



Department of
Primary Industries and
Regional Development

Protect
Grow
Innovate

Local Content in the regions report 2023-24





Jalardi Contractors
State Barrier Fence
Yalgoo WA

(Cover) Albany Ring Road
Albany WA
Mainroads WA



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Minister's foreword

The Western Australian Government is committed to maximizing local content outcomes in government procurement.

Our tailored local content approach in Western Australia has worked to guarantee that regional businesses have full, fair and reasonable opportunity to supply to the state. At the forefront of supporting these regional business opportunities is the Local Content Adviser Network.

As Minister for Regional Development, I am pleased to present the Local Content in the Regions Report 2023-24, prepared by the Department of Primary Industries and Regional Development (DPIRD).

Our Local Content Adviser Network has been instrumental in connecting regional businesses with government supply opportunities to maximize local participation in the state's economy.

Their efforts have not only built local content intelligence but have also significantly influenced government procurement practices impacting regional WA.

This report offers a comprehensive overview of local content outcomes for the 2023-24 financial year, and I am pleased to be able to highlight a notable uplift in the Western Australian Government's local content performance across key indicators.

The results again demonstrate the importance of prioritizing local content and its impact to our regional economies, underscored by the WA Jobs Act 2017, the WA Industry Participation Strategy (WAIPS) and the WA Buy Local Policy.

The positive results detailed within this report reinforce the Western Australian Government's ongoing commitment to local content in procurement. They validate that dedicating resources to support local content outcomes yields tangible socio-economic benefits for our regions.

This report offers valuable insights into local content practice and programming, along with an evidence base in support of local content as a worthy regional economic development pursuit.

Our government will continue to foster local content best practice in procurement, ensuring its continued involvement in shaping positive outcomes for our regional communities.

I would like to thank the Director General of DPIRD, the Local Content Adviser Network and our Regional Development Commissions for their ongoing drive and dedication to leading local content in regional Western Australia.



The Hon. Stephen Dawson
Minister for Regional Development; Fisheries

Executive summary

The Local Content Adviser Network (LCAN) collaborates closely with the Department of Jobs, Tourism, Science and Innovation and the Department of Finance to increase opportunities for regional businesses to supply to the Western Australian Government.

Since its inception in 2017 the LCAN has engaged with government agencies, Government Trading Enterprises (GTEs), and industry and business to foster the growth, diversification, and development of regional businesses.

The LCAN examines WA Government contract award data annually through a local content lens and conducts longer-term analysis of supply trends and challenges. This examination of local content metrics reveals important progress in local content across various indicators when viewed over longer term timeframes.

In 2023-24 the Western Australian Government's local content performance showed continued improvement. Specifically, average local supply for contracts valued between \$1.5 and \$5 million increased to 40% of the value of supply in this range, representing a 14% increase relative to the 7 year average. Similarly, the local share of contracts valued between \$25 and \$50 million rose to 22%, representing a 29% increase in the value of supply relative to the longer term average.

Crucially, local supply on contracts exceeding \$50 million, which are often more complex, lifted to 13% of the value of supply. Relative to the longer term average of 9% this represents a 44% increase, and is a significant result indicating increased regional business participation in more complex higher value contracts.

Looking ahead, LCAN is dedicated to achieving its objectives by supporting continuous improvement in local content practices in procurement and expanding its collaborations across government and regional suppliers. The LCAN will continue to support the transition of our regional economies, enhancing their economic complexity through strategic procurement and projects and robust business capability building.

Furthermore, meeting our objectives will foster the growth of Small to Medium Enterprises (SMEs), recognising them as key economic drivers and their pivotal role in building resilient and prosperous communities across regional Western Australia. This sustained focus will ensure that regional economies not only adapt but also thrive through leveraging local talent, skills and competitiveness, ultimately contributing to a robust state economy.

Local content in Western Australia



Indian Ocean Drive
Dandaragan WA
Courtesy of Matt Day

LCAN was established in 2017, with the impetus behind the formation of the local content program being the WA Government's commitment to building and diversifying regional economies and creating jobs.

The LCAN seeks to ensure businesses in regional WA receive a fair share of government expenditure on works, goods and services. The LCAN connects across government agencies, industry bodies and local suppliers in regional WA to increase participation in supply chains, and to assist regional businesses to grow, diversify, and develop in capability.



**Cotton Gin Construction
Kununurra WA**

Local content objectives for regional Western Australia

1.

The Western Australia Buy Local Policy is supported across government agencies

2.

To facilitate a culture of buying close to home

3.

Understanding and growing regional business capability and capacity

4.

To measure and demonstrate the value and impact of local content in regional economies

5.

Providing feedback on regional business advantages and challenges

LCAN 3 program pillars



Relationships

Forging lasting and mutually beneficial relationships with our stakeholders



Reform

Supporting and influencing reforms that maximise opportunities for regional businesses



Reporting

A trusted source of information and to gather a strong local content evidence base

LCAN activities and engagements 2023-24

\$2,096,147,709

Value of regional supply opportunities pursued by LCAN*

 **2,066**

Total contacts across the LCAN with government agencies, buyers, suppliers and stakeholders

 **377**

Regional business referrals to business support or funding assistance and information

 **454**

Meetings across the LCAN with regional suppliers and agencies about projects and procurements

 **30**

New potential regional suppliers to Government identified in 2023-24

 **437**

Market soundings with regional suppliers about upcoming supply opportunities

 **523**

Total supply opportunities across regional WA scanned by LCAN

*Estimated values are derived from Department of Finance Strategic Forward Procurement Planning data, project budget estimates, or Western Australian Government announcements

Regional SMEs and economic growth

Western Australia's regional SMEs are highly capable in delivering works and goods and services, and their success significantly fuels socio economic growth in regional areas.

SMEs often act as subcontractors on major strategic projects in regional WA, such as large-scale infrastructure initiatives. Public private partnerships (PPPs) with regional businesses help retain a greater share of investment within regional areas, creating a more resilient and diverse local economy.

**47,632**

Small businesses in regional WA¹

Involving regional SMEs in strategic regional projects and procurements:

- Improves decision making through local know-how and reduces risks
- Increases project support from the local community.
- Offers more sustainable practices during project delivery; and
- Utilises important region-specific technical skills.

Compared with the rest of Australia there was a higher percentage of people employed in regional WA, and a lower percentage of unemployed people in regional WA².

**20%**

of Western Australian SMEs are in regional WA¹

This positive trend in workforce participation in regional WA creates a positive feedback loop, improving support services and making our regions more attractive for business investment.

The LKAN is dedicated to simplifying and expanding the frequency and diversity of supply opportunities for local and regional based businesses and Aboriginal SMEs on strategic regional projects.

By working to increase regional business participation, LKAN directly contributes to strengthening regional economies and, in turn, ensures the growth and prosperity of the state's economy.

The highest numbers of regional SMEs were in³:

Great Southern

7,072 small businesses

Of these 1,627 were in Albany, and 919 were in Kojonup

South West

13,490 small businesses

Of these 7,034 were in Bunbury and surrounds, and 6,456 were in Busselton and surrounds

Wheatbelt – North

6,569 small businesses

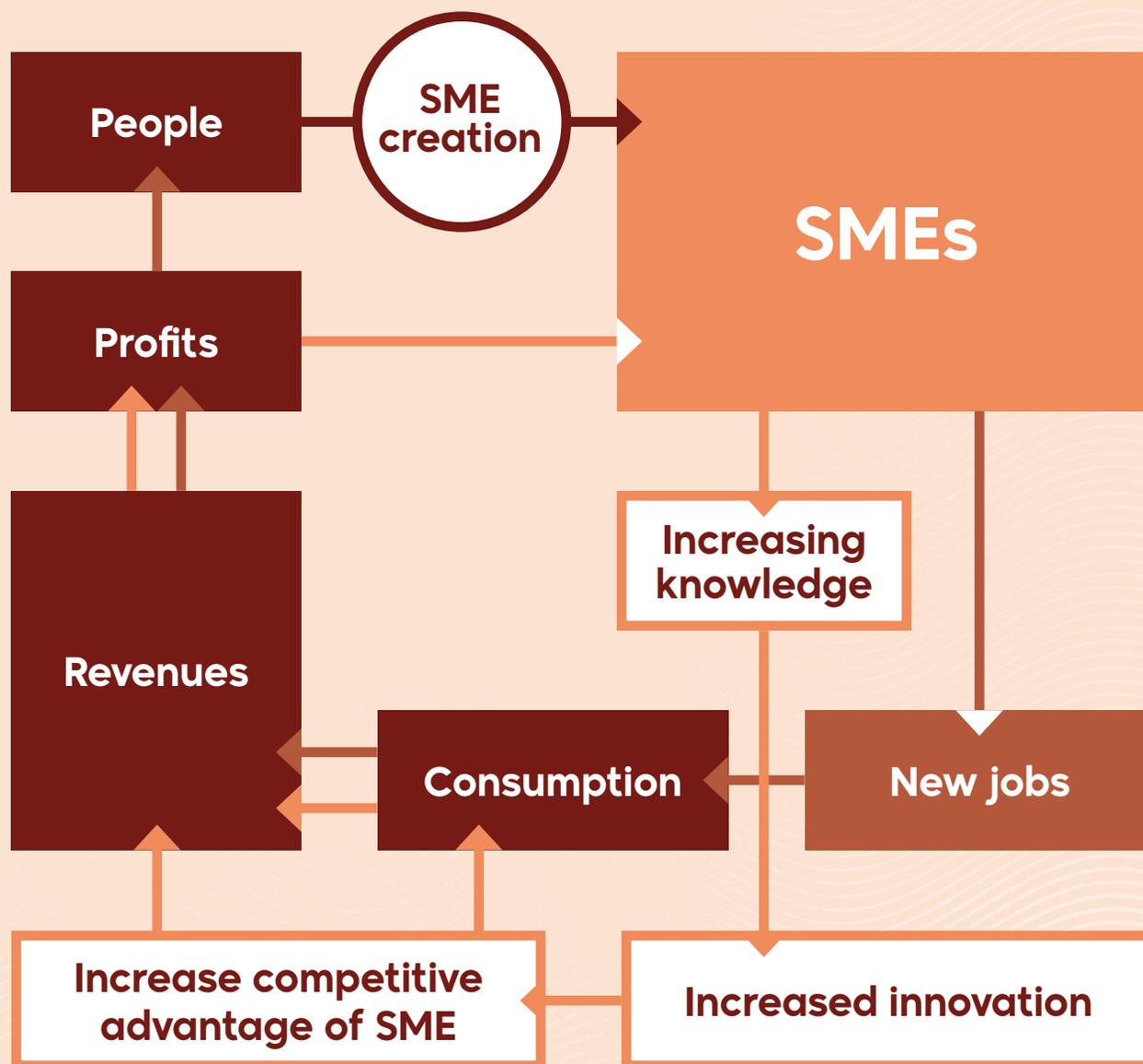
Of these 1,117 were in Gin Gin – Dandaragan

Mid West

4,707 small businesses

Of these 2,730 were in Geraldton and surrounds.

Effects of SME development⁴



Transitioning regional economies and building resilience

Regional Western Australia faces both opportunities and challenges as it undergoes significant economic transition.

Many regional areas are shifting from traditional industries to emerging sectors driven by technological advancements, major investments in renewable industries, and changing government priorities. Each region has unique characteristics and local conditions, creating economic opportunities that can be leveraged.

Building resilience is essential for regions to adapt and thrive. This includes economic resilience, achieved through diversified industries and a skilled workforce; social resilience, built on strong communities and support networks; and environmental resilience, maintained through sustainable practices and climate-responsive infrastructure.

Local content initiatives support this by:

- 1. Access to government procurement:** Promoting awareness of government procurement opportunities, developing regional business' capabilities and capacity to secure contracts, and maintaining high standards of work practice.
- 2. Job creation:** Encouraging diversification to generate employment across multiple sectors.

3. Innovation, technology and infrastructure development: Maximising investment and uptake in innovation, technology and infrastructure for local businesses, and supporting new industries.

4. Resilience and environmental sustainability: Assisting SMEs in adopting sustainable practices and improving their capacity to adapt to changing economic, social and environmental conditions.

5. Global competitiveness: Strengthening the ability of regional businesses to compete in domestic and international markets through access to strategic partnerships, investment attractions, and new markets.

The LCAN has been engaged in strategic forward procurement and project planning and local content advocacy to ensure there is an adaptable regional workforce capable of meeting our state's strategic agenda and ready to embrace future economic opportunities.

Economic complexity and local content

Economic complexity measures the productive capabilities of large economic systems.

Local content policies can serve as a mechanism to stimulate economic complexity by cultivating local business capability and competitiveness. By supporting the supply of works and goods and services from regional businesses, these policies can spur new industry and growth in existing industries in regions. Furthermore, they often necessitate supplier development programs, foster sophistication through training, and uplift professional standards and business competitiveness.

Local content in procurement and practice can also attract broader investments beyond traditional sectors, signalling the burgeoning of a more diverse regional economic landscape. Regions that nurture productive capabilities, particularly unique know-how, can produce a diverse array of goods and services that few others can create.

Focusing resources on local content and implementing targeted policy mechanisms stimulates partnerships and joint ventures and facilitated the adoption of best practice. Investments in local business sophistication, certifications and pre-qualification levels, and their workforce training and skills specialisation enhances the regional labour force skill base, which is a prerequisite to engaging in higher-value activities.

Moreover, by integrating local SMEs into global supply chains, these policies drive adoption of higher standards and development of specialised expertise, potentially leading to the creation of unique know-how. This interconnected set of policy and development mechanisms fosters more diverse, sophisticated, and resilient regional economies.

The LCAN is undertaking research on the Wilman Wadandi Highway (formerly known as the Bunbury Outer Ring Road) in the South West region. Aspects of this research look at the South West's regional economy and local business capability, diversity, and development through a local content lens.

The research will enable the LCAN to develop a transferable local content working model on large scale infrastructure projects in developed economies. It is envisaged this working model will assist in targeting planned projects for local content best practice, and support further research on the impact of local content strategies and programs as a valid mechanism to stimulate regional economic growth.

Local Content in government procurement

Metrics 2017-24





**Hedland Road and Rail
Safety Improvement**
Port Hedland WA
Mainroads WA

Local content through a long lens

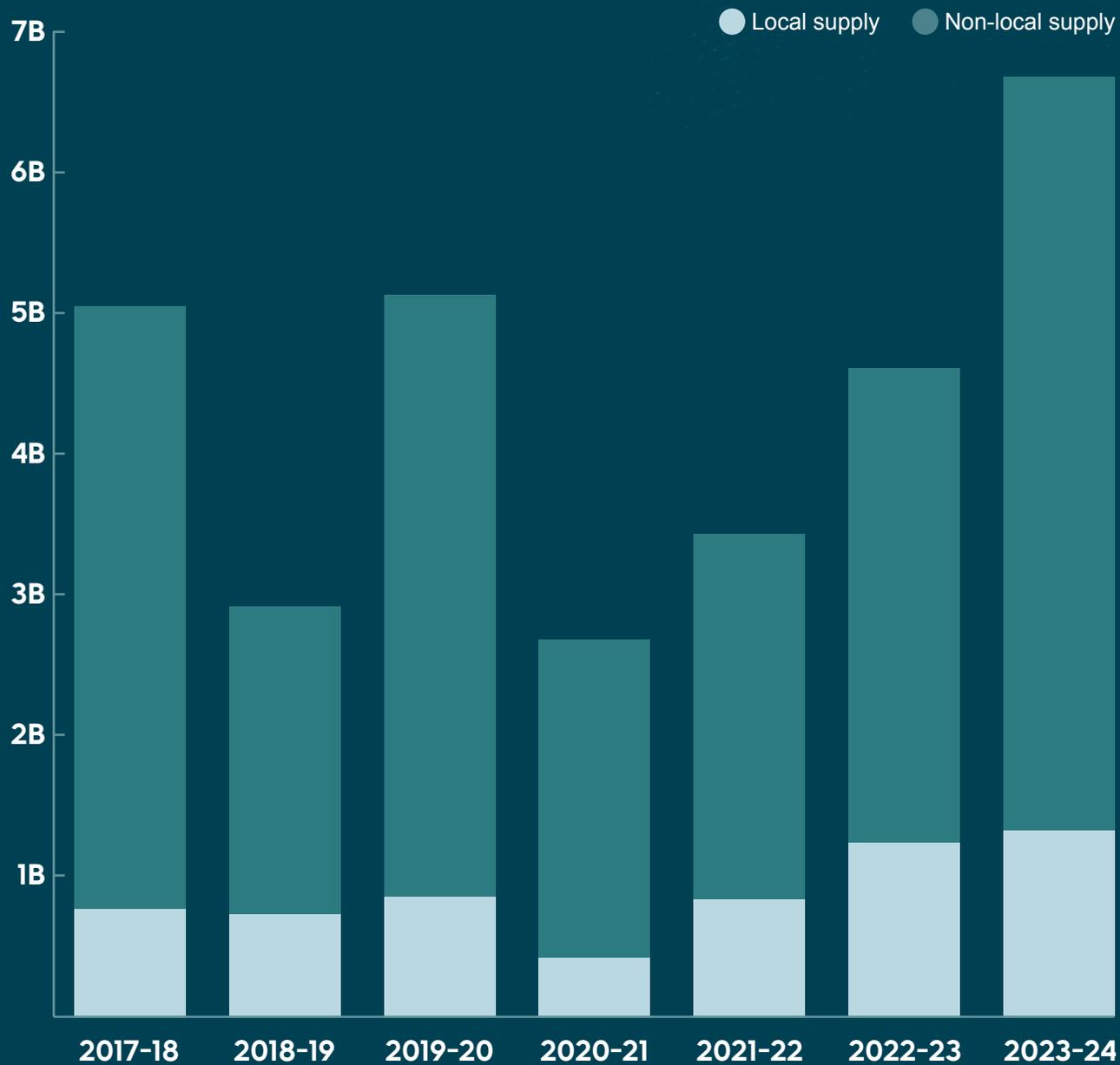
LCAN's collection of WA Government local content data commenced in 2017 to enable long term analysis of supply trends and constraints.

The progress chart of local content on statewide, multi-region and single region contracts combined year-on-year since 1 July 2017 demonstrates gradual uplift in the proportion of local supply towards the end of the period.

The long term data presented throughout this report covers the period 1 July 2017 to 30 June 2024.



*Average Local Content is the total local supply value over the total value of all contracts awarded in the same period.



 **999**

Number of local supplier contracts in 2023-24

2171

Number of all contracts in 2023-24

 **5207**

Number of local supplier contracts since 1 July 2017

12,625

Number of all contracts since 1 July 2017



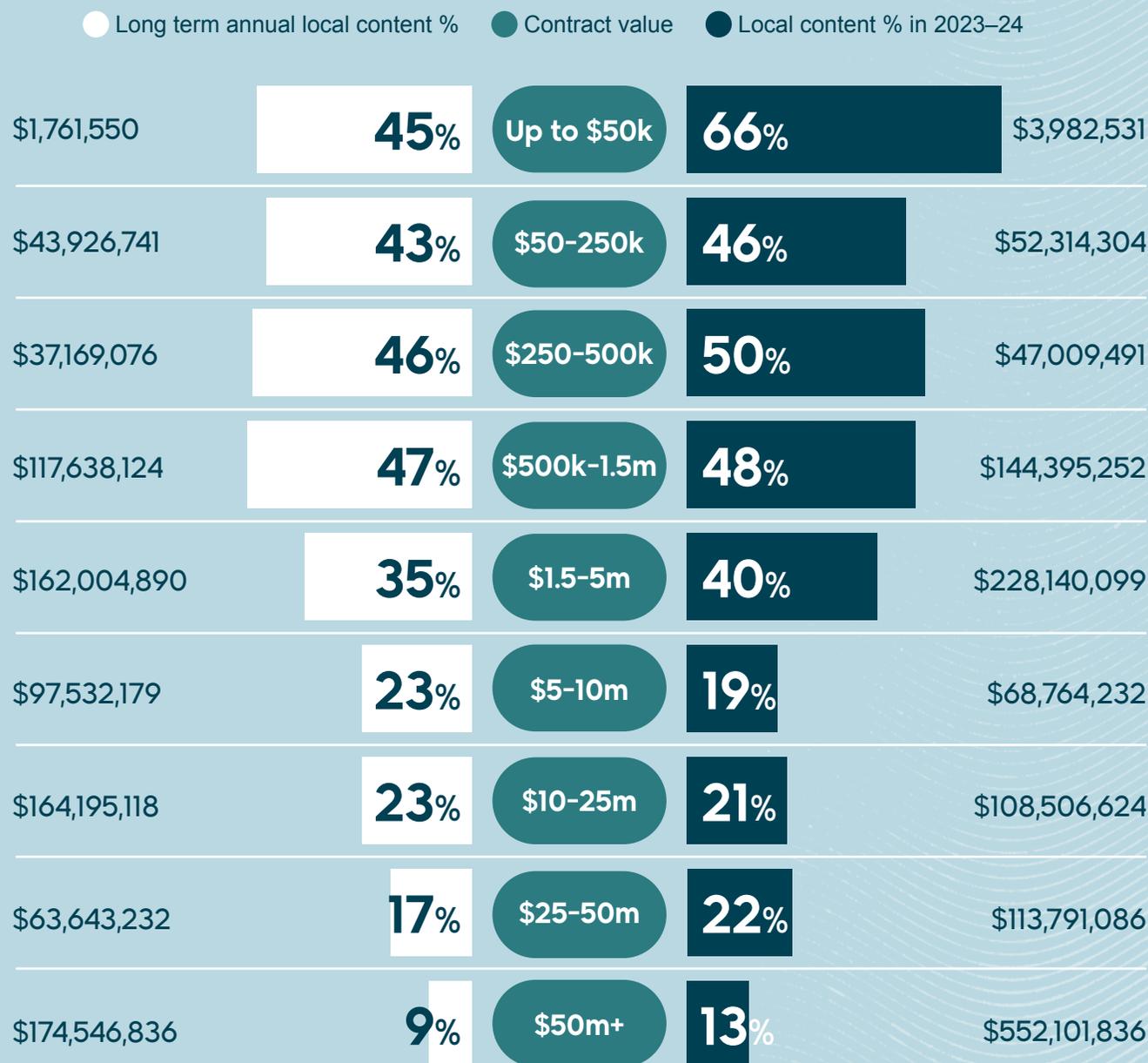
**Manuwarra Red Dog
Highway link**
Mainroads WA

Local content in regional WA

Local supplier outcomes by contract value on combined statewide, multi-region and single region contracts.

Average local supply for contracts valued between \$1.5 and \$5 million increased to 40% of the overall value of supply, representing a 14% improvement relative to the long term average. Similarly, the local content share of contracts valued between \$25 and \$50 million rose to 22% in 2023-24, representing a 29% increase relative to the long term average.

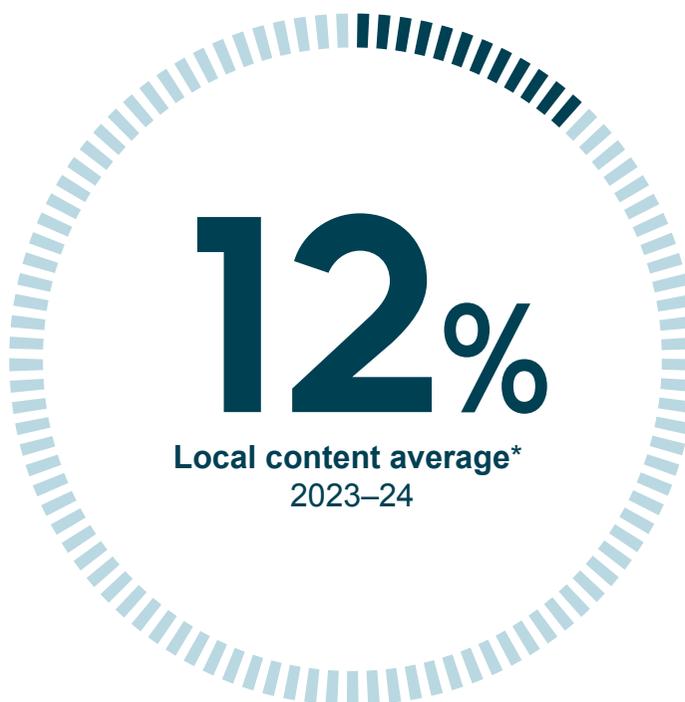
Local supply on contracts exceeding \$50 million, which are often more complex, lifted to 13% of the value of supply. Relative to the long term average of 9%, this represents a 44% improvement in market share for local content, a significant result for regional participation in more complex and higher value contracts.



Local content on statewide contracts

Local supply on Statewide contracts from 2017-24 was \$264.24m per annum and in 2023-24 suppliers based in regional WA were awarded \$595.50m on these contracts.

Statewide supply is located in all 9 regions of WA and the Perth metropolitan area. Local Content on statewide contracts is deemed local when the supplier's ABN is registered in regional WA.

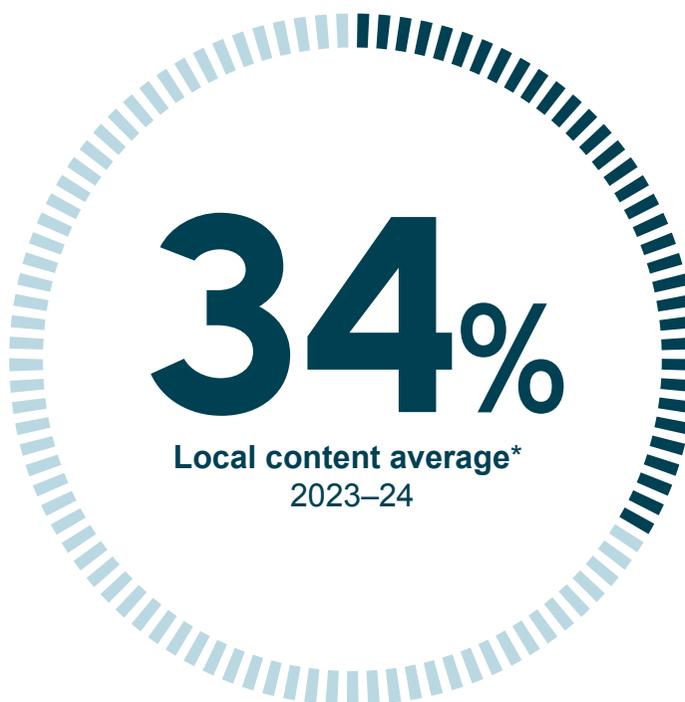


*Average Local Content is the total local supply value over the total value of all contracts awarded in the region in the same period.

Local content on multi-region contracts

Local supply on Multi-region contracts from 2017-24 was \$90.98m and in 2023-24 suppliers based in regional WA were awarded \$135.58m on multi-region contracts.

Multi-region supply is located in 2 or more regions but is not statewide. 'Multi-region' data includes all multi-region contracts, including those from the Peel/Perth metro and Mid-West/Gascoyne combined regions.



*Average Local Content is the total local supply value over the total value of all contracts awarded in the region in the same period.

Regional profiles





**Mandurah Estuary
Bridge Duplication**
Mandurah WA
Mainroads WA

Gascoyne

The Gascoyne region is home to 9,537 people, with 12% identifying as Aboriginal or Torres Strait Islander.

The region spans 135,074 km² and includes the Shires of Carnarvon, Exmouth, Shark Bay and Upper Gascoyne. It is bordered by more than 600 km of coastline. Aboriginal people have lived in the Gascoyne for tens of thousands of years. The Baiyungu, Malgana, Thadgari, Thalanyji and Yinggarda language groups have a central role in the ongoing care and management of the region's natural assets.

Carnarvon is the region's largest town and is the major administrative and service hub. Smaller regional towns include Exmouth, Coral Bay, Denham and Gascoyne Junction.

Emerging industries

The Gascoyne is strategically positioned to support new mineral, resource, and renewable industry projects. Exmouth and Carnarvon are crucial to supply chains and back offshore oil and gas and high-value salt operations. The region offers significant opportunities in rare earths, gypsum, limestone, and other raw materials.

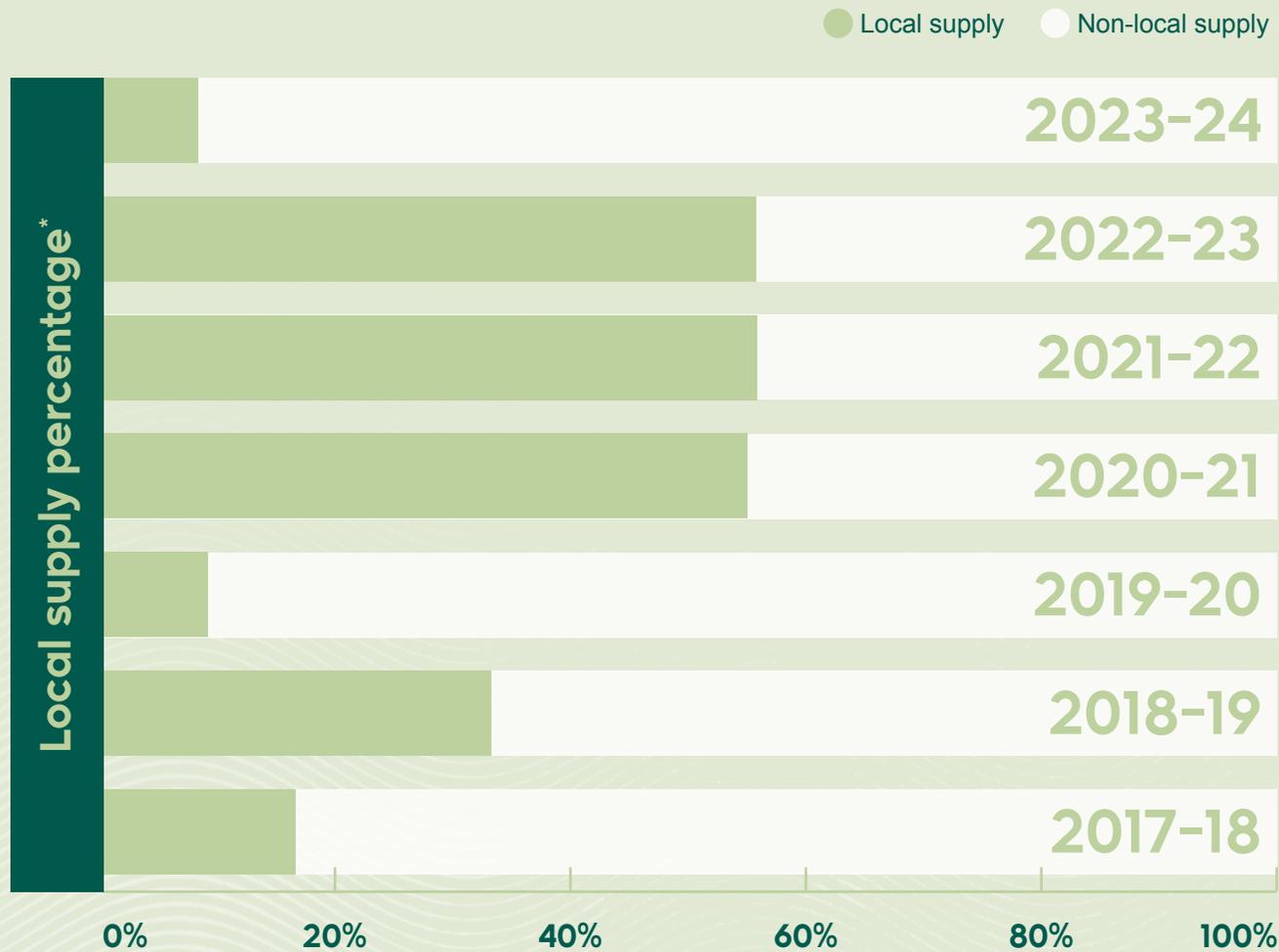
The Gascoyne boasts some of the world's best locations for renewable energy, with Carnarvon a globally recognized "hotspot" for renewable hydrogen production. This makes the Gascoyne well-placed to help the WA Government achieve its goal of 10% green hydrogen in by 2030.

Competitive advantages

- Gascoyne suppliers recognised demand shortages in the region and have diversified to create local supply.
- Local suppliers have comprehensive understanding of supply and delivery timeframes in the region.
- Local suppliers are acutely aware of buyer's requirements and supply challenges sometimes not specified in scopes of work.
- Local suppliers comprehend the tyranny of distance and schedule their delivery of contracts accordingly.



Gascoyne local supply snapshot



\$1,759,913

Highest local contract awarded in the region since 1 July 2017

↑ 18%

Gascoyne suppliers increased their share of contracts valued between \$250 and 500k from 50% annually since 1 July 2017 to 68% in 2023-24, worth almost \$1.5 million in local supply

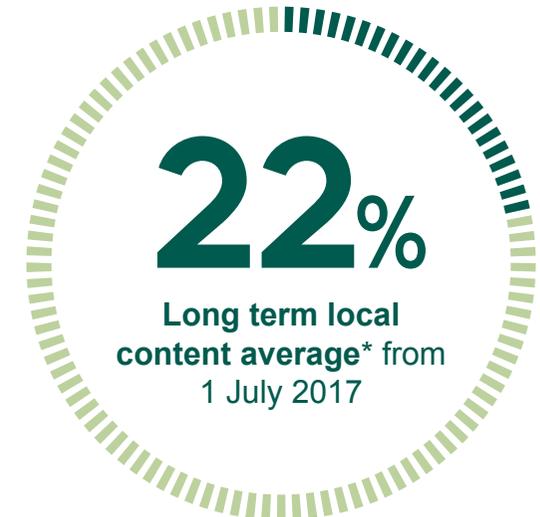
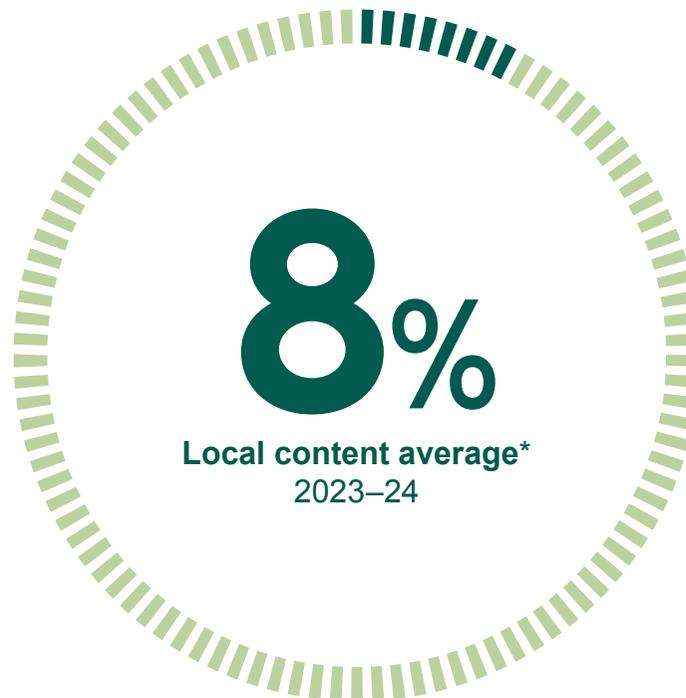
54

Unique local suppliers awarded contracts in the region since 1 July 2017

* % represents value of supply

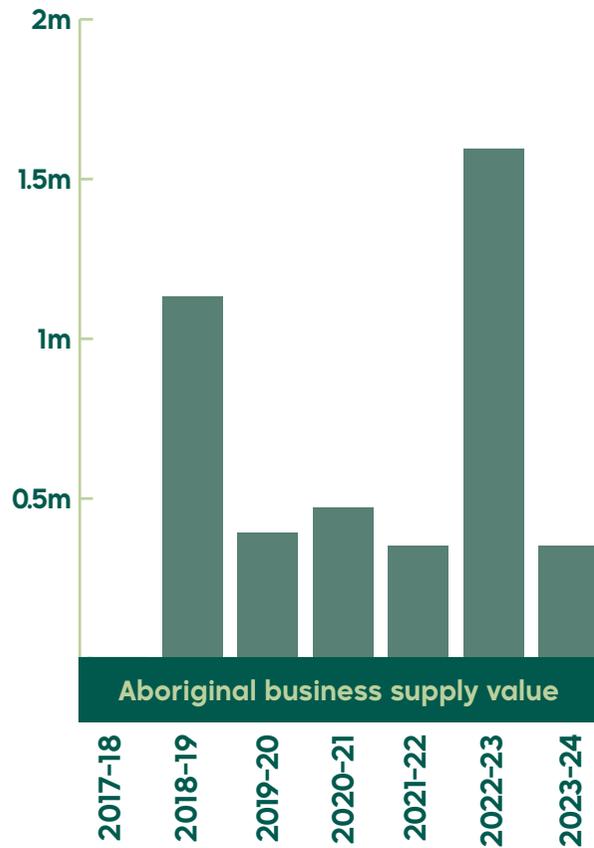
Gascoyne local content

In 2023-24 Gascoyne businesses were awarded 51% of the number of contracts in the region, with 19 out of 37 total contracts going to local suppliers.



*Average Local Content is the total local supply value over the total value of all contracts awarded in the region in the same period.

Gascoyne Aboriginal business content



 **47%**

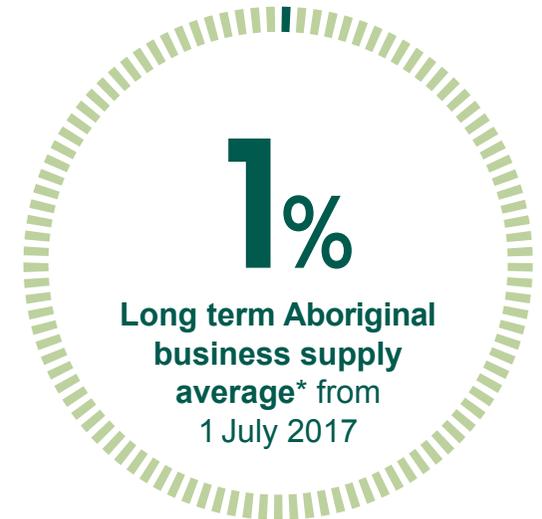
of Aboriginal business supply has been sourced from **Gascoyne based Aboriginal businesses** since 1 July 2017

\$0.35m
Value of all Aboriginal Business supply 2023-24

 **2**
Number of **Aboriginal Business contracts** 2023-24

\$4.29m
Value of all Aboriginal Business supply since 1 July 2017

17
Number of **Aboriginal Business contracts** since 1 July 2017



*Average Aboriginal business supply is the value of all Aboriginal business supply over the total value of all contracts awarded in the region in the same period.

Goldfields- Esperance

Goldfields-Esperance is home to 58,134 people and thrives with prosperous communities.

Goldfields-Esperance is WA's largest region and its stunning southeastern coast drives a robust tourism sector alongside ideal conditions for broadacre cropping, livestock, fisheries, and forestry.

Mining is the predominate sector, yielding gold, nickel, lithium, and rare earths. Construction, manufacturing, and healthcare are also significant local employers.

Excellent road and rail networks and the only deep-sea port in Southern WA, in Esperance, is an important strategic asset and economic enabler.

Continuous investment in infrastructure and amenities fosters modern, family-friendly communities rich in heritage, culture, and economic opportunity.

Emerging industries

The Goldfields-Esperance region is perfectly placed to capitalise on the clean energy transition, boasting significant lithium, cobalt, and rare earth reserves.

The upcoming 50-megawatt Vanadium Flow Battery project in Kalgoorlie-Boulder presents an advancement in Western Australia's renewable energy infrastructure and to position Kalgoorlie to become a vanadium battery storage hub.

The region's natural assets enable the emergence of new industries such as aquaculture and renewable energy, creating opportunities for the development and adoption of new technology.

Competitive advantages

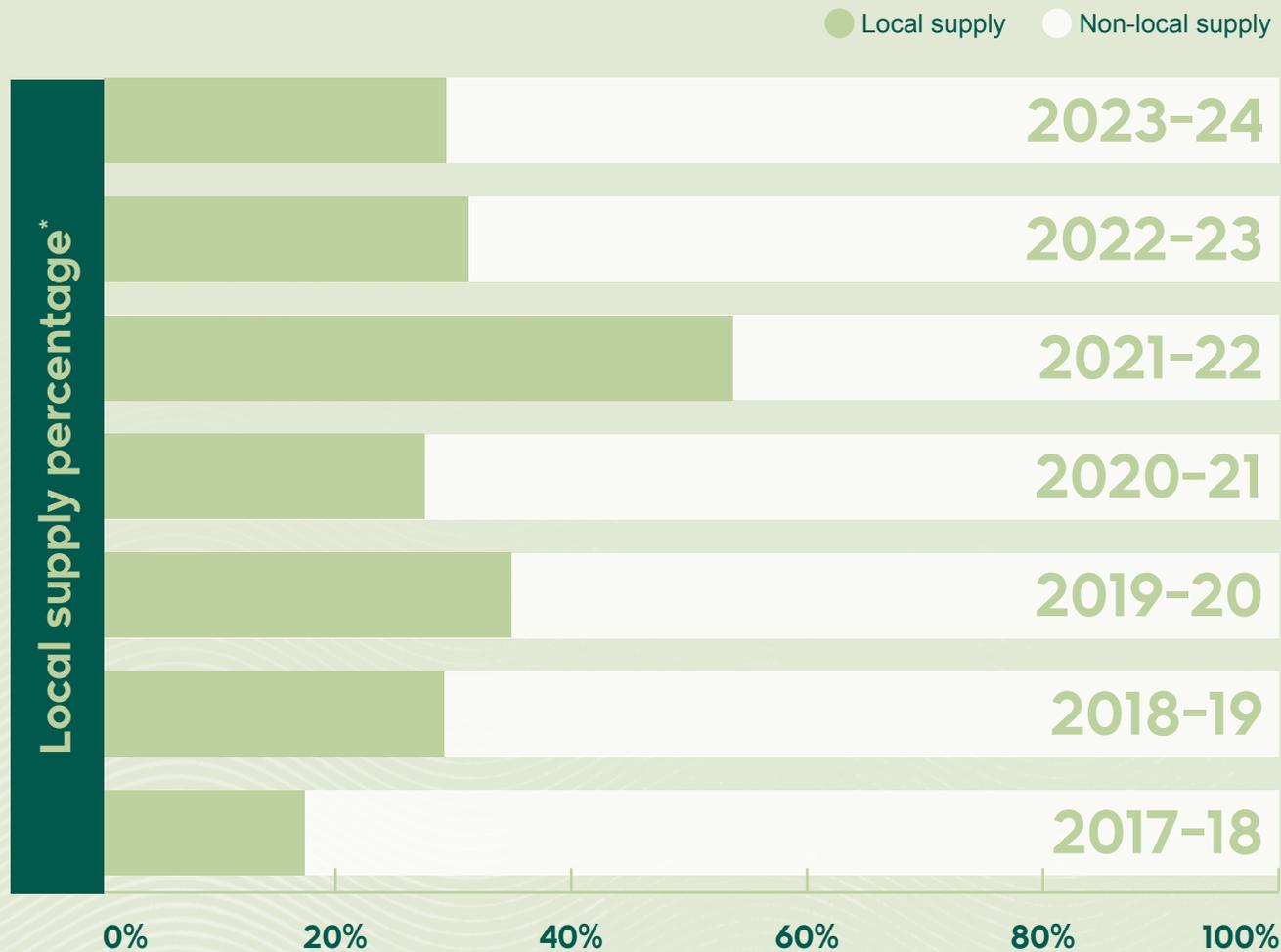
- New and emerging industries benefit from highway, rail and air networks as well as connections to Esperance Port and strong digital connectivity that connects them to the world.
- Local suppliers understand the complexities of regional and remote environments and the impacts and opportunities they present.
- Curtin University's WA School of Mines and Curtin Medical School Rural Health Campus provide world class training to attract and develop skilled regional workers.



Goldfields-Esperance

WA

Goldfields-Esperance local supply snapshot



\$32,000,000

Highest local contract awarded in the region since 1 July 2017

55%

Goldfields-Esperance local suppliers won 55% of the number of contracts awarded in their region in 2023-24

200

Unique local suppliers awarded contracts in the region since 1 July 2017

* % represents value of supply

Goldfields- Esperance local content

In 2023-24 Goldfields-
Esperance local suppliers
maintained their average
annual share of contracts
valued between \$500k
and \$1.5 million, worth
more than \$9.7 million
in local supply.

\$87.99m

Value of all contracts
2023-24

\$25.89m

Value of local contracts
2023-24

78

Number of local
contracts 2023-24

\$794.46m

Value of all contracts
since 1 July 2017

\$235.66m

Value of local contracts
since 1 July 2017

447

Number of local
contracts since
1 July 2017

29%

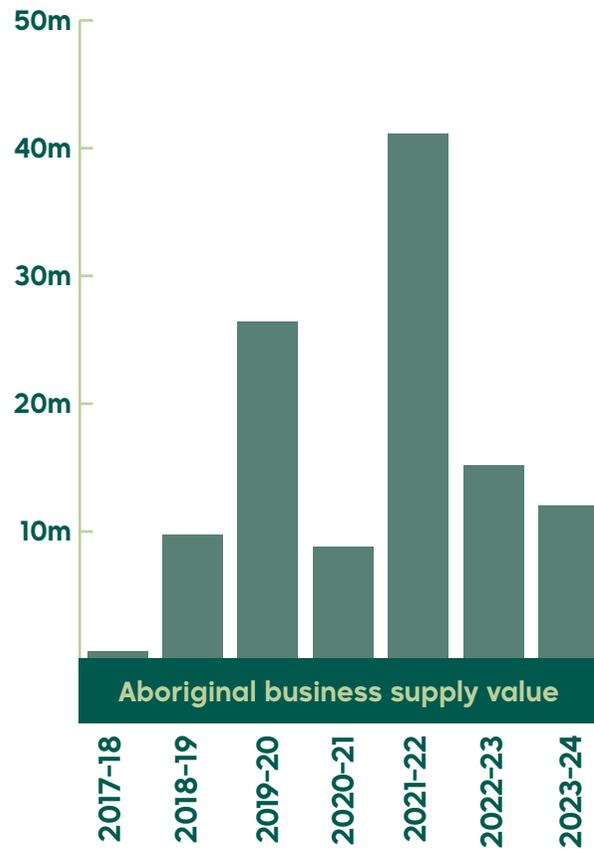
Local content average*
2023-24

30%

Long term local
content average* from
1 July 2017

*Average Local Content is the total local supply
value over the total value of all contracts
awarded in the region in the same period.

Goldfields- Esperance Aboriginal business content



78%

of Aboriginal business supply has been sourced from Goldfields-Esperance based Aboriginal businesses since 1 July 2017

\$12.02m

Value of all Aboriginal Business supply 2023-24

20

Number of Aboriginal Business contracts 2023-24

\$113.84m

Value of all Aboriginal Business supply since 1 July 2017

118

Number of Aboriginal Business contracts since 1 July 2017

14%

Aboriginal business supply average* 2023-24

14%

Long term Aboriginal business supply average* from 1 July 2017

*Average Aboriginal business supply is the value of all Aboriginal business supply over the total value of all contracts awarded in the region in the same period.

Great Southern

The Great Southern region has 11 local government areas and is home to 61,879 people.

The Great Southern covers 39,007 km² and has the picturesque City of Albany and townships. Major trading towns include Katanning, Mount Barker and Denmark. The key industries in the region are agriculture, health care and social assistance, and education and training. The region's major supply chains include Albany's port and airport, and road and rail networks.

Geographic features include the Stirling and Porongurup ranges, forests, farmland, and 250 km of Southern Ocean coastline which attracts a diverse range of professionals to live and work within the region.

Emerging industries

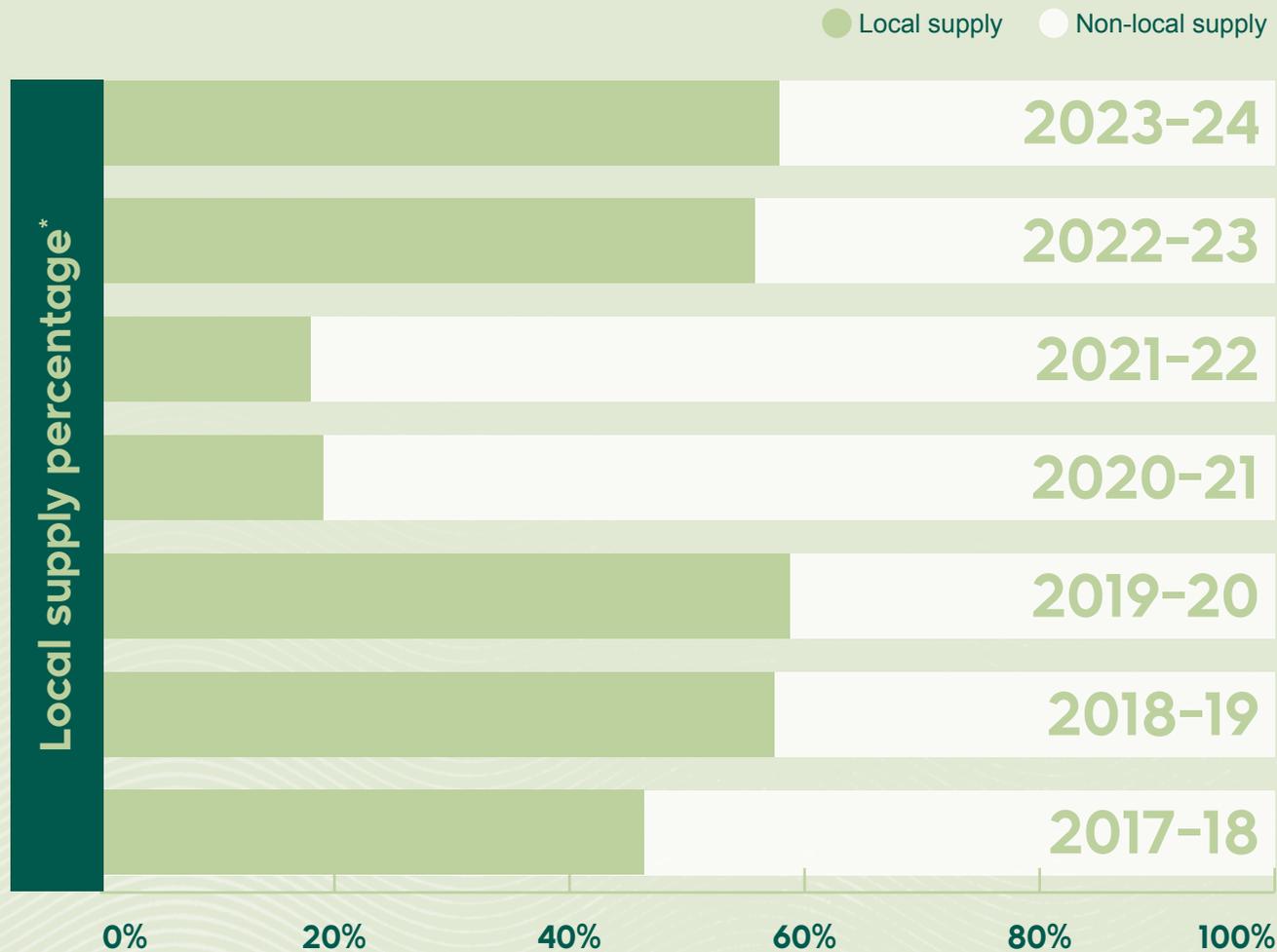
The Great Southern region is notable for its consistent growth across most industry sectors over multiple years. Job opportunities in the health care services industry are showing the most growth, particularly in residential care and social services, which falls in line with WA Country Health Service continuing to be one of the top state government buyers in the region.

Competitive advantages

- Great Southern suppliers have an active and engaged business development centre servicing the whole region.
- Local suppliers are committed to their region, many making a conscious decision to live here for lifestyle reasons. This makes them highly invested in building a positive brand reputation which leads to enhanced outcomes for buyers.
- Local suppliers deliver development opportunities through traineeships for youth, disadvantaged and remote communities.
- Local suppliers are accessible, with quicker response times and ability to pivot to meet contractual modifications.



Great Southern local supply snapshot



\$16,956,507

Highest local contract awarded in the region since 1 July 2017

↑ 16%

Great Southern suppliers increased their share of contracts valued between \$1.5 and \$5 million contract from 55% annually since 2017 to 71%, exceeding \$15 million in local supply in 2023-24

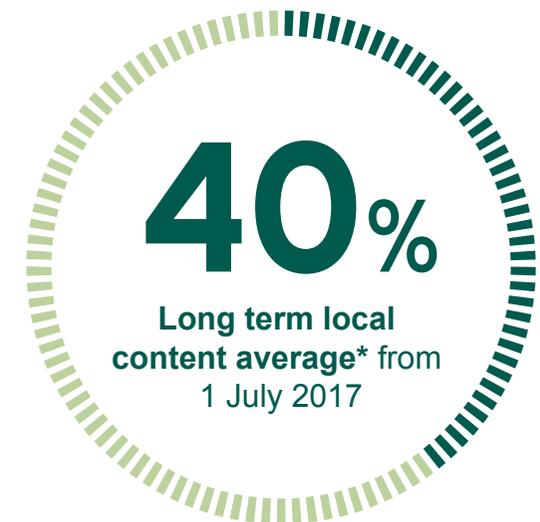
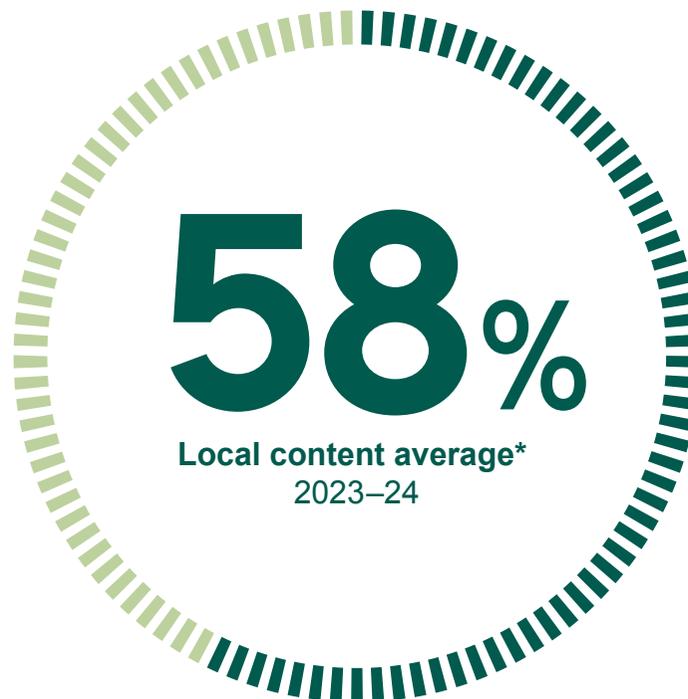
166

Unique local suppliers awarded contracts in the region since 1 July 2017

* % represents value of supply

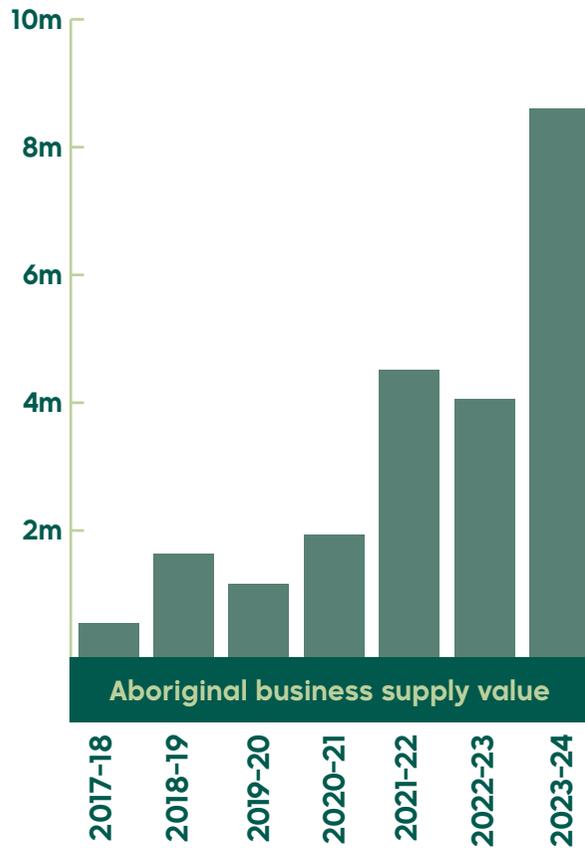
Great Southern local content

The Great Southern has increased its overall local content from 40% long term to 58% in 2023-24, with increases in contracts under \$50k and between \$1.5 and \$5 million.



*Average Local Content is the total local supply value over the total value of all contracts awarded in the region in the same period.

Great Southern Aboriginal business content



 **94%**

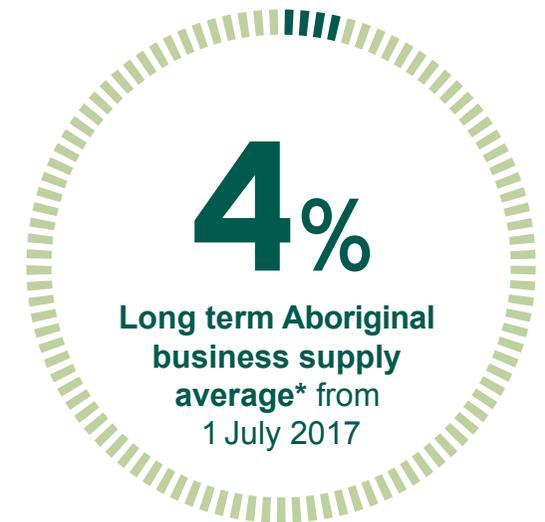
of Aboriginal business supply has been sourced from **Great Southern based Aboriginal businesses** since 1 July 2017

\$8.59m
Value of all Aboriginal Business supply 2023-24

 **20**
Number of **Aboriginal Business contracts** 2023-24

\$22.45m
Value of all Aboriginal Business supply since 1 July 2017

72
Number of **Aboriginal Business contracts** since 1 July 2017



*Average Aboriginal business supply is the value of all Aboriginal business supply over the total value of all contracts awarded in the region in the same period.

Kimberley

The Kimberley region spans 423,000 km² and is home to 39,934 people.

A significant Aboriginal population represents 160 communities with over 30 language groups.

Comprising 4 local government areas: Broome, Derby-West Kimberley, Halls Creek and Wyndham-East Kimberley, its 3 largest towns - Broome, Kununurra, and Derby, serve as vital hubs for goods and services and are critical to regional supply chains.

The Kimberley region is prioritising local capability and capacity building to meet the demands of infrastructure and other regional projects. This focus is vital due to vast distances and limited freight options and seasonal access, which necessitate place-based local procurement and logistics solutions.

Emerging industries

The Kimberley region is developing sophisticated value chains, such as an innovative Broome based enterprise commercialising the use of pearl shell (nacre) in the manufacturing of medical implants. Pastoral stations are diversifying into tourism, generating new income and supporting Traditional Owner led enterprises.

Carbon abatement, land management, the arts and culture, and social services sectors are growing, as is civil and construction. Local SMEs and Aboriginal businesses are poised for future clean energy and carbon projects.

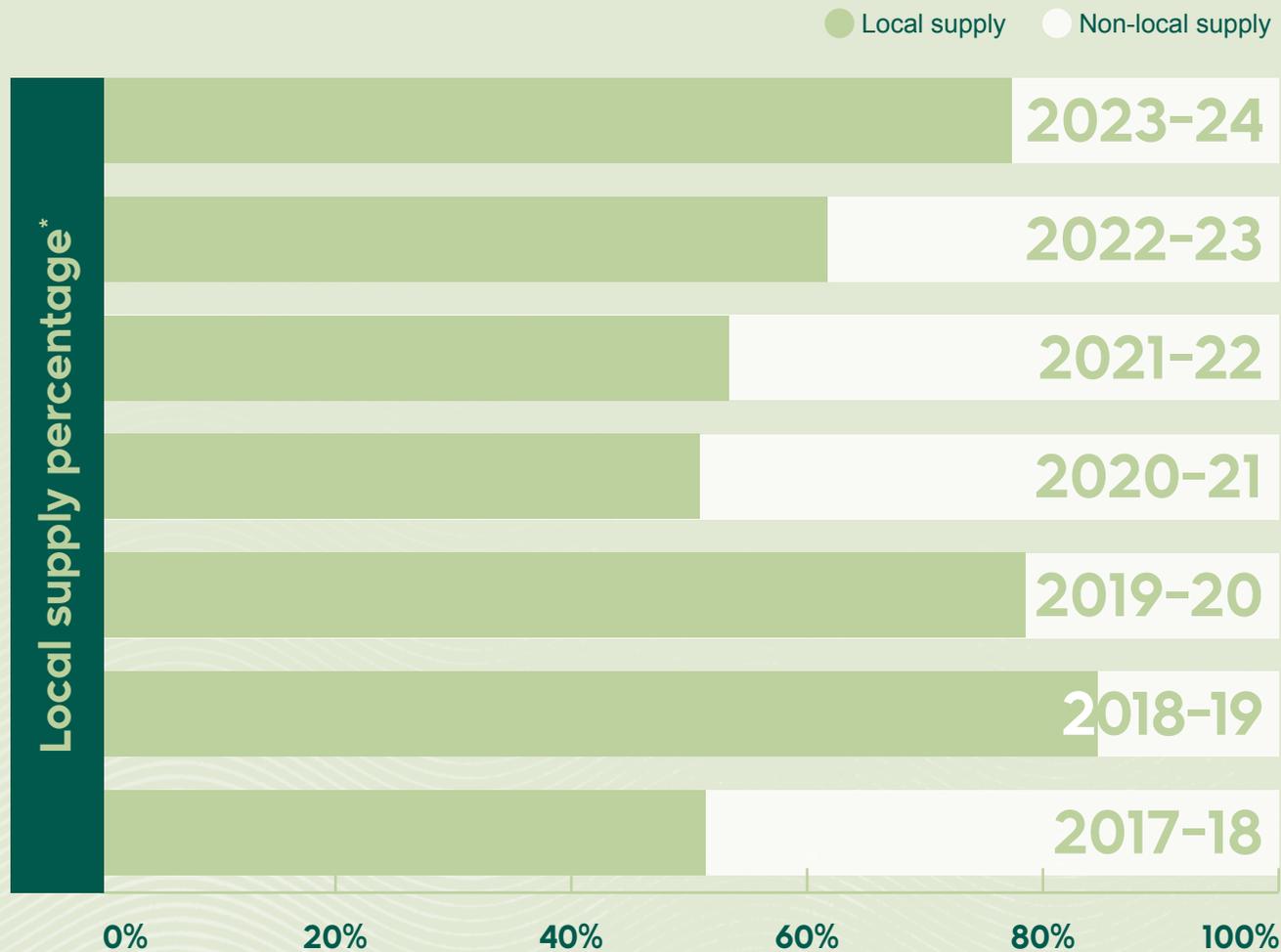
Competitive advantages

- Kimberley businesses bring strong local networks and knowledge of suppliers, local conditions, and cultural considerations to project delivery.
- Proximity to project sites enables faster response times, fewer delays, and continuity through changing conditions.
- Access to trusted suppliers and a locally engaged workforce streamlines delivery and improves service quality.
- A strong local workforce and supply chain reduces transport costs, dependence on FIFO operations, environmental impacts, and project disruptions.

Kimberley

WA

Kimberley local supply snapshot



\$60,067,756

Highest local contract awarded in the region since 1 July 2017

↑ 9%

In 2023-24 local content on contracts in the region valued between \$1.5 and \$5 million increased to 81%, being 9% over the long term average annual of 72% and worth more than \$44 million in local supply

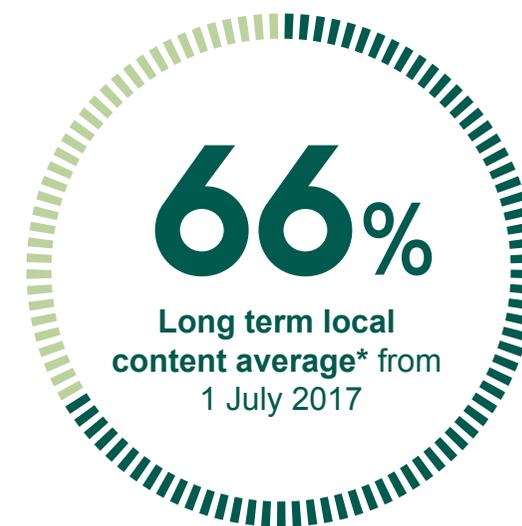
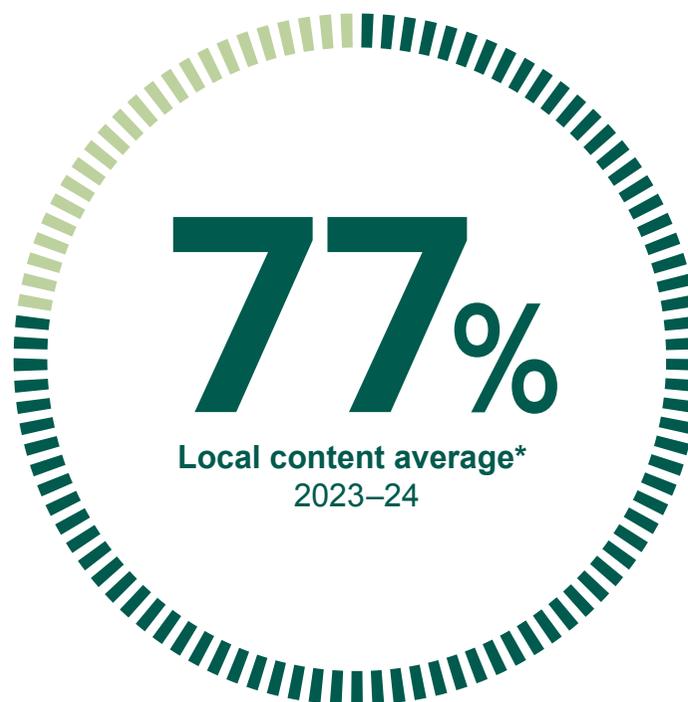
📍 356

Unique local suppliers awarded contracts in the region since 1 July 2017

* % represents value of supply

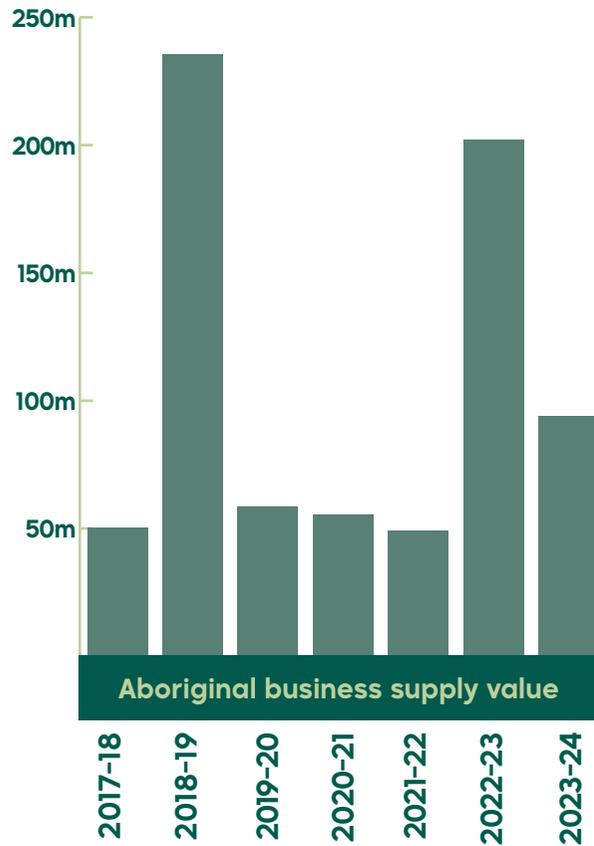
Kimberley local content

In 2023-24 local content on contracts in the region valued between \$10 and \$25 million increased to 84%, being 24% over the long term average annual of 60% and worth more than \$60 million in local supply.



*Average Local Content is the total local supply value over the total value of all contracts awarded in the region in the same period.

Kimberley Aboriginal business content



 **88%**

of Aboriginal business supply has been sourced from **Kimberley based Aboriginal businesses** since 1 July 2017

\$93.80m

Value of all Aboriginal Business supply 2023-24

 **65**

Number of Aboriginal Business contracts 2023-24

\$746.14m

Value of all Aboriginal Business supply since 1 July 2017

528

Number of Aboriginal Business contracts since 1 July 2017

41%

Aboriginal business supply average* 2023-24

43%

Long term Aboriginal business supply average* from 1 July 2017

*Average Aboriginal business supply is the value of all Aboriginal business supply over the total value of all contracts awarded in the region in the same period.

Mid West

The Mid West is home to just over 58,000 people and covers 16 local government areas.

The Mid West is within 250 km of Perth and stretches along coastline from Green Head to Kalbarri and extending into the pastoral Southern Rangelands and fertile broadacre agricultural zones.

The region's capital Geraldton is WA's largest city north of Perth and is home to over 73% of the region's residents.

Once driven by agriculture and fishing, the economy now thrives on mining, boosted by external investment over 2 decades.

Construction, manufacturing, logistics, and tourism also play key roles, while renewable energy, rare earth, and critical mineral projects continue to diversify economic opportunities.

Emerging industries

Mid West's emerging industries are growing to meet government demand. Leading this shift are world-class renewable energy projects, drawing global investment in clean energy, radio astronomy and technology, with internationally significant projects underway.

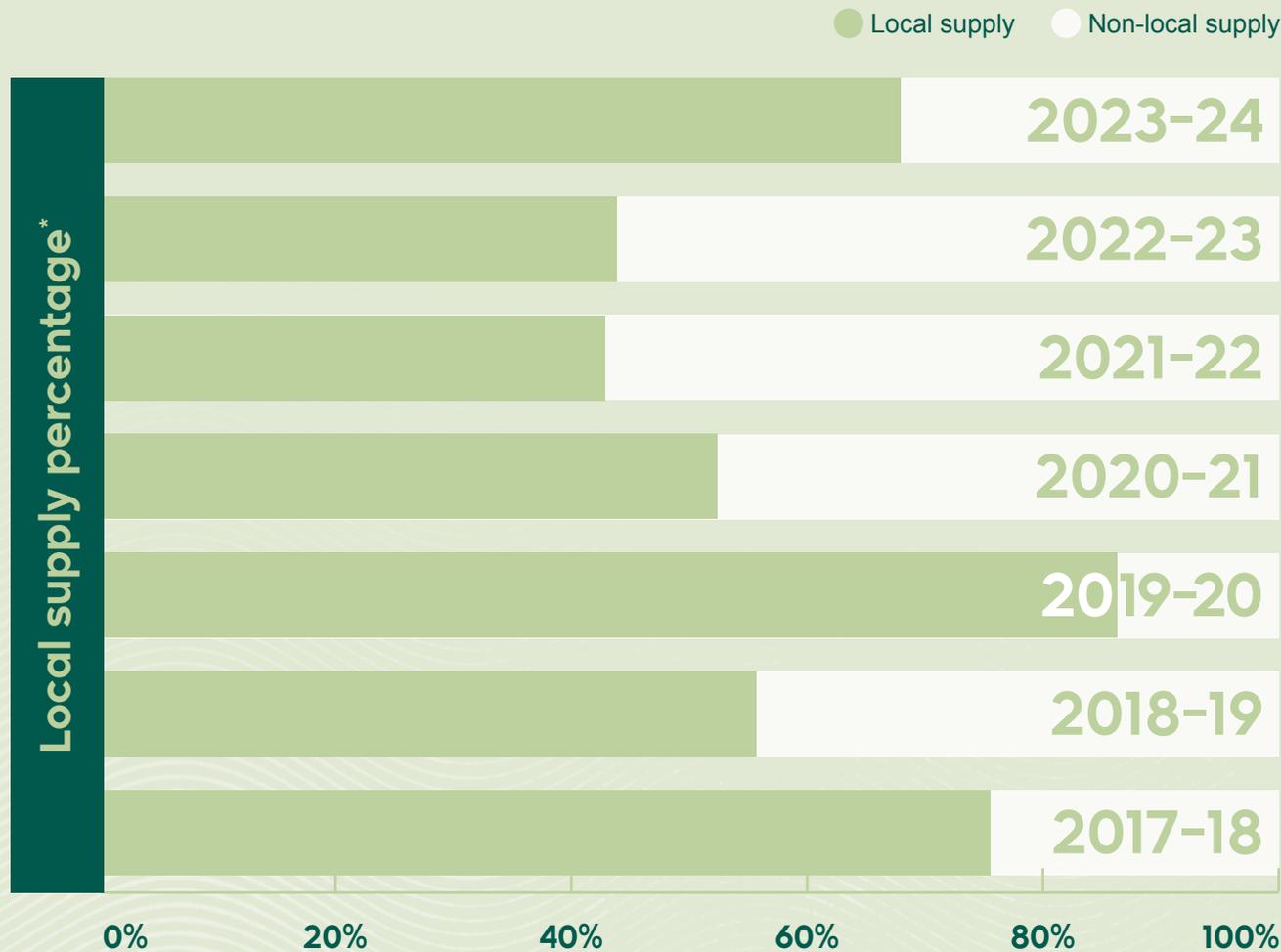
Advanced manufacturing is expanding, including modular housing solutions to meet remote accommodation needs. Additionally, the area's unique natural assets, such as Kalbarri and the Abrolhos Islands, are driving interest from global tourism markets, further diversifying the regional economy, positioning the Mid West as a hub for innovation and development.

Competitive advantages

- Skilled tradespeople and specialised contractors offer tailored solutions for diverse industry needs.
- Local SMEs benefit from strong community ties, fostering trust and long-term business relationships.
- Agility and innovation within SMEs enable quick adaptation to market changes and new opportunities.
- Advanced manufacturing fabrication sector and collaborative businesses drive regional economic growth.



Mid West local supply snapshot



\$60,128,516

Highest local contract awarded in the region since 1 July 2017

✓ **65%**

In 2023-24 Mid West businesses were awarded 65% of contracts in the region with 83 of 127 contracts going to local suppliers

📍 **172**

Unique local suppliers awarded contracts in the region since 1 July 2017

* % represents value of supply

Mid West local content

In 2023-24 suppliers in the Mid West were awarded 92% of the value of contracts between \$500k and \$1.5 million, being 23% higher than the annual average and worth more than \$7 million in local supply.

\$82.15m

Value of all contracts
2023-24

\$55.82m

Value of local contracts
2023-24

83

Number of local
contracts 2023-24

\$670.30m

Value of all contracts
since 1 July 2017

\$481.60m

Value of local contracts
since 1 July 2017

422

Number of local
contracts since
1 July 2017

68%

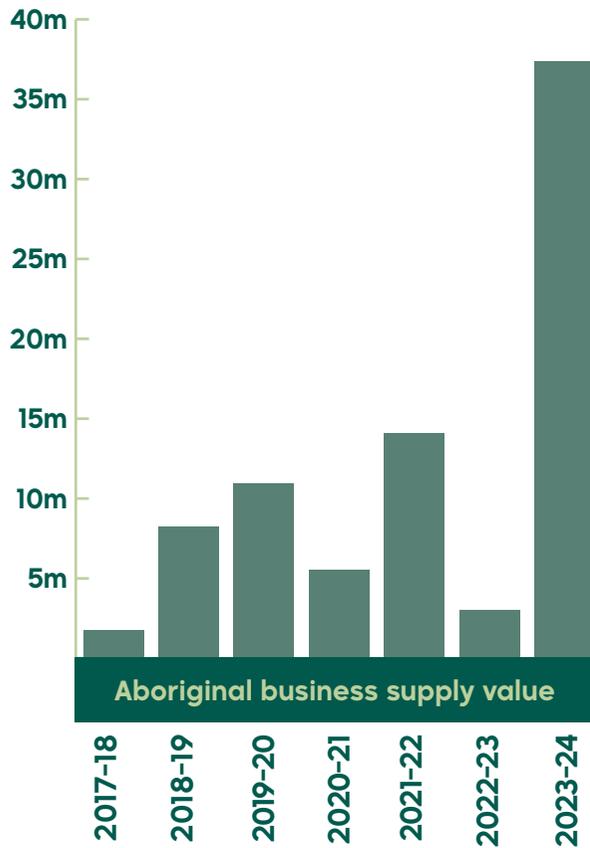
Local content average*
in 2023-24

72%

Long term local
content average* from
1 July 2017

*Average Local Content is the total local supply value over the total value of all contracts awarded in the region in the same period.

Mid West Aboriginal business content



 **92%**

of Aboriginal business supply has been sourced from **Mid West based Aboriginal businesses** since 1 July 2017

\$37.39m

Value of all Aboriginal Business supply 2023-24

 **29**

Number of **Aboriginal Business contracts** 2023-24

\$81.46m

Value of all Aboriginal Business supply since 1 July 2017

124

Number of **Aboriginal Business contracts** since 1 July 2017

45%

Aboriginal business supply average* 2023-24

12%

Long term Aboriginal business supply average* from 1 July 2017

*Average Aboriginal business supply is the value of all Aboriginal business supply over the total value of all contracts awarded in the region in the same period.

Peel

The Peel is a progressive, prosperous and dynamic region home to 146,486 people.

Its proximity to Perth and the South West presents opportunities to deliver on the state's urban and peri-urban growth and economic development plans. The region has a population-driven economy across 5 local government areas. The Peel's varied landscape comprises urban, agricultural and horticultural land, a forested escarpment and 50 km of coastline.

The Peel will play a key role in the growth of the Perth metropolitan region, presenting opportunities for expanding and deepening business and commerce and creating new markets.

Emerging industries

The Peel region's minerals sector produces alumina, gold, copper and mineral sands. The region's manufacturing and engineering industries, including emerging electric vehicle manufacturing, are expanding.

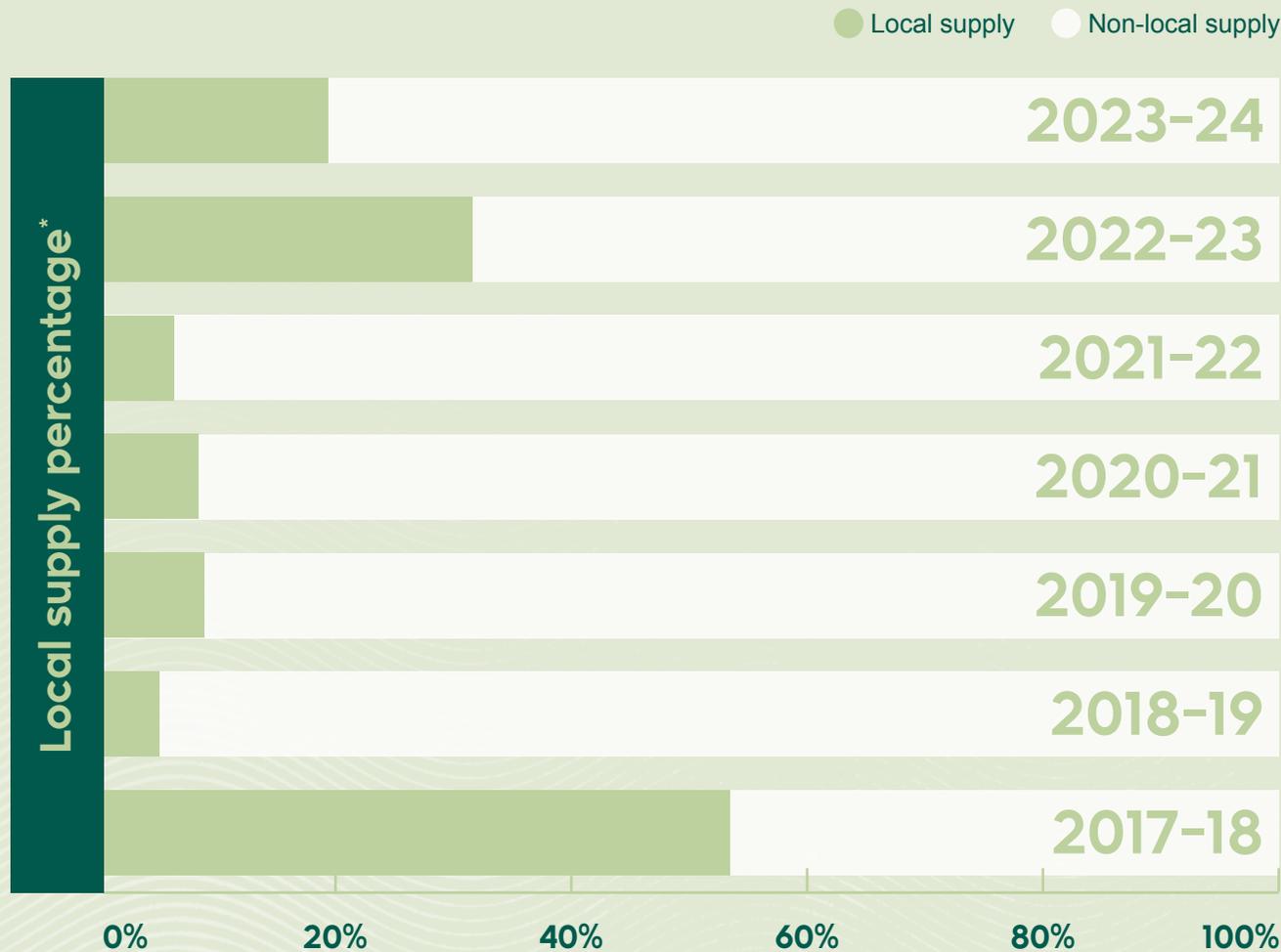
The region specialises in hospitality and culinary training and the region's Food Innovation Precinct Western Australia allows for research and development into intensive food production and innovation. An early success indicator for the precinct is the investment of more than \$70m by the international bakery group.

Competitive advantages

- Peel suppliers are adjacent to Perth and the South West region, enabling opportunity for expansion across the tourism, residential, commercial and industrial sectors.
- The Peel region has well-developed transport systems and access to available commercial/industrial land.
- Local suppliers have an existing innovative manufacturing industry.
- Local suppliers have access to a diverse range of renewable energy opportunities close to customers and existing infrastructure.



Peel local supply snapshot



\$31,520,000

Highest local contract awarded in the region since 1 July 2017

100%

The only contract in the Peel region valued between \$25 and 50 million awarded in 2023-24 was won by a local supplier

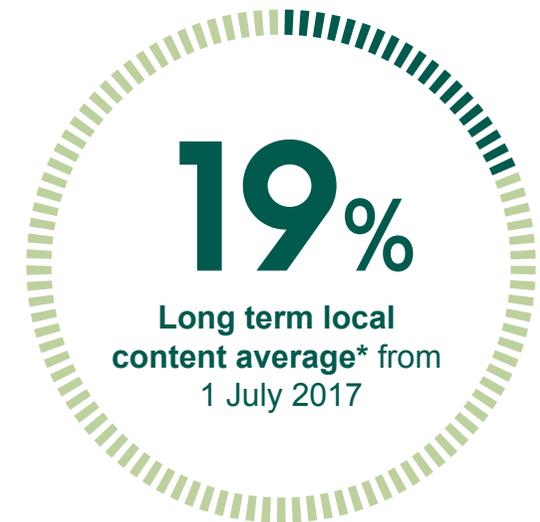
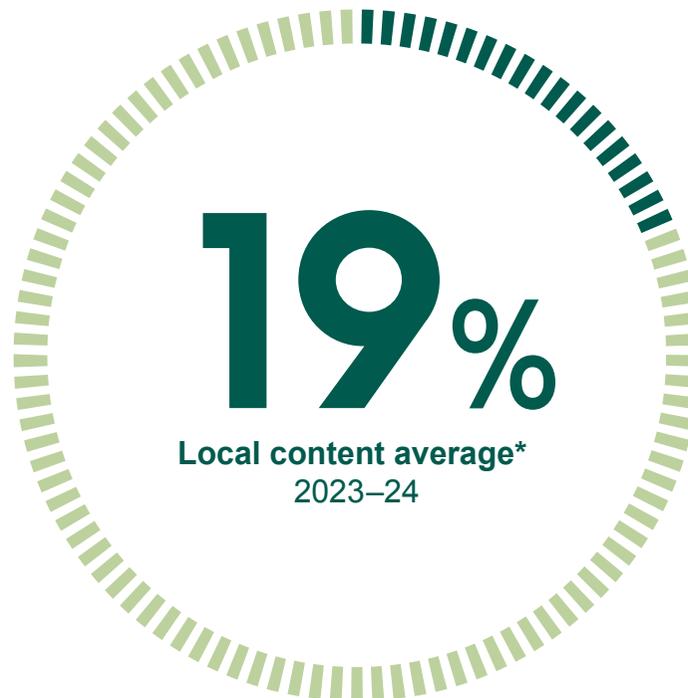
40

Unique local suppliers awarded contracts in the region since 1 July 2017

* % represents value of supply

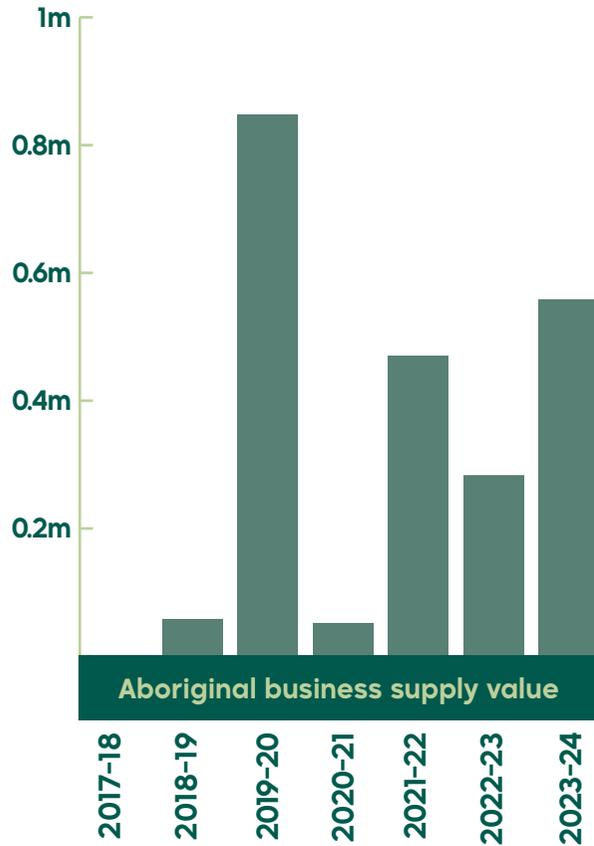
Peel local content

In 2023-24 Peel suppliers increased their share of contracts valued between \$500-1.5 million to 39% over the long term average of 20%, worth over \$2.2 million in local supply.



*Average Local Content is the total local supply value over the total value of all contracts awarded in the region in the same period.

Peel Aboriginal business content



 **39%**

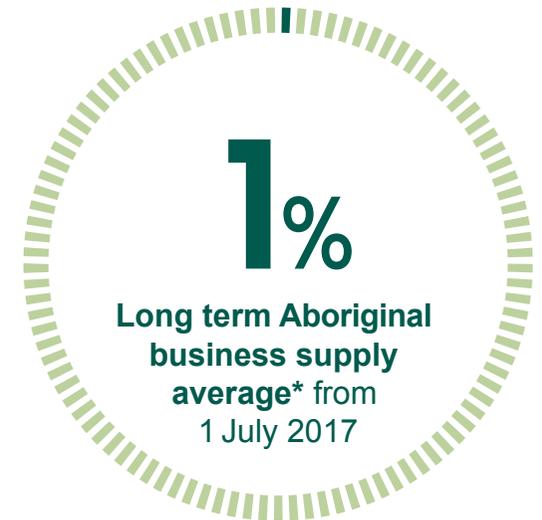
of Aboriginal business supply has been sourced from **Peel based Aboriginal businesses** since 1 July 2017

\$0.56m
Value of all Aboriginal Business supply 2023-24

 **3**
Number of **Aboriginal Business contracts** 2023-24

\$2.27m
Value of all Aboriginal Business supply since 1 July 2017

16
Number of **Aboriginal Business contracts** since 1 July 2017



*Average Aboriginal business supply is the value of all Aboriginal business supply over the total value of all contracts awarded in the region in the same period.

Pilbara

The Pilbara is a vast region spanning 507,896 km² and is home to 59,770 people.

The Pilbara has 4 local government areas. Aboriginal people represent 19% of the population and have lived in the region for over 50,000 years and there are 31 Aboriginal language groups.

The region's major towns Karratha, Port Hedland, and Onslow, export a third of Australia's goods. Inland towns like Newman, Tom Price, and Paraburdoo are central to iron ore mining, supported by regional businesses servicing the extractive resource industry.

Emerging industries

The Pilbara is becoming a significant green energy producer, with projects in planning and underway. The WA government is focusing on developing strategic industrial estates in Onslow, Port Hedland and Karratha to support local manufacturing and value-adding for green steel, hydrogen, and mineral processing.

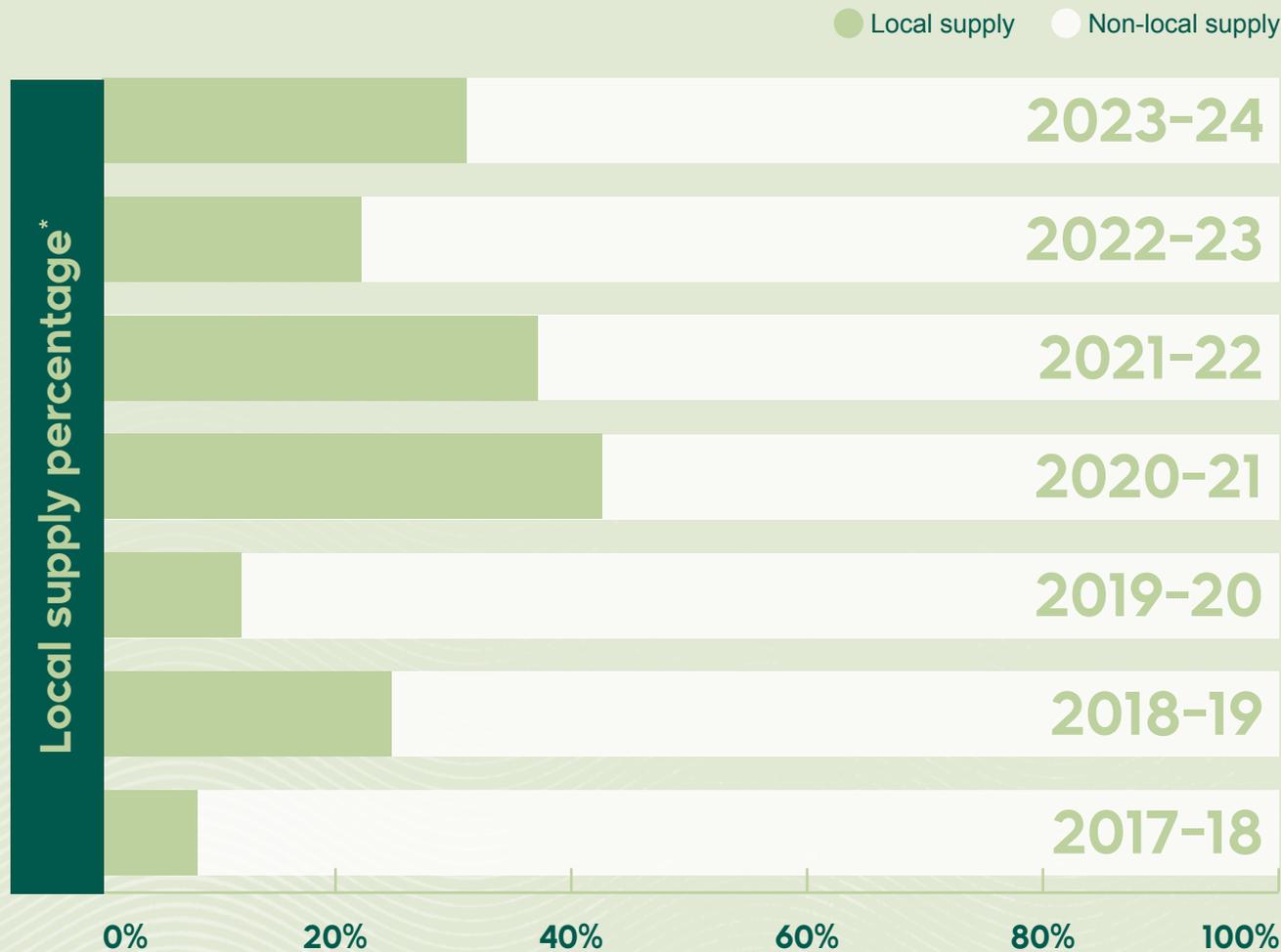
Advancement in logistics and transport remain a priority in the region; completion of the Manuwarra (Red Dog) Highway and enhancements to sea freight facilities in Port Hedland are developments underpinning prosperity and economic diversification.

Competitive advantages

- Local suppliers understand the Pilbara's unique costs, environment, isolation and scale.
- Established Aboriginal businesses have direct connections to Traditional Owners.
- Local suppliers offer strong technical skills to support regional manufacturing.
- Suppliers demonstrate agility and adapt well to local conditions.



Pilbara local supply snapshot



\$41,970,188

Highest local contract awarded in the region since 1 July 2017

✓ 100%

A local Pilbara business was awarded the only supply contract between \$25 and \$50 million in 2023-24

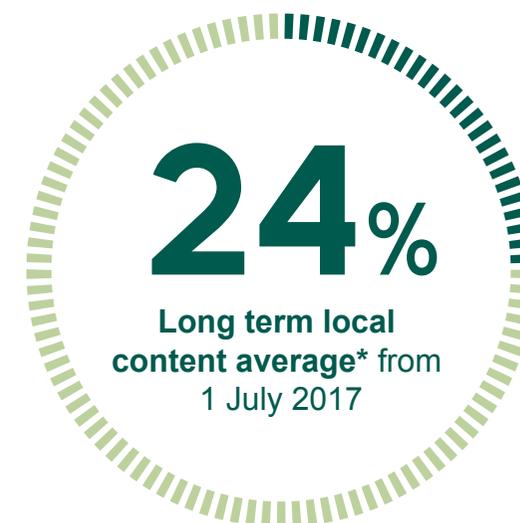
📍 207

Unique local suppliers awarded contracts in the region since 1 July 2017

* % represents value of supply

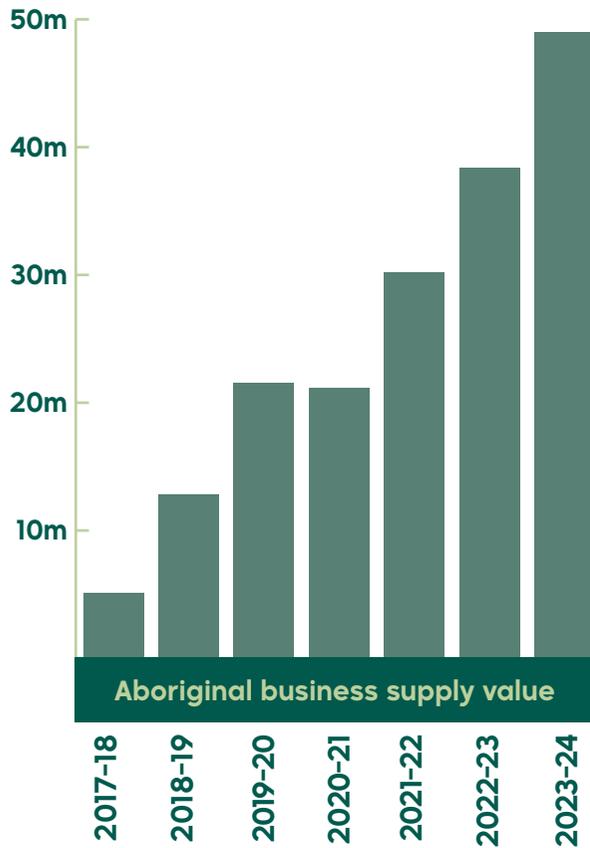
Pilbara local content

The Pilbara has seen an increase over long term local content in 2023-24, up 6% above the annual average of 24%.



*Average Local Content is the total local supply value over the total value of all contracts awarded in the region in the same period.

Pilbara Aboriginal business content



 **86%**

of Aboriginal business supply has been sourced from **Pilbara based Aboriginal businesses** since 1 July 2017

\$50.69m

Value of all Aboriginal Business supply 2023-24

 **57**

Number of **Aboriginal Business contracts** 2023-24

\$179.87m

Value of all Aboriginal Business supply since 1 July 2017

271

Number of **Aboriginal Business contracts** since 1 July 2017

21%

Aboriginal business supply average* 2023-24

12%

Long term Aboriginal business supply average* from 1 July 2017

*Average Aboriginal business supply is the value of all Aboriginal business supply over the total value of all contracts awarded in the region in the same period.

Southwest

The South West is 24,000km² and includes 16,000km² of state forest areas and is home to 201,659 people.

As Western Australia's most populous region outside of Perth and the Peel region, the South West features the City of Bunbury as its economic hub, the tourism areas centred by Busselton, the famed Margaret River wine region, and the Warren Blackwood horticultural areas.

Supply chain linkages are robust, facilitated by Bunbury Port for trade, and extensive road and rail networks. The Busselton Margaret River Airport further reinforces these links, offering direct flights to Sydney and Melbourne and servicing the FIFO mining sector.

Emerging industries

The South West regional economy is rapidly diversifying and leveraging its manufacturing sector. Emerging industries include advanced manufacturing, critical minerals processing, and renewable energy. This growth is fuelled by global demand for electric vehicles and energy storage, capitalizing on the region's abundant lithium and other critical minerals.

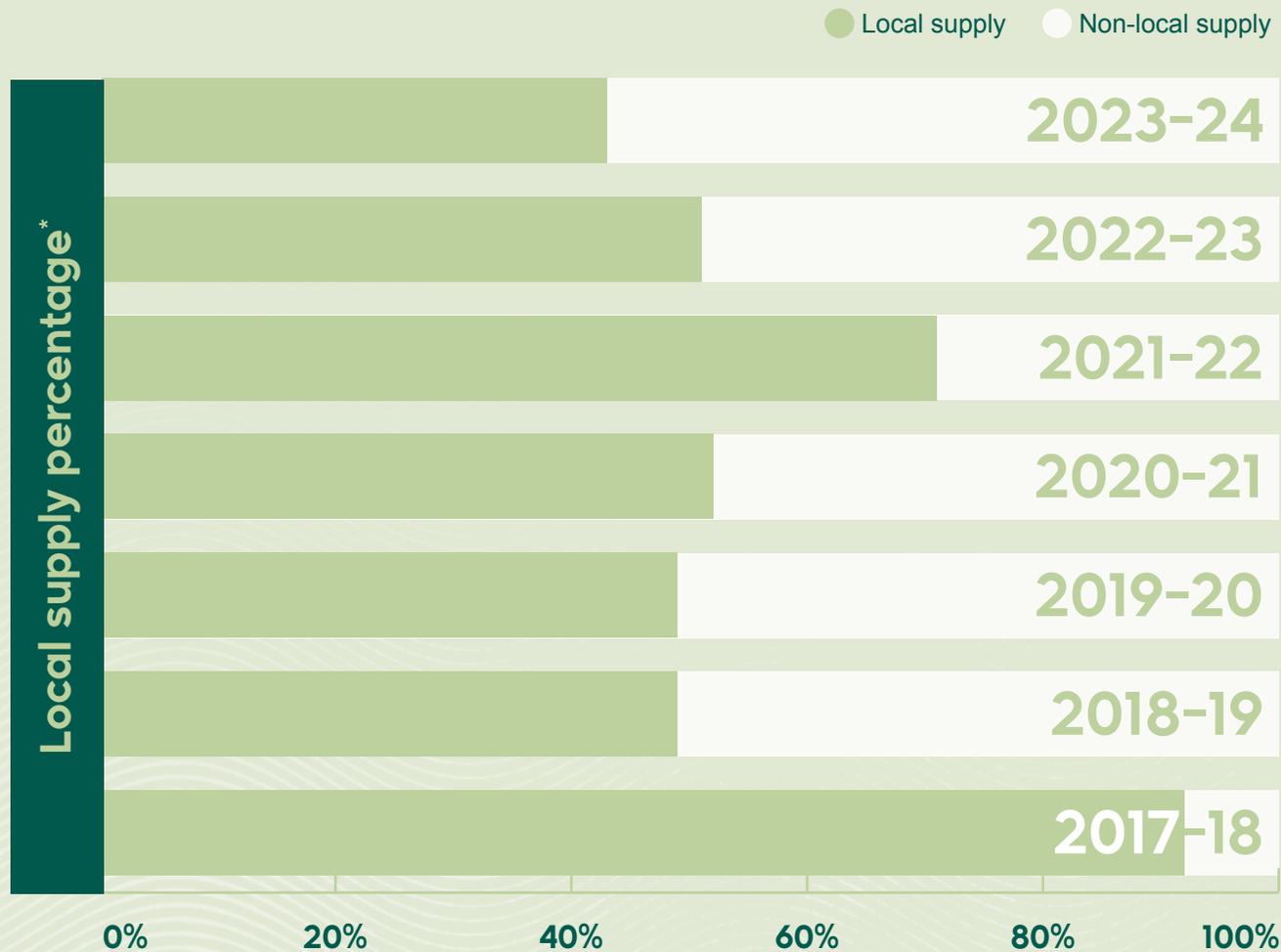
Collie's economic transition from coal fired energy further bolsters these opportunities. Significant government-backed infrastructure projects are also driving strong growth in the construction sector.

Competitive advantages

- The South West has a diverse range of capable contractors and suppliers to support industry sectors.
- Local suppliers are adjacent to unique resources enabling optimisation of sustainable supply chains.
- Local suppliers are committed to local workforce and training support, enhancing skill levels within the region.
- Sophistication of processes through innovation and technological advancements.



Southwest local supply snapshot



\$37,531,500

Highest local contract awarded in the region since 1 July 2017

59%

South West suppliers were awarded 59% of the value of contracts in the region valued between \$50 and \$250k, worth over \$12 million in local supply

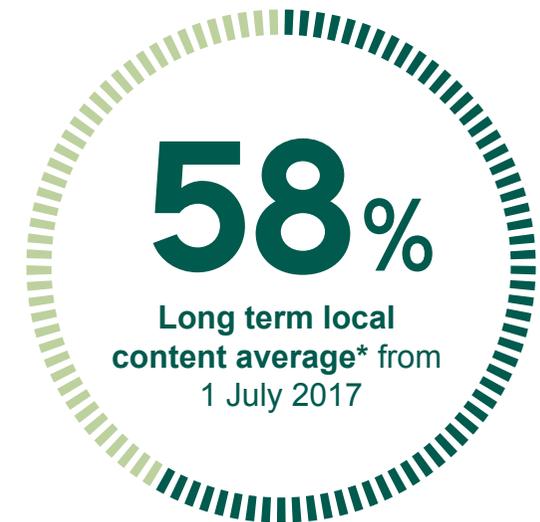
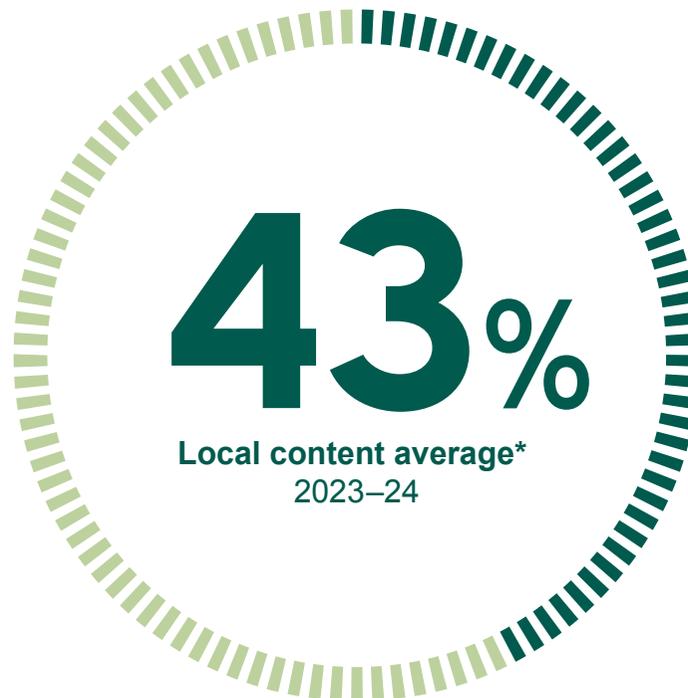
372

Unique local suppliers awarded contracts in the region since 1 July 2017

* % represents value of supply

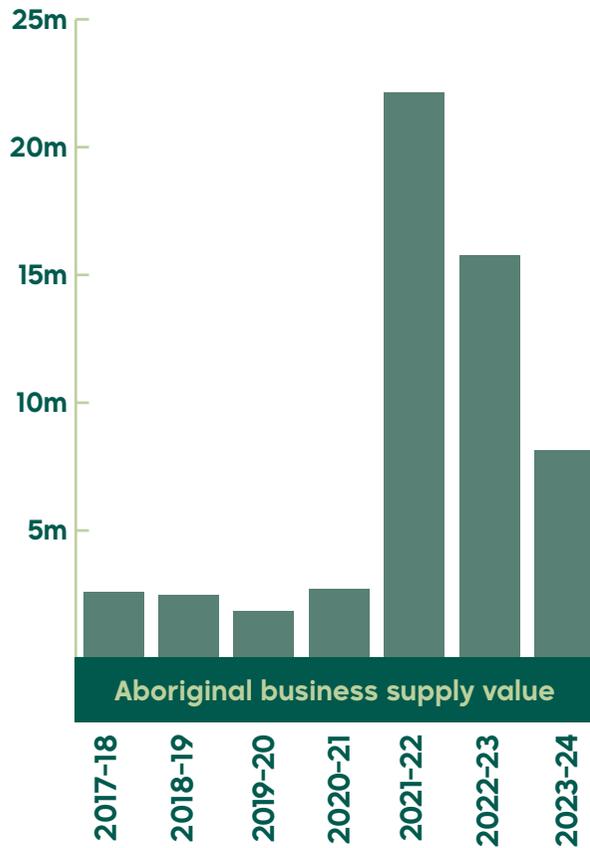
Southwest local content

South West suppliers were awarded 100% of the contracts in the region valued between \$10 and 25 million in 2023-24.



*Average Local Content is the total local supply value over the total value of all contracts awarded in the region in the same period.

Southwest Aboriginal business content



 **67%**

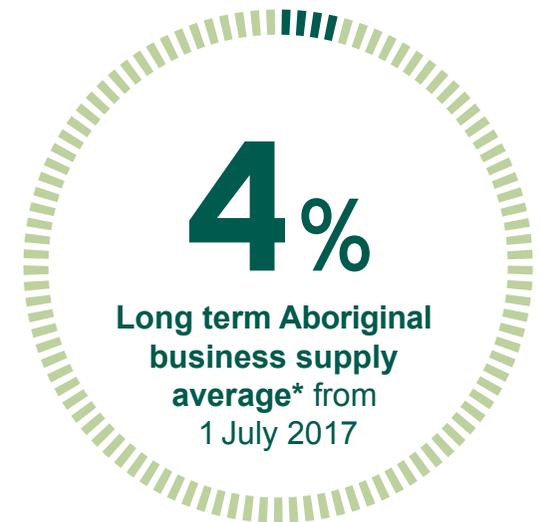
of Aboriginal business supply has been sourced from **Southwest based Aboriginal businesses** since 1 July 2017

\$8.12m
Value of all Aboriginal Business supply 2023-24

 **27**
Number of Aboriginal Business contracts 2023-24

\$55.61m
Value of all Aboriginal Business supply since 1 July 2017

92
Number of Aboriginal Business contracts since 1 July 2017



*Average Aboriginal business supply is the value of all Aboriginal business supply over the total value of all contracts awarded in the region in the same period.

Wheatbelt

The Wheatbelt is home to more than 78,517 people and is the third most populous region in Western Australia.

With 5 sub regions and diverse landscapes and natural resources and industry, the Wheatbelt's major towns of Northam, Moora, Merredin, Jurien Bay and Narrogin are service hubs. Our region's economy is driven by agriculture and mining exports, is growing thanks to its proximity to Perth and key transport routes connecting to other regional centres and ports.

The Wheatbelt's Avon and Central Coast are seeing growth in population and industries like intensive farming, manufacturing, and professional services.

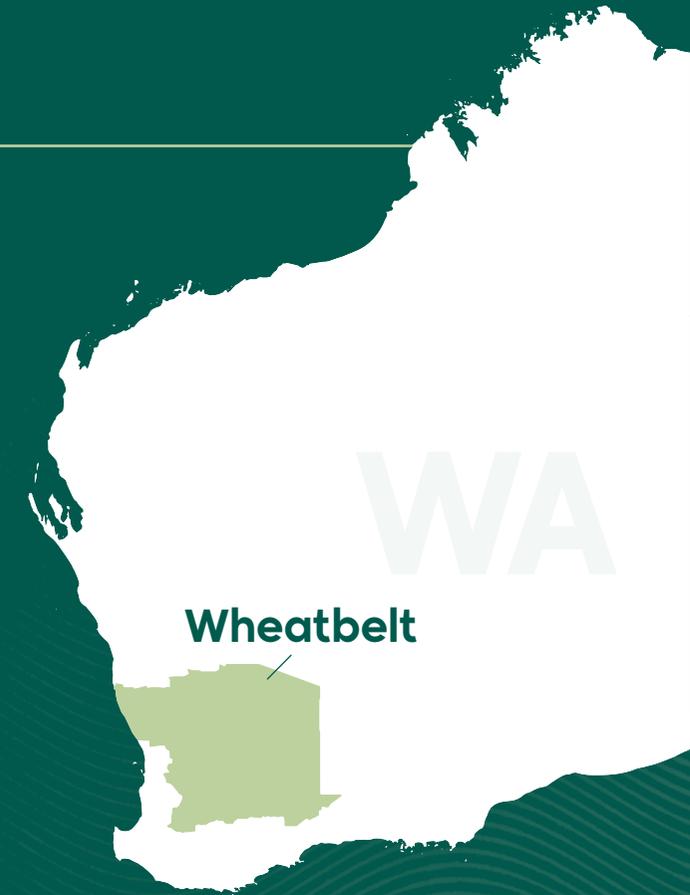
Emerging industries

Our region's modular housing construction and strong civil works sector (supporting agriculture, road maintenance, construction, and renewable energy) are well-placed for supplying to upcoming projects.

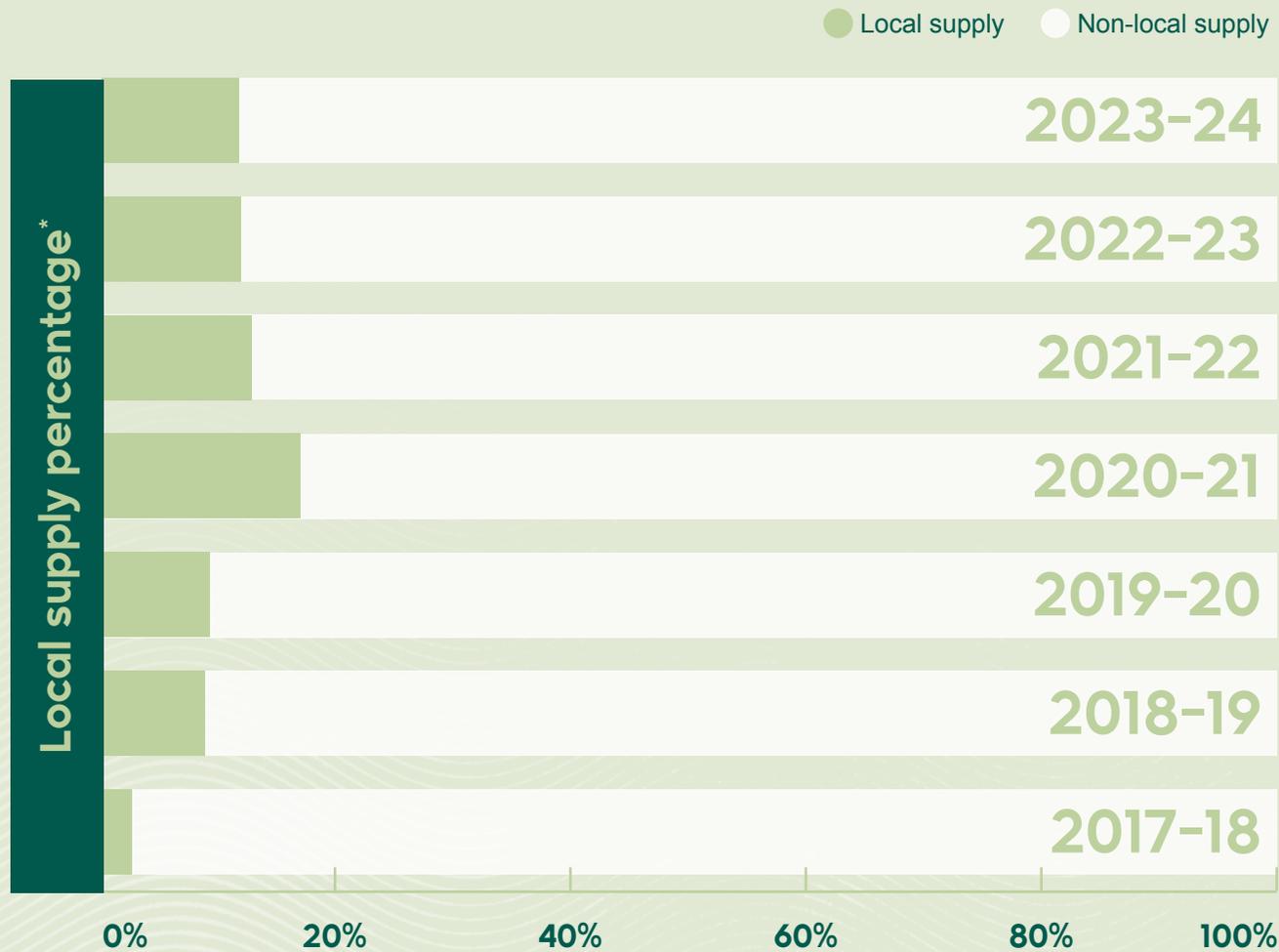
The manufacturing sector is maturing and the renewable energy transition presents significant economic diversification and employment opportunities; with over 35 projects in planning or development offering strong regional supply opportunities.

Competitive advantages

- Our SME sector is adaptable and mobile, willing and skilled to service remote site locations, both inter and intra regionally.
- Our region's business owners are cooperative, well networked and strongly integrated into their local communities.
- Our regional business owners are resourceful, practical problem solvers, and resilient in the face of project challenges.
- Many Wheatbelt businesses are multi-functional, with diverse service offerings.



Wheatbelt local supply snapshot



\$7,204,067

Highest local contract awarded in the region since 1 July 2017

✓ 20%

Wheatbelt local suppliers were awarded 20% of contracts valued between \$1.5 and \$5 million in 2023-24, worth over \$5 million in local supply

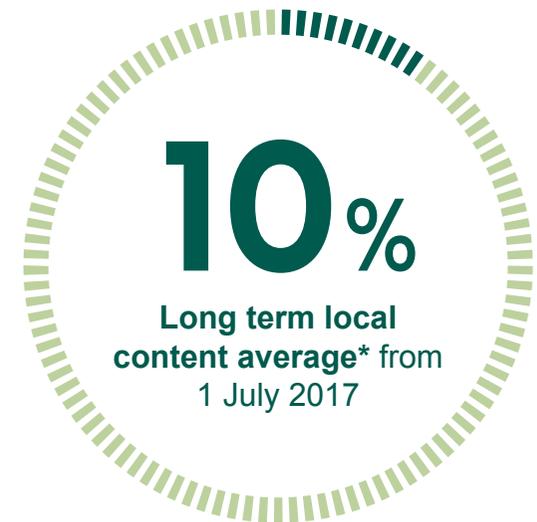
📍 191

Unique local suppliers awarded contracts in the region since 1 July 2017

* % represents value of supply

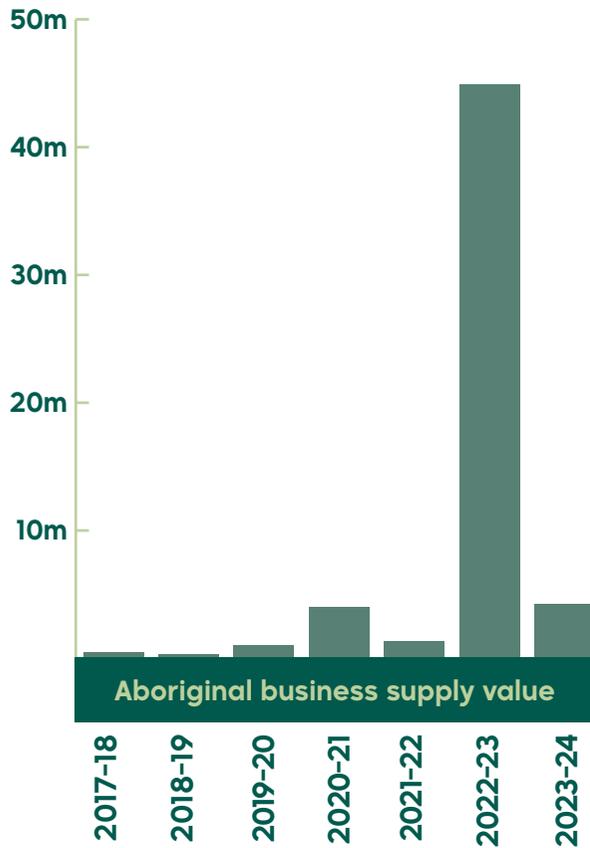
Wheatbelt local content

The Wheatbelt had a positive indicator on contracts worth under \$50k in 2023-24, with local suppliers awarded 73% of contracts, up from the long term annual average of 41%.



*Average Local Content is the total local supply value over the total value of all contracts awarded in the region in the same period.

Wheatbelt Aboriginal business content



 **6%**

of Aboriginal business supply has been sourced from **Wheatbelt based Aboriginal businesses** since 1 July 2017

\$4.20m
Value of all Aboriginal Business supply 2023-24

 **19**
Number of Aboriginal Business contracts 2023-24

\$56.12m
Value of all Aboriginal Business supply since 1 July 2017

67
Number of Aboriginal Business contracts since 1 July 2017

5%

Aboriginal business supply average* 2023-24

7%

Long term Aboriginal business supply average* from 1 July 2017

*Average Aboriginal business supply is the value of all Aboriginal business supply over the total value of all contracts awarded in the region in the same period.

References





Derby Highway
Kimberley WA
Mainroads WA

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1. Australian Small Business and Family Enterprise Ombudsman, Table 1: Small businesses in Western Australia, 30 June 2023, at <https://www.asbfeo.gov.au/small-business-data-portal/location-australias-small-businesses-state-and-territory/western#:~:text=There%20were%2047%2C632%20small%20businesses,were%20in%20Geraldton%20and%20surrounds>, accessed 2 May 2025.
2. Australian Bureau of Statistics, Census of Population and Housing 2016 and 2021, Employment status, Regional WA – Persons in the labour force (usual residence), 2021 and 2016.
3. Australian Small Business and Family Enterprise Ombudsman, Table 1: Small businesses in Western Australia, 30 June 2023, customised data, 2023.
4. Martin, Florin & Vasilciuc, Bogdan, *Reducing international competitive pressures through the ICT adoption in SMEs*, Revista economică, Vol. 58., 2011, pp. 35-39. Figure 3: Effects of SME development

Definitions





**Natural Bridge Torndirrup
National Park**
Albany WA
Courtesy of Steve Fraser

Definitions

Long term local content

Long term data in this report spans the period 1 July 2017 to 30 June 2024 and collects and compares the same datasets covering multiple Local Content variables on a financial year basis.

Multi-region contract

An awarded contract where the location of the delivery point of supply is within 2 or more Regional Development Commission (RDC) regions and/or the Perth metropolitan region but is not a statewide contract.

Single-region contract

An awarded contract where the location of the delivery point is limited to one of the RDC regions.

Statewide contract

An awarded contract where the location of the delivery point of supply is within all 9 RDC regions plus the Perth metropolitan region.

Important disclaimers

- Tenders WA is the primary source of contract award data for this report and is subject to agencies entering information in a timely and accurate manner
- Individual agencies are responsible for submitting Tenders WA data, and Department of Finance therefore does not guarantee the completeness and accuracy of that data
- Contract award data presented in this report may change if records in Tenders WA are added and/or amended
- Tenders WA data refers to awarded contract information and may not include any contract extension beyond term or subsequent variation information
- Strategic Forward Procurement Planning (SFPP) data is not definitive and is subject to change, as it relates to state agencies' anticipated procurements at the time of the SFPP submission.
- Local Content metrics presented in this report exclude contract award details from Government Trading Enterprises (GTEs)
- Local Content metrics presented in this report exclude any spending reported through *Western Australian Industry Participation Strategy* (WAIPS) plans or reports

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