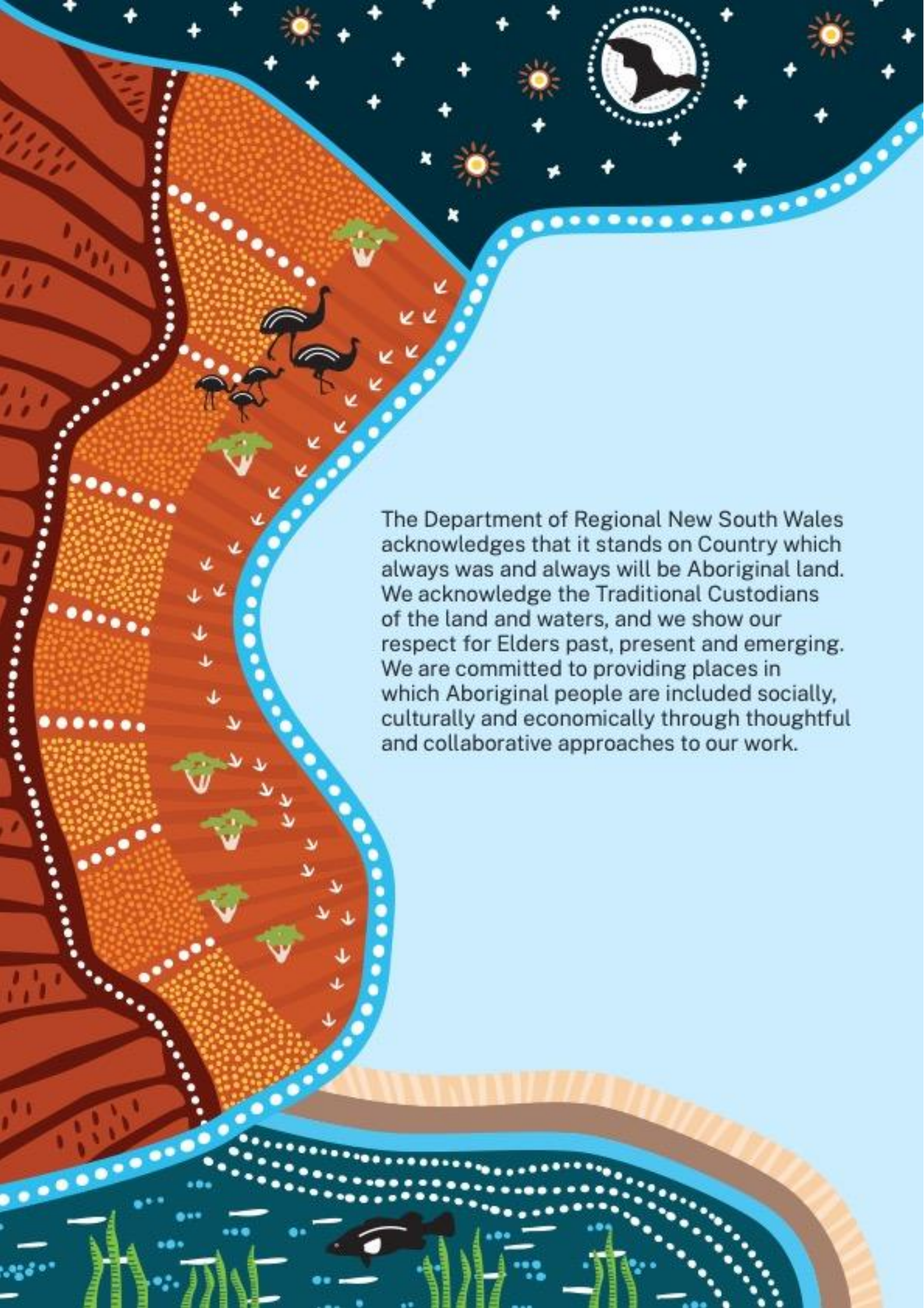


Tweed Regional Economic Development Strategy – 2023 Update





The Department of Regional New South Wales acknowledges that it stands on Country which always was and always will be Aboriginal land. We acknowledge the Traditional Custodians of the land and waters, and we show our respect for Elders past, present and emerging. We are committed to providing places in which Aboriginal people are included socially, culturally and economically through thoughtful and collaborative approaches to our work.

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The Department of Regional NSW would like to acknowledge the significant contribution of many stakeholders in Tweed region to the development of the 2023 REDS Update, with particular thanks to staff from Tweed Shire Council. The Department of Regional NSW also acknowledges the assistance provided by PricewaterhouseCoopers and ProjectsJSA to help deliver the 2023 REDS Update project.

On Country – Artwork by Mumbulla Creative

"On Country" captures the many different countries located within the Department of Regional NSW footprint. Only part of the image is shown on the Acknowledgement of Country page. The regions included in this partial image are detailed below.

The Far West region of NSW is represented by red earth plains, mallee scrubs and an abundant emu population. Freshwater countries are referenced by the expansive network of rivers stretching through the regions. The Riverina Murray region is represented by the roots of a river redgum on the banks of a river, and a large Murray Cod can be seen in the river. The night sky features as it plays an important navigational and story-telling role in traditional life.

Cover image: View of Murwillumbah from above. Photo credit: R Fowler.

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1. Executive summary

Changes in the Tweed region since 2018

In 2018, the NSW Government developed Regional Economic Development Strategies (REDS) for 38 Functional Economic Regions (FERs) across regional NSW. Since publication, regional NSW has endured shocks including bushfires, floods, COVID-19 and the mouse plague, and significant new economic opportunities have emerged. The 2023 REDS Update provides an updated evidence base to guide governments in making policy and investment decisions to enhance resilience and drive sustainable, long-term economic growth in regional NSW.

The Tweed region has seen significant investment delivered since 2018, with additional projects in the planning or delivery stages



The **\$723 million Tweed Valley Hospital Development**.



Two major **urban release areas** in Kings Coast and Cobaki Lakes.



\$21.35 million for the development of the **Northern Rivers Rail Trail** and the **Tweed Byron Hinterland Trail**.



\$6.6 million to deliver the **Industry Central Land Swap program**.

Since 2018, the region has experienced sustained population growth accompanied by significant increases in house prices



+ 2% population growth since 2018.



Median house prices have risen by **47%** since 2018.



The proportion of the population **over 55 years old** is **11.4%** higher than the NSW average.



The **unemployment** rate for the Tweed region was **3.9%** in June 2022, in line with pre COVID-19 pandemic levels, while **job vacancies** in the North Coast region reached an all-time high of **4,595** in 2022.

The region's key industries including tourism, healthcare, agriculture, and construction have remained resilient despite major shocks, and are continuing to drive growth



Tourism

+ **5.3%** Year on Year (YoY) growth from 2011-2020

\$400 million visitor spend in 2021

8,758 jobs supported in 2021



Healthcare

+ **5.6%** YoY growth from 2011-2020

\$519 million Gross Value Added (GVA) in 2020

7,075 jobs supported in 2021



Agriculture

+ **5.6%** YoY growth from 2011-2020

\$147 million GVA in 2020

967 jobs supported in 2021



Manufacturing

+ **1.1%** YoY growth from 2011-2020

\$180 million GVA in 2020

1,736 jobs supported in 2021

Key themes from local consultation

Stakeholders from the Tweed region have highlighted enabling growth through a focus on enhanced climate and economic resilience, improved housing availability and affordability and cross-border integration as key priorities for the region.

Climate and economic resilience



Recent devastating flooding events and other natural disasters, alongside the impacts of the COVID-19 pandemic on consumer spending and tourism visitation, have highlighted the need to build principles of resilience into policy and programs.

Housing availability and affordability



Stakeholders expressed concern that current housing market challenges being experienced by the region will only worsen in the face of a growing population and the ongoing impacts on housing supply associated with the 2022 floods.

Cross-border integration



Stakeholders highlighted the negative impacts of border closures on the restriction of trade and labour with South East Queensland. A focus on fostering deeper connections with the South East Queensland economy will present major opportunities for local communities, businesses and industries within the Tweed region.

Tweed REDS – 2023 Update strategies and enablers

Strategies	Enablers
<p>Cultivate the region’s specialised economic precincts and activities by providing increased access to climate resilient industrial land and a skilled local workforce.</p>	<ul style="list-style-type: none"> • Support the supply of diverse, affordable housing stock by implementing the recommendations of the Tweed Growth Management and Housing Strategy. • Support businesses and community in preparing for and responding to the impacts of climate events by developing a climate resilience mitigation strategy. • Cultivate a circular economy that supports regeneration of natural systems, keeps products and materials in use and eliminates waste.
<p>Utilise the Northern Rivers Reconstruction Corporation mandate and local government collaboration to plan and rebuild the region’s communities and a more climate resilient economy.</p>	<ul style="list-style-type: none"> • Adopt a regional approach to economic recovery and reconstruction to build local business and workforce capability and maximise opportunities for local employees, businesses and Aboriginal communities. • Strategically plan for a pipeline of future flood-free employment and industrial-zoned lands, aligned with Tweed Shire Council’s Local Strategic Planning Statement, to support local job growth and business expansion. • Review planning controls to ensure adequate provisions and incentives for housing diversity and affordability, as well as temporary housing for displaced residents and the (re)construction workforce.
<p>Implement a precinct strategy for the current Tweed Valley Hospital site and the redevelopment of the old hospital.</p>	<ul style="list-style-type: none"> • Undertake strategic planning of the current Tweed Valley Hospital site and the Kingscliff TAFE NSW site to support expanded workforce capability.
<p>Increase cross-border integration to realise the benefits of proximity to the South East Queensland economy.</p>	<ul style="list-style-type: none"> • Refresh the NSW-Queensland Memorandum of Understanding (MOU) to improve economic integration across the skills, transport, infrastructure and tourism domains, as well as a coordinated approach to events that may impact cross-border mobility. • Create an implementation plan for a multi-modal corridor between Tweed and the Gold Coast.
<p>Increase the value of the visitor economy to the region in a culturally and environmentally sensitive way.</p>	<ul style="list-style-type: none"> • Support the development of a diverse tourism industry, including nature based, cultural, active and ecotourism, building on the development of the Northern Rivers Rail Trail and the conservation and restoration of natural heritage assets.

2. About the 2023 REDS Update

In 2018, the NSW Government and local councils developed a series of Regional Economic Development Strategies (REDS) for 38 Functional Economic Regions (FERs) across regional NSW. FERs are made up of one or more Local Government Areas (LGAs) that work together to create smaller economies with strong economic links.

Supporting the *20-Year Economic Vision for Regional NSW*, the REDS set out a place-based vision and framework for economic development for each FER. The REDS identify each FER's endowments, industry specialisations and key vulnerabilities and opportunities, and outline economic development strategies and actions to leverage these strengths.

Since 2018, regional NSW has endured many challenges including drought, bushfires, floods, COVID-19 and the mouse plague. At the same time a range of broader state-wide trends and actions continue to change the economic landscape across regional NSW, including digital transformation, increased remote working and the shift towards net zero. These challenges and trends have altered the landscape of economic development in many regions and created new opportunities for growth.

The 2023 REDS Update provides an updated evidence base to guide governments in making policy and investment decisions to enhance resilience and drive sustainable, long-term economic growth in regional NSW. The objectives of the update are to:

1. **Highlight progress:** reflect on significant initiatives and investments that have supported progress against the key strategies and actions in the 2018 REDS.
2. **Capture major changes:** Identify and assess the impacts of major changes to regional economies since 2018, including the effect of recent shocks such as bushfires, droughts, floods, mouse plagues and the COVID-19 pandemic.
3. **Identify strategic opportunities:** Identify key strategic opportunities and vulnerabilities for engine and emerging industries, as well as any changes to local endowments.
4. **Set the foundation for the future:** Review, affirm and/or adjust the 2018 strategies, including consideration of new strategies to meet emerging priorities, to ensure they remain relevant.
5. **Identify key enablers to guide future action:** Develop a non-exhaustive list of priority enabling actions that will support the 2023 REDS Update strategies.



Figure 1: Coffee served at a café in Tweed. Photo credit: Tweed Shire Council.



Figure 2: A big avocado welcomes visitors to tropical fruit world. Photo credit: Destination NSW.

3. About the Tweed region

The Tweed FER is situated on the Far North Coast of NSW and borders the state of Queensland. It is solely comprised of the Tweed Shire Local Government Area (LGA), with a population approaching 100,000 people. Tweed Heads is the primary regional city, with other significant population centres being Casuarina, Kingscliff, Murwillumbah and Pottsville. Given its close proximity to the Gold Coast, the region has strong cross-border economic integration with the South East of Queensland.

Total area covered (km ²)	1,321
Population (2021)	97,151
Size of the economy (2020)	\$4.307 billion
Total employment (2021)	40,080

Source: Australian Bureau of Statistics (ABS) (2021) Estimated Resident Population, REMPLAN (2020), ABS Census (2021).

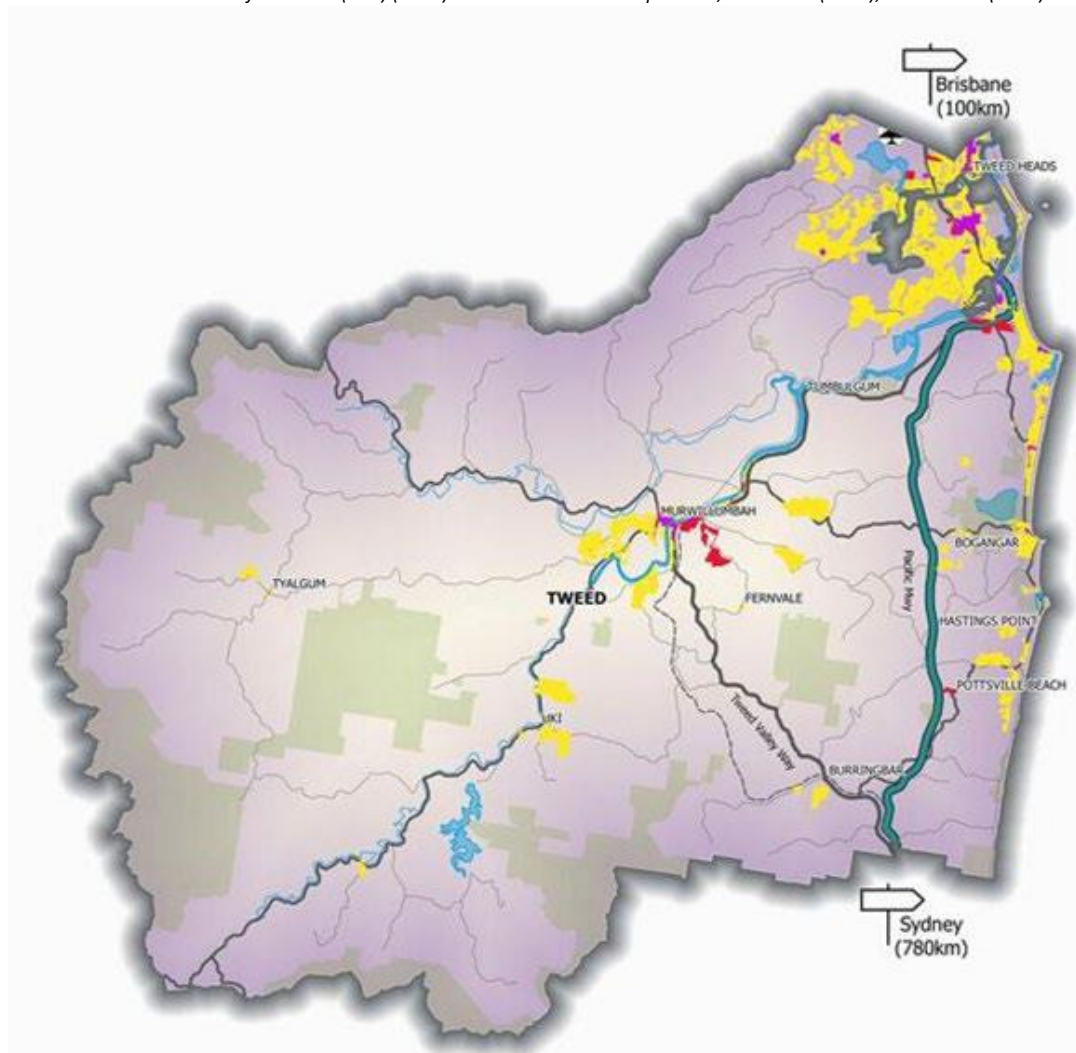







Figure 3: Map of the Tweed Functional Economic Region.

4. The 2018 Tweed REDS and 2020 bushfire addendum





In the 2018 REDS, the region was actively pursuing growth in its key industry specialisations of agriculture, tourism, and healthcare. Endowments recognised in the document spanned natural, social and infrastructure assets, which are highlighted below. Following the 2019-2020 bushfires, the NSW Government developed the 2020 Tweed Bushfire Impact Addendum, which offered additional areas of strategic focus to aid recovery and develop future enhanced economic and community resilience.

2018 Tweed strategies

	Leverage tourism endowments in a culturally and environmentally sensitive way
	Cultivate the region's specialised economic precincts and activities
	Increase cross-border integration and offset tax and regulatory distortions
	Develop a precinct strategy for Tweed Valley Hospital Precinct
	In addition to the core strategies articulated in the Tweed REDS, the 2020 Tweed Bushfire Impact Addendum sets a series of additional short, medium, and long-term priorities focused on: <ul style="list-style-type: none"> • Recovery - overcoming direct and indirect damage sustained by the tourism sector. • Resilience - pursuing growth and diversification opportunities which may improve the region's economic and community resilience.


2018 Tweed specialisations

The primary industry specialisations below were identified as comparative advantages for the Tweed region in the 2018 REDS, based on employment concentrations.

	Tourism
	Healthcare and social services
	Agriculture, forestry, and fishing
	Construction

2018 Tweed endowments

The Tweed region is home to a wealth of physical, institutional, built, and human endowments. These endowments play a key role in enabling success and growth across its key industry specialisations including agriculture and forestry, manufacturing, tourism, and healthcare.

Endowment	Relevant 2018 specialisation
Riverine and hinterland amenity	
Coastal amenity	
Wollumbin (Mt Warning) National Park	
Proximity to South East (SE) Queensland	
Rich soils and high rainfall	
Gold Coast Airport	
Pacific Highway	
Margaret Olley Art Centre	
New Tweed Valley Hospital development	
Diverse, specialised skill sets	
Strong collective arts community	
Rich Aboriginal culture and history	
Regional Development Australia Northern Rivers	
State government agencies	
Southern Cross University	
Northern Rivers Joint Organisation of Councils	

5. The big picture: Shocks and trends impacting the Tweed region since 2018



Figure 4: Scenic coastal views looking south towards Wooyung from Hastings Point. Source: Destination NSW.

Significant events impacting major industries

A sustained period of drought, followed by major bushfires and flooding has had severe environmental and economic implications for the region. The COVID-19 pandemic further challenged the region, with local businesses suffering, with substantial impacts from movement and operating restrictions and border closures. For the period from 2018 to 2022 the region had 5 disaster declarations^[1] and received \$4.60 million in disaster recovery grants funding.*^[2] Recovering from these events and developing both industry and community resilience is a key priority for the region.

Drought

The Tweed region experienced severe drought during the period from 2017 to 2020. 2019 was the driest year on record for Tweed and the drought had a significant impact on livestock and dairy farmers.^[3]

The Tweed Shire Council updated its Drought and Water Restrictions Policy in 2019 to refine its approach to protect the region's water supply, with pre-determined water restriction imposed when water levels drop to specified percentages in Clarrie Hall Dam, the region's main water supply.^[4]

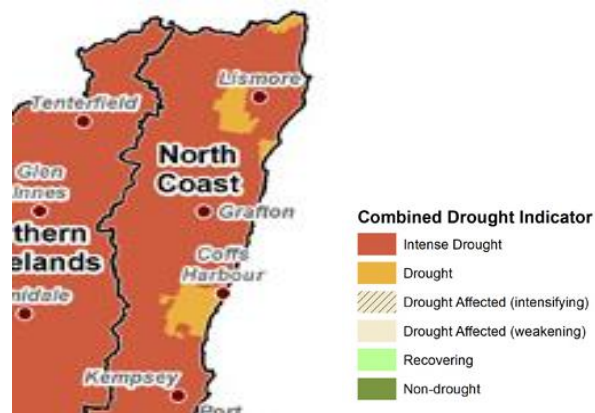


Figure 5: Combined Drought Indicator: 12 months to 31 December 2019 (Department of Primary Industries (DPI), 2022).

*Excludes funding associated with the Northern Rivers Reconstruction Corporation and the 2022 flood recovery.

Bushfires

Tweed was moderately impacted by the 2019-2020 bushfires, with around 1 per cent of the total land area of the region damaged.^[5] While there was not significant physical damage in the region, with just 2 properties damaged or destroyed, the tourism industry was temporarily impacted by road closures of key routes such as the Pacific Highway due to proximity to fires, and the heavy smoke associated with fires diminished visitation and amenity.^[5]

COVID-19

The impact of the COVID-19 pandemic was significant in the Tweed region, primarily driven by substantial impacts from border closures. This impact was highlighted by 62% of businesses reporting that COVID-19 negatively affected their business.^[6] Consequently, there was a sustained increase in income support recipients in the acute phase of the pandemic in 2020, with JobSeeker recipients rising by 84%, while Health Care Card recipients rose by 40% from March to June 2020.^[7]

Border closures between NSW and Queensland had significant impacts on the region's employment, services, community and supply chains. Border barricades were in place for more than a year, which directly impacted the whole community, but particularly affected the region's estimated 8,000 NSW residents that work in South East Queensland, and the 5,000 Queensland residents that travel in the opposite direction for work.^[8]

There were severe impacts on the operations of businesses and industry in the region, in particular the visitor economy, with 2021 visitor spending in the Tweed down \$115 million on 2019 levels as a result of the substantial decrease in overnight and day travel in the region.^[9]

Floods



The Tweed region has been impacted by repeated major flooding events between 2020 and 2022. In particular, the major floods of February and March 2022 damaged more than 2,100 houses (making at least 500 no longer habitable), caused an estimated \$58 million damage to businesses, with direct costs for Tweed Shire Council associated with infrastructure repairs of more than \$110 million.^{[10][11]}

The impact of flooding on key industries in the region was also significant. Many farmers lost significant numbers of livestock, crop growers faced a substantial reduction in yield due to degradation of soil quality, oyster production was impacted by poor water quality and a range of key infrastructure was badly damaged or destroyed.^[12] The manufacturing sector was also significantly impacted by asset and infrastructure damage, with Condong Sunshine Sugar suffering major damage to facilities followed by substantial flow-on supply chain impacts.^[13]

The impact of these major events and fatigue from repeated flooding events has affected the mental health of the local community and significantly impacted overall business confidence.^[14] A March 2022 business survey found the Tweed region to have the highest estimated proportion of businesses directly impacted by flooding, followed closely by the Northern Rivers LGAs.^[14] A Tweed Shire Council survey found that almost 2,000 employees were directly impacted by damage to businesses, with 90 businesses reporting they would either temporarily or permanently close as a result of the floods.^[15]

Macroeconomic trends shaping the region’s future

Macro trends related to climate and migration have played a significant role in the development of the Tweed region since 2018 and are likely to continue to have a strong influence on its future. With a growing population of remote workers, the impacts of successive natural disasters, and opportunities associated with the shift towards net zero, the region faces both opportunities and risks in building resilience against and leveraging competitive advantage of these trends.

Trend		Opportunities and risks
 <p>Digital transformation</p>	<p>Increasing uptake of digital technologies with wide-ranging applications across industries can support economic development by facilitating increased productivity in engine and emerging industries. The COVID-19 pandemic has highlighted opportunities associated with an enhanced ability for many parts of the workforce in various sectors to work remotely.</p> <p>Ensuring digital infrastructure is fit for purpose is vital to underpinning continued economic growth as technology advances. Investments to improve telecommunications infrastructure since 2018 through the Connecting Country Communities program has included new mobile phone towers at Burringbar, Farrants Hill, and Kunghur. While this investment has addressed some identified digital connectivity issues, further investment will be required to continue to build and enhance digital connectivity in the Tweed region.</p>	<p>Unsuitable or unreliable internet speeds and geographic locations with poor coverage represent key barriers to increased technology adoption in many agriculture industries.</p> <p>The increase in digital economy activity can create opportunities for small to medium businesses via online channels to enlarge their market reach and grow their business.</p>
 <p>Changing migration patterns</p>	<p>The COVID-19 pandemic has bolstered the ability of workers to operate remotely, with many people taking advantage of the high quality of living in the Tweed region, while still maintaining metro-based employment. This was evident in the population shift in 2020-21, with regional NSW gaining an additional 26,800 residents while Sydney declined by 5,200.^[16]</p> <p>COVID-19 related migration to regional NSW has increased demand for enabling infrastructure and increased pressure on local housing stock.</p> <p>COVID-19 related migration also presents a challenge to population growth assisting with filling local job vacancies, as residents can live in the region but increasingly work in higher paying jobs based elsewhere.</p>	<p>Population growth creates greater demand for metro competitive services and infrastructure. Ensuring local capacity to meet these demands represents a challenge.</p> <p>Sustained migration to the region has the potential to add to current housing affordability and availability pressures.</p>



 <p>Towards net zero</p>	<p>The Tweed Shire Council Renewable Energy Action Plan 2017 seeks to establish council as a leader in emissions reduction, with a goal of reducing greenhouse gas emissions by 50% from 2016-17 levels by 2025, and a focus on maximising energy efficiency and renewable energy production at its facilities.^[17]</p> <p>Meanwhile, the region’s strengths in high emission industries including agriculture, manufacturing and construction will present challenges as NSW works towards net zero.</p>	<p>Opportunities may exist to support renewable investments such as solar farms, albeit limited land availability directly in the region is a key constraint.</p> <p>Encouraging carbon farming can support improved emissions outcomes and take advantage of growth in the carbon credits market.^[18]</p>
 <p>Rising uncertainty</p>	<p>The Tweed region has been severely impacted by repeated flooding and extreme climate events since 2018. With the frequency and intensity of these events projected to increase in coming decades, there is a need to enhance flood and climate resilience in the region.^[19]</p> <p>Building community resilience in relation to health and wellbeing, alongside that economic and infrastructure resilience will be crucial to the region’s future.</p> <p>Supply chain interruptions continue to impact enabling sectors such as construction, including the cost and timelines of major construction projects in the region.</p>	<p>An ongoing focus on identifying flood-free lands for development can support urban and economic growth and unlock opportunities to support relocation away from flood prone locations as demonstrated by the Industry Central Land Swap program.^[20]</p> <p>Rising uncertainty places upward pressure on inflation, driving up input costs for key industries.</p>



Figure 6: Morning mist in Tweed Valley, Murwillumbah. Photo credit: Destination NSW.

6. Responding to change: Initiatives and investments since 2018



Figure 7: A brewery in the Tweed region. Photo credit: Tweed Shire Council.

Since 2018, Tweed Shire Council, the NSW Government and other key organisations have delivered new and updated strategic documents and plans that help guide economic and community development in the region. These documents support the development of local enabling actions that contribute towards progress against REDS priorities and strategies.

Strategies and plans	Relevant 2018 strategies
<p>The North Coast Regional Plan 2041 outlines a focus on creating a North Coast region that is liveable, sustainable and resilient with productive and connected communities, where growth and change is supported while protecting and enhancing the natural environment. The Tweed Local Strategic Planning Statement then sets out strategic planning objectives for the LGA in alignment with the Regional Plan.</p>	
<p>The Tweed Community Strategic Plan 2022-2032 identifies strategic priorities for the region, including protecting the natural environment, improving reliable essential services and infrastructure, and sustainable growth of industries through strategic land use planning.</p>	
<p>The Tweed Growth Management and Housing Strategy currently underway will establish a framework to guide sustainable development in the Tweed region.</p>	
<p>The Tweed Sustainable Agriculture Policy is the result of close collaboration between Tweed Shire Council and the region's farming community, providing a vision and roadmap for a sustainable agricultural future.</p>	

<p>The North Coast Destination Management Plan (DMP) aims to grow the North Coast visitor economy by encouraging sustainably managed, nature-based tourism.</p>	
<p>The Tweed Head DMP is a long-term strategic vision for tourism in Tweed to 2030. The strategic intent aims to position Tweed as a world’s best practice sustainably managed destination with nature at the core of the experience.</p>	
<p>The Draft Far North Coast Regional Water Strategy sets out the long term water plan for the region to support community and industry resilience.</p>	
<p>The NSW Marine Estate Strategy 2018-2028 outlines how to protect and enhance waterways, coastlines, and estuaries over the next ten years.</p>	
<p>The NSW Recovery Plan sets out the strategic arrangements associated with disaster recovery in NSW, and provides a framework for local, specific plans.</p>	

Significant investments since 2018

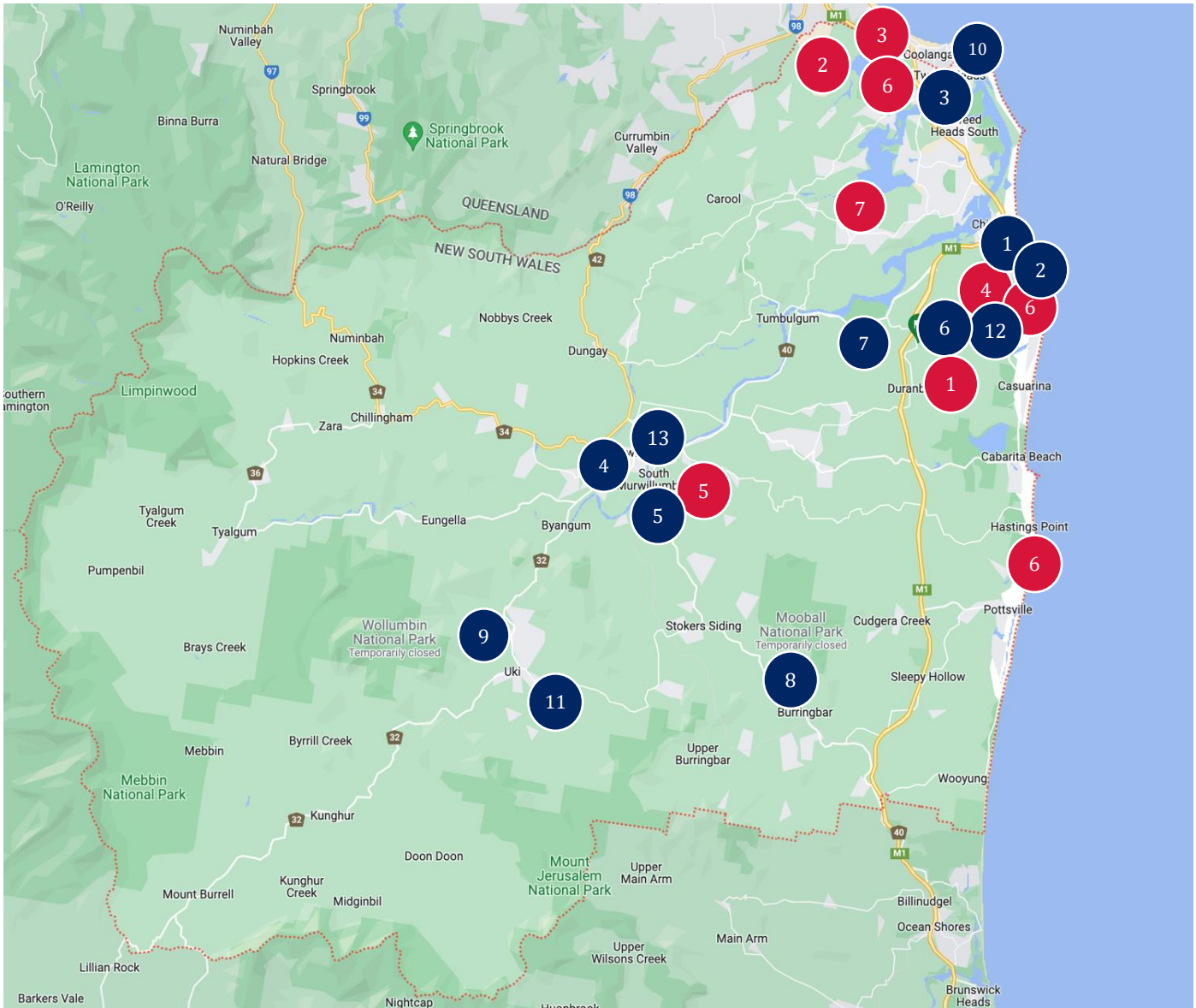











Figure 8: Significant investments in the Tweed region since 2018 (Map data ©2023 Google).







As shown in Figure 8 above, since 2018 the region has received significant local, state and federal funding, as well as seen progress on a number of major private investments. These investments are at varying stages of progress, with some delivered, some underway, and some investments still in the planning stage. Public investments have included major health and education infrastructure upgrades, significant new tourism endowments, and investment to support population growth and industry development. Grant funding has played a role in delivery of many of these projects.













Major private investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 Kings Forest urban development	Not available	
2 Cobaki Lakes urban development	Not available	
3 Gold Coast Airport upgrade	\$260 million	  
4 Australian Bay Lobster Producers Seawater Pipeline*	>\$3.5 million	
5 Northern Rivers brewery expansion	\$50 million	
6 Aged Care – Uniting Kingscliff upgrade, Tricare Hastings Point expansion, Serene Seniors Tweed Heads project	>\$250 million	
7 Lindisfarne Anglican School expansion	\$10 million	

* This project was supported by a NSW Government grant through the Regional Job Creation Fund.

Major public investment since 2018

Investment	Estimated total project value	Relevant 2018 Strategies
1 Tweed Valley Hospital Kingscliff	\$723 million	
2 Kingscliff Public School and High School upgrades	\$46.86 million	
3 Tweed Heads high school and Tweed Heads South public school upgrades	\$20.8 million	
4 Murwillumbah TAFE Connected Learning Centre	Not available	
5 Industry Central land swap	\$6.6 million	 

6	Tweed Coast Road widening	\$55 million	
7	Tweed Organic Waste facility	\$7 million	
8	Northern Rivers Rail Trail – Murwillumbah to Crabbes Creek	\$14.3 million	  
9	Tweed Byron Hinterland Trail	\$7.35 million	  
10	Captain Cook Memorial and Lighthouse upgrade	\$6.1 million	
11	Uki Mountain Bike Park	\$0.43 million	
12	Kingscliff Regional Sports Complex Masterplan rollout	>\$4 million	
13	Murwillumbah Civic Centre auditorium upgrade	\$2.5 million	

Regional grant programs

The region has received \$26.77 million in grant funding since 2018. Key programs in the region have included the Stronger Country Communities Fund, with \$8.86 million committed to a range of projects including new recreational facilities and community infrastructure.

Grant category	Approved funding
Community	\$15.23 million
Economic	\$6.94 million
Disaster recovery	\$4.60 million

Note: Total grant funding outlined above only includes programs managed by the Department of Regional NSW, accurate as at January 2023.

7. Tweed region 2023 economic snapshot

The Tweed region’s population is growing and ageing, highlighting the need to attract and maintain a sufficient working age population to the region

While the Tweed region has recorded ongoing population growth since 2011, the rate of growth has slowed since 2016. A focus on developing climate-resilient infrastructure and housing to accommodate future population growth and assist with recovery from the floods, alongside actions to support growth in the working population, will be critical to achieving sustainable population growth.

Population growth

The region recorded an average annual population growth rate of 0.94% per year between 2011 and 2021 (see Figure 9). There has been a decrease since the peak growth rate recorded in 2016, with 2020 and 2021 rates likely to have been impacted by the COVID-19 pandemic, in particular due to border closures in the region.

The longer term impacts of the 2022 flood on population growth are not yet clear. The speed of successful housing development on flood resilient lands, and whether displaced residents decide to permanently relocate elsewhere, will be important influencing factors.

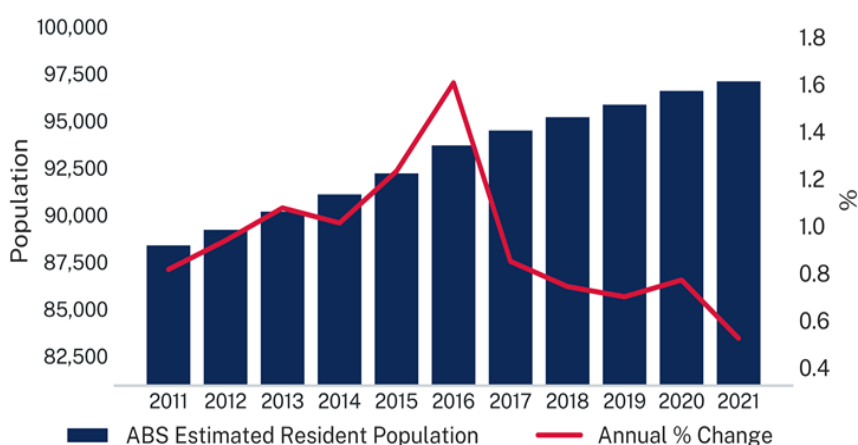


Figure 9: Tweed FER population growth, 2011-2021 (ABS ERP, July 2022).

Demographic profile

In 2021, the Tweed region had 41.0% of the population over the age of 55, 11.4 percentage points higher than NSW (see Figure 10).

Those in the primary working age cohort (25 to 49 years old) represented 37.2% of the population, 9.6 percentage points less than NSW-wide at 46.6%, representing a population that is structurally older compared to the state.

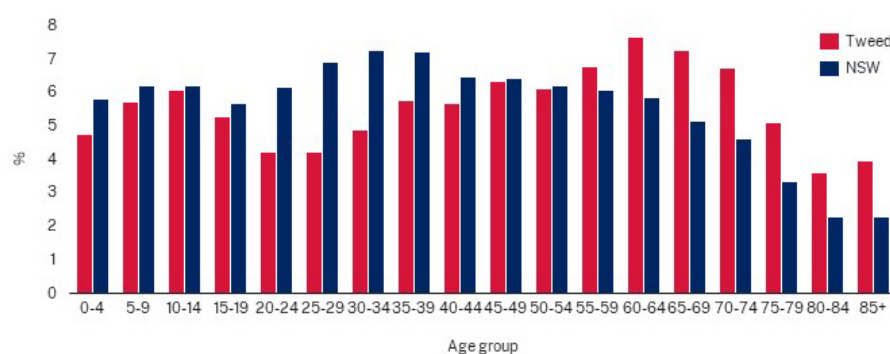


Figure 10: Tweed FER population by age, 2021 (ABS ERP, July 2022).

The proportion of the population over 55 years old has not changed significantly in recent years, which aligns with the fact that the Tweed region is a population destination for many retirees seeking a lifestyle change. A key challenge for the Tweed region will be attracting and retaining a sufficient workforce to match the demand for labour in the key population serving areas of healthcare, hospitality, and administrative support services, as well as meeting the workforce needs of industry and business in the region.

House prices in the Tweed region have increased significantly since 2018, while housing availability has been significantly impacted by major flood events

The region has faced a steep decline in housing availability and affordability since 2018. Given the region has a high level of amenity and is a desirable location to live, rising demand for housing from those relocating from other locations has contributed to price increases. Pressure on housing supply has been increased by the need to support local residents displaced by flood damage.

Housing availability

The broader Northern Rivers region has recorded sustained low vacancy rates since 2018, with rates only briefly increasing above 2% in the early stages of the COVID-19 pandemic period (see Figure 11). Residential vacancy rates dropped as low as 0.6% in January 2022, reflecting strong population growth across the region, with COVID-19 related migration of remote workers and ongoing growth in short term holiday letting also likely contributing factors. This highlights the housing market in the region was already facing significant availability challenges prior to the 2022 floods.^[21]

The impacts of the 2022 floods in the Tweed region, with 500 homes no longer habitable and 2,100 houses damaged, created significant housing supply and demand-side shocks. Although the vacancy rate rebounded to 4.1% on August 2022, this estimate likely reflects homes made untenable by the major flood events, and therefore is unlikely to represent a reliable estimate of short term housing availability in the region. The substantial pressure on housing availability is likely to continue for some time, given the time that will be required to facilitate complete recovery from the floods.

Residential building approvals have remained relatively consistent in the region since 2018, aside from a peak in July 2021 which saw 125 building approvals. Lack of land availability for development and extended development timeframes including delays in developers activating urban release areas represent impediments to growing housing stock.

Housing affordability

Between June 2018 and June 2022, median house prices in the region increased by 47% to \$955,000.^[22] In July 2021, the price to income ratio in the region was estimated at 11.16, significantly higher than the NSW benchmark average of 8.12.^[23] Investment to support increased supply of social and affordable housing will be critical to helping address challenges faced by lower income members of the community associated with housing, in particular those displaced by the 2022 floods.

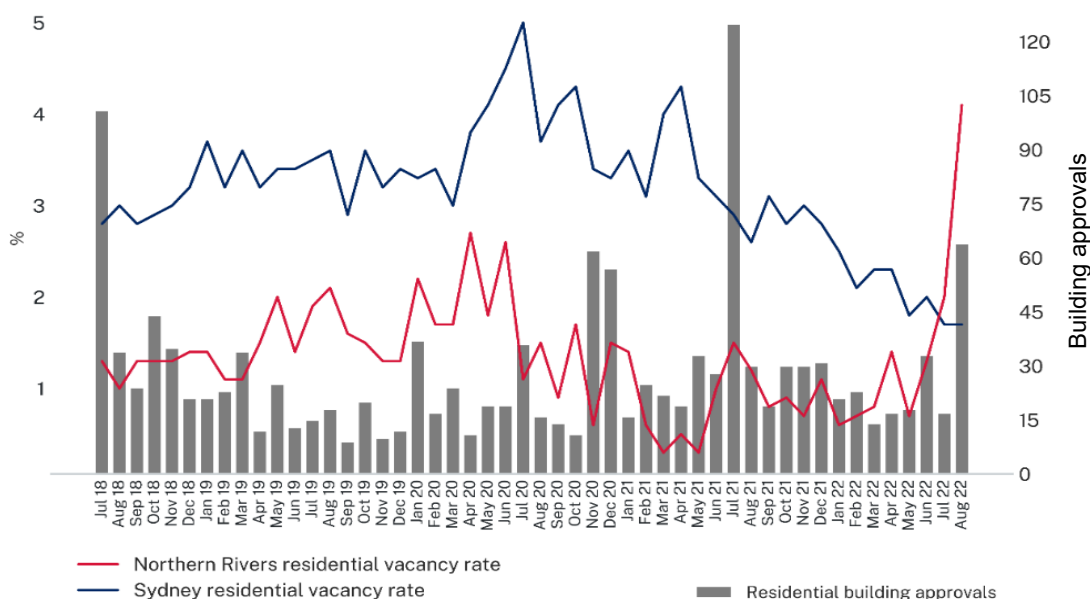


Figure 11: Tweed FER vacancy rate and building approvals, 2018-2022 (REINSW, 2022).

Note: Real Estate Institute of NSW (REINSW) vacancy data collection is not aligned with the FER boundary map, resulting in an overlap with other FERs. These results are therefore intended to provide an indication of housing vacancies in the region noting the limitations mentioned.

The unemployment rate in the Tweed region has remained relatively stable since 2018, while job vacancies have more than doubled

A constrained labour market has been an issue for the Tweed region since 2018, with COVID-19 border closures restricting labour movements between the Gold Coast and Tweed regions, and job vacancies more than doubling since 2020 despite major shocks to business and industry.

Employment

As at June 2022, the Tweed region unemployment rate was 3.9%, above the NSW benchmark of 3.3% (see Figure 12). Following the commencement of the COVID-19 pandemic, the unemployment rate increased only moderately despite significant impacts from border closures. The unemployment rate peaked at 5.2% in March 2021, before returning to a rate commensurate with the pre-pandemic rate by early 2022.

Job vacancies in the North Coast region climbed to reach a record 4,595 in August 2022, more than double the 2,084 recorded in December 2018 (see Figure 13). Occupations with an acute need for workers included medical practitioners and nurses (383 vacancies), carers and aides (449), sales assistants (352), and administrative workers (347). Ongoing skills shortages in essential population serving sectors represent a challenge for the region given sustained population growth and an ageing population.

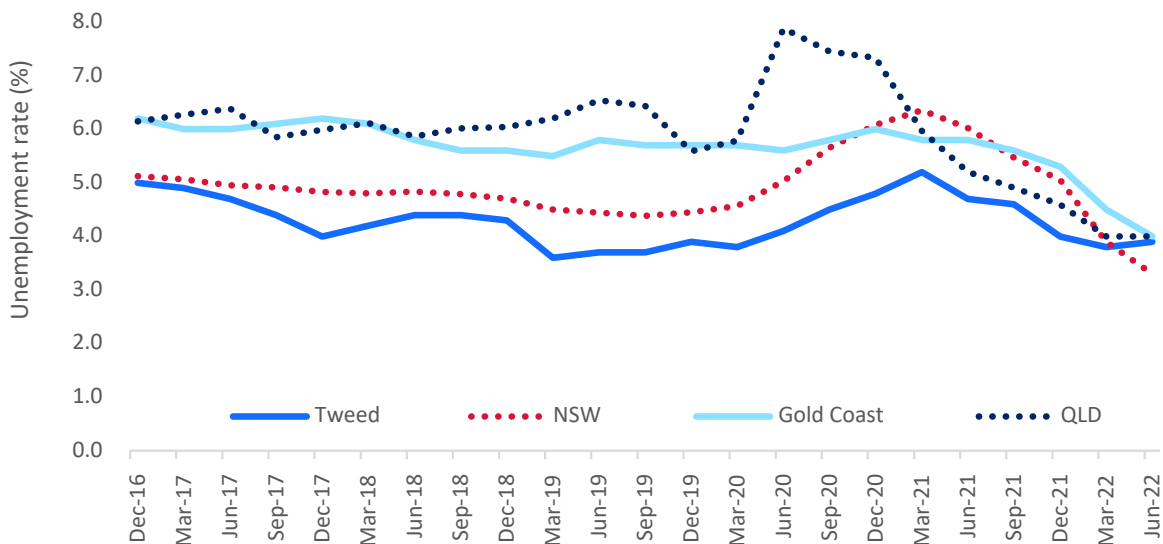


Figure 12: Tweed unemployment rate (%), 2016-2022 (National Skills Commission, 2022; ABS Labour Force, 2022).



Figure 13: Job vacancies, North Coast (2018-2022) (Regional IVI, National Skills Commission, 2022).

Note: The regional IVI – National Skills Commission job vacancy data collection is not aligned with the FER boundary map, resulting in an overlap with other FERs. Job vacancy data only includes online job vacancies. These results are therefore intended to provide an indication of job vacancies in the region.

Aboriginal economic development

The Aboriginal unemployment rate in the Tweed was 8.6% in 2021, which represents a significant improvement from the 15.3% rate recorded in 2011 and 12.7% in 2016. The rate is below the NSW Aboriginal unemployment rate of 9.8%, but remains above the NSW unemployment rate of 4.9%.

Aboriginal unemployment rate: Tweed	2011	15.3%
	2016	12.7%
	2021	8.6%
NSW Aboriginal unemployment rate	2021	9.8%
NSW unemployment rate	2021	4.9%

Source: ABS Census 2021.

The improvement in employment outcomes outlined above demonstrates that substantial progress has been made to support Aboriginal economic participation and development in the Tweed region. However, a focus on continuing engagement and collaboration between local land councils, business, government and community groups, needs to be prioritised so this progress can be sustained.

The 2023 REDS Update strategies and enablers (see page 33) highlight important areas of focus that can support ongoing growth in economic participation and development for the Aboriginal community in the Tweed region, including:

- ensuring economic recovery actions underway after the 2022 floods can be leveraged to maximise economic and skills development opportunities for members of the Aboriginal community and to support Aboriginal business development.
- supporting growth in the visitor economy in a culturally sensitive way, which could involve building on the Tweed region's long and rich Aboriginal cultural history to support ongoing growth in cultural tourism, supported by significant cultural assets such as the Minjungbal Museum and Cultural Centre.



Figure 14: A sign welcomes people to the Tweed, traditional home of the Nganduwal/Minjungbal people. Photo credit: Destination NSW.

Tweed 2023 engine and emerging industries

The Tweed region is a diverse \$4.3 billion economy with a range of engine industries that, despite significant shocks since 2018, have remained a source of stability for the regional economy. The relative strength of key industries is highlighted through Location Quotient (LQ) analysis¹ as shown in Figure 15 (below), in which the size of the bubbles correlates with industry size.

Engine industries

Healthcare (LQ of 1.71) is a key driver of economic output in the Tweed region, generating \$519 million of Gross Value Added (GVA) in 2020, equal to 12% of total economic output. The new Tweed Valley Hospital will be an important endowment that can underpin future growth in the healthcare specialisation.

Agriculture (LQ of 1.77) is also an important engine industry in the region, generating \$147 million in GVA in 2020, with average annual growth of 5.6% between 2011 and 2020. Key specialisations include fruit and nut and sugar cane production (LQ of 4.8) and aquaculture (LQ of 5.7).

Tourism (LQ of 1.47) is another core pillar of the regional economy, with visitors to the region spending \$400 million in 2021 despite the impacts of COVID-19 pandemic border closures and movement restrictions.^[9] The region has a diverse range of visitor attractions including cultural knowledge and sites, coastal amenities and significant natural attractions.

Construction represents a key source of economic output in the Tweed region, as well as an enabler for development of other industry sectors. Construction contributed \$440 million to GVA in 2020.

Although manufacturing as a sector is not a specialisation, **food manufacturing** (LQ of 6.4) – in particular sugar processing - represents a significant subsector specialisation in the region.

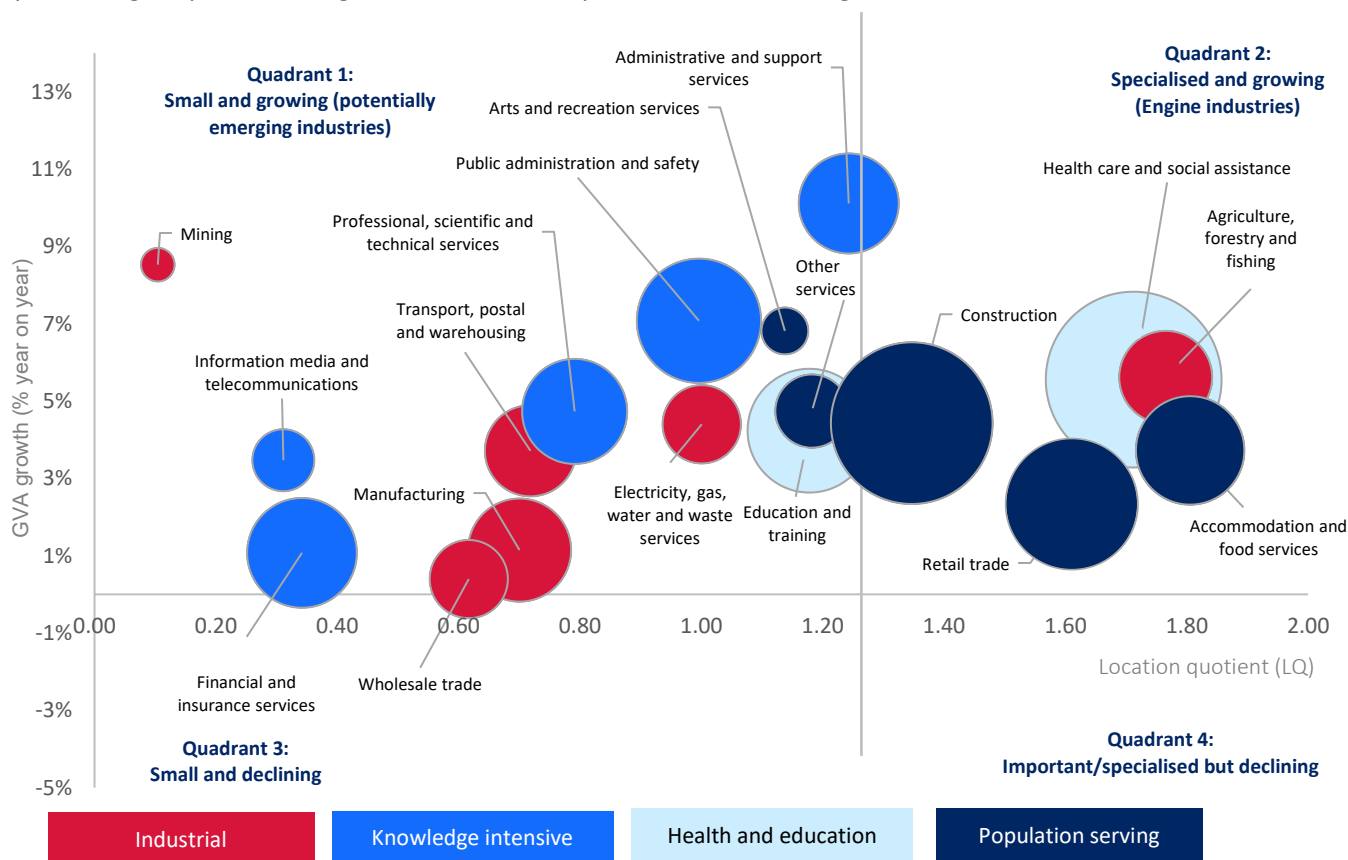


Figure 15: Location Quotient (LQ) Analysis by GVA, 2011-2020 (REMPPLAN, 2020).

Note: While the 2018 REDS used employment data as the basis for LQ analysis, the 2023 Update has used Gross Value-Add (GVA) data. This allows for a clear demonstration of the changing economic impact of both engine and emerging industries across the regions.

¹ LQ analysis is used to measure industry specialisation by comparing the relative size of an industry in the region versus the whole of NSW.

Emerging industries

The region's emerging specialisations have remained broadly consistent since the 2018 REDS (see Figure 16).

Public administration and safety and **professional, scientific and technical services** have both recorded strong average annual growth rates between 2011 and 2020 of 7.1% and 4.7% respectively.

The **arts and recreation services** sector demonstrated strong average annual growth of 6.8% between 2011 and 2020. Sports and recreation contributed 49% of the industry's output in 2020 with an LQ of 1.4, followed by the heritage, creative & performing arts sector.

The **administrative and support services** industry has also demonstrated very strong GVA growth over the past decade, averaging 10.1% growth per year between 2011 and 2020, which reflects a broader growth trend seen across many parts of regional NSW.

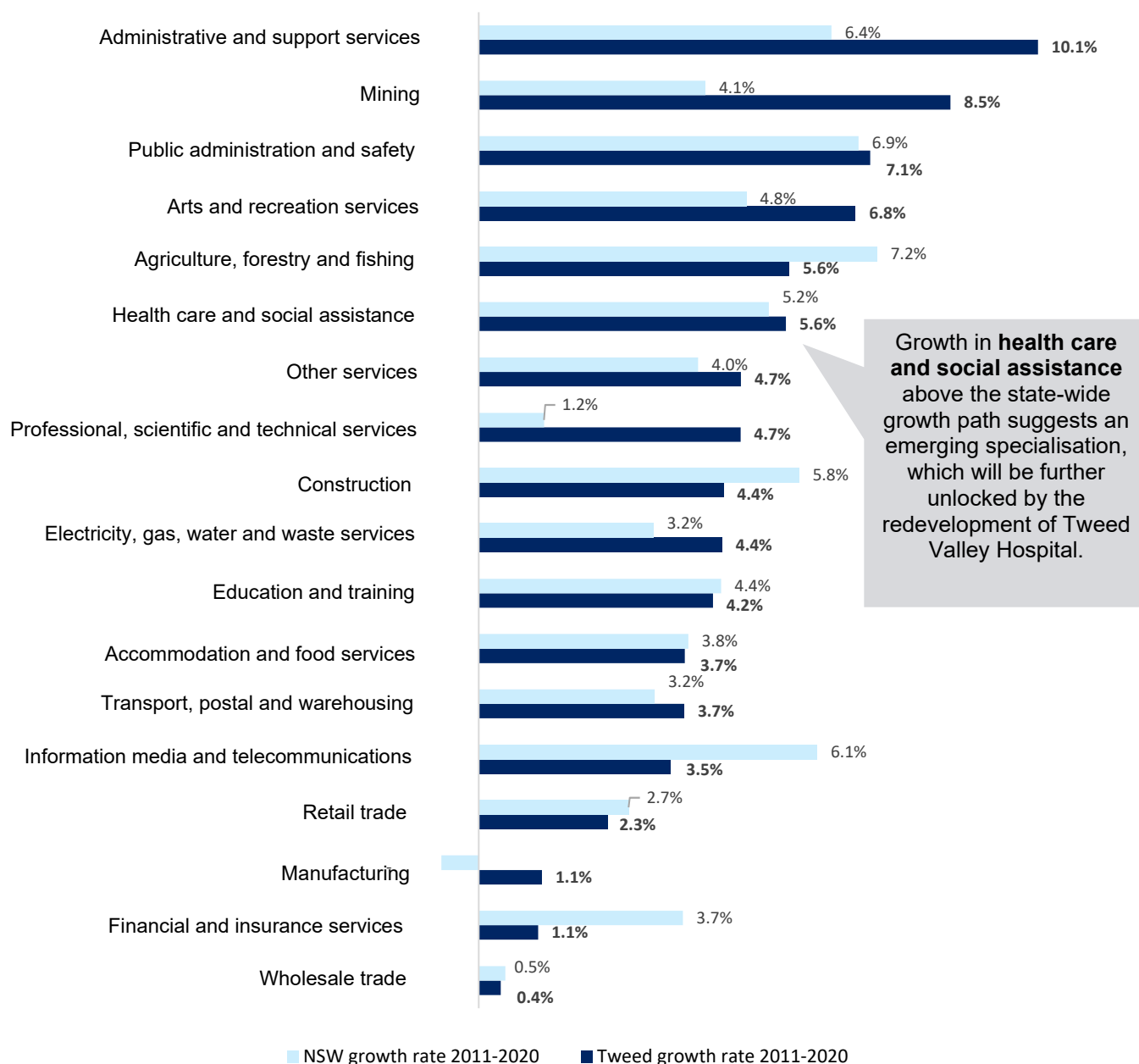


Figure 16: Change in Gross Value-Added by Industry (% YOY), 2011-2020 (REMPPLAN, 2020).

Tweed 2023 endowments

Review of the 2018 endowments

The 2018 REDS identified a diverse range of endowments underpinning Tweed’s economy and regional competitiveness (see page 11 for the complete list from the 2018 REDS). Despite recent shocks impacting many key endowments, consultation outcomes and analysis has affirmed they remain valid, with key endowments for the Tweed region including:

- riverine, hinterland and coastal amenity
- transport services and infrastructure
- state government agencies and educational institutions
- the new Tweed Valley Hospital
- strong collective arts community and infrastructure.

New endowments

While not yet reflected in the employment and industry specialisation (LQ) analysis, recent investments and policy efforts have led to the creation of new endowments which can underpin new economic opportunities and future specialisations.

+ Northern Rivers Rail Trail

The revitalisation of the disused rail corridor between Murwillumbah and Casino through conversion into a shared user path will provide a significant nature based attraction that will allow visitors to walk and ride through the natural beauty of the Northern Rivers region.

+ Northern Rivers Reconstruction Corporation (NRRC)

The NRRC will aid the collaborative capacity of the region to support industry growth and rebuild after the floods, by working closely with local councils and key government agencies.



Figure 17: A woman purchases fresh produce from Tropical Fruit World, Duranbah. Photo credit: Destination NSW.

8. Looking ahead: Strategic opportunities for growth, resilience and liveability

Opportunities and vulnerabilities in engine and emerging industries

Manufacturing

Ongoing growth in regional manufacturing specialisations will require a focus on ensuring that flood-free and/or flood resilient land is available to support industry development.

Gross Value Added (GVA) (2020, \$m)	180
Employment (2021)	1,736
Location Quotient (LQ) score (2020)	0.7
LQ Sugar & confectionary (2020)	6.4
LQ Wood products (2020)	1.3

Strengths

- The Tweed region has strengths in manufacturing associated with value add to key agriculture, forestry and fishing sectors including sugar and confectionary processing, other value-add processing associated with the agricultural sector and wood products.
- The region has a manufacturing strength in sugar processing, leveraging the Condong Sugar Mill that has operated since 1880 and strong linkages to local sugarcane producers. ^[24]
- The region also has emerging strengths in the sector, such as the significant recent growth in microbreweries and distilleries in the region, alongside announced plans for a major upgrade of the Northern Rivers brewery site in Murwillumbah.

Vulnerabilities

- Floods in recent years have been particularly detrimental to the manufacturing sector, with major loss of equipment, damage to facilities, and disruption to the availability of key inputs. ^{[13][25]}
- Manufacturing in the Tweed region is largely reliant on imported equipment as key inputs, with COVID-19 border closures leading to supply chain disruptions that have impacted operations and flood recovery.
- The manufacturing industry is susceptible to fluctuations in input costs, energy supply and freight costs, with significant increases in energy supply costs a key current concern for the sector.
- Increasing competition between various industry sectors for flood free land to support expansion will represent a challenge to ongoing growth in manufacturing in the region.

Opportunities

- Opportunities exist to improve productivity a focus on circular economy processing and maximising use of all inputs, as demonstrated by the increasing reuse of sugarcane 'trash' for stockfeed. ^[26]
- Increased release and rezoning of flood free industrial lands and delivery of required enabling infrastructure can support ongoing growth in the sector, including the potential to develop a food manufacturing hub in the region.

Agriculture

The region's agricultural specialisations continue to deliver sustained growth, despite challenges associated with the impacts of natural disasters and challenges associated with competing land uses.

GVA (2020, \$m)	147
Employment (2021)	967
LQ score (2020)	1.77
LQ Aquaculture (2020)	5.7
LQ Other agriculture (2020) ^a	4.8

a Other agriculture includes fruit and tree nut growing, nursery and floriculture production, vegetable, and other crop growing.

Strengths

- Fertile soils and a favourable subtropical climate provide a diversity of agricultural landscapes across the region which supports a variety of specialisations in the agriculture sector.
- Key specialisations in the Tweed region including fruit and tree nut growing, sugarcane production, mushroom and vegetable growing, beef and dairy and aquaculture.
- The Tweed is a key sugarcane growing region in Australia, with cane farms situated across the region that benefit from co-location of downstream manufacturing facilities at the Condong Sugar Mill.

Vulnerabilities

- Flooding and adverse climate events since 2018 have impacted agricultural production throughout the region, resulting in property damage and lost crops and livestock, with significant impacts in particular on the sugarcane, macadamia nut and oyster production industries.
- Given constraints on land supply, there are challenges associated with balancing the use of high value agricultural land for primary production with the needs of adjoining and growing rural, residential and employment lands.

Opportunities

- A focus on increased regenerative agriculture practices, supported by increased uptake of agtech can support productivity improvements and higher yields, while simultaneously recognising the need to conserve natural resources and increase sustainability in the agricultural sector.
- Carbon sequestration and other biodiversity conservation activities on local farmlands present an opportunity to cater to the growing demand for carbon and biodiversity offset credits required for residential and industrial developments.
- Opportunities exist to support growth in agritourism in the region, potentially with a focus on supporting development of 'farm to table' experiences that can leverage the high quality local agricultural produce of the region.

Healthcare and social services

Healthcare in the Tweed region continues to grow strongly as a key contributor to the regional economy, but will require an ongoing focus on skilled workforce development, attraction and retainment to meet increased demand for services from a growing and ageing population in the region.

GVA (2020, \$m)	519
Employment (2021)	7,075
LQ score (2020)	1.71
LQ Residential care (2020)	1.9
LQ Healthcare (2020)	1.6

Strengths

- Healthcare and social services sector is a major employer in the Tweed region, with key specialisations including residential care (LQ of 1.9) and healthcare (LQ of 1.6).
- The new Tweed Valley Hospital in Kingscliff will represent a significant new health infrastructure endowment, given its role as a major regional referral hospital that works closely with a range of other hospitals in Northern NSW and tertiary hospitals in South East Queensland.
- The region's close proximity to South East Queensland allows it to draw on a wide labour pool that includes skilled healthcare workers and medical students from the Gold Coast region.

Vulnerabilities

- Attracting skilled professionals, from medical practitioners and nurses to carers and aides is a continuing challenge as the sector seeks to meet growing demand for healthcare services.
- The region faces strong competition for workforce attraction from other regions that also are facing acute skilled health worker challenges.
- The lack of affordable housing, alongside key challenges associated with housing availability impacts the ability to attract and retain key workers in the region, including healthcare professionals.

Opportunities

- The region's growing and ageing population, as well as the increased role the Tweed Valley Hospital can play as a regional hub will continue to support growth in the healthcare sector.
- The new Tweed Valley Hospital's location near the Kingscliff TAFE NSW site can support a strong ongoing education partnership between the institutions, with a focus on local skilled workforce development for the healthcare sector utilising dedicated training infrastructure.
- There are also opportunities to develop and enhance partnerships between the Tweed region's health sector and universities across the broader region (both in NSW and South East Queensland).

Tourism

The Tweed region's tourism economy continues to grow, with a wide variety of experiences and attractions contributing to a diverse visitor economy offering.

Visitor spend (2021, \$m) ^[9]	400
Employment (2021) ^a	8,758
LQ score (2020) ^b	1.47
LQ Food and beverage (2020)	1.6
LQ Accommodation (2020)	2.5

a Summation of Australia and New Zealand Standard Industrial Classification (ANZSIC) 1 digit retail trade, accommodation and food services and, arts and recreation.

b LQ for accommodation and food services.

Strengths

- Set between the Gold Coast and Byron Bay tourist hubs, the Tweed region has continued to emerge as a key tourism destination in its own right in recent years, with a distinct visitor offering. Key attractions include a range of natural attractions such as national parks, rainforests and the Tweed River, alongside hinterland villages and a growing distilling and agritourism sector.
- The region benefits from having a dedicated tourism and marketing organisation, the Tweed Tourism Company that provides strategic leadership to guide development of a sustainable, dynamic and prosperous visitor economy in the region.
- Despite substantial impacts from the COVID-19 pandemic lockdowns and border restrictions, the region's visitor economy has demonstrated a high level of resilience, with a strong bounce back in visitation recorded during 2021.^[27]

Vulnerabilities

- The industry is vulnerable to the impacts of natural disaster events and external shocks, as demonstrated since 2018 by flooding and bushfires damaging tourist infrastructure and disrupting key transport links, and the impacts of COVID-19 pandemic restrictions and border closures.
- The tourism and hospitality sector continues to experience ongoing staff shortages, as many workers shifted to work in other industries following the COVID-19 pandemic.
- A major key regional attraction, Wollumbin National Park, has been closed for a significant period as major repairs are undertaken after flooding related damage. Alongside ongoing uncertainty about the future of the summit track, this represents a key short-term vulnerability given the park is a drawcard attraction for many visitors.
- A focus is required on successfully balancing the conservation and protection of natural and heritage assets against the needs associated with expansion of the visitor economy.

Opportunities

- The Northern Rivers Rail Trail and the Tweed Byron Hinterland Trail developments represent significant new nature based tourism offerings in the region, which can support growth in high value multi-day tourism experiences.
- Opportunities exist to support growth in agritourism in the region, potentially with a key focus on supporting development of 'farm to table' experiences that can leverage the high quality local agricultural produce of the region.

Key themes in stakeholder consultation

The Tweed region has been severely impacted by a number of major flood events in recent years, with the major impacts of the 2022 floods highlighting for stakeholders the need to build climate resilience across the local community and within the region's economy.

Stakeholders noted that achieving land use change and associated development is a major focus for future sustainable economic development in the Tweed region, with a need for a balanced approach that considers ongoing community concerns about land use and environmental impacts and provides opportunities for lower income and disadvantaged members of the community.

Climate and economic resilience

Recent devastating flooding events and other natural disasters, alongside the impacts of the COVID-19 pandemic on consumer spending and visitation have brought the need to build principles of resilience into policy and programs to the forefront of many stakeholders' minds. Collaborative approaches to delivering sustainable economic growth and unlocking development on flood free land were highlighted by stakeholders as a key priority for the Tweed region.

Housing availability and affordability

As reflected in the analysis of housing supply and prices in the region (see Page 21), stakeholders highlighted the substantial pressures currently being felt in the region's housing market. Stakeholders raised concerns that current housing shortages and affordability challenges will only worsen in the face of a growing population and the ongoing need to support recovery from the 2022 floods.

The need to ensure support for lower income and disadvantaged members of the community, including through a focus on increasing availability of affordable and social housing, was also highlighted by stakeholders as a key priority for the region.

Cross-border integration

Stakeholders highlighted the significant negative impacts on the community, business and industry associated with the COVID-19 pandemic border closures, given the strong linkages between the Tweed region and South East Queensland. Stakeholders highlighted the importance of ensuring renegotiation of the Memorandum of Understanding between the NSW and Queensland Governments also includes consideration of potential future border closure events.

Stakeholders highlighted the importance of continuing to foster stronger connections with the South East Queensland economy, given it supports major opportunities for local communities, businesses and industries in the Tweed region. Key areas of future focus discussed included ongoing enhancements to mutual recognition of occupational licences and opportunities to increase cooperation and coordination in the delivery of health, transport, and water supply services.

Tweed REDS - 2023 Update strategies

Regional stakeholders noted that the 2018 strategies remained relevant to the Tweed region and expressed a desire to broadly retain the intent of these strategies as part of the 2023 Update, with some revisions made to reflect the updated economic context in the region. Changes have been made to:

- highlight the need to increase access to climate resilient industrial land in the region,
- create a focus on increasing the value of the visitor economy to the region,
- reflect the opportunity to develop a precinct strategy for the current Tweed Valley Hospital site,
- increase the focus on leveraging the economic benefits associated with the region's close proximity to South East Queensland,
- introduce a new strategy focused on leveraging the Northern Rivers Reconstruction Corporation mandate to support the development of a more climate resilient economy.

Reflecting the changes outlined above, the 2023 REDS Update strategies for the Tweed region are listed below (amendments made to existing 2018 strategies are highlighted in **bold**):

Amended	Cultivate the region’s specialised economic precincts and activities by providing increased access to climate resilient industrial land and a skilled local workforce.
New	Utilise the Northern Rivers Reconstruction Corporation mandate and local government collaboration to develop a more climate resilient economy and provide for future population and economic growth across the region.
Amended	Implement a precinct strategy for the current Tweed Valley Hospital site and the redevelopment of the old hospital.
Amended	Increase cross-border integration to realise the benefits of proximity to the South East Queensland economy.
Amended	Increase the value of the visitor economy to the region in a culturally and environmentally sensitive way.

Key enablers of economic growth

A number of key enablers have been identified to assist with delivering each of the strategies. This list is non-exhaustive, with a focus on identifying priority short- to medium-term enablers. Responsibility for implementation of these enablers sits with various levels of government, and in some cases may also include business, industry or non-government bodies. Collaboration across these entities at a local level will be key to achieving results.

Strategy	New enablers		Lead and support	Rationale
Cultivate the region’s specialised economic precincts and activities by providing increased access to climate resilient industrial land and a skilled local workforce.	Infrastructure / land use	Support the supply of diverse, affordable housing stock by implementing the recommendations of the Tweed Growth Management and Housing Strategy.	Tweed Shire Council, Department of Regional NSW (DRNSW), Department of Planning and Environment (DPE).	Taking action to improve understanding and deliver actions to help address housing cost challenges and availability shortages.
	Government, regulation and information	Support businesses and community in preparing for and responding to the impacts of climate events by developing a climate resilience mitigation strategy.	Tweed Shire Council, DRNSW, DPE, local business chambers.	The region has been heavily impacted by climate-related events in recent years, and mitigating the impacts of future

Strategy	New enablers		Lead and support	Rationale
	Government, regulation and information	Cultivate a circular economy that supports regeneration of natural systems, keeps products and materials in use and eliminates waste.	Tweed Shire Council , DRNSW, DPE.	disasters is a key area of focus for the region.
Utilise the Northern Rivers Reconstruction Corporation mandate and local government collaboration to plan and rebuild the region's communities and a more climate resilient economy.	Government regulation and information	Adopt a regional approach to economic recovery and reconstruction to build local business and workforce capability and maximise opportunities for local employees, businesses and Aboriginal communities.	Northern Rivers Reconstruction Corporation , Tweed Shire Council, DRNSW, local Aboriginal organisations	Leverage region-wide opportunities to support sustainable economic growth and recovery.
	Land use	Strategically plan for a pipeline of future flood-free employment and industrial-zoned lands, aligned with Tweed Shire Council's Local Strategic Planning Statement, to support local job growth and business expansion.	Northern Rivers Reconstruction Corporation , Tweed Shire Council, DRNSW, DPE.	Supporting an increased focus on residential, commercial, and industry growth on flood-resilient land in the region.
Review planning controls to ensure adequate provisions and incentives for housing diversity and affordability, as well as temporary housing for displaced residents and the (re)construction workforce.				
Implement a precinct strategy for the current Tweed Valley Hospital site and the redevelopment of the old hospital.	Infrastructure	Undertake strategic planning of the current Tweed Valley Hospital site and the Kingscliff TAFE NSW site to support expanded workforce capability.	DPE, Tweed Shire Council , DRNSW, Northern NSW Local Health District.	Maximising the investment in Tweed Valley Hospital, with a key focus on precinct development.

Strategy	New enablers		Lead and support	Rationale
<p>Increase cross border integration to realise the benefits of proximity to the South East Queensland economy.</p>	<p>Government, regulation and information</p>	<p>Refresh the NSW-Queensland MoU to improve economic integration across the skills, transport, infrastructure and tourism domains, as well as a coordinated approach to events that may impact cross border mobility.</p>	<p>Office of the Cross-Border Commissioner (OCBC), Transport for NSW (TfNSW), DRNSW, QLD Department of Transport and Main Roads (QTMR).</p>	<p>Improving and enabling economic integration and connectivity with the South East Queensland economy.</p>
	<p>Infrastructure</p>	<p>Create an implementation plan for a multi-modal corridor between Tweed and Gold Coast.</p>	<p>TfNSW, OCBC, DRNSW, QTMR.</p>	
<p>Increase the value of the visitor economy to the region in a culturally and environmentally sensitive way.</p>	<p>Infrastructure</p>	<p>Support the development of a diverse tourism industry, including nature based, cultural, active and eco-tourism, building on the development of the Northern Rivers Rail Trail and the conservation and restoration of natural heritage assets.</p>	<p>Destination North Coast, Tweed Shire Council, DRNSW, local Aboriginal organisations, National Parks and Wildlife Service, Tweed Tourism Company, Destination NSW.</p>	<p>Achieving a balance between growth of sustainable tourism offerings and the need to protect, conserve and restore natural assets.</p>

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Figure 18: A man walks on the beach by Hastings Point at sunrise. Photo credit: Destination NSW.