Pyrenees Shire Council

# Economic Development and Investment Attraction Strategy 2026 - 2031




October 2026

## Executive Summary

The Pyrenees Shire Economic Development and Investment Attraction Strategy sets out a practical, evidence-based approach to supporting jobs, businesses and investment across the Shire by enabling private-sector activity, reducing barriers to development and strengthening the local economic system.

The Strategy recognises that the Pyrenees economy is fundamentally agriculture-led, with agriculture underpinning output, employment, exports and local supply chains. It also drives tourism through wine, food and rural experiences and supports a wide range of local businesses. As such, strengthening agricultural productivity, resilience and value-adding is central to achieving broader economic growth.

The Strategy identifies the key challenge as constraints that limit growth, not a lack of opportunity, including housing availability, workforce access, infrastructure capacity, planning complexity, digital connectivity and economic leakage to nearby centres such as Ballarat. Addressing these constraints is critical to unlocking investment and enabling sustainable development.

To respond, the Strategy is structured around five interrelated Strategic Themes:

- Agriculture and Agribusiness – strengthening productivity, resilience and value-adding
- Population, Housing and Development Enablement – enabling population growth and workforce attraction through housing delivery
- Tourism – increasing visitor yield through accommodation, experiences and integration with agriculture
- Local Value-Adding – reducing economic leakage and expanding local supply chains.
- Workforce – improving labour force participation, attraction and retention

These themes reflect how the local economy operates as a connected system, where progress in one area supports outcomes in others.

The Strategy positions Pyrenees to leverage proximity to Ballarat rather than compete with it, targeting realistic markets, including residents, workers, small businesses and tourism investors. Housing affordability, liveability and access to regional markets are key competitive advantages.

Council's role is to enable, influence and accelerate private-sector investment through planning facilitation, investment promotion, infrastructure advocacy, business engagement and targeted partnerships. The Council will strongly advocate for enabling infrastructure, particularly water security, transport and digital connectivity, with the Southern Wimmera and Northeast Pyrenees Water Supply Project identified as a critical priority.

Implementation will occur through annual Economic Development and Tourism Business Plans, ensuring actions are prioritised, resourced and responsive to changing conditions. Progress will be monitored through a structured KPI framework that measures economic outcomes, Council's influence and delivery performance.

The Strategy will be reviewed annually, with a comprehensive review in late 2027 informed by updated Census data and regional strategies.

Overall, the Strategy provides a clear, realistic and coordinated pathway to grow the Pyrenees economy by strengthening its agricultural base, enabling development, attracting investment and capturing more local economic value.

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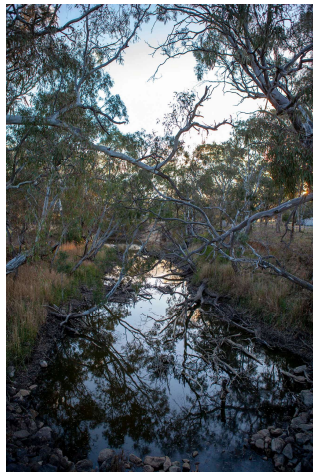
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### Acknowledgement of Country

*We acknowledge that the strategy will take place on the lands of the people, past and present, of the Wadawurrung, Dja Dja Wurrung, Eastern Maar, Wotjobaluk, Jaadwa, Jadawadjali, Wergaia and Jupagulk Nations.*

*We pay our respects to their Ancestors and Elders, recognise and respect their customs, stewardship and continuing connection to Country.*



# 1 The Economic Development and Investment Attraction Strategy

The Economic Development and Investment Attraction Strategy (the Strategy) sets out how Council will support jobs, businesses and investment in the Pyrenees Shire to improve economic outcomes and community prosperity.

The Strategy focuses on enabling private-sector activity rather than directly delivering development. It identifies where growth is most achievable, how to reduce barriers and risks, and how key drivers—agriculture, housing, tourism, local value-adding, and workforce—can work together to support sustainable economic growth.

## 1.1 Council Plan Pillar 2 – A Thriving Economy

Aligned to **Council Plan Pillar 2 – A Thriving Economy**, the Strategy provides a practical, action-oriented framework to:

- Strengthen the Shire's economic foundations
- Support population and workforce growth
- Increase local economic activity and reduce leakage
- Facilitate investment aligned with the Shire's capacity and character

## 1.2 Development of the Strategy

The Strategy is informed by a structured, evidence-based process that integrates data analysis, stakeholder input, and strategic alignment.

This has included:

- Preparation of a **Background Report**, analysing economic, demographic and industry data to understand how the local economy functions and where opportunities and constraints exist
- Delivery of a **Stakeholder Engagement Report**, capturing insights from local businesses, community members and industry representatives
- Engagement with **Councillors and an Economic Development Taskforce**, comprising local business leaders and operators, to test priorities and refine the strategic framework

This work has been synthesised into a clear set of opportunities, challenges, and priorities that underpin the Strategy's Strategic Themes and actions.

## 1.3 Structure of the Strategy

The Strategy is structured to provide a clear line of sight from *evidence* ➡ *positioning* ➡ *priorities* ➡ *actions* ➡ *implementation*.

### 1.3.1 Section 2 – Pyrenees Shire: The Big Picture

Provides the evidence base, including population, housing, workforce, agriculture, tourism and economic structure. It identifies key strengths and constraints, and agriculture's central role in the local economy.

### 1.3.2 Section 3 – Investment Attraction Positioning Statement

Defines how the Shire will attract investment by leveraging its advantages—particularly proximity to Ballarat—focusing on realistic markets such as residents, workers, small businesses and tourism investors.

### 1.3.3 Section 4 – Key Strategic Themes

Establishes five interrelated Strategic Themes that reflect how the local economy operates:

1. Agriculture and Agribusiness
2. Population, Housing and Development Enablement
3. Tourism
4. Local Value-Adding
5. Workforce

These themes were derived directly from the evidence base and stakeholder feedback and represent the core economic system of the Shire:

- Agriculture drives output and tourism
- Housing enables population and workforce growth
- Tourism brings external spending
- Local value-adding retains economic activity
- Workforce underpins all sectors

#### 1.3.4 Sections 5 and 6 – Implementation and Action Plans

Translate the Strategic Themes into coordinated, practical actions, aligned to Council's role and delivered through annual business planning.

#### 1.3.5 Section 7 – Alignment with Council Plan

Demonstrates how the Strategy supports Pillar 2 objectives and broader Council priorities.

### 1.4 How the Strategy Will Be Implemented

The Strategy will be implemented through a whole-of-Council, partnership-based approach, supported by a clear delivery framework.

Annual Business Planning is the primary delivery mechanism. Each year, actions will be translated into a 12-month Economic Development and Tourism Business Plan that:

- Assigns responsibilities across Council teams
- Defines timeframes and priorities
- Aligns with budgets and resources
- Responds to emerging opportunities and constraints

Council's role is to enable, influence and accelerate private sector activity by reducing risk, improving readiness and supporting delivery.

This role is delivered through five integrated functions:

- Facilitator – reducing barriers and improving development readiness
- Promoter – communicating opportunities and attracting investment
- Advocate – securing enabling infrastructure and policy support
- Connector – linking businesses and enabling B2B activity
- Partner – supporting targeted projects and co-investment opportunities

Progress will be measured through a three-tier KPI framework:

- **System indicators** – overall economic outcomes
- **Influence indicators** – Council's contribution
- **Delivery indicators** – implementation performance

### 1.5 Review of the Strategy

The Strategy is designed to remain adaptive and responsive; it will be:

- Reviewed annually to update priorities and inform the Annual Business Plan
- Comprehensively reviewed in late 2027, triggered by:
  - Release of the 2026 ABS Census
  - Updated regional strategies (including the Central Highlands Regional Economic Development Strategy)
  - Changes in population, housing, workforce and investment conditions

  The 2027 review will:

  - Recalibrate priorities and targets
  - Assess the effectiveness of actions implemented to date
  - Update the Strategy to reflect emerging opportunities and constraints

A further full review will occur in line with Council Plan cycles (late 2028 / early 2029).

# 2 Pyrenees Shire - The Big Picture

Section 2 sets out the evidence base underpinning the Strategy. It draws on the Background Report and feedback from the Stakeholder Engagement Report. It explains:

How the local economy currently functions

- Where growth is occurring
- What constraints are limiting investment
- Which sectors and opportunities are most important

This analysis is not intended as a standalone piece. Instead, it directly informs:

- Section 3: Investment Positioning
- Section 4: Strategic Themes
- Section 5: Action Plans and Priorities

The analysis shows that the Pyrenees economy is fundamentally agriculture-led. Agriculture underpins output, employment, exports and supply chains, and directly influences tourism, population growth and local business activity.

The central challenge is not to expand agriculture itself, but to strengthen its productivity, resilience and value capture, while tackling constraints in housing, infrastructure, workforce and connectivity that limit its full economic contribution. These constraints drive the Strategy's focus on:

- Enablement (removing barriers)
- Facilitation (supporting delivery)
- Local value capture (retaining more economic activity in the Shire)

## 2.1 Pyrenees Population

The Pyrenees Shire population[1], as of the 2021 ABS Census, was 7,657, distributed across the following age groups, with the largest being "Older workers and pre-retirees".

**Table 2-1 Pyrenees Population – 2021 ABS Census**

| Cohorts | # | % |
|---|---|---|
| Babies and preschoolers (0 to 4) | 322 | 4.2% |
| Primary schoolers (5 to 11) | 538 | 7.0% |
| Secondary schoolers (12 to 17) | 506 | 6.6% |
| Tertiary education and independence (18 to 24) | 428 | 5.6% |
| Young workforce (25 to 34) | 624 | 8.2% |
| Parents and homebuilders (35 to 49) | 1,283 | 16.8% |
| Older workers and pre-retirees (50 to 67) | 2,231 | 29.2% |
| Retirees and Seniors (68 to 80) | 1,385 | 18.1% |
| Elders (81 plus) | 340 | 4.4% |

The population increased from around 7,300 people recorded in the 2016 ABS Census. The largest growth was among those aged 70 to 79 years. In contrast, the 40 to 44 and 55 to 64 age groups declined.

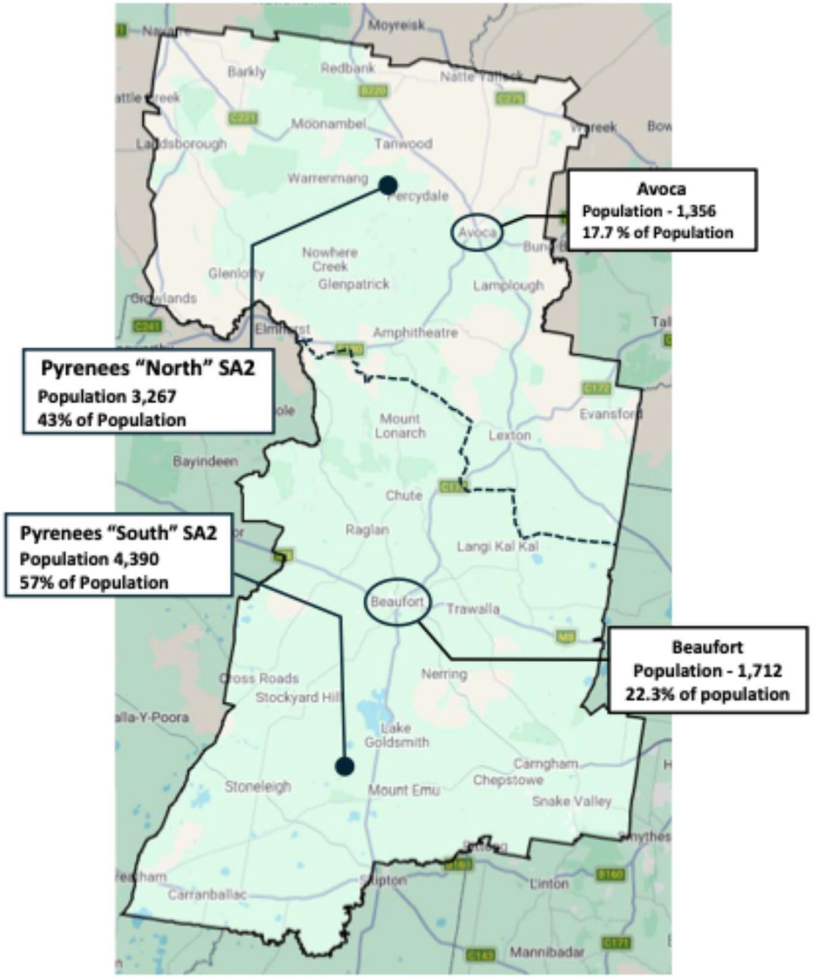
### 2.1.1 Population Distribution

According to the 2021 ABS Census, 57% of the Shire's population lives in the Shire's southern portion, centred on its largest town, Beaufort (population: 1,712).

The remaining 43% of the population is in the Shire's northern end, centred on Avoca (population: 1,356). Together, Beaufort and Avoca account for 40% of the Shire's population – see Figure 2-1

[1] All population data has been dewan from the REMPLAN Community data set

**Figure 2-1 Pyrenees Shire Population Distribution**




The Shire also has several smaller towns, with populations (as per the ABS 2021 Census) as listed in Table 2-2:

**Table 2-2 Pyrenees Small Town Populations**

| Town | Pop | Town | Pop | Town | Pop |
|---|---|---|---|---|---|
| Amphitheatre | 223 | Moonambel | 185 | Snake Valley | 820 |
| Landsborough | 200 | Natte Yallock | 89 | Trawalla | 140 |
| Lexton | 284 | Raglan | 223 | Waubra | 308 |

Collectively, these towns account for 2,472, or 32%, of the population, meaning another 2,890, or 28%, of the Shire's population live outside Beaufort, Avoca, and the towns listed above.

## 2.2 Population Growth

Population growth is a critical driver of economic development. A larger resident base supports workforce availability, business viability, local services and a stronger visitor economy. Without sustained population growth, many of the Shire's economic opportunities—across business growth, workforce participation, service delivery and tourism—cannot be fully realised.

The Pyrenees Shire population grew from 7,238 people in 2016 to 7,671 in the 2021 ABS Census, with an increase of around 200 in Beaufort and surrounds. The 2025 Estimated Resident Population (ERP) of 7,957 has exceeded State Government population forecasts.

To sustain long-term growth, the Shire needs to attract more people to live locally, including working-age residents. Retaining the existing population is also critical.

Although a significant share of this growth has been among residents aged 70 and over, the working-age population has also increased, underscoring the Shire's appeal as a place to live.

### 2.2.1 Sources of Population Growth

ABS data on the Estimated Resident Population for the Pyrenees Shire indicate that net increases in internal and overseas migration have driven population growth. In contrast, natural increase (i.e., births less deaths) has been a negative factor.

### 2.2.2 Where are People Coming From

The 2021 Census shows that population change in the Pyrenees is strongly influenced by migration from the following locations:-

| *Locations* | *% of Immigration* |
|---|---|
| Regional and rural Victoria | 61% |
| Greater Metropolitan Melbourne | 31% |
| Interstate | 8% |

Of the immigration from regional and rural Victoria, the majority – 81% was from Local Government Areas (LGAs) in the Central Highlands Region or the adjoining Pyrenees Shire – i.e.

- City of Ballarat - The City of Ballarat was the largest single source of immigration across all locations
- Ararat Rural City
- Central Goldfields Shire
- Golden Plains Shire
- Moorabool Shire
- Hepburn Shire
- Northern Grampians Shire

Among the 23 Greater Metropolitan Melbourne LGAs that contributed immigrants, Wyndham and Melton were the two largest sources. Overall, LGAs in western and north-western Melbourne were the main sources of immigration. This immigration data highlights the importance of positioning the Pyrenees Shire as a well-located, affordable and liveable alternative to Ballarat and Melbourne's western growth areas.

### 2.2.3 Population Forecast

The VIF population forecast for the Pyrenees Shire in 2026 is 7,820; however, the 2024 ERP already exceeds this forecast figure. Should the average population growth rate since 2011 of 1.6% continue, the population in 2036 would be 9,686, exceeding the VIF forecast of 8,250.

### 2.2.4 Economic Impact of Population Growth

If the Shire's population reaches 9,800, modelling indicates an additional 780 jobs in the local economy, with the largest increase in agriculture. This figure reflects the local economy's current structure. Increasing technology use and off-farm labour may temper the large growth in agricultural jobs.

## 2.3 Housing

Housing is critical to supporting population growth, providing accommodation for workers, and increasing overnight visitation to the Shire.

### 2.3.1 Demand for Housing

Stakeholder feedback indicates a steady flow of enquiries from real estate agents about housing opportunities in the Pyrenees Shire. The feedback also noted limited or no rental accommodation availability, particularly in Beaufort and Avoca.

The Council received approximately 200 pre-purchase or pre-application enquiries in the last quarter of 2025, indicating significant interest in housing development in the Shire.

### 2.3.2 Council Housing Projects

The Council is actively pursuing additional housing in Beaufort through the Burke Street Housing Development Project. This initiative aims to support population and workforce growth while maintaining the viability of local shops, services, and jobs. The project responds to Beaufort's population growth.

Avoca and the northern part of the Shire are expected to play an increasingly important role in tourism, particularly through accommodation linked to wine, events, and nature-based experiences. Various developments will meet this demand, including housing suitable for short-term rentals and a broader range of serviced accommodation.

### 2.3.3 Housing Needs Assessment

To understand housing demand, the Council is undertaking a Housing Needs Assessment in 2026. This assessment will provide the evidence needed to identify future housing demand, suitable locations, and appropriate housing types. The findings will guide sustainable settlement planning and housing delivery across the Pyrenees Shire.

### 2.3.4 Housing Affordability and Market Choice

Victorian Valuer-General data for 2025 reinforce the Pyrenees Shire's housing affordability advantage. The median house price in the Pyrenees Shire was approximately $400,000, compared with $570,000 in Ballarat and $865,000 across metropolitan Melbourne.

A house in the Pyrenees Shire therefore costs around 70% of the Ballarat median and less than half the metropolitan Melbourne median. This offers a significant draw for households seeking greater affordability, space and lifestyle while maintaining access to Ballarat's employment and services.

However, the Pyrenees Shire has a much smaller, less diverse property market. In 2025, 102 house sales and 29 vacant residential land sales were recorded, with no unit/apartment sales. The investment proposition is therefore based on affordability and lifestyle rather than breadth of housing choice.

Detailed information regarding median house prices is included in the Background Report and has been sourced from “A Guide to Property Values 2025 – Victorian Valuer General”.

### 2.3.5 Tourism Accommodation

Facilitating residential development also positively impacts the development of visitor accommodation; the need for such accommodation is discussed in Section 2.14

### 2.3.6 Key Strategic Theme

The strategy has added housing as a key strategic theme and identified relevant actions.

## 2.4 Liveability and Place

The Pyrenees Shire offers a high level of liveability, attracting and retaining residents and strengthening the local economy. Liveability is supported by:

- Strong, active local communities
- Recreational facilities, open spaces, trails, natural landscapes and community facilities in Beaufort, Avoca, Lexton, Natte Yallock, Landsborough, Moonambel, Amphitheatre, Snake Valley and Waubra that host a range of events
- A network of towns delivering essential services, including a hospital in Beaufort, shared community facilities and a strong local identity.
- Access to primary and secondary education (including a secondary school in Beaufort), early years services and lifelong learning
- Proximity to higher-order health, education and retail services in Ballarat, Maryborough and Ararat
- Road connections that support commuting, freight and visitor access

These assets are central to the Shire's ability to attract new residents, support visiting friends and relatives (VFR), retain workers and encourage longer stays for visitors. Maintaining and enhancing liveability across towns is both a community goal and an economic development priority.

### 2.4.1 Public Transport

Up to eight daily rail services operate between Beaufort and Melbourne (via Ballarat), and about 60% of the Shire's population lives within a 30-minute drive of Beaufort Rail Station.

Residents in the Shire's south-west are within 30 minutes of Ballarat Rail Station, while northern residents can access more limited rail services to Melbourne (via Ballarat) from Ararat or Maryborough. Many residents reportedly drive to Castlemaine to access more frequent daily services on the Bendigo line.

A twice-daily V/Line bus service to Melbourne departs from Beaufort, and one service per day runs from Avoca to Melbourne departing at 3.45 am, with no other stops in the Pyrenees Shire.

### 2.4.2 Impact on the Economy

Without public transport in towns other than Beaufort, travelling by car is the only practical option. This makes travelling for employment problematic for people without access to a car.

## 2.5 Economic Growth

The local economy[1] in the Pyrenees Shire has grown in the period since the 2021 ABS Census, as indicated by the growth in :

- Gross Regional Product grew from $321.9 M to $434 M in 2025, or 35%
- Output grew from $647.9 M to $863 M, or 33.%
- Employment increased from 2,219 jobs in 2021 to 2,374 jobs in 2025—an increase of 155 jobs or approximately 7-%..

### 2.5.1 Gross Regional Product

Gross Regional Product (GRP) is the net measure of wealth generated by the region.

For the Pyrenees Shire, the increase in GRP was driven by a significant increase in

- Household Consumption, which in 2025 rose to more than $430 M from more than $333 M in 2021
- Exports, which in 2025 rose to more than $429 M from more than $336 M in 2021

Imports tempered GRP, rising to more than $738 M in 2025 from more than $567 M in 2021. In 2025, almost 95% of imports were sourced from within Australia.

### 2.5.2 Output

Output is the total income generated by businesses and organisations operating within the Shire.

Between 2021 and 2025, five sectors accounted for just over 75% of the increase in economic output:

- Sheep, Grains, Beef & Dairy Cattle – the largest sector, generating 26% of total output in 2025.
- Ownership of Dwellings – the economic value of rented and owner-occupied housing.
- Construction Services
- Public Administration & Regulatory Services
- Heavy & Civil Engineering Construction – output increased by 77%.

[1] All economic data has been derived from the REMPLAN Pyrenees data set

While these sectors generated the largest dollar increases, several smaller sectors recorded percentage growth well above the Shire's overall 33%.

Thirteen sectors grew by 70% or more, though most contributed less than 1% of total output. Growth was particularly strong in Exploration & Mining Support Services (370%), Electricity Distribution (179%), Community and Other Education (137%), and Heritage, Creative & Performing Arts (96%).

Other growing sectors included agricultural support services, livestock production, electricity generation, repair and maintenance, recreation, residential care and non-residential construction.

Several new sectors also recorded output, predominantly in manufacturing, including machinery, electronic equipment, chemicals, pharmaceuticals, beer, meat processing and metal products. Other new activities included mining, telecommunications and gas supply. Each contributed less than 0.4% of total output.

In contrast, wine production declined significantly. Output fell by more than $13 million from over $60 million in 2021. Nevertheless, wine production remained the Shire's fifth-largest sector in 2025, accounting for 5.5% of total output.

### 2.5.3 Exports

Exports represent the value of goods and services produced by industry sectors in Pyrenees LGA and sold to consumers, businesses, and governments outside the region's boundaries. Exports can also be defined as money flowing into the region.

In the period 2021 to 2025, exports grew by $92 M to more than $426 M, an increase of 28%

Agriculture dominates exports, generating more than $231 M in 2025, or more than 54% of all exports from the Pyrenees Shire.

This is followed by the Public Administration & Safety sector, which contributed more than $58 M or 13.6% of total regional exports.

The wine industry is the next-highest exporter, contributing almost $44 M, or 10.3% of total regional exports. This sector's exports contracted by about $14 M between 2021 and 2025.

Given the renewables sector's presence in the Pyrenees Shire, electricity exports grew 75% to more than $14 M.

### 2.5.4 Local Expenditure

Local Expenditure data represents the value of intermediate goods and services purchased by local industry sectors within the region. High local expenditure on intermediate goods and services, relative to total output, indicates well-developed local supply chains and suggests that any expansion in this sector would typically deliver broad-based benefits for the region’s economy.

In the period 2021 to 2025, local expenditure grew by almost $47 M to more than $155 M, an increase of 43%

The following sectors account for more than 80% of all local expenditure

- Agriculture, Forestry & Fishing – primarily this involves sheep and grain production
- Construction – much of this is in construction services
- Public Administration & Safety – much of this relates to the activities of the Pyrenees Shire Council
- Manufacturing – this is dominated by wine manufacturing, which experienced a contraction in local expenditure of some $1 M
- Electricity, Gas, Water & Waste Services – this is largely through electricity generation and distribution

The largest increases in local expenditure were in agriculture and construction, while electricity-related activities grew by 175%.

Households also spent more than $143 M on local goods and services.

The growth in local expenditure demonstrates the importance of business-to-business purchasing to the Shire's economy, particularly in agriculture and construction. The extent to which local businesses can capture a greater share of this expenditure is considered in the later discussion of opportunities to extend local value chains.

### 2.5.5 Imports

Imports represent the value of goods and services imported into Pyrenees LGA by industry sector.

In the period 2021 to 2025, imports grew by more than $65 M to almost $313 M, an increase of 26%

Agriculture dominates imports, accounting for more than 33% or $104 M. This is followed by

- Manufacturing at almost 16% or $49 M; this is dominated by wine manufacturing, which experienced a contraction of some $11 M
- Construction at almost 14% or $42 M, with construction services being the largest importer in this sector

Households also generated almost $258 M in domestic imports, more than double local expenditure.

Growth in these sectors may affect demand for local employment spaces, particularly those zoned for industrial or business use. This flags the Shire's capacity to accommodate growth in these spaces.

While overall output increased, several sectors declined—key elements of Pyrenees Shire's visitor economy, including Accommodation, food and beverage services, and wine production.

### 2.5.6 Employment Growth

The following sectors accounted for 90% of the local economy's employment growth since the 2021 ABS Census.

| Sectors | Years | | Change | |
|---|---|---|---|---|
| | 2025 | 2021 | # | % |
| Sheep, Grains, Beef & Dairy Cattle | 581 | 556 | 25 | 4% |
| Residential Care & Social Assistance Services | 102 | 78 | 24 | 31% |
| Health Care Services | 161 | 145 | 16 | 11% |
| Sports & Recreation | 49 | 33 | 16 | 48% |
| Public Order & Safety | 171 | 156 | 15 | 10% |
| Public Administration & Regulatory Services | 217 | 203 | 14 | 7% |
| Ag, Forestry & Fishing Support Services | 41 | 30 | 11 | 37% |
| Heavy & Civil Engineering Construction | 34 | 24 | 10 | 42% |
| Pre-School, Primary, Secondary Education | 152 | 142 | 10 | 7% |
| *Totals* | 1,508 | 1,367 | 141 | |

Of the nine sectors noted above, the following five entirely or largely operate in the public sector.

- Residential Care & Social Assistance Services
- Health Care Services
- Public Order & Safety
- Public Administration & Regulatory Services
- Pre-School, Primary, Secondary Education

The sports and recreation sector includes horse racing. Given that the Shire has no indoor recreation centres, horse racing is assumed to be the main driver.

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### 2.5.7 Challenges Facing the Local Wine Industry

The Victorian Wine Strategy 2025-2030 outlines some of the significant challenges the wine industry faces arising from global wine oversupply, declining consumption, increased price competition and rising operating costs. These pressures particularly affect smaller wineries, threatening profitability, business viability and the capacity to invest.

The economic data highlight the pressures facing the local industry. Between 2021 and 2025, employment in Wine, Spirits & Tobacco* fell by 20 jobs (18%), local expenditure fell by $1.1 million (14%), and exports fell by $14.3 million (25%).

Despite these reductions, wine production remains an important contributor to local manufacturing, employment, exports and tourism.

These challenges reinforce the need to strengthen existing wineries' resilience, including opportunities for business diversification and greater value-adding.

***Note** The ABS classification of Wine, Spirits & Tobacco includes

- Spirit Manufacturing
- Wine and Other Alcoholic Beverage Manufacturing
- Cigarette and Tobacco Product Manufacturing

The Pyrenees local economy has no Cigarette and Tobacco Product Manufacturing and a very small presence of Spirit Manufacturing. As a result, the ABS Wine, Spirits & Tobacco data reflects wine production.

## 2.6 Number of Businesses

The total number of businesses in the local economy as of June 2025 was 890; they are distributed across industry sectors, and employee counts are noted in Table 2-3

The agriculture sector has the most businesses, followed by construction. The most common business type by employee count is non-employing, and the agriculture and construction sectors have the most such businesses.

**Table 2-3 - Number of Businesses by Employees**

| | Employee Counts | | | | |
|---|---|---|---|---|---|
| **Sectors**[1] | Non - employ | 1 – 4 | 5 - 19 | 20 - 199 | Totals |
| **Agriculture, Forestry & Fishing** | 287 | 113 | 21 | 1 | 422 |
| **Construction** | 69 | 29 | 5 | 1 | 104 |
| **Rental, Hiring & Real Estate Services** | 66 | 6 | 0 | 0 | 72 |
| **Transport, Postal & Warehousing** | 30 | 25 | 11 | 0 | 66 |
| **Retail Trade** | 25 | 11 | 0 | 1 | 37 |
| **Professional, Scientific & Technical Services** | 26 | 11 | 0 | 0 | 37 |
| **Accommodation & Food Services** | 12 | 12 | 8 | 1 | 33 |
| **Other Services** | 15 | 13 | 0 | 0 | 28 |
| **Manufacturing** | 11 | 5 | 4 | 1 | 21 |
| **Wholesale Trade** | 7 | 4 | 3 | 1 | 15 |
| **Health Care & Social Assistance** | 7 | 3 | 3 | 0 | 13 |
| **Arts & Recreation Services** | 9 | 4 | 0 | 0 | 13 |
| **Financial & Insurance Services** | 5 | 3 | 3 | 0 | 11 |
| **Administrative & Support Services** | 3 | 6 | 0 | 0 | 9 |
| **Education & Training** | 4 | 2 | 0 | 0 | 6 |
| **Electricity, Gas, Water & Waste Services** | 0 | 1 | 1 | 1 | 3 |
| **Public Administration & Safety** | 0 | 0 | 0 | 0 | 0 |
| **Mining** | 0 | 0 | 0 | 0 | 0 |
| **Information Media & Telecommunications** | 0 | 0 | 0 | 0 | 0 |
| *Total Business Numbers* | **576** | **248** | **59** | **7** | **890** |

[1] Note – The listing does not include "public sector" organisations

### 2.6.1 Large Number of Small Businesses

The high percentage of micro and small businesses in the Shire means many have limited resources to support growth and develop practical business and marketing plans. Often, such businesses are unaware of local opportunities to provide goods and services to other local businesses.

The predominance of micro and small businesses suggests that much of the Shire's future business growth may come from existing operators increasing their sales, diversifying their activities and accessing additional markets. Some businesses may expand without hiring additional staff or moving from their existing premises. This reinforces the importance of business development support, digital connectivity and stronger connections between local businesses and potential customers.

The presence of many micro and small businesses highlights the need for active local business associations to help them access resources that support their growth. The Council already plays a proactive role in promoting these programs, but local businesses must ultimately take advantage of them.

## 2.7 Resident Expenditure and Economic Leakage

Different datasets provide complementary perspectives on resident expenditure. REMPLAN models total household consumption and how much demand is supplied locally versus externally. At the same time, SpendMapp provides transaction-based information on where residents spend and whether purchases occur locally, elsewhere, or online.

SpendMapp data for September 2025 to August 2026 show total resident expenditure of $169.79 million. Of this, residents spent $13.05 million (8%) locally, $100.97 million (59%) outside the Shire, and $55.77 million (33%) online.

Neighbouring LGAs captured $54.63 million, or 54% of escape expenditure. Ballarat alone accounted for $38.46 million (38%), followed by Central Goldfields (7%), Golden Plains (5%) and Ararat (3%).

The scale of surrounding retail and service centres means that much of this expenditure is unlikely to be recovered locally. The strategic opportunity is therefore to identify specific gaps where additional local provision is commercially sustainable and to assist existing businesses to capture a greater share of resident demand.

### 2.7.1 Impact of Nearby Larger Towns

About 86% of Pyrenees Shire residents live within a 30-minute drive of a town outside the Shire larger than Beaufort or Avoca. These centres offer a considerably greater range and scale of retail, health, professional and other services.

This is particularly evident in retail. Ballarat's retail sector generates approximately $744.9 million in output and supports 6,140 jobs, compared with $19.1 million and 133 jobs in the Pyrenees Shire. The Central Goldfields, Northern Grampians and Ararat LGAs also have substantially larger retail sectors.

These differences shape residents' spending patterns. Many residents naturally access goods and services in the nearest larger centre rather than travelling to Beaufort or Avoca. This is particularly evident in communities near Ballarat, Ararat and Maryborough. Consequently, a significant share of resident expenditure outside the Shire reflects the Pyrenees Shire's location and settlement pattern, rather than expenditure that can necessarily be recovered locally.

**Table 2-4 Adjoining LGA Retail Sectors**

| | Retail Sectors | | |
|---|---|---|---|
| **LGAs** | **Key Retail Centers** | **Output ($M)** | **Jobs** |
| **Ballarat City** | Several retail centers | $744.9 | 6,140 |
| **Central Goldfields** | Maryborough | $81.4 | 563 |
| **Northern Grampians** | Stawell | $65.5 | 453 |
| **Ararat Rural City** | Ararat | $54.5 | 377 |
| **Pyrenees Shire** | Beaufort, Avoca | $19.1 | 133 |

Many residents in the smaller towns do not rely on Beaufort or Avoca for retail goods and services. For instance, Landsborough residents predominantly travel to Ararat, while Waubra and Snake Valley residents generally visit Ballarat. Stakeholder feedback also suggests minimal interaction between Beaufort and Avoca residents in retail spending.

These larger centres also offer services not available in Beaufort or Avoca, giving Pyrenees Shire residents another incentive to shop in these regional hubs.

### 2.7.2 Visitor Spending

Visitor expenditure is an important demand source that extends well beyond the Shire's resident population. Between September 2025 and August 2026, visitors spent $29.19 million locally, compared with $13.05 million by Pyrenees Shire residents.

Visitors therefore accounted for 69% of total local spending captured through SpendMapp. This shows that the visitor economy is not simply a means of offsetting resident expenditure leakage; it is a fundamental contributor to the viability of local retail, hospitality, food and beverage, accommodation and other visitor-facing businesses.

Increasing visitation, length of stay and expenditure per visitor therefore presents an important economic development opportunity alongside targeted initiatives to retain more resident expenditure.

## 2.8 Agriculture

Agriculture is the Pyrenees Shire's primary economic driver, underpinning most local output, employment, expenditure, and exports. It contributes 37.3% of total output, 29.3% of employment, 39.4% of local expenditure and 61.2% of exports—far exceeding any other sector. Consequently, the Shire's economic prosperity depends on the agricultural sector's performance, resilience, and evolution.

Sheep grazing, grain production, and beef and dairy cattle dominate the industry, reflecting the Shire's strong natural resource base and long-established farming systems. Agriculture also defines the physical landscape: approximately 71% of land (see Figure 2-3) is used for agricultural purposes, with livestock grazing accounting for around 46% of land use and cropping for about 16%. Together, these activities support most agricultural employment.

Vineyards and horticulture occupy a relatively small area but generate high economic value relative to their scale. The wine sector underpins most local manufacturing employment and plays a critical role in the Shire's visitor economy. This creates a direct link between agriculture and tourism, with agricultural production supporting wine tourism and food experiences, regional branding and overall visitation.

**Figure 2-2 - Land Area Utilised by Agriculture**

**Land use in the Shire is dominated by various forms of agriculture**

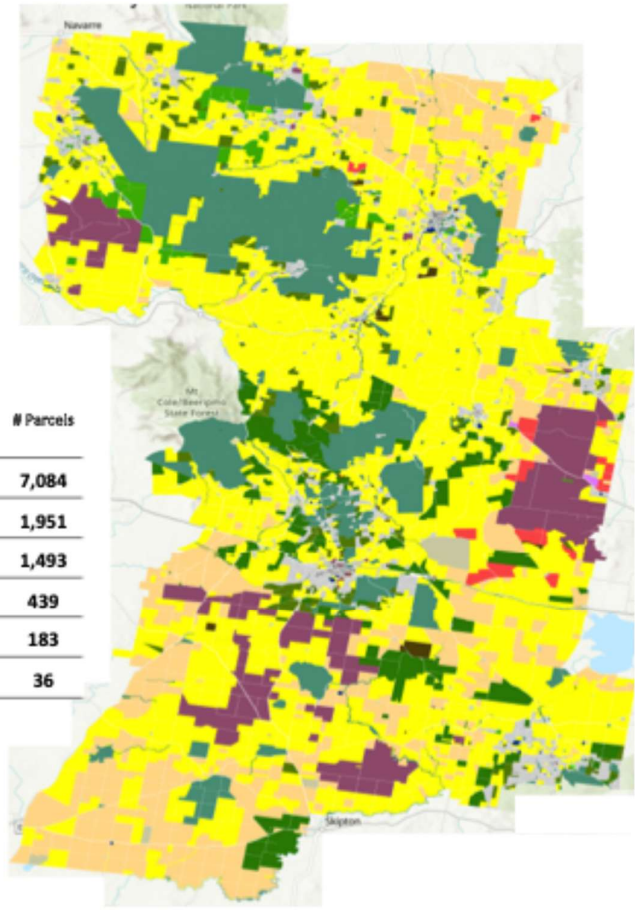
**Agriculture dominates the local economy**

**The area available for agricultural activity cannot expand**

**The agricultural sector does and will need to further explore ways to improve its productivity and value-adding opportunities. This will include reliable access to water and increased use of technology.**

| Land Use Category | Hectares | % of Total | # Parcels |
|---|---|---|---|
| Total Shire Land Area | 343,457 | | |
| Livestock Grazing | 158,634 | 46.2% | 7,084 |
| National Parks & Reserves | 55,982 | 16.3% | 1,951 |
| Cropping | 54,674 | 15.9% | 1,493 |
| Wind/Solar Infrastructure[1] | 23,417 | 6.8% | 439 |
| Vineyard | 4,225 | 1.2% | 183 |
| Horticulture Annual Crops | 2,537 | 0.7% | 36 |
| Residential Areas | | | |

Notes
1 Agricultural production takes place on land holdings that host wind turbines



Collectively, these relationships highlight a key opportunity for economic development. Agriculture functions not only as a production sector, but also as a platform for broader economic activity, including tourism, hospitality, manufacturing and local services. Strengthening agriculture, therefore, delivers strong multiplier effects across the wider economy.

### 2.8.1 Key Challenges to Future Growth

Despite its strengths, the agricultural sector faces structural challenges that will shape its future performance.

The sector is highly exposed to climate variability, including increasingly variable rainfall, rising temperatures and more frequent droughts. This creates production uncertainty and increases reliance on risk management strategies. At the same time, global commodity price volatility continues to influence farm incomes and investment decisions.

Cost pressures are also mounting, particularly for labour, fuel, fertiliser and feed. These pressures are compounded by constraints in key enabling systems, including water availability, freight efficiency, digital connectivity and workforce access.

Together, these factors mean that growing, or in some cases maintaining, current production levels is a significant challenge. Future growth will depend on the sector's ability to:

- Improve productivity and efficiency
- Reduce exposure to climate and market risks
- Transition toward higher-value and more diversified production systems

### 2.8.2 The Role of Enabling Infrastructure

Infrastructure is central to addressing these challenges and enabling future growth. It is not merely a supporting factor—it is a core determinant of productivity, competitiveness and investment.

***Transport infrastructure*** (roads and bridges) is critical to the efficient movement of agricultural inputs and outputs. Modern farming operations rely on larger, heavier freight vehicles, and limitations in local road and bridge capacity can restrict access to markets and processing facilities.

Upgrading these networks

- Reduces transport costs and travel times.
- Improves safety and reliability
- Expands access to regional and export supply chains
- Enhances the feasibility of local value-adding and processing

Without these upgrades, the sector faces increased operating costs and reduced competitiveness, limiting both productivity and investment.

***Digital connectivity*** is increasingly essential to modern agriculture. Precision agriculture, remote monitoring, water management systems and supply chain platforms all depend on reliable digital infrastructure. Limited connectivity constrains the adoption of these technologies, reducing the sector's ability to improve productivity and adapt to changing conditions. Improved digital access enables:

- Data-driven decision-making
- Adoption of agri-tech and automation
- Improved market access and supply chain integration
- Access to training, services and innovation

***Water infrastructure*** is fundamental to long-term agricultural viability. A reliable, accessible water supply supports higher-value production, reduces climate risk, and underpins investor confidence. It enables diversification into more intensive and resilient agricultural systems, including horticulture and intensive agriculture (e.g., animal production).

***Workforce availability and accommodation*** also remain critical constraints. Access to labour, particularly for more intensive or diversified activities, depends on the availability of suitable housing and services.

### 2.8.3 Strategic Projects Supporting Sector Transformation

Two major initiatives demonstrate how these structural challenges are being addressed and highlight the critical role of Council and regional partnerships in enabling agricultural transformation.

**Southern Wimmera and Northeast Pyrenees Water Supply Project (SWNP)**

The SWNP would represent a step-change in regional water security. Covering 354,000 hectares and supported by a 1,582-kilometre pipeline network, the project would provide reliable, climate-resilient water to over 2,500 rural landholders, including many in the north of the Pyrenees Shire – see Figure 2-3.

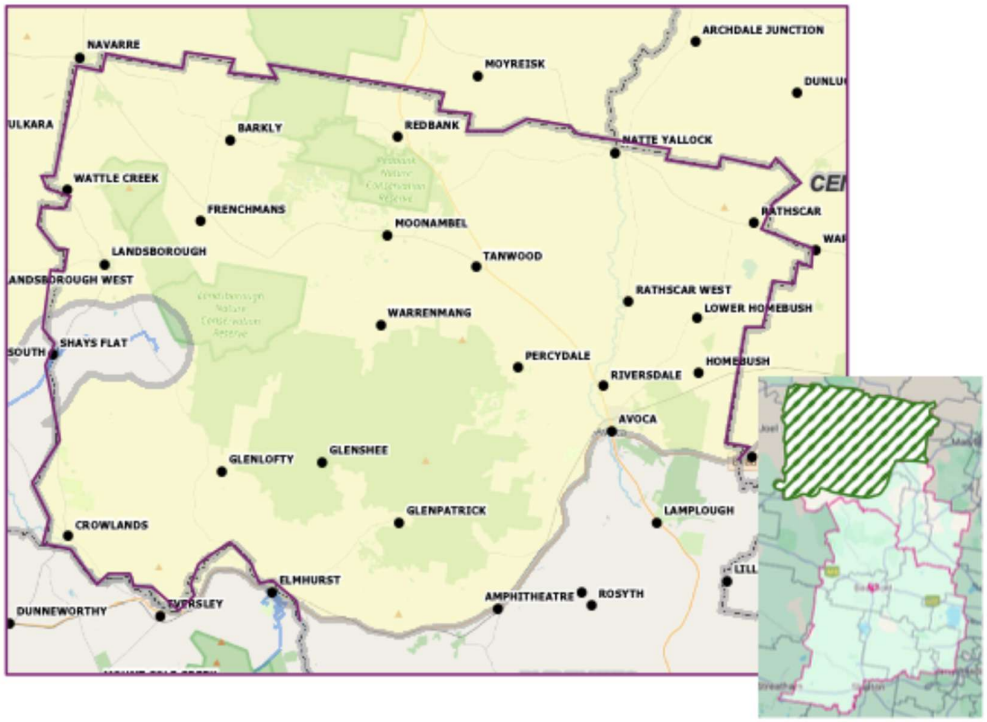
The SWNP is a foundational investment that would:

- Reduce climate-related production risk
- Enable diversification into higher-value agricultural activities
- Support more intensive and reliable farming systems
- Unlock new private investment across the sector

The preliminary Business Case identified that there are $201.82 million in benefits of the SWNP as follows:

- **Economic Benefits: $150.4M**, primarily reflecting increased agricultural productivity, reduced water carting costs, improved farm planning certainty and wider regional activity
- **Social Benefits: $26.9M,** including improved household water security, reduced time and financial stress with sourcing water, and improved liveability, health and wellbeing for rural communities

**Figure 2-3 Area of Pyrenees Shire relevant to the Southern Wimmera and Northeast Pyrenees Water Supply Project**




- **Environmental Benefits: $24.5M,** associated with improved landscape resilience, environmental watering opportunities and improved ecological outcomes in waterways connected to the Wimmera and Avoca River catchment systems

Against estimated project costs of almost $164M, the project business case shows a very positive **Benefit-Cost Ratio of 1.47**, with a Net Present Value of $64.3 million.

This project highlights the Council's essential role in advocating, coordinating, and partnering with state agencies, water authorities, and landholders to deliver large-scale enabling infrastructure.

**Resilient Agriculture Project**

The Resilient Agriculture Project, delivered through the Central Highlands Drought Resilience Plan, complements this focus by emphasising adaptation, innovation and long-term sustainability. It integrates research, stakeholder engagement and practical planning to support the transition to a more resilient and productive agricultural system. The project identifies key opportunities for the Pyrenees Shire, including:

- Adoption of climate-resilient farming systems and practices
- Diversification into higher-value and emerging products
- Expansion of local value-adding and processing
    - Development of circular economy opportunities
    - Increased adoption of agri-tech and data-driven farming
    - Integration of agriculture with tourism and visitor experiences

Importantly, the project reinforces the view that future growth will depend on moving beyond traditional production towards a more diversified, technology-enabled, and value-adding agribusiness system

Agriculture provides a major market for other local businesses, particularly those supplying contracting, equipment, maintenance, transport and technical services. Strengthening these connections creates opportunities to expand existing businesses, encourage new business establishment, and keep more economic activity within the Shire. This reinforces the importance of agricultural productivity and diversification as drivers of broader local economic development.

### 2.8.4 Implications for Economic Development Strategy

Agriculture is not just a sector within the Pyrenees Shire economy—it underpins broader economic development. Accordingly, the Economic Development Strategy must prioritise actions that strengthen agricultural productivity, resilience and value capture. These implications include :

- Advocating for and facilitating investment in **water, transport and digital infrastructure**
- Supporting the adoption of **technology and innovation** in farming systems
- Enabling **local value-adding and processing** to retain more economic activity within the Shire
- Strengthening the link between **agriculture and tourism**, particularly through wine, food and agritourism experiences
- Supporting **workforce attraction and accommodation** to enable sector growth
- Facilitating partnerships across government, industry and research organisations

By focusing on these areas, the Strategy can support the transition from a production-based agricultural economy to a more resilient, diversified and value-adding agribusiness system.

Ultimately, strengthening agriculture will drive broader economic outcomes, including increased employment, higher local spending, greater investment and a more sustainable and competitive regional economy.

### 2.8.5 Funding Programs

A range of funding programs is available to both individual farmers and farming-related organisations (e.g., Landcare). These programs support the sustainability of farming operations and farms, and access to them underscores the importance of active and organised local industry bodies.

### 2.8.6 Council's and Industry's Role

Council's role is not to manage farms, but to:

- Enable conditions for more productive and resilient agriculture
- Support value-adding and diversification
- Advocate for critical enabling infrastructure

The Strategy therefore prioritises agriculture through:

- Productivity enablement (water, digital, freight)
- Workforce and accommodation support
- Downstream value-adding opportunities
- Integration with tourism and visitor economy

Key to the growth of the local agriculture sector is the industry's engagement in exploring processes and opportunities that would support improved productivity and value addition.

Effective industry engagement relies heavily on organisations such as Perennial Pasture Systems, Bestwool/Bestlamb, Beefcheck, Landcare and Southern Farming Systems. These groups are instrumental in bringing farming and other agricultural businesses together, facilitating the sharing of relevant information, and driving projects that deliver value to the sector.

As the major spender on local goods and services and the largest importer of goods and services, the agriculture sector is essential to B2B programs that aim to extend local supply chains.

### 2.8.7 Key Strategic Theme

The strategy adds agriculture as a key strategic theme and identifies relevant actions.

## 2.9 Tourism and the Local Economy

Tourism is a key part of the Pyrenees Shire economy, supporting 142 jobs (about 6.4% of local employment) and generating demand across accommodation, hospitality, retail, wine production, recreation and other services.

Its importance extends beyond tourism-specific employment. SpendMapp data for September 2025 to August 2026 show that visitors contributed $29.19 million (69% of total local spending), compared with 31% from Pyrenees Shire residents. Visitor expenditure is therefore fundamental to the viability of many businesses and services that residents also use.

Tourism is closely linked to agriculture. Wine, food production, and rural landscapes are central to the Shire's visitor offer, creating opportunities to turn agricultural production and landscape assets into higher-value visitor experiences. Strengthening these connections can increase visitation, length of stay, and expenditure while supporting value-adding in agriculture.

### 2.9.1 Visitor Expenditure and Local Business Viability

High resident expenditure outside the Shire reflects the accessibility and scale of nearby regional centres. Visitor expenditure provides an additional demand source, expanding the customer base available to Pyrenees Shire businesses.

Visitors account for 69% of total local SpendMapp expenditure. Growing this expenditure can therefore:

- strengthen retail and hospitality viability;
- support additional visitor services and experiences;
- increase demand for locally produced food, wine and other products;
- improve the viability of accommodation and events; and
- support services that also benefit residents.

The strategic objective is therefore to increase both visitor numbers and yield through longer stays, greater expenditure per visitor and stronger connections between accommodation, wine, food, events and nature-based experiences.

### 2.9.2 Wine and Tourism

The Pyrenees wine region is the Shire's primary tourism drawcard. Wineries act as anchor attractions, linking agricultural production directly to visitor experiences.

The wine industry faces additional challenges from global oversupply and declining consumption, increasing pressure on the profitability and viability of local wineries. These conditions reinforce the importance of agricultural resilience, diversification and value-adding.

While Council cannot influence global market conditions, it can help strengthen the industry's resilience through:

- Facilitating access to business development, innovation and diversification support programs.
- Working with industry and Tourism MidWest Victoria to strengthen cellar-door experiences, direct sales, wine tourism promotion, visitor itineraries and events, and opportunities to integrate wine with food and other visitor experiences s.
- Facilitating investment in accommodation and hospitality, particularly around Avoca and Moonambel.
- Addressing planning and infrastructure barriers to commercially viable business diversification.

The strategic priority should be strengthening existing wineries and increasing their economic contribution through higher-value products, diversified revenue and tourism, rather than encouraging increased wine production in an already oversupplied market.

Strengthening agriculture—particularly through water security, diversification and value-adding—will:

- Improve the quality and consistency of visitor experiences
- Support events, food and agritourism
- Increase visitation and length of stay

The Southern Wimmera and Northeast Pyrenees Water Supply Project could strengthen water security and the resilience of existing vineyards, while supporting commercially viable diversification and complementary wine tourism activities.

**Figure 2-4 - Wine and Tourism**



### 2.9.3 Pyrenees Local Area Action Plan (LAAP)

The LAAP provides a coordinated framework for tourism growth, focusing on increasing yield and overnight stays.

Key priorities include:

- Expanding accommodation
- Strengthening wine, food and nature-based experiences
- Developing trails and connections between towns and agricultural areas
- Enhancing town centres
- Improving digital visibility and booking pathways
- Building industry capability

These priorities rely on a strong agricultural base, reinforcing the need to align agriculture and tourism.

Two of the key LAAP projects are as follows:

- Beaufort Linear Corridor

  The Garibaldi Creek at Beaufort is a neglected, weed-infested watercourse, underutilised as a recreational space and pedestrian corridor.

  The Beaufort Linear project will restore the watercourse and enable the local community and tourists to walk, cycle, learn, and gather along the waterway, celebrating the creek and connecting to destinations such as the town centre and caravan park.

- Beaufort Lake Caravan Park

  The $3 million Beaufort Lake Caravan Park redevelopment project will modernise the Council-owned and managed tourist park to increase visitation, better accommodate people with disabilities, provide short-term worker accommodation, and deliver a higher-quality experience that attracts new visitors to Beaufort and the region.

### 2.9.4 Projected Growth in Visitation

Visitation is forecast to grow by approximately 43% to more than 320,000 visits by 2033, driven by:

- Population growth in Ballarat and Melbourne's west
- Demand for regional food, wine and nature experiences
- Repeat visitation and short stays

This growth is expected to be yield-led rather than volume-led. Realising this growth depends on:

- Increased accommodation supply
- Strong agriculture-based experiences
- Event development linked to agricultural seasons
- Infrastructure and digital improvements

### 2.9.5 The Importance of Accommodation to Tourism Growth

Limited accommodation is the primary constraint on tourism growth. Expanding accommodation is critical to:

- Converting day trips into overnight stays
- Increasing visitor spend
- Supporting events and seasonal tourism
- Capturing the value of agriculture-based visitation

Investment in accommodation is closely linked to housing and broader economic development, and a stronger accommodation pipeline:

- Supports construction sector activity
- Improves the feasibility of small-scale development
- Builds investor confidence

Improved housing supply supports the tourism sector's ability to attract and retain staff, supports the viability of tourism businesses, and helps sustain operations. A coordinated approach to housing and tourism accommodation is therefore essential.

This will include collaboration with Tourism MidWest Victoria to develop a Visitor Economy Investment Attraction Strategy for the wider region, with a particular focus on Moonambel and the surrounding wine country.

### 2.9.6 Workforce Constraints for Tourism and Agriculture

Workforce availability is a key constraint on tourism and agricultural growth. Many businesses are located outside Beaufort and Avoca, where public transport is limited, making car access essential. This restricts access for younger workers and limits labour supply, increasing reliance on residents or Ballarat commuters.

These challenges are most acute for wineries, agritourism and dispersed accommodation. Without improved workforce access, growth and investment will be constrained, highlighting the need for more housing, local workforce participation, and targeted transport solutions.

### 2.9.7 Key Tourism Markets for the Pyrenees Shire

Visitor expenditure comes from a geographically diverse market. Regional Victoria is the largest source, accounting for 51% of external visitor expenditure, followed by Greater Melbourne at 33% and interstate visitors at 15%.

Importantly, neighbouring LGAs account for only 15% of total expenditure. Ballarat is the largest immediate source market at 8%, followed by Ararat at 5%, making both important markets for day trips, events, repeat visitation and short breaks. However, the rest of Regional Victoria contributes a further 36%, showing the visitor market extends well beyond adjoining municipalities.

Greater Melbourne represents one-third of visitor expenditure. Melbourne's western suburbs contribute only around 3%, indicating that metropolitan marketing opportunities extend across Greater Melbourne rather than being confined to the western growth areas.

Interstate visitors account for 15%, including 4% from Greater Adelaide. The Western Highway also connects Beaufort with Ballarat, western Victoria and the Melbourne–Adelaide corridor. This creates opportunities to capture spending from through traffic, although available expenditure data do not separately identify the value of this market.

Tourism marketing should therefore balance nearby repeat markets with broader Regional Victoria, Greater Melbourne and selected interstate markets.

### 2.9.8 Roles of Council and Industry in Tourism

Tourism growth requires a partnership between Council, tourism operators, investors and other industry participants. While private-sector investment and business development will drive much of the growth in accommodation, experiences and visitor services, Council has an important role in creating the conditions that support this investment.

**Council's role is to:**

- Enable appropriate development through planning advice, development facilitation and coordinated support for investment enquiries.
- Support investment readiness by identifying and communicating opportunities and helping proponents understand development requirements.
- Advocate for enabling infrastructure, including transport, housing, digital connectivity and other infrastructure that supports tourism growth.
- Operate and maintain the Beaufort Lake Caravan Park as an important part of the Shire's visitor accommodation offer.
- Maintain community infrastructure and public spaces that contribute to the visitor experience, including recreation facilities, trails and public amenities.
- Advocate to other levels of government for investment in public spaces and community infrastructure that benefits residents and visitors, including projects such as the Beaufort Linear Park.

**Industry's role is to:**

- Invest in and deliver accommodation, hospitality, attractions and visitor experiences that respond to contemporary visitor expectations and market demand.
- Improve the quality, diversity and availability of visitor products and experiences.
- Develop commercially viable opportunities that encourage longer stays and increased visitor expenditure.
- Collaborate with other businesses to package and promote complementary wine, food, events, nature and accommodation experiences.
- Respond to emerging visitor markets and investment opportunities.

### 2.9.9 Key Strategic Theme

The strategy now recognises tourism as a key strategic theme and identifies specific actions to support its growth, which is highly dependent on

- A strong alignment between agriculture and tourism
- Expanded accommodation options to support overnight stays
- An adequate workforce capacity to sustain business operations
- Enhanced experience bundling and product development
- The effective leveraging of the visiting friends and relatives (VFR) market

If workforce and housing constraints are not addressed, tourism growth will remain constrained.

## 2.10 Renewables

Renewable energy is an increasingly important and fast-growing sector in the Pyrenees Shire. Part of the Central Highlands Renewable Energy Zone (REZ) lies within the Shire, and wind, solar and transmission projects are already generating jobs, local spending and new income streams.

Since 2016, electricity generation has grown from a zero contribution to the local economy to the following:-

- Output $18.2 M
- Local expenditure $4.5 M
- Exports $11.8 M
- Employment 8 jobs

Existing and proposed wind farms, together with the Western Renewable Link, are creating significant short-term construction employment and contracting opportunities, driving demand for local accommodation and services, and providing long-term lease income for landholders. These projects also support skills development, infrastructure upgrades and community investment.

Although renewable energy development presents challenges—including construction impacts, amenity concerns and relatively few long-term jobs—effective planning, genuine community engagement and fair benefit-sharing can maximise local value. If managed well, renewables can diversify the economy, support population retention, and deliver lasting improvements to liveability and resilience across the Pyrenees Shire.

**Figure 2-5 A Windfarm in the Pyrenees Shire**



### 2.10.1 Draft REZ Community Benefits Plan

The draft REZ Community Benefits Plan allocates coordinated funding from renewable energy projects to host communities, recognising infrastructure impacts and supporting tailored, long-term social, economic and environmental improvements that deliver inclusive local benefits.

## 2.11 Local Value-Adding and Business Development Opportunities.

Agriculture, construction, tourism, and renewable energy generate demand for a wide range of goods and services, much of which the Shire currently sources from outside.

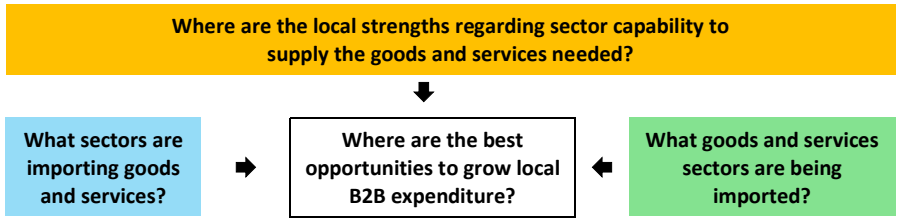
This creates opportunities to strengthen existing businesses, encourage new business establishment and retain more economic activity locally. The greatest potential lies where local businesses have, or could develop, the capacity to meet this demand competitively.

Given the high proportion of micro and small businesses, much of this growth is likely to involve expanding existing businesses and strengthening connections with potential customers.

### 2.11.1 Opportunities to Extend Local Value Chains

The strongest opportunities appear to be in agricultural support services, construction, equipment hire, repair and maintenance, where existing businesses have demonstrated capability and recent growth.

**Figure 2-6 Growing Local B2B Expenditure**




Other opportunities may exist in professional, technical, transport, food production and visitor-related services, although local business capacity varies.

Local suppliers cannot competitively supply all imported goods and services, particularly those requiring specialised expertise or large-scale production. The priority is therefore to identify specific purchasing requirements local suppliers can meet and support businesses in developing the capabilities and connections needed to secure additional work.

### 2.11.2 Potential Emerging Sectors

Several relatively small sectors grew substantially faster than the Shire's overall increases in employment (7%), local expenditure (44%), and exports (27%).

Notable examples include Exploration & Mining Support Services, Publishing, Other Repair & Maintenance, Heritage, Creative & Performing Arts, Computer Systems Design and Sports & Recreation. Some recorded increases exceeding 200% in local expenditure or exports.

Although these increases largely reflect growth from a low economic base, potentially involving only a few micro or home-based businesses, they suggest opportunities for economic diversification and specialist business development.

Some of these businesses may also serve markets beyond the Shire, generating additional income without necessarily requiring substantial employment growth or dedicated commercial and industrial premises.

### 2.11.3 Implications for Economic Development and Investment Attraction

These findings suggest an important opportunity for the Pyrenees Shire is to support existing businesses' expansion and encourage smaller, specialist businesses to establish and grow.

The focus should be on strengthening local supply chains, developing business capabilities, connecting suppliers with customers and facilitating commercially viable new investment.

This approach recognises that businesses can grow through increased sales to local and external markets without necessarily requiring substantial investment in new premises.

### 2.11.4 Key Strategic Theme

Local Value-Adding is a key Strategic Theme of the Strategy, focused on strengthening existing businesses, supporting the growth of emerging enterprises and extending local value chains to increase economic activity, employment and investment within the Shire.

## 2.12 Workforce

Understanding workforce age, labour force participation and commuting patterns is critical to economic development in Pyrenees Shire, as workforce availability, skills, and access directly shape business growth, service viability and investment outcomes.

### 2.12.1 Workforce Age, Labour Force and Workforce Data

As at the 2021 ABS Census, there were 4,810 residents of workforce age (i.e., 15 to 67[1] years old)

The Small Area Labour Market (SALM)[2]. Data is provided by the Department of Employment and Workplace Relations (DEWR) regarding the size of an LGA labour force (Labour Force = Workforce, i.e., those in work, plus unemployed residents, i.e., not employed, actively looking for work and available to start work)

SALM data indicates that over the last five years, the Pyrenees Shire labour force has varied, with a low of 3,121 in the December quarter of 2023 and a high of 3,613 in the December 2024 quarter.

The Pyrenees Shire workforce as at the 2021 ABS Census consisted of some 2,715 residents, of which:

- 1,520 work locally.
- 1,195 commute to another LGA, with 70% of those working in Ballarat

The local economy has 2,219 jobs. This means nearly 700 people live in the Pyrenees Shire but work elsewhere. 63% of these workers reside in Ballarat.

This data highlights Ballarat's importance as both a source of workers and a source of employment.

### 2.12.2 Potential Workers Residing in the Pyrenees Shire

The data indicates that of the:

- 4,810 working-age residents, between 3,120 and 3,610 are in the labour force, meaning there can be between 1,200 and 1,700 working-age residents who are not engaged in the labour force
- Between 3,120 and 3,610 are in the labour force; 2,700 are in the workforce, meaning between 420 and 910 residents (i.e., with accommodation in the Pyrenees Shire) may be seeking to enter the workforce.

[1] 67 is being used as this is the age at which people can receive a government pension

[2] SALMs provide modelled labour force estimates for LGAs and SA2s, combining Census, survey and Centrelink data, but should be interpreted alongside other local indicators.

### 2.12.3 Workforce Shortages

Stakeholder feedback indicates that many businesses cannot secure enough workers to support current operations or grow further.

Feedback from stakeholders indicates that barriers to recruiting workers include

- Poor transport services, particularly for younger residents seeking work.
- Limited accommodation availability for people who want to work in the Pyrenees Shire and need local housing.
- Many school leavers are not “work-ready” and do not understand how to maximise their employment opportunities.
- Many businesses lack adequate processes and skills to attract, recruit and retain workers (a reflection of the high number of micro and small businesses.
- Limited access to an employment service

An employment service operates from Beaufort one day per week. This would indicate that there is a likely shortage of support for residents seeking work (and businesses seeking workers)

### 2.12.4 Key Strategic Theme

The strategy has added workforce as a key strategic theme and identified relevant actions.

## 2.13 Availability of Commercial and Industrial Land and Premises

The preceding economic analysis identifies opportunities to strengthen existing businesses and encourage smaller and specialist enterprises, particularly in agricultural support services, construction, repair and maintenance, and local value-adding.

The availability of suitable commercial and industrial land and premises is an important consideration in supporting these opportunities. However, demand will depend on individual business requirements, as many micro and small businesses can operate from homes, rural properties or existing premises.

### 2.13.1 Commercial and Industrial Property Market

The Pyrenees Shire has a relatively small commercial property market. Between 2022 and 2025, commercial property sales were substantially fewer than in Ballarat and generally below those in larger neighbouring regional centres.

The limited market means businesses seeking premises of a particular size, location or configuration may have relatively few options.

Industrial property activity is comparatively stronger. Between 2022 and 2025, the Shire recorded 15 industrial development-site sales, more than Ararat, Northern Grampians or Central Goldfields over the same period, although substantially fewer than Ballarat.

Industrial development-site prices were consistently lower than in Ballarat, but not always lower than in other neighbouring LGAs. This suggests a potential affordability advantage for businesses seeking access to Ballarat and surrounding regional markets.

Ballarat's West Employment Zone (BWEZ) is a major 438-hectare industrial precinct developed in stages to accommodate manufacturing, construction, logistics and related industries. Its scale and infrastructure create opportunities for larger industrial development that are generally unavailable in the Pyrenees Shire.

The Shire is therefore better positioned to complement Ballarat by attracting smaller, specialist businesses seeking relatively affordable land, suitable premises, and access to regional markets, rather than competing for large-scale industrial or logistics investment.

This positioning is consistent with the Shire's existing business structure and the growth opportunities identified in the preceding economic analysis.

The Background Report provides a more detailed comparison of commercial and industrial property markets using Victorian Valuer-General sales data, including single-occupancy retail properties and industrial development sites.

### 2.13.2 Availability and Suitability of Land and Premises

Beaufort and Avoca are the Shire's principal commercial centres, with opportunities for new development, redevelopment and reuse of existing premises.

Commercial sales activity is limited and varies between years. No commercial property sales were recorded in 2024, compared with five in 2025.

Stakeholder feedback also indicates that the age and condition of some commercial premises can limit their attractiveness to businesses and investors.

Industrial land is available in Beaufort and Avoca, but its suitability varies with lot size, servicing, road access, and freight requirements. Much of this land is better suited to smaller enterprises than major manufacturing or logistics operations.

The issue is therefore not simply the amount of commercially or industrially zoned land available, but whether sites and premises can meet contemporary business requirements.

Maintaining current information on vacant premises, redevelopment opportunities, site suitability and development constraints will assist Council in responding to business expansion and investment enquiries.

### 2.13.3 Implications for Business Growth and Investment

The economic analysis suggests that many business growth opportunities will involve micro and small enterprises, some of which may expand without needing additional premises.

However, businesses in construction, agricultural support, repair, and maintenance may require workshops, equipment storage, yards, or small industrial facilities as they grow.

These activities, along with selected specialist businesses serving wider regional markets, represent potential opportunities for the use of existing commercial and industrial land and premises.

The priority is to understand the requirements of existing and prospective businesses, identify suitable sites and premises, and facilitate development where there is demonstrated demand.

This provides a targeted approach to supporting business expansion and attracting investment without assuming increased economic activity will necessarily require additional commercial or industrial land.

## 2.14 Planning

Planning processes, infrastructure availability and development readiness influence the Shire's ability to accommodate population growth, business expansion and new investment.

The challenge is to identify and progress appropriate development opportunities with sufficient clarity and certainty, particularly for smaller projects where planning complexity and costs can be significant barriers.

### 2.14.1 Planning Performance

Stakeholder feedback identifies concerns about the complexity, cost and uncertainty of planning processes, which can discourage investment and delay housing, accommodation and business development.

However, Council's Planning Performance data indicates that 93.5% of applications in the reported 2025/26 financial year period were determined within statutory timeframes.

This suggests a difference between Council's statutory performance and applicants' experience of the development process.

For smaller businesses and investors, clear information, early advice and coordinated assistance can help reduce uncertainty and improve development readiness.

### 2.14.2 Tourism Accommodation

The tourism analysis identifies limited accommodation as a constraint on increasing overnight visitation and visitor expenditure, particularly around wine, events and nature-based experiences.

Supporting accommodation investment requires identifying suitable locations, clarifying servicing and effluent management requirements, and facilitating appropriately scaled development.

Avoca offers opportunities for larger accommodation proposals where reticulated sewerage is available. Moonambel and surrounding rural areas are more suited to boutique, farm-stay and low-impact accommodation, subject to planning and effluent management requirements.

Small- and medium-scale accommodation linked to wineries, events and nature-based experiences is likely to offer the most realistic investment opportunities.

### 2.14.3 Commercial and Industrial Development

The opportunities identified for smaller and specialist businesses reinforce the importance of ensuring that planning requirements and infrastructure constraints do not unnecessarily impede commercially viable development.

For businesses requiring dedicated premises, Council's role is to provide clear information about permitted land uses, site constraints, servicing requirements and development approval processes.

This will help existing businesses assess expansion opportunities and prospective investors identify locations suited to their requirements.

### 2.14.4 Business Friendly Council Program

The preceding analysis reinforces the importance of Council's Business Friendly Council program[1] in supporting investment and business growth.

The program provides a framework for improving development readiness through clearer guidance, early pre-application advice, coordinated assessment and active facilitation of appropriate proposals.

These improvements are particularly relevant to smaller businesses and investors who may have limited resources or experience in navigating planning and development processes.

A business-friendly approach will strengthen Council's capacity to support housing, tourism accommodation and commercial and industrial investment, helping translate identified opportunities into viable development.

## 2.15 Digital Connectivity

Digital connectivity is a critical enabler of economic growth in the Pyrenees Shire, underpinning agricultural productivity, business operations, remote work, and the visitor economy.

However, connectivity remains uneven, with gaps in mobile coverage, limited fixed broadband in rural areas, no 5G network, and reliance on costly, inconsistent satellite services. These constraints limit business efficiency, agri-tech adoption, online sales, and visitor service.

Digital literacy is equally important. Many local businesses—predominantly micro and small enterprises—need support to adopt digital tools, improve cybersecurity, and participate effectively in online markets, which directly affects their ability to grow and compete.

Recent infrastructure improvements, including new and upgraded NBN fixed wireless towers, expanded mobile coverage, and the availability of Low Earth Orbit satellite services, are progressively improving access.

### 2.15.1 Digital Connectivity Action Plan

Council's Digital Connectivity Action Plan plays a central role in coordinating providers, identifying priority investment areas, advocating for infrastructure funding, and delivering digital literacy programs. Together, these actions aim to improve connectivity, capability and economic participation across the Shire.

[1] The Business Friendly Councils initiative aims to improve the end-to-end approvals process and make it easier to start and grow a business in Victoria.

## 2.16 SWOT Analysis

The strategy development included preparing a SWOT analysis based on the Background Report findings and stakeholder feedback. This analysis has shaped the Strategic Themes described in the following section.

| | Now | Future |
|---|---|---|
| **Positives** | **Strengths**<br>**Outstanding natural assets and landscape quality**<br>National parks, rural vistas, rivers, bushland and heritage landscapes underpin the Shire's identity, liveability and tourism appeal.<br>**Strong agriculture, food and wine base**<br>Agriculture remains the backbone of the local economy, with established strengths in grains, livestock and wine that support export income, agribusiness services and value-adding opportunities.<br>**Strong visitor expenditure base**<br>Visitors generate the majority of local transaction spending, supporting retail, hospitality, wine, accommodation and other businesses beyond what the resident population alone could sustain.<br>**Lifestyle and liveability advantage**<br>Affordable housing (relative to Ballarat and Melbourne), rural amenity and small-town character attract tree-changers, owner-operators and lifestyle-aligned investors.<br>**Established visitor drawcards**<br>Wine regions, events, outdoor recreation, trails and heritage assets generate consistent visitation and provide a strong foundation for growth in tourism yield.<br>**Engaged communities and local stewardship**<br>Strong community attachment to place, landscape and heritage supports sustainable, place-based development and long-term investment confidence. | **Opportunities**<br>**Housing and accommodation as economic enablers**<br>Delivering residential, worker and visitor accommodation unlocks workforce attraction, business growth, service expansion and higher visitor yield.<br>**Small Business Growth and Local Value-Adding**<br>Opportunities to strengthen existing businesses, extend local supply chains and support smaller and specialist enterprises serving local and external markets, particularly in agricultural services, construction, repair and maintenance, and professional services.<br>**Value-adding and diversification in agriculture**<br>Opportunities in agri-services, processing, logistics, ag-tech and climate-resilient production, supported by water security projects and regional infrastructure.<br>**Grow visitor yield from diverse markets**<br>Increase expenditure and overnight stays by targeting wider Regional Victoria, Greater Melbourne and selected interstate markets, while continuing to leverage Ballarat, Ararat and Western Highway traffic.<br>**Growth in boutique, low-impact tourism**<br>Pairing natural assets with boutique accommodation, improved dining and activated towns to shift from daytrip to overnight visitation and higher spend.<br>**Town activation as gateways to nature**<br>Strengthening Beaufort, Avoca and smaller towns as service, experience and accommodation hubs that capture spend linked to surrounding landscapes.<br>**Lifestyle-aligned and stewardship-led investment**<br>Attracting investors and businesses aligned with amenity, environmental values and long-term place commitment rather than volume growth.<br>**Partnerships and regional collaboration**<br>Leveraging Ballarat's role as an employment and service hub, Traditional Owner enterprises (including Djaara), and State and Commonwealth programs to unlock funding and co-investment. |
| **Negatives** | **Weaknesses**<br>**Housing and accommodation shortages (binding constraint)**<br>Lack of rental, worker, diverse and visitor accommodation is the single most significant constraint on workforce attraction, business expansion, population growth and tourism yield.<br>**Planning and approvals frustration**<br>The Victorian government planning scheme is complex, resulting in perceptions that the processes are slow, inconsistent and disproportionately constrain small-scale investment, adaptive reuse, accommodation, agribusiness diversification and town activation.<br>**Workforce shortages and skills gaps**<br>Acute challenges across health, retail, hospitality, agriculture and trades, compounded by housing constraints, ageing workforce and limited local recruitment capability.<br>**Limited commercial and industrial land availability**<br>Commercial property choice is limited, and some industrial land is constrained by lot size, servicing or freight access. Industrial land can offer a cost advantage relative to Ballarat, but development readiness varies between sites.<br>**High resident expenditure outside the Shire**<br>The substantially greater scale and diversity of nearby regional centres and online retail means a high proportion of resident spending occurs outside the Pyrenees Shire.<br>**Under-investment in town amenity and natural-asset access**<br>Gaps in signage, trails, public toilets, streetscapes and maintenance limit usability and economic return from otherwise strong assets. | **Threats**<br>**Failure to address housing and planning constraints**<br>Continued stagnation in workforce growth, business investment and tourism yield if enabling conditions are not resolved.<br>**Challenges Facing the Wine Industry**<br>Global wine oversupply, declining consumption and increased competition are affecting winery profitability and investment, with potential impacts on local employment, manufacturing and tourism.<br>**Persistent low-yield visitation model**<br>Ongoing reliance on day-trip visitation resulting in limited local economic benefit and continued leakage to competing destinations.<br>**Competition from better-enabled destinations**<br>Ballarat, Daylesford and the Grampians capturing investment and visitor spend due to stronger accommodation, dining, infrastructure and facilitation.<br>**Climate variability and environmental pressure**<br>Increasing risk to agricultural productivity, tourism assets and water security if adaptation and infrastructure investment lag.<br>**Inappropriate or poorly sequenced development**<br>Risk that over-commercialisation or misaligned projects undermine landscape character, community trust and long-term brand positioning.<br>**Community disengagement and "left behind" sentiment**<br>Perceived inequity between towns and slow delivery of basics eroding confidence in economic development efforts. |

## 2.17 Implications for Economic Development and Investment Attraction

The analysis highlights opportunities to strengthen the Shire's agricultural base, support tourism growth, extend local value chains and encourage business diversification.

Given the predominance of micro and small businesses, much of the Shire's economic growth will likely come from existing business expansion, specialist business development, and incremental investment.

Relative affordability, rural character and proximity to Ballarat provide opportunities to attract businesses serving local and wider regional markets.

Realising these opportunities will depend on addressing constraints in housing, workforce availability, infrastructure, planning and access to suitable business premises.

These findings underpin the investment attraction positioning and five Strategic Themes outlined in the following sections.

# 3 Investment Attraction Positioning Statement

This section defines who the Pyrenees Shire is best placed to attract, why, and how Council will support investment aligned with the Shire's capacity and priorities.

The Strategy is not about competing with Ballarat or Melbourne on scale. Instead, it focuses on leveraging proximity to Ballarat and capturing spillover demand for housing, the workforce, tourism and business activity where the Pyrenees Shire offers a clear advantage.

## 3.1 What makes the Pyrenees Shire attractive

The Pyrenees Shire offers a more affordable, well-located alternative within western Victoria, particularly for households and businesses connected to Ballarat. Key strengths include:

- Lower housing costs than Ballarat and Melbourne's west
- Direct access to Ballarat's jobs, services and markets
- Strong agriculture and wine sectors
- Growing renewable energy activity
- High liveability, small towns and strong communities

These strengths support steady, realistic growth, particularly where development aligns with infrastructure, services and workforce availability.

The Pyrenees Shire is well positioned to support small and specialist business growth by building on its established economic strengths, relatively affordable land and premises, and proximity to larger regional markets. The priority is to facilitate the expansion of existing businesses, encourage commercially viable new investment and strengthen local value chains, rather than compete directly for large-scale industrial development.

## 3.2 Key markets the Shire is targeting

The Strategy focuses on realistic, high-value markets aligned with the Shire's competitive advantages:

- Residents from Ballarat seeking more affordable housing and lifestyle options
- Households from Melbourne's western growth areas priced out of those markets
- Workers across agriculture, construction, renewables, health, tourism and professional services
- Small and specialist businesses seeking opportunities to establish or expand in an affordable regional location, particularly those supporting agriculture, construction, tourism and other established industries, or serving wider regional markets.
- Tourism investors, particularly small-to-medium accommodation linked to wine, events and nature-based experiences

Large-scale industrial and logistics investment is not a priority, given Ballarat's scale and capacity. Instead, the Shire will focus on smaller, specialist businesses whose operating requirements align with its available land, premises, infrastructure, and access to regional markets. The Shire will pay particular attention to businesses seeking to establish or expand from Ballarat and Melbourne's west.

## 3.3 Housing affordability as a competitive advantage

Housing affordability is the Shire's strongest and most consistent competitive advantage; It:

- Supports population growth and workforce attraction
- Enables downsizing and ageing in place
- Reduces cost pressures for local employers
- Improves the feasibility of tourism and worker accommodation

This advantage underpins key actions in housing, workforce and tourism.

### 3.4 How Council will support aligned investment

Council's role is to reduce risk and improve investment readiness, not replace the private sector.

This will be achieved through:

- Identification and communication of development-ready locations (without promoting individual sites)
- Delivery of a Housing and Accommodation Prospectus
- Strong pre-application advice and coordinated facilitation
- Targeted promotion of industrial land suited to small and service-based businesses
- Direct alignment of infrastructure advocacy with deliverable projects

These actions are designed to convert interest into investment by capturing, triaging and actively managing development and investment enquiries from initial contact through to pre-application, approval, referral or investment decision. A well-coordinated enquiry management process will ensure the Shire capitalises on viable opportunities.

### 3.5 Agriculture as a priority investment sector

Agriculture is the Shire's primary economic driver and a central focus for investment attraction. Investment will be targeted toward activities that:

- Improve productivity and resilience
- Increase local value-adding and reduce leakage
- Strengthen supply chains and local business participation
- Enhance integration with tourism

Priority agriculture-related investment opportunities include:

- Agricultural services (contracting, agronomy, maintenance, logistics)
- Food and beverage processing and value-adding, including investment that strengthens the productivity, resilience and market positioning of existing wineries, with additional wine production capacity subject to demonstrated commercial demand
- On-farm diversification, including agritourism and direct-to-market activities
- Water-efficient and climate-resilient farming systems
- Agri-tech and data-driven farming solutions
- Renewable energy integration with agriculture, including co-location and energy use optimisation

The focus is on **incremental, commercially viable investments** that build on existing strengths rather than on large-scale transformation.

## 3.6 Other Investment Priorities

In addition to agriculture-related investment, the following table offers a broad timeframe for investment attraction priorities:-

| Investment Priorities | Years | | | | |
|---|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | 5 |
| **Housing and Tourism* Accommodation** | | | | | |
| **Visitor experiences** | | | | | |
| **Local value adding/capture – including Agriculture** | | | | | |
| **Small and specialist business expansion and investment, including the use of suitable commercial and industrial premises** | | | | | |

***Note**: Avoca–Moonambel as the priority wine-tourism accommodation/experience opportunity

## 3.7 How this positioning will be used

This positioning will guide:

- Housing and accommodation promotion
- Engagement with real estate agents, builders and investors
- Targeted investment attraction activities
- Tourism and workforce attraction messaging
- Alignment of infrastructure advocacy with investment-ready opportunities

The focus is on achievable, place-based growth aligned with local capacity and infrastructure.

## 3.8 Advocacy to enable investment

Advocacy is a critical enabler of attracting investment. Council's role is to align local opportunities with State and Federal priorities and to secure infrastructure that unlocks development; advocacy will focus on:

### 3.8.1 Key Priority – Water Security

- Progression of the Southern Wimmera and Northeast Pyrenees Water Supply Project, including Stage 1 – Project Development and Due Diligence. This advocacy is positioning water as a critical enabling infrastructure for:
  - Farm productivity and diversification
  - Agri-processing and value-adding
  - Tourism and accommodation development
  - Housing growth and resilience

### 3.8.2 Other Advocacy Priorities

- Infrastructure supporting housing and accommodation (water, wastewater, power, roads)
- Transport and freight connectivity for agriculture, tourism and construction
- Digital connectivity for agriculture, business and remote work
- Investment opportunities for local businesses linked to transmission infrastructure and renewable energy projects
- Workforce and housing programs aligned with regional labour markets
- Support for the implementation of the LAAP

Advocacy will be:

- Place-based and project-specific, linked to identifiable opportunities
- Evidence-based, drawing on housing, workforce and economic data
- Coordinated, aligned with regional strategies and neighbouring Councils
- Outcome-focused, demonstrating clear links to investment, jobs and growth

# 4 Key Strategic Themes

This Strategy is structured around five Strategic Themes that respond directly to the evidence in Section 2 and the positioning in Section 3.

The themes reflect how the Pyrenees Shire economy functions in practice:

- Agriculture is the primary economic driver
- Housing enables population and workforce growth
- Tourism converts local assets into external demand
- Local value-adding retains economic activity
- Workforce underpins all sectors

These themes are interdependent and must be delivered in a coordinated way.

## 4.1 Strategic Theme 1: Agriculture and Agribusiness

***Strengthen agricultural productivity, resilience and value-adding to support the Shire's primary economic driver and enable broader economic growth.***

### 4.1.1 Why this matters

Agriculture underpins output, employment, exports and local expenditure in the Pyrenees Shire. It also directly supports tourism (wine and food), local business activity and population stability.

Future growth will not come from expanding land use, but from:

- Increased productivity
- Greater resilience to climate and cost pressures
- Higher-value production and diversification
- Stronger local value capture

### 4.1.2 How this Strategic Theme works

This theme focuses on enabling conditions rather than direct production:

- Infrastructure (water, freight, digital) improves productivity
- Innovation and ag-tech improve efficiency
- Value-adding increases local economic capture
- Integration with tourism expands demand

### 4.1.3 Key Strategies

- Advocate for water security, including the Southern Wimmera and Northeast Pyrenees Water Supply Project.
- Improve freight and transport infrastructure to support efficient supply chains.
- Support the adoption of ag-tech, data-driven farming and climate-resilient practices.
- Facilitate diversification into higher-value and emerging agricultural products.
- Encourage downstream processing, food and beverage manufacturing and agritourism.
- Strengthen links between agriculture and tourism (wine, food, events)

### 4.1.4 What this enables

- Tourism growth (wine, food, agritourism)
- Local value-adding and manufacturing
- Increased exports and local expenditure
- Greater investment confidence

### 4.1.5 Key Measures – Agriculture and Agribusiness

**System Indicators (Outcomes)**

- Agricultural output and Gross Regional Product contribution
- Agricultural employment levels
- Value of agricultural exports
- Growth in value-added agricultural production (e.g. wine, processed goods)

**Influence Indicators (Council Contribution)**

- Infrastructure advocacy outcomes (water, roads, digital)
- Number of agri-businesses engaged in programs or partnerships
- Industry participation in ag-tech, resilience or diversification initiatives
- Investment enquiries or projects linked to agriculture

**Delivery Indicators (Accountability)**

- Advocacy actions delivered (e.g., water project, road, bridges, digital, transport connections)
- Number of industry engagement activities (forums, workshops)
- Partnerships established (e.g., Agriculture Victoria, RDV, industry groups)
- Actions completed under agriculture-related initiatives

## 4.2 Strategic Theme 2: Population, Housing and Development Enablement

***Enable population growth through housing delivery and development facilitation to support the workforce, services, and economic growth.***

### 4.2.1 Why this matters

Population growth is fundamental to economic growth. Housing availability is the primary constraint on:

- Workforce attraction and retention
- Business growth
- Tourism accommodation
- Service viability

Without housing delivery, other Strategic Themes cannot be realised.

### 4.2.2 How this Strategic Theme works

- Planning facilitation reduces development risk
- Housing supply enables population growth
- Population growth supports workforce, services and business demand

### 4.2.3 Key Strategies

- Facilitate the delivery of housing that supports population growth, affordable options, workforce accommodation, and visitor accommodation.
- Support the workforce and rental housing.
- Enable tourism accommodation in appropriate locations.
- Implement Business-Friendly Council planning practices
- Develop and promote a Housing and Accommodation Prospectus
- Align infrastructure advocacy with development-ready sites

### 4.2.4 What this enables

- Workforce growth (Theme 5)
- Tourism accommodation and overnight stays (Theme 3)
- Increased local demand for businesses (Theme 4)

### 4.2.5 Key Measures – Housing and Development Enablement

***Enable population growth through housing delivery and facilitation of development.***

**System Indicators (Outcomes)**

- Population growth and migration trends
- Dwelling approvals and completions
- Rental vacancy rate
- Median house prices (relative affordability)

**Influence Indicators (Council Contribution)**

- Number of housing and accommodation projects facilitated
- Pre-application enquiries supported
- Development facilitation meetings held
- Reduction in perceived planning barriers (qualitative feedback)

**Delivery Indicators (Accountability)**

- % of housing-related actions delivered
- Housing and Accommodation Prospectus completed and promoted
- Residential land audit and activation register completed
- Number of landowners engaged

## 4.3 Strategic Theme 3: Tourism

***Grow tourism yield through accommodation, experiences and integration with agriculture.***

### 4.3.1 Why this matters

Tourism is a major source of external income and offsets high levels of escape expenditure. Visitors account for a significant share of local spending. However, the current model is heavily weighted toward:

- Day trips
- Stand-alone experiences
- Limited accommodation

Growth depends on increasing:

- Length of stay
- Visitor spend
- Experience bundling

### 4.3.2 How this Strategic Theme works

- Agriculture provides the core product (wine, food, landscapes)
- Accommodation enables overnight stays
- Bundled experiences increase yield

### 4.3.3 Key Strategies

- Facilitate the development of tourism accommodation, particularly in Avoca, Moonambel and the northern wine tourism area, with accommodation forms matched to servicing and planning capacity.
- Support bundling of wine, food, events and nature-based experiences
- Develop bookable itineraries and visitor products
- Leverage events as drivers of overnight stays
- Target priority visitor markets based on demonstrated expenditure patterns, including Greater Melbourne, wider Regional Victoria, Ballarat and Ararat as important nearby markets, and selected interstate markets; leverage the Western Highway corridor as an additional opportunity to capture regional and interstate traveller expenditure.
- Strengthen digital presence and visitor servicing.
- Leverage the Visiting Friends and Relatives (VFR) market.

#### 4.3.4 What this enables

- Increased visitor expenditure
- Stronger retail and hospitality sectors
- Greater demand for local products (Theme 4)
- Reinforcement of agriculture (Theme 1)

#### 4.3.5 Key Measures – Tourism

***Grow tourism yield through accommodation, experiences and bundling.***

**System Indicators (Outcomes)**

- Total visitation
- Overnight stays vs day trips
- Visitor expenditure
- Accommodation occupancy rates

**Influence Indicators (Council Contribution)**

- Number of accommodation projects facilitated
- Number of bookable tourism products developed
- Events generating overnight stays
- Industry collaboration and partnerships

**Delivery Indicators (Accountability)**

- Visitor itineraries developed and promoted
- Tourism campaigns delivered
- Industry engagement sessions completed
- Actions delivered under LAAP alignment

### 4.4 Strategic Theme 4: Local Value-Adding

***Strengthen existing businesses, support the development of smaller and specialist enterprises, and extend local value chains to increase sales to local and external markets, encourage investment and retain more economic value within the Shire.***

#### 4.4.1 Why this matters

Local businesses and residents purchase a significant proportion of goods and services from outside the Shire. While much of this demand cannot be competitively met locally, opportunities exist to strengthen local supply chains where businesses have, or could develop, the required capabilities.

The predominance of micro and small businesses, together with growth in several specialist sectors, also suggests opportunities to expand sales to markets beyond the Shire.

The priority is therefore to strengthen existing businesses, develop local supplier capabilities, encourage diversification and support commercially viable new business investment.

#### 4.4.2 How this Strategic Theme works

- Identify supply gaps in the local economy
- Support businesses to expand into these gaps
- Strengthen local procurement and collaboration

#### 4.4.3 Key Strategies

- Identify and promote local supply chain and business-to-business (B2B) opportunities using economic data (e.g. LQ and REMPLAN analysis)
- Deliver a Shire-wide B2B engagement program, including Beaufort and Avoca business roundtables, to:
  - Highlight local supply gaps
  - Promote collaboration and local sourcing
  - Connect businesses across priority sectors

- Support the establishment, expansion and diversification of micro, small and specialist businesses, including enterprises serving local, visitor and wider regional markets, where commercially viable opportunities are identified.
- Support existing businesses to capture more local spending and supply chain opportunities.
- Promote and facilitate access to relevant business development programs and support services.
- Assess and promote industrial land and vacant premises opportunities, targeting small business investment from Ballarat and western Melbourne.
- Leverage renewable energy and transmission projects to maximise local jobs, services and procurement opportunities.
- Support small-scale circular economy initiatives, including repair, reuse and food recovery.

#### 4.4.4 What this enables

- Increased local expenditure
- More resilient local businesses
- Job creation
- Greater economic self-sufficiency

#### 4.4.5 Key Measures – Local Value-Adding

**Reduce economic leakage and strengthen local business activity and supply chains.**

**System Indicators (Outcomes)**

- Local expenditure vs imports (reduction in leakage)
- Growth in business numbers
- Output growth in target sectors
- Growth in exports from selected small and specialist industry sectors, where reliable data are available.
- Employment in value-adding sectors

**Influence Indicators (Council Contribution)**

- Number of B2B connections facilitated
- Local procurement opportunities identified and supported
- Businesses participating in capability programs
- Investment enquiries in local industry sectors

**Delivery Indicators (Accountability)**

- B2B events delivered (e.g. Beaufort / Avoca roundtables)
- Supply chain initiatives implemented
- Business engagement sessions completed
- Actions delivered under value-adding programs

## 4.5 Strategic Theme 5: Workforce

***Lift workforce participation, attract workers and improve local labour availability.***

### 4.5.1 Why this matters

Workforce availability is a key constraint across agriculture, tourism, construction and local businesses.

Challenges include:

- Limited housing
- Transport constraints
- Low participation among some cohorts
- Skills and work-readiness gaps

### 4.5.2 How this Strategic Theme works

- Housing enables workforce attraction
- Transport and access improve participation
- Skills and support services improve employability
- Business capability improves recruitment and retention

### 4.5.3 Key Strategies

- Support workforce attraction through housing and liveability promotion
- Increase participation of underutilised or underemployed residents
- Improve access to employment services and job pathways
- Support businesses to improve recruitment and workforce practices
- Advocate for improved transport options
- Strengthen links between education, training and local employment
- Promote the Pyrenees Shire as a location for:
    - Commuters to Ballarat
    - Remote and hybrid workers
    - Self-employed and small business operators

### 4.5.4 What this enables

- Business growth across all sectors
- Increased productivity in agriculture and tourism
- Greater economic resilience

### 4.5.5 Key Measures – Workforce

**Lift workforce participation and improve labour availability.**

**System Indicators (Outcomes)**

- Labour force participation rate
- Employment and unemployment levels
- Number of local jobs
- Commuting patterns (local vs outbound workers)

**Influence Indicators (Council Contribution)**

- Workforce participation initiatives delivered
- Businesses supported in recruitment and retention
- Workforce housing or accommodation facilitated
- Engagement with education and training providers

**Delivery Indicators (Accountability)**

- Workforce-related actions delivered
- Employer engagement sessions completed
- Partnerships with employment and training providers
- Programs supporting work readiness and local employment pathways

### 4.6 How the Strategic Themes Work Together

The five Strategic Themes form a clear economic system:

- **Agriculture (Theme 1)** ➡ drives output, exports and tourism
- **Housing (Theme 2)** ➡ enables population, workforce and tourism accommodation
- **Tourism (Theme 3)** ➡ brings external spending
- **Local Value-Adding (Theme 4)** ➡ retains economic activity
- **Workforce (Theme 5)** ➡ supports all sectors

Progress in one theme reinforces outcomes in others.

Failure in one theme (particularly housing or workforce) constrains the entire system.

Implementation will therefore focus on:

- Actions that deliver across multiple themes
- Coordinated delivery rather than siloed programs
- Clear alignment between strategy, actions and outcomes

## 5 Implementation of the Strategy

The Strategy will be delivered through a coordinated, whole-of-Council approach aligned to five Strategic Themes:

1. **Agriculture and Agribusiness**
2. **Population, Housing and Development Enablement**
3. **Tourism**
4. **Local Value-Adding**
5. **Workforce**.

### 5.1 Strategic Themes Action Plans

Actions will be delivered through:

- Annual service plans and budgets
- Cross-departmental collaboration (planning, infrastructure, community services)
- Partnerships with State Government, regional organisations and industry
- Ongoing engagement with businesses, landowners and the community

Priority will be given to actions that:

- Address key constraints (housing, workforce, infrastructure)
- Unlock private sector investment
- Deliver outcomes across multiple Strategic Themes

Council's role in economic development guides the delivery of these actions,

## 5.2 Council's Role in Economic Development

The Council's defined role in economic development guides delivery of these actions: enabling, influencing, and accelerating private-sector activity by reducing risk, improving readiness, and supporting delivery, rather than directly delivering housing, tourism, or business investment outcomes.

This role is delivered through one or more of five integrated functions:

- **Facilitator (Enablement)**
  - Council: Provides coordinated planning and economic development support to provide efficient and effective responses to investment enquiries.
  - Others: Deliver housing, accommodation and business projects
- **Promoter (Market Signalling)**
  - Council: Communicates opportunities, promotes the Shire and signals investment potential
  - Others: Market and deliver products and services
- **Advocate (Infrastructure and Policy)**
  - Council: Advocates for enabling infrastructure and aligned policy settings
  - Others: Fund and deliver major infrastructure
- **Connector (Coordination and Engagement)**
  - Council: Connects businesses, investors and stakeholders, enabling B2B activity.
  - Others: Collaborate, transact and deliver outcomes
- **Partner (Targeted Support)**
  - Council: Co-invests selectively and supports pilot and enabling initiatives
  - Others: Lead investment and project delivery

## 5.3 Annual Business Plan

The Strategy is not a static document. It is operationalised through an ***Annual Economic Development and Tourism Business Plan,*** which:

- Translates Strategy actions into 12-month deliverables
- Assigns clear responsibilities across Council teams
- Defines timeframes, milestones and sequencing
- Identifies required resources and partnerships
- Aligns with Council budgeting and work programs

This ensures the Strategy moves from direction to delivery to measurable outcomes.

## 5.4 Monitoring Framework

Progress will be monitored using a **Three-Tier KPI Framework**, aligned to each Strategic Theme:

1. **System Indicators (Outcomes)**
   Measure overall economic performance (e.g. population, employment, visitation, output)
2. **Influence Indicators (Contribution)**
   Measure Council's contribution (e.g. investment facilitated, partnerships, engagement)
3. **Delivery Indicators (Accountability)**
   Measure implementation of actions (e.g. actions completed, programs delivered)

This framework ensures:

- Realistic expectations of Council's role
- Clear accountability for delivery
- Ability to track progress over time

## 5.5 Reporting

The reporting of the Strategy's progress and impact will be as follows:

Internal Reporting

- Quarterly reporting on delivery indicators (including progress against the Annual Business Plan)
- Annual reporting on influence indicators
- Alignment with Council Plan and annual reporting processes

External Reporting

- Annual public reporting on progress
- Communication of key achievements and investment outcomes

## 5.6 Strategy Review and Update

The Strategy will be reviewed on a two-tier basis to ensure it remains current, evidence-based and responsive to changing conditions.

### 5.6.1 Annual Review

The Strategy will be reviewed annually to update priorities, refine actions and respond to emerging opportunities, constraints and delivery progress. This review will inform the development of the Annual Business Plan.

### 5.6.2 Major Review – Late 2027

A comprehensive review will be undertaken in late 2027. This review is triggered by the release of the 2026 ABS Census and updated regional strategies, and will provide a refreshed evidence base on:

- Population growth and migration
- Workforce participation and commuting patterns
- Industry structure and employment
- Housing demand and household composition

This review is necessary as the current Strategy is based on 2021 Census data and interim estimates, and because population growth, housing demand, investment activity and workforce dynamics are evolving rapidly.

The 2027 review will:

- Recalibrate targets and priorities
- Assess the effectiveness of actions implemented in 2026–2027
- Adjust actions in response to emerging opportunities and constraints
- Update alignment with the Central Highlands Regional Economic Development Strategy (anticipated 2027 update)
- Update the Strategy based on the outcomes of Tourism MidWest Victoria's Visitor Economy Investment Attraction Plan

Actions beyond 2027 have not been assigned fixed timeframes to allow flexibility following this review. Ongoing actions will continue across the life of the Strategy.

### 5.6.3 Four-Year Review (Council Plan Alignment)

The Strategy will also be fully reviewed every four years in line with Council Plan cycles, with the next full review scheduled for late 2028 / early 2029.

### 5.6.4 Beyond 2031

The five strategic themes outlined in this Strategy are expected to remain relevant beyond their initial five-year lifespan. In 2031, a new ABS Census will be conducted, and the Western Highway Beaufort Bypass and the Western Renewable Link may be constructed—both of which would impact the Pyrenees Shire. These developments, along with a comprehensive review of other changes, will guide the development of Action Plans for each Strategic Theme and inform a review of relevant KPIs.

# 6 Action Plans

## 6.1 Strategic Theme 1 – Agriculture

| *Action #* | | | *Council Role* | *Driver* | *Timeframe* | | |
|---|---|---|---|---|---|---|---|
| | | | | | 2026/27 | 2027/28 | Later |
| 1) **Advocate for Water Security as a Long-Term Economic Enabler** | **Advocate for Water Security as a Long-Term Economic Enabler** | Position water security as critical enabling infrastructure, linking investment to improved farm productivity, diversification, agri-processing, tourism growth and residential development | **Advocate (Infrastructure and Policy)** | **ED** | ● | ● | ● |
| | **Stage 1 - Southern Wimmera and Northeast Pyrenees Water Supply Project** | Maintain an ongoing, coordinated advocacy program (with Northern Grampians and Central Goldfields Shire Councils) to progress the Southern Wimmera and Northeast Pyrenees Water Supply Project, with a focus on securing funding for Stage 1 – Project Development and Due Diligence | **Advocate (Infrastructure and Policy)** | **ED** | ● | ● | |
| | **Delivery of Stage 1 - Southern Wimmera and Northeast Pyrenees Water Supply Project** | Support completion of Stage 1 investigations and design, including geotechnical assessments, pipeline alignment, environmental and cultural heritage approvals, land access, and refined costings, to achieve a fully developed, investment-ready project | **Advocate (Infrastructure and Policy)** | | | | ● |
| 2) **Agriculture and Agribusiness Strengthening** | **Collaborate with local farming operators, Agriculture Victoria and other agribusiness networks (e.g. Landcare groups) to support ag-tech adoption and on-farm productivity**<br>• Promote technologies that:<br>  • lift productivity in dry-land farming,<br>  • reduce climate risk<br>  • improve labour efficiency.<br>• Connect farmers to:<br>  • demonstration projects,<br>  • extension services,<br>  • relevant research institutions. | | **Connector (Coordination and Engagement)** | **ED** | ● | ● | ● |
| | **Collaborate with local farming operators, Agriculture Victoria and other agribusiness networks to encourage small-scale agri-processing and value-adding**<br>• Support feasibility and business planning for:<br>  • beverage and food manufacturing,<br>  • artisanal, niche and premium products – that can also support agri-tourism<br>  • other downstream processing opportunities<br>• Focus on:<br>  • scalable, low-impact models,<br>  • alignment with local brand and identity. | | | **ED** | ● | ● | ● |
| | **Collaborate with local farming operators, and other agribusiness networks to access relevant funding programs being offered through entities such as Catchment Management Authorities** | | | **ED** | ● | ● | ● |

ED = Economic Development & Tourism

## 6.2 Strategic Theme 2 Population, Housing and Development Enablement – Action Plan

| *Action #* | | *Council Role* | *Driver* | *Timeframe* | | |
|---|---|---|---|---|---|---|
| | | | | 2026/27 | 2027/28 | Later |
| **3) Residential and Accommodation Activation Program** | **Residential Land Audit and Activation Register**<br>Undertake a Shire-wide audit of serviced residential land to using Housing Needs Assessment Study outcomes, rating database and GIS information to develop an evidence-based land supply pipeline:<br>• That identifies<br>• Vacant residential-zoned land<br>• Underutilised lots (large lots, single dwellings in growth areas)<br>• Ownership patterns (local vs absentee owners)<br>• That classifies land into "shovel-ready / near-ready / constrained" land classification<br>• Identifies sites suitable for smaller dwellings, dual occupancy, townhouse-style development (where appropriate) -including those that would be suitable as rental housing<br>Prioritises workforce housing in Beaufort given service access and Ballarat proximity | **Facilitator (Enablement)** | **PD & ED** | ● | | |
| | **Deliver Beaufort Burke Street Residential Development**<br>Complete residential subdivision of remaining lots at Burke Street site in Beaufort<br>• Complete construction of ten Regional Worker Accommodation dwellings<br>• Include project information in the Housing and Accommodation Prospectus<br>• Provide proof-of-concept and market signal<br>• Build capability in local construction sector | **Partner (Targeted Support)** | **AM** | ● | ● | |
| | **Support Visitor Accommodation Delivery**<br>Utilise the outcomes of Action #1 to:<br>• Identify existing accommodation capacity gaps – align with LAAP<br>• Identify locations suitable for tourism accommodation; focus on<br>  • Avoca where reticulated sewerage is available for larger developments<br>  • rural areas near Avoca and wine tourism clusters,<br>  • adaptive reuse of existing buildings<br>  • areas where lot sizes and soil conditions support-compliant effluent systems<br>  • sites suitable for boutique accommodation, Farm stays, Medium-scale developments<br>Incorporate findings with Tourism MidWest Victoria's Visitor Economy Investment Attraction Strategy – See Action #12 | **Facilitator (Enablement)** | **PD & ED** | | ● | |

ED = Economic Development & Tourism | PD = Planning & Development | AM = Asset Management

### 6.2.1 Strategic Theme 2 Population, Housing and Development - Investment Attraction Actions

| *Action #* | *Council Role* | *Driver* | *Timeframe* | | |
|---|---|---|---|---|---|
| | | | 2026/27 | 2027/28 | Later |
| **4) Prepare a Housing and Accommodation Prospectus** | **Facilitator (Enablement)** | **ED & PD** | | ● | |

Develop a Housing and Accommodation Prospectus informed by the Housing Needs Assessment and Council's ratings data that communicates the scale, type and location of housing and accommodation demand across the Shire, and supports informed private investment decision-making; the Prospectus will:

- Present evidence-based demand and growth drivers, including:
  - Forecast population growth
  - Visitor demand and accommodation needs
  - Required housing typologies and segments
- Provide a high-level spatial overview (non-site specific) of:
  - Areas containing vacant residential-zoned land
  - Areas with potential for infill or redevelopment
  - Locations where subdivision may be feasible over time
  - Key towns, including Beaufort, Avoca and smaller settlements
  - Townships and rural areas where development may be supported subject to planning requirements
- Include market and feasibility context, such as:
  - Comparative housing prices and trends – this will include the most recent housing sales data from the Victorian Valuer General
  - Rental availability and constraints
  - Indicative development drivers and barriers
- Identify broad locations and settlement areas where housing and accommodation development is supported, based on:
  - Existing zoning and planning controls
  - Findings of the Housing Needs Assessment
  - Servicing capacity and infrastructure availability
- Differentiate development conditions at a precinct or town level, including:
  - Areas where development may be more readily achievable under current planning settings
  - Areas where additional servicing, infrastructure or approvals may be required
  - Highlight liveability, amenity and place-based attributes, including:
  - Access to services, transport and employment
  - Lifestyle and environmental qualities
  - Community infrastructure and strengths
- Incorporate Town-specific development profiles – i.e.:
  - Beaufort → workforce + commuter housing
  - Avoca → tourism-linked accommodation + lifestyle housing
  - Smaller towns → niche/lifestyle/affordable segments
- Incorporate local insights, including:
  - Engagement with local and regional real estate agents (including Ballarat)
  - Generalised market feedback on demand, buyer profiles and constraints
  - Resident perspectives and testimonials (presented at a community level, not site-specific)

The Prospectus is intended to reduce information gaps and improve market confidence by clearly communicating demand, planning context and local conditions, rather than directing or promoting specific development outcomes and will clearly state that:

- The Prospectus does not identify or promote specific privately owned sites
- Land availability is subject to landowner intent and market conditions
- All development is subject to planning approvals and relevant regulations

**Note:** Action #6 will be updated based on the findings of the Housing Needs Assessment

| *Action #* | | *Council Role* | *Driver* | *Timeframe* | | |
|---|---|---|---|---|---|---|
| | | | | 2026/27 | 2027/28 | Later |
| **5) Promote Housing and Accommodation Prospectus to Landowners, Regional Investors, Owner Operators and Lifestyle Investors** | **Provide the Housing and Accommodation Prospectus to relevant local landowners**<br>• Seek EOIs from landowners and engage with those considering development of their properties | **Facilitator (Enablement)** | **ED** | | ● | |
| | **Growing Awareness in Ballarat**<br>• Work with Commerce Ballarat to promote **Housing and Accommodation Prospectus** to Ballarat businesses to consider in the use of their workforce attraction process<br>• Leverage the VFR network organically<br>  • Encourage residents to share prospectus summaries, lifestyle stories, events and accommodation option with friends and relatives in Melbourne's west (and other locations)<br>  • Support this with simple shareable content, local success stories.<br>• Promote Pyrenees as a location for:<br>  • hybrid workers employed in Ballarat<br>  • remote professional services<br>  • self-employed workers.<br>• Frame it as "More affordable homes. Less congestion. Still connected" | **Facilitator (Enablement)**<br>**Promoter (Market Signalling)** | **ED** | | ● | |
| **6) Business Friendly Council Program** | **Growing Awareness in Melbourne's Western Suburbs**<br>• Explore the feasibility of the use of a digital based campaign to promote housing opportunities to the population of Melbourne's Western Suburbs that:<br>  • Use postcode-targeted social media and search ads aimed at western Melbourne.<br>  • Focus messaging on price comparisons, space and lifestyle, access to Ballarat jobs and services.<br>  • Drives traffic to a single landing page hosting the prospectus. | **Facilitator (Enablement)**<br>**Promoter (Market Signalling** | **ED** | | | ● |
| | Implementation of the the agreed outcomes of the Business Friendly Council Program will benefit local businesses from a range of sectors including agriculture, construction and tourism<br>Implement the agreed outcomes of the Business Friendly Council Program which may include publish plain-English development pathways for housing, tourism accommodation, and small business | **Facilitator (Enablement)** | **ED** | ● | ● | ● |

## 6.3 Strategic Theme 3: Tourism – Action Plan

| *Action #* | | *Council Role* | *Driver* | *Timeframe* | | |
|---|---|---|---|---|---|---|
| | | | | 2026/27 | 2027/28 | Later |
| **7) Development of Visitor Experiences and Products** | **Continue the implementation of the Pyrenees Local Area Action Plan (LAAP)**<br>• Encourage tourism development that:<br>  • meets the contemporary expectations of target markets<br>  • aligns with town character,<br>  • respects environmental values,<br>  • delivers local employment and spend.<br>• Avoid promotion of experiences that:<br>  • cannot be supported by infrastructure,<br>  • undermine community amenity.<br>• Grow the role of local business in the development and delivery of improved visitor experiences and products | **Facilitator (Enablement)**<br>**Advocate (Infrastructure and Policy)** | **ED** | ● | ● | ● |
| | **Continue implementation of the Beaufort Lake Caravan Park redevelopment project** | | | | | |
| | **Advocacy for funding for the Beaufort Linear Corridor project** | | ■ | ● | ● | ● |
| **8) Events as Yield Drivers** | **Continue to strengthen the role of events**<br>• Recognise events as:<br>  • anchors for visitation,<br>  • drivers of Visiting Friends & Relatives (VFR) travel,<br>  • opportunities to extend stays.<br>• Support:<br>  • growth of existing events,<br>  • better scheduling to encourage overnight stays,<br>  • packaging events with accommodation and experiences. | **Facilitator (Enablement)**<br>**Connector (Coordination and Engagement)** | **ED** | ● | ● | ● |
| | **Continue to align events with accommodation and services**<br>• Work with event organisers to:<br>  • coordinate accommodation availability,<br>  • promote local dining and experiences,<br>  • reduce day-trip bias.<br>• Encourage event timing that benefits local businesses and communities. | **Facilitator (Enablement)**<br>**Connector (Coordination and Engagement)** | **ED** | ● | ● | ● |

■ = This action will involve a range of Council teams, Council's Executive Team and Councillors

| *Action #* | | *Council Role* | *Driver* | *Timeframe* | | |
|---|---|---|---|---|---|---|
| | | | | 2026/27 | 2027/28 | Later |
| 9) **Leveraging the VFR Market** | Increase resident awareness of visitor offerings through:<br>• Promoting<br>  • visitor and shareable itineraries<br>  • local event calendars upcoming events<br>  • accommodation, dining experience<br>  • new experiences<br>• Encouraging residents to act as local ambassadors for visiting friends and relatives<br>• Adopting a Visiting Friends & Relatives (VFR) campaigns used by other tourism bodies including the potential development of "Host your visitors" toolkits for resident use | **Facilitator (Enablement)**<br>**Promoter (Market Signalling** | **ED** | ● | ● | ● |
| 10) **Bundling Experiences into Products to Support Extended Stay** | Continue to work in partnership with Tourism Midwest Victoria and local operators to turn existing attractions into bookable products and themed itineraries that make trip planning simple for visitors from Ballarat and Melbourne's west including:<br>• Supporting tourism operators to convert existing assets into ticketed and bookable experiences, including seasonal offers, limited-capacity activities and events.<br>• Prioritising experiences that extend length of stay, operate in shoulder seasons, and complement wine, food and events.<br>• Facilitating industry engagement to bundle accommodation with experiences, including winery visits, events, nature-based activities and dining.<br>• Providing simple templates, examples and guidance to reduce the effort for operators to create packages.<br>• Developing and promoting themed visitor itineraries, such as wine and food weekends, events-led short breaks, cycling and walking trails, and nature and heritage loops.<br>• Develop itineraries capable of capturing Western Highway travellers, particularly through Beaufort, by providing clear reasons to stop, explore, dine or stay overnight.<br>• Ensuring itineraries span multiple towns, encourage overnight stays and can be easily shared and booked online.<br>• Refreshing itineraries seasonally to align with events calendars, harvest and vintage periods, and shoulder-season opportunities, supporting repeat visitation. | **Facilitator (Enablement)**<br>**Connector (Coordination and Engagement)** | **ED** | ● | ● | ● |

### 6.3.1 Strategic Theme 3: Tourism – Investment Attraction and Marketing Action Plan

| *Action #* | | *Council Role* | *Driver* | *Timeframe* | | |
|---|---|---|---|---|---|---|
| | | | | 2026/27 | 2027/28 | Later |
| **11) Targeted Markets and Promotion** | Collaborate with Tourism Midwest Victoria to undertake evidence-based promotion across priority markets:<br>• **Ballarat and Ararat** – target day trips, events, repeat visitation and short breaks, positioning Pyrenees as a complementary regional destination.<br>• **Wider Regional Victoria** – build awareness of wine, food, events, nature and heritage experiences, recognising that this market generates a substantial share of current visitor expenditure.<br>• **Greater Melbourne** – promote short breaks and overnight experiences across the metropolitan market, with Melbourne's west retained as an important growth market but not the sole metropolitan focus.<br>• **Interstate markets** – support targeted promotion where justified, particularly Greater Adelaide and travellers using the Melbourne–Adelaide road corridor.<br>• **Western Highway traffic** – strengthen Beaufort's role as a visitor gateway and encourage travellers to stop, spend and explore other parts of the Shire. | **Facilitator (Enablement)**<br>**Promoter (Market Signalling** | **ED** | ● | ● | ● |
| **12) Tourism MidWest Victoria Investment Attraction Plan** | Collaborate with Tourism Midwest Victoria to develop a Tourism Investment Attraction Strategy and include the outcomes of Action #6 | **Partner (Targeted Support)** | **ED** | ● | | |
| | Collaborate with Tourism Midwest Victoria to implement a Tourism Investment Attraction Plan | | **ED** | | ● | ● |
| **13) Facilitate investment in tourism accommodation** | • Promote forecast visitation growth to owners of vacant property and builders to stimulate investment<br>• Provide pre-application advice tailored to accommodation projects.<br>• Actively support:<br>  • adaptive reuse (e.g. pubs, heritage buildings),<br>  • small-scale managed accommodation,<br>  • opportunities in Avoca for serviced accommodation and Moonambel/wine-country for boutique, farm-stay and adaptive-reuse accommodation | **Facilitator (Enablement)**<br>**Promoter (Market Signalling** | **ED & PD** | | ● | ● |

## 6.4 Strategic Theme 4 – Local Value-Adding – Action Plan

| *Action #* | | *Council Role* | *Driver* | *Timeframe* | | |
|---|---|---|---|---|---|---|
| | | | | 2026/27 | 2027/28 | Later |
| 14) **Business-to-Business (B2B) Opportunities and Supply Chains** | **Identify and promote local supply gaps**<br>• Leverage the information in the *Background Report*<br>• Use economic data (including LQ analysis) to identify:<br>  • high-demand services currently sourced outside the Shire,<br>  • sectors with realistic potential for local provision.<br>• Focus on:<br>  • agriculture services,<br>  • trades and construction,<br>  • beverage and food manufacturing,<br>  • repair and maintenance services,<br>  • transport and logistics,<br>  • professional and technical services. | **Facilitator (Enablement)**<br>**Connector (Coordination and Engagement)** | **ED** | | ● | |
| | **Support business expansion and local market capture**<br>• Leverage the information in the Background Report<br>• Identify businesses with capacity to:<br>  • expand product or service lines,<br>  • extend operating hours,<br>  • service new local or regional markets.<br>• Provide tailored referrals to:<br>  • business mentoring,<br>  • financial and investment advice,<br>  • export and growth programs.<br>• Prioritise businesses that employ local workers, service local demand currently met elsewhere. | **Facilitator (Enablement)**<br>**Connector (Coordination and Engagement)** | **ED** | ● | ● | ● |
| | **Collaborate with local business groups to deliver a Shire-wide B2B engagement program**<br>• Establish a Shire wide process for businesses to network and seek local supply options.<br>• Work in concert with local business groups<br>• Encourage businesses to:<br>  • source locally where feasible,<br>  • form consortia for larger contracts.<br>• Promote:<br>  • local supplier capabilities,<br>  • upcoming project pipelines,<br>  • collaboration opportunities | **Facilitator (Enablement)**<br>**Connector (Coordination and Engagement)** | **ED** | | ● | ● |

| *Action #* | | *Council Role* | *Driver* | *Timeframe* | | |
|---|---|---|---|---|---|---|
| | | | | 2026/27 | 2027/28 | Later |
| 15) **Strengthening Existing Businesses** | **Continue to promote access to business development programs**<br>• Include micro, home-based and specialist businesses in business development engagement, with particular attention to opportunities for diversification, digital capability, increased sales and access to markets beyond the Shire.<br>• Translate programs into plain-English guidance explaining:<br>  • who they suit,<br>  • what support is available,<br>  • how to apply.<br>• Actively promote relevant State and Commonwealth programs to local businesses, including:<br>  • small business grants,<br>  • productivity and digital uplift programs,<br>  • export readiness and diversification support. | **Facilitator (Enablement)**<br>**Connector (Coordination and Engagement)** | **ED** | ● | ● | ● |
| | **Continue the implementation of the Digital Connectivity Plan**<br>• Work in collaboration with relevant providers<br>• Actively promote relevant upgrades<br>• Increase the business uptake of digital tools<br>• Provide practical guidance for:<br>  • businesses considering remote roles<br>  • residents working from home. | **Advocate (Infrastructure and Policy)** | **ED** | ● | ● | ● |
| 16) **Advocacy for Improved Infrastructure** | **Continue advocacy for improvements to infrastructure that support local productivity**<br>• Continue advocacy efforts relating to :<br>  • Improved roads and bridges<br>  • Improved digital connectivity<br>Access to improved water supply<br>Leverage the finding of the Housing Needs Assessment Study and the Residential Land Audit and Activation Register to identify and priorities advocacy for infrastructure improvements that support increased housing and tourism accommodation | **Advocate (Infrastructure and Policy)** | ■ | ● | ● | ● |

■ = This action will involve a range of Council teams, Council's Executive Team and Councillors

| *Action #* | | *Council Role* | *Driver* | *Timeframe* | | |
|---|---|---|---|---|---|---|
| | | | | 2026/27 | 2027/28 | Later |
| **17) Renewable Energy and Construction Supply Chains** | **Seek to leverage renewable energy projects for local benefit**<br>• Work with project proponents to:<br>  • identify local procurement opportunities,<br>  • communicate project pipelines to local businesses.<br>• Support local firms to:<br>  • meet procurement requirements,<br>  • access any relevant training and accreditation. | **Facilitator (Enablement)**<br>**Advocate (Infrastructure and Policy)**<br>**Connector (Coordination and Engagement**) | **ED** | | ● | ● |
| | **Support construction and transport businesses**<br>• Support local firms to:<br>  • meet procurement requirements,<br>  • access training and accreditation.<br>• Encourage workforce development aligned with renewables. | | **ED** | ● | ● | ● |
| | • Continue to identify potential opportunities for local businesses and employment associated with the proposed Western Renewable Link (WRL) | | **ED** | ● | ● | ● |
| | Track and report Local procurement and Community funding utilisation | | **ED** | ● | ● | ● |
| **18) Circular Economy and Local Services** (undertake in conjunction with #14 & #15) | **Support practical circular economy initiatives**<br>• Encourage small-scale initiatives such as:<br>  • repair services,<br>  • reuse and refurbishment,<br>  • food recovery and redistribution.<br>• Focus on:<br>  • job creation,<br>  • cost-of-living benefits,<br>  • local service gaps. | **Facilitator (Enablement)**<br>**Connector (Coordination and Engagement)** | **ED** | | | ● |
| **19) Industrial Land and Premises Activation** | **Assess the suitability of industrial land and vacant premises**<br>• Undertake a practical assessment of:<br>  • lot size,<br>  • access and servicing,<br>  • freight suitability,<br>  • development constraints.<br>• Clearly identify:<br>  • sites suitable for small-scale industry,<br>  • Sites unsuitable for larger logistics or manufacturing. | **Facilitator (Enablement)** | **ED & PD** | | | ● |
| | • Undertake the development of an updated Industrial Land Strategy (this would be coordinated with the implementation of the proposed Beaufort By-Pass) | | **PD & ED** | | | ● |
| **20) Availability of Commercial Sites** | Review the availability and suitability of current commercial premises focusing on Avoca and Beaufort | | **ED** | | | ● |

### 6.4.1 Strategic Theme 4: Local Value-Adding Investment Attraction Action Plan

| *Action #* | | *Council Role* | *Driver* | *Timeframe* | | |
|---|---|---|---|---|---|---|
| | | | | 2026/27 | 2027/28 | Later |
| 21) **Attract and Facilitate Small and Specialist Business Investment** | Identify and promote opportunities for smaller and specialist businesses to establish or expand in the Pyrenees Shire, building on local industry strengths, suitable sites and premises, relative affordability and access to wider regional markets.<br>Target businesses whose requirements align with available infrastructure and planning conditions, including agricultural services, construction, repair and maintenance, specialist manufacturing and other value-adding activities.<br>Promote suitable industrial land and commercial premises to prospective investors, particularly businesses in Ballarat and Melbourne's west, and facilitate enquiries where commercially viable opportunities are identified. | **Facilitator (Enablement)**<br>**Promoter (Market Signalling)** | **ED** | | | ● |

## 6.5 Strategic Theme 5: Workforce – Action Plan

| *Action #* | | | *Council Role* | *Driver* | *Timeframe* | | |
|---|---|---|---|---|---|---|---|
| | | | | | 2026/27 | 2027/28 | Later |
| 22) | **Understanding Workforce Needs and Gaps** | **Conduct a Shire-wide workforce needs and skills survey**<br>• Utilise the REMPLAM BAM to distribute an online survey to local employers to identify relevant needs and priorities including:<br>  • hard-to-fill roles<br>  • seasonal vs ongoing demand<br>  • skills gaps<br>  • barriers to attracting workers (housing, transport, childcare, connectivity) | **Facilitator (Enablement)** | **ED** | ● | | |
| | | **Publish and promote workforce survey insights**<br>• Produce a plain-English workforce snapshot of:<br>  • priority occupations<br>  • growth sectors<br>  • realistic job opportunities.<br>• Share findings with:<br>  • training providers<br>  • Residents.<br>  • Real estate agents<br>  • In the B2B program | **Facilitator (Enablement)**<br>**Promoter (Market Signalling)** | **ED** | ● | | |
| 23) | **Increasing Workforce Participation** | **Investigate relevant programs (i.e. Maryborough BOUNCE program) that support the engagement of residents in the labour force* into employment**<br>Target under-utilised labour pools including<br>• people working part-time who want more hours<br>• older workers seeking flexible roles<br>• carers and parents<br>• young people not in full-time education or work.<br>• Actions may include:<br>  • employer education on flexible roles<br>  • job redesign and job-sharing examples<br>  • promotion of portfolio work across sectors. | **Facilitator (Enablement)**<br>**Connector (Coordination and Engagement)** | **ED** | ● | | |
| | | Work with an appropriate service provider to deliver a program to engage residents in the workforce (conditional on a positive outcome to the above) | | **ED** | | ○ | ○ |

***Note** - Labour force = those residents of workforce age seeking employment

| *Action #* | | *Council Role* | *Driver* | *Timeframe* | | |
|---|---|---|---|---|---|---|
| | | | | 2026/27 | 2027/28 | Later |
| **24) Skills Development and Employer Capability** | **Investigate the opportunity to engage an appropriate service provider to deliver a workforce development program for employers**<br>• Program elements could include:<br>  • recruitment and retention strategies<br>  • managing flexible and part-time staff<br>  • workforce planning<br>  • training pathways and apprenticeships<br>  • navigating migration and visa pathways (where relevant). | **Facilitator (Enablement)**<br>**Connector (Coordination and Engagement)** | **ED** | | | ● |
| | **Support local workers to upskill**<br>• Work with RDV to foster Federation TAFE and other relevant providers to:<br>  • align short courses to local demand<br>  • promote micro-credentials<br>  • encourage on-the-job training.<br>• Promote opportunities in:<br>  • Hospitality<br>  • Renewables supply chains<br>  • Construction and maintenance<br>  • Health and care services. | | **ED** | ● | ● | ● |
| **25) Linking Housing, Transport and Workforce Outcomes** | **Align workforce actions with housing delivery**<br>• Explicitly link workforce shortages to:<br>  • workforce housing projects in Beaufort<br>  • rental housing supply<br>  • diverse housing options<br>• Use workforce data to justify:<br>  • housing grant applications<br>  • infrastructure advocacy. | **Advocate (Infrastructure and Policy)**<br>**Connector (Coordination and Engagement)** | **ED** | ● | ● | ● |
| | **Advocate for transport improvements that support work access (in conjunction with #19)**<br>• Prioritise roads and bridges that:<br>  • support agricultural freight<br>  • improve access to Ballarat jobs<br>  • support shift work and early starts.<br>• Seek improved public transport connections to towns across the Shire<br>• Frame transport advocacy around workforce access, not just traffic. | | **ED** | ● | ● | ● |
| **26) Support flexible and hybrid work** | In conjunction with the Housing Needs Prospectus (see also Action #4) promote Pyrenees as a location for:<br>• hybrid workers employed in the Pyrenees, Ballarat and other adjoining LGAs<br>• remote professional services<br>• self-employed workers who work from home | **Promoter (Market Signalling)** | **ED** | | ● | |

# 7 Support of Council Plan Pillar 2 Objectives

The Strategy delivers on Council Plan Pillar 2 by positioning agriculture as the primary economic driver, with housing, tourism, local value-adding and workforce development as enabling systems.

Rather than competing with Ballarat or Melbourne, the Strategy leverages proximity to these centres to capture spillover demand for housing, labour, services, tourism and business activity. Growth is achieved through strengthening existing sectors, enabling population and workforce growth, and increasing the value captured locally from both residents and visitors.

## 7.1.1 Pillar 2 Objective A

**Support the Growth and Diversification of New and Existing Businesses**

***Context***

The Combined SWOT and Section 2 confirm that the most realistic, lowest-risk growth pathway for the Pyrenees Shire is for existing businesses to expand and diversify, particularly in agriculture and related sectors.

Agriculture and agribusiness form the foundation of the local economy, with strong opportunities in:

- Value-adding and processing
- Agricultural services and supply chains
- Tourism-related businesses (wine, food, hospitality)
- Construction, trades and local services

As population and visitation grow—particularly in Beaufort and Avoca—demand for goods and services will increase, supporting incremental business growth.

***How the Strategy supports Objective A***

Objective A is delivered by:

- Strengthening agriculture as the core economic driver
- Expanding local demand through population and visitation growth
- Supporting local businesses to capture more value through supply chains and services

The Strategy prioritises **incremental, locally driven growth** rather than large-scale external investment.

***Key Supporting Strategic Themes***

- Strategic Theme 1 – Agriculture and Agribusiness
  Drives output, exports and diversification through productivity, resilience and value-adding.
- Strategic Theme 4 – Local Value-Adding
  Supports B2B activity, supply chain development and local business expansion.
- Strategic Theme 2 – Population, Housing and Development Enablement
  Increases local demand and workforce supply.
- Strategic Theme 5 – Workforce
  Improves labour availability and business capacity.

***Outcome for Pillar 2 Objective A***

A stronger, more diverse local business base, supported by agriculture, increased local demand, improved workforce availability, and expanded value-adding opportunities.

### 7.1.2 Pillar 2 Objective B

**Deliver Coordinated and Facilitated Planning and Economic Development Outcomes**

***Context***

Stakeholders consistently identify planning uncertainty, complexity and lack of coordination as key barriers to development. These issues particularly affect:

- Housing delivery
- Tourism accommodation
- Small-scale business investment

These constraints limit population growth, workforce availability and tourism yield.

***How the Strategy supports Objective B***

Objective B is delivered through a clear shift toward:

- Facilitation rather than regulation-led planning
- Improved coordination across Council functions
- Alignment between planning, infrastructure and economic development

**Key Supporting Strategic Themes**

- **Strategic Theme 1 – Agriculture and Agribusiness**
  Supports planning and infrastructure outcomes that enable agricultural productivity and diversification.
- **Strategic Theme 2 – Population, Housing and Development Enablement**
  Aligns planning, servicing and infrastructure advocacy to support delivery-ready development.
- **Strategic Theme 3 – Tourism**
  Aligns tourism delivery with regional strategies to reduce fragmentation.
- **Business-Friendly Council actions**
  Provide clear and effective pre-application advice, internal coordination and project tracking through approvals processes.

***Outcome for Pillar 2 Objective B***

More predictable, transparent and coordinated planning and economic development processes that reduce delivery risk and improve investor confidence.

### 7.1.3 Pillar 2 Objective C

**Support Events and the Visitor Economy**

***Context***

Visitation to the Pyrenees Shire is forecast to grow, driven by proximity to Ballarat and Melbourne's west, and the strength of wine, food and nature-based experiences.

However, economic impact is constrained by:

- Low overnight stays
- Limited accommodation
- Workforce availability
- Stand-alone, unbundled experiences

Tourism is closely linked to agriculture, particularly wine and food production, which underpin the visitor experience.

***How the Strategy supports Objective C***

Objective C is delivered by shifting to a **yield-focused tourism model**, supported by:

- Accommodation development
- Experience bundling
- Stronger integration with agriculture

***Key Supporting Strategic Themes***

- Strategic Theme 1 – Agriculture and Agribusiness
  Provides the core visitor product (wine, food, agritourism).
- Strategic Theme 2 – Population, Housing and Development Enablement
  Enables accommodation and event-related stays.
- Planning Enablement (within Theme 2)
  Reduces barriers to tourism development.
- Strategic Theme 3 – Tourism
  Increases visitor yield through accommodation, events and bundled experiences.

***Outcome for Pillar 2 Objective C***

Higher visitor yield, longer stays, stronger event outcomes and increased economic benefit from tourism, supported by agriculture.

### 7.1.4 Pillar 2 Objective D

**Advocate for Improved Transport, Support Job Creation and Invest in Workforce Development**

***Context***

Infrastructure constraints and workforce access are the primary limits on economic growth.

Key issues include:

- Housing availability
- Transport access (particularly for dispersed employment)
- Digital connectivity
- Workforce participation and skills

Many residents commute to Ballarat, while local businesses face ongoing labour shortages.

***How the Strategy supports Objective D***

Objective D is delivered by addressing **barriers to participation and access**, rather than focusing solely on job creation.

This includes:

- Enabling housing and population growth
- Improving infrastructure and connectivity
- Supporting workforce participation and retention

***Key Supporting Strategic Themes***

- Strategic Theme 1 – Agriculture and Agribusiness
  Supports employment in the Shire's largest sector.
- Strategic Theme 2 – Population, Housing and Development Enablement
  Provides housing to support workforce attraction and retention.
- Strategic Theme 4 – Local Value-Adding
  Creates local job opportunities through business growth.
- Strategic Theme 5 – Workforce
  Addresses participation, skills, access and employment pathways.
- Cross-cutting advocacy
  Roads, bridges, digital connectivity, energy infrastructure and water supply.

***Outcome for Pillar 2 Objective D***

Improved workforce participation, better access to jobs, reduced reliance on commuting and stronger alignment between housing, employment and infrastructure.

**Table 7-1 Overview of Strategies Impact on Pillar 2 Objectives**

| Strategic Themes | Pillar 2A | Pillar 2B | Pillar 2C | Pillar 2D |
|---|---|---|---|---|
| **Agriculture and Agribusiness** | ✓✓ | ✓ | ✓✓ | ✓ |
| **Population, Housing & Development Enablement** | ✓ | ✓✓ | ✓✓ | ✓✓ |
| **Tourism** | ✓ | ✓ | ✓✓ | ✓ |
| **Local Value-Adding** | ✓✓ | ✓ | ✓ | ✓ |
| **Workforce** | ✓ | ✓ | ✓ | ✓✓ |