Kimberley: a region in profile 2014
Foreword

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

The Kimberley region is a northern jewel. The region produces 90 per cent of the world’s pink diamonds and world-class beef, possesses a number of famous natural attractions, while the Ord-East Kimberley Expansion Project is unlocking fertile agricultural land.

The Royalties for Regions program is an important State Government initiative that will allocate more than $1 billion for regional projects in 2014-15, including more than $64 million in the Kimberley region. Since it began in 2008, Royalties for Regions has allocated $4.2 billion to more than 3,500 projects across regional Western Australia.

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

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

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

Hon Terry Redman MLA
Minister for Regional Development
Regional Development Commissions

The State’s nine Regional Development Commissions were established by the Western Australian Parliament following the ratification of the *Regional Development Commissions Act 1993*.

The role of each commission is to:
- maximise job creation and improve career opportunities in the region
- develop and broaden the regional economy
- identify infrastructure services to promote economic and social development of the region
- provide information and advice to promote business development within the region
- seek to ensure that the standard of, and access to, government services in the regions is comparable to the Perth metropolitan area.

For the purposes of achieving that role a commission is expected to:
- promote the region
- facilitate coordination between relevant statutory bodies and State government agencies
- cooperate with representatives of industry and commerce, employer and employee organisations, education and training institutions and other sections of the community within the region
- identify the opportunities for investment in the region and encourage that investment
- identify the infrastructure needs of the region and encourage the provision of that infrastructure in the region
- cooperate with departments of the public service of the State and the Commonwealth and other agencies, instrumentalities and statutory bodies of the State and the Commonwealth in order to promote equitable delivery of services within the region
- cooperate with local governments in order to promote equitable delivery of services within the region.
The Kimberley is a vast region with abundant resources, attractions and opportunities. The region is located in the north of the state and comprises four local government areas: the shires of Broome, Derby-West Kimberley, Halls Creek and Wyndham-East Kimberley. The region is famous for natural attractions such as the Buccaneer Archipelago, Cable Beach, Cape Leveque, Geikie Gorge National Park and Purnululu (Bungle Bungle) National Park. The traditional tourism season is from April to September during the cooler months and there is increasing visitor interest in the dynamic wet season.

The region has a diverse economy. Mining, agricultural production, construction, tourism and retail trade are major contributors to the region’s economic output. The Kimberley accounts for all of Western Australia’s diamond output and produces approximately 90 per cent of the world’s pink diamonds. Retail turnover continues to contribute strongly to the economy and tourism is expected to remain one of the region’s major growth industries.

The Kimberley is well positioned to capitalise on its proximity to the South East Asian market, providing potential opportunities for future growth and development. Some of the prospects include increasing trade links, developing irrigated agricultural land, maximising regional benefits from servicing the mining industry and developing adventure, nature and cultural based tourism.

Royalties for Regions has contributed to numerous projects to enhance the region’s economic, business and social development. In 2014–15, $12.5 million is allocated to the Seizing the Opportunity initiative Water for Food West Kimberley project, $8 million is available for the Broome Road industrial area and work will commence on the $33 million West Kimberley Transitional Housing project.

### Overview

Source: Department of Regional Development.

Note: Industry activity is an estimation of the gross value of production of key regional industries.
Population

In 2013 the estimated resident population of the Kimberley was nearly 39,900, accounting for approximately two per cent of Western Australia’s population. The most populous local government area is the Shire of Broome at approximately 17,200 residents or 43 per cent of the region. Broome is also the regional employment hub and a significant centre for servicing and growing the region’s many industries.

In the 10 years to June 2013, the population grew at an average rate of 1.9 per cent per year. The region has a large Aboriginal resident base and the 2011 ABS census reported 17,000 Aboriginal Australians live in the region.

In 2012, the Western Australian Planning Commission forecasted the population of the Kimberley would continue to steadily rise and reach 44,400 residents by 2023.

The forecast represents the best estimate of future population size based on fertility, mortality and migration trends.
Western Australia experienced a rise in employment levels over the last decade driven by population and industry growth, and international demand for raw material exports. The Kimberley recorded its highest level of employment at nearly 17,700 persons in 2012-13, continuing the upward trend of the previous five years. The unemployment rate fluctuated over the decade to 2012-13, recording a low of 5.1 per cent in 2006-07 and 2011-12. Labour market conditions moderated over the 12 months to 2012-13 with some softening of employment growth and an increase in regional and state unemployment rates.

The 2011 ABS census reported social health care and assistance, and education and training as the largest employers, each employing more than 12 per cent of the workforce. The growth in employment can also be attributed to increased mining and construction activity and a growing tourism industry.

Improving the capacity of local people to participate in mainstream employment is a priority for the region.

### Industry of Employment 2011-2006

<table>
<thead>
<tr>
<th>Industry</th>
<th>2011</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Care and Social Assistance</td>
<td>12.7%</td>
<td>15.0%</td>
</tr>
<tr>
<td>Education and Training</td>
<td>12.1%</td>
<td>8.9%</td>
</tr>
<tr>
<td>Public Administration and Safety</td>
<td>9.2%</td>
<td>13.5%</td>
</tr>
<tr>
<td>Construction</td>
<td>9.0%</td>
<td>6.8%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>7.7%</td>
<td>8.6%</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>7.5%</td>
<td>7.1%</td>
</tr>
<tr>
<td>Other Services</td>
<td>6.7%</td>
<td>5.3%</td>
</tr>
<tr>
<td>Mining</td>
<td>5.8%</td>
<td>4.3%</td>
</tr>
<tr>
<td>Transport, Postal and Warehousing</td>
<td>5.7%</td>
<td>5.1%</td>
</tr>
<tr>
<td>Agriculture, Forestry and Fishing</td>
<td>4.7%</td>
<td>5.2%</td>
</tr>
<tr>
<td>Administrative and Support Services</td>
<td>3.6%</td>
<td>3.4%</td>
</tr>
<tr>
<td>Inadequately described/Not stated</td>
<td>3.4%</td>
<td>5.2%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>2.5%</td>
<td>3.3%</td>
</tr>
<tr>
<td>Professional, Scientific and Technical Services</td>
<td>2.4%</td>
<td>2.1%</td>
</tr>
<tr>
<td>Rental, Hiring and Real Estate Services</td>
<td>1.4%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>1.3%</td>
<td>1.2%</td>
</tr>
<tr>
<td>Arts and Recreation Services</td>
<td>1.2%</td>
<td>1.0%</td>
</tr>
<tr>
<td>Electricity, Gas, Water and Waste Services</td>
<td>1.2%</td>
<td>1.0%</td>
</tr>
<tr>
<td>Information Media and Telecommunications</td>
<td>1.1%</td>
<td>1.1%</td>
</tr>
<tr>
<td>Financial and Insurance Services</td>
<td>0.7%</td>
<td>0.6%</td>
</tr>
</tbody>
</table>

Tourism

The Kimberley is internationally recognised for its unique and dramatic landscape, which includes spectacular gorges, waterfalls and cave systems and an astonishing variety of wildlife. Famous attractions include the World Heritage listed Purnululu National Park, Mitchell River and Geikie Gorge national parks, Cable Beach, Lake Argyle, Cape Leveque and the Buccaneer Archipelago.

According to Tourism Western Australia, the industry attracted an average of 292,600 overnight visitors annually between 2010 and 2012, of which 88 per cent were domestic tourists. In the same period, turnover was estimated at $327 million per annum.

Broome’s Cable Beach is arguably Western Australia’s most famous coastal paradise, known for its 22 kilometres of sun-kissed white sand, turquoise water, rich red soil and spectacular Indian Ocean sunsets. The Kimberley offers vastly diverse experiences such as exploring the rugged pioneering towns of Halls Creek and Wyndham, the magnificent setting of Kununurra and learning from Aboriginal people about their culture.
Retail turnover

The retail sector is a large employer and an important contributor to the Kimberley’s economy. The industry was valued at $258 million in 2001-02, steadily increasing 77 per cent to $455 million in 2011-12.

The Shire of Broome is the major centre of business activity, supported by sustained population growth. Chambers of commerce and industry operate across the region. Local businesses in Halls Creek, Wyndham and Kununurra were finalists for the 2012 Western Australian Regional Small Business Award.

Mean taxable income

The mean taxable income in the Kimberley region was more than $66,000 in 2010-11 representing an annual average growth rate of 6.2 per cent over 10 years. The increase is driven by growth in the labour force arising from greater employment levels, increased hourly rates and longer work hours.

Resources activity influenced wages in the mining industry, as well as construction and wholesale trade industries servicing the increased production. There is a substantial section of the population that relies on welfare transfer receipts.

<table>
<thead>
<tr>
<th></th>
<th>Median Weekly Personal Income 2011</th>
<th>Mean Taxable Income 2010-11</th>
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<tbody>
<tr>
<td>Broome (S)</td>
<td>$779</td>
<td>$67,852</td>
</tr>
<tr>
<td>Derby-West Kimberley (S)</td>
<td>$409</td>
<td>$60,064</td>
</tr>
<tr>
<td>Halls Creek (S)</td>
<td>$312</td>
<td>$59,034</td>
</tr>
<tr>
<td>Wyndham-East Kimberley (S)</td>
<td>$794</td>
<td>$68,086</td>
</tr>
<tr>
<td>Western Australian</td>
<td>$662</td>
<td>$73,591</td>
</tr>
</tbody>
</table>

Agriculture

The ABS reported agricultural production for the Kimberley at $230 million in 2011-12, representing three per cent of Western Australia’s total value. Livestock disposals (cattle and calves) accounted for 85 per cent of this total at $195 million. The growth over the decade to 2011-12 is largely attributed to expansion of the beef industry, which originated from overland movement of cattle from the eastern states of Australia in the 1880s. The industry is now one of the most established in the region. A dominant player on world markets, the steady rise in demand for safe and high-quality beef has served the sector well domestically and overseas, particularly the primary export market Indonesia. Cattle are exported through the Broome and Wyndham ports.

There is increasing interest in opportunities for horticulture in the West Kimberley, which already produces sweet corn, watermelons and fodder. The Water for Food West Kimberley project will see Royalties for Regions funding of $12.5 million targeted to water investigations and planning for improved land access to expand and develop new agriculture precincts. Areas targeted include Mowanjum, Knowsley and Fitzroy Valley.
Ord River Irrigation Area

The Ord-East Kimberley Expansion Project will generate employment opportunities and deliver sustainable economic growth in agriculture and cultural tourism. Crop production is dominated by the region’s largest irrigated agricultural project, the Ord River Irrigated Area (ORIA) located near Kununurra.

In 2011-12, the Department of Agriculture and Food Western Australia estimated the total value of production of the ORIA to be $117 million. The largest component was sandalwood accounting for 61 per cent at $72 million. Field crops ($15 million), horticulture ($29 million) and hybrid seeds ($1 million) accounted for the remainder. The region benefits from distinct competitive advantages due to the warm tropical climate, as summer crops such as mangoes and melons are produced during the winter (dry) counter-seasonal months.

The Royalties for Regions program invested $311 million to the expansion of ORIA in 2012. This unlocked great potential for new agricultural land developments in the Goomig and Knox Plains area of the Ord Valley. The State Government is continuing to explore the potential of other development areas.

The Kimberley will benefit from substantial private investment, Wyndham Port improvements and farm infrastructure developments, building a foundation for a long-term, sustainable agricultural industry in the north of the state. Additionally, a national partnership agreement between the State and Australian governments invested $195 million of Commonwealth funding in social and community infrastructure in Kununurra, Wyndham and surrounding communities. The success of the Ord-East Kimberley Expansion Project serves as a template for advancing other new agricultural precincts in Western Australia.
Fishing and aquaculture

The Kimberley’s fishing industry was valued at $7 million in 2011-12, following increased fish catch from the previous two years. Fisheries focus on high value tropical finfish; particularly barramundi, emperors, snapper and cod.

Recreational fishing is becoming increasingly popular with visitors to the region and residents.

Pearling is an iconic industry operating out of Broome with pearl farms along the Kimberley coast, particularly off Eighty Mile beach, Buccaneer Archipelago and the Lacepede Islands. The success of the Broome pearling industry is attributed to the collection of pearl oysters (*pinctada maxima*), large tidal movements and a pristine marine environment.

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

Fishing Catch Estimated Value

![Graph showing the estimated value of fishing catch from 2001-02 to 2011-12 for Kimberley. The graph displays data for different classes such as other classes, prawns, crabs, fish, and total. The values are represented in millions of dollars.](image-url)
<table>
<thead>
<tr>
<th></th>
<th>2008-9</th>
<th>2009-10</th>
<th>2010-11</th>
<th>2011-12</th>
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<tbody>
<tr>
<td>Finfish</td>
<td>3,097</td>
<td>3,199</td>
<td>5,333</td>
<td>7,105</td>
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<tr>
<td>Koi Carp</td>
<td>24</td>
<td>25</td>
<td>21</td>
<td>14</td>
</tr>
<tr>
<td>Ornamental Fish</td>
<td>21</td>
<td>23</td>
<td>11</td>
<td>6</td>
</tr>
<tr>
<td>Pearls (maxima)</td>
<td>67,500</td>
<td>64,232</td>
<td>74,330</td>
<td>69,797</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>70,641</strong></td>
<td><strong>67,478</strong></td>
<td><strong>79,695</strong></td>
<td><strong>76,921</strong></td>
</tr>
</tbody>
</table>

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

The value of the industry was $70 million in 2011-12, constituting 75 per cent of the state’s pearl value. Pearl oysters for seeding are obtained from wild stocks with major hatcheries operating at Broome and the King Sound. There are further opportunities to grow the aquaculture industry across the region.
Western Australia’s resources industry grew significantly over the past decade due to unprecedented overseas demand, which resulted in a mineral production and revenue increase from $27.9 billion in 2002-03 to $101.8 billion in 2012-13.

The Kimberley region has a long history of mining activity, commencing with the discovery of gold in Halls Creek in 1885.

The first construction of an iron ore mine began in 1944 on Cockatoo Island and in the
1980s diamond and zinc/lead deposits were discovered. The Argyle diamond mine in the Kimberley is the largest supplier by volume in the world and the only known source of pink diamonds. The region is also a significant producer of natural coloured diamonds including champagne, cognac, and rare blue diamonds.

In 2012-13, total resources production in the Kimberley was valued at $1.1 billion. Iron ore accounted for $535 million (48 per cent). Diamonds and crude oil make up 32 per cent of resources production, valued at $360 million in 2012-13. The remaining 20 per cent valued at $217 million, is comprised of nickel, copper, cobalt, gold, silver and construction materials.

There is significant global interest in developing both the offshore Browse Basin and predominately onshore Canning Basin gas reserves. Development of these projects could significantly impact the Kimberley economy.

A range of potential resource deposits are being explored across the region.
Building approvals

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

The total value of building approvals for the Kimberley was estimated at $368 million in 2012-13. There were nearly 700 residential buildings approved for construction, at a value of $288 million.

![Value of Building Approvals](image)

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

The building and construction industry supports major development projects and provides employment and training opportunities across the region.

The value of non-residential construction peaked at $243 million in 2010-11 as a result of strong mining investment. In 2012-13, the value was estimated at $79 million.
Project investment

For the last decade, Western Australia was the fastest growing economy in Australia fuelled by investment in the mining sector’s construction phase. Western Australia experienced a tighter investment market in 2013 due to rising production costs, lower commodity prices and a softer economic outlook. The value of mining production remains positive however, and production will continue to cater to domestic and international markets. It is important that the economy transitions to a broader investment profile for growth.

Project investment data is divided across three categories: under consideration, committed and under construction. Projects under consideration are those expected to proceed in the near future. Once the projects are approved they are committed and under construction where work has commenced.

Investment has grown significantly since 2006–07 with the increase of mining and gas projects off the Kimberley coast. A floating liquefied natural gas (LNG) platform in the Browse Basin is expected to begin drilling in 2017 and provide flow-on economic opportunities. Additional major projects include the underground expansion of Argyle diamond mine ($1.7 billion) and stage two development of the Ord River Irrigation Scheme ($517.5 million).

![Project Investment Diagram](image_url)

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

At the 2011 ABS census, the Kimberley had an Aboriginal population of 17,022 people, 46 per cent of the region’s population. The importance of the Aboriginal population is reflected in the strong impetus to progress appropriate economic and social developments that embrace and reflect the region’s multicultural society. There are approximately 160 Aboriginal communities with more than 30 traditional Aboriginal languages spoken across the region.

Aboriginal arts, eco and cultural tourism and the pastoral industry incorporate the strongest Aboriginal involvement and offer potential for further expansion.

A number of programs administered through State and Commonwealth governments, and increasingly through industry, target and promote Aboriginal economic participation and employment. The Ord-East Kimberley Expansion Project developed a range of Aboriginal employment and training opportunities through a partnership between the State and Commonwealth governments, major contractors and the Miriuwung Gajerrong traditional owners. Argyle Diamond Mine operator Rio Tinto established benchmark employment policies aimed at reaching a workforce comprising 80 per cent local with 40 per cent Aboriginal employment. In addition, a range of innovative mechanisms to support Aboriginal training and employment are anticipated to provide socio-economic benefits beyond the life of the project.

Through Native Title settlements across the region, Aboriginal people have the opportunity to leverage and guide project development. This will enable increased Aboriginal involvement in regional planning and contribute towards enhanced cultural considerations for current and future projects. Sustained social and economic benefits for Aboriginal people can be achieved through partnerships with public and private investors for the benefit of the entire Kimberley community.
Public investment in social and economic infrastructure attracts, retains and builds human capital and enables private sector investment.

Extensive distances between the six major population centres, coupled with large numbers of small, isolated Aboriginal communities and the remoteness of local industries in relation to major domestic markets, presents the Kimberley with unique challenges in providing appropriate infrastructure.

The vast region is serviced by a network of sealed and unsealed roads, which are complemented by shipping and air services. Regional ports are located at Broome, Derby and Wyndham and provide key transport infrastructure for developing the regional economy. Cattle and resource-based materials are key exports.

The electricity supply for Kununurra, Wyndham and the Argyle Diamond Mine is generated from the hydro-electricity plant at Lake Argyle and there are liquefied natural gas power plants in Broome, Derby, Fitzroy Crossing and Halls Creek. The region is well placed to take advantage of alternative energy production techniques in the future.

Regional towns are linked to the broadband network providing businesses and the wider community with access to internet services. Satellite broadband has extended range and access across the region. Communications infrastructure is complemented by Community Resource Centres, which provide access to technology and information for community members in regional townships and remote Aboriginal communities.

Air services have increased over the past 10 years with direct jet passenger flights linking the region to Perth and other capital cities. Charter companies provide intra-regional air services between airstrips in regional communities and small towns. Additionally, air support infrastructure is provided for the offshore oil and gas industry.

Government and non-government schools provide primary and secondary education. Kimberley School of the Air services, based in Derby, supports students in remote locations where mainstream facilities are not available. A number of Aboriginal communities have established their own independent community schools. Kimberley Training Institute has campuses across the region, offering a range of courses. The University of Notre Dame operates a campus in Broome and other Australian universities also provide a broad range of programs, delivered through combinations of online and interactive options.

A range of integrated facilities deliver health services across the region with town hospitals complemented by community clinics in remote locations.
Living in the Kimberley

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

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

Specifically:
- the Kimberley is characterised by the quality of lifestyle and economic and career opportunities offered to local residents
- results showed a very high number of respondents were regularly involved in community and cultural activities
- the Kimberley was rated a desired location to live in the future.

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

Aspects of Regional Life

![Bar chart showing mean scores for various aspects of regional life]

Invest in the Kimberley

Tourism
The Kimberley’s unique natural environment provides a strong basis for a sustainable tourism industry capable of delivering benefits to some of the region’s most remote localities. The region is renowned for its environmental values, many of which have been identified for regional, state, national and international significance. The Kimberley is defined by unique terrestrial and marine ecosystems with complex biodiversity values set in wild, rugged and remote landscapes.

With more than 290,000 visitors spending more than $330 million per year, the Kimberley provides excellent investment opportunities in a wide range of tourist attractions and accommodation options.

A growing number of the Kimberley’s tourists seek original cultural and educational experiences in learning about the region’s Aboriginal heritage. There are opportunities to partner with local traditional owners to develop unique tourism experiences that will enhance visitor satisfaction and integrate economic opportunities for local people and investors.

There are also opportunities to fill a range of niche gaps in tourism product supply in a number of regional towns.

Agriculture
The Kimberley region has land resources that can provide a variety of economic, multiple use and diversification options. Climatic conditions provide the capacity for regional agriculture to exploit ‘out of season’ production windows.

The quantity of divertible surface water and ground water reserves are nationally significant and coincide, in some locations, with agricultural soil types. The capacity to develop these resources in the context of global food security provides a highly influential development opportunity that is gaining state and national focus.

The Ord-East Kimberley Expansion Project is a joint initiative of the State and Commonwealth governments and includes the release of up to 14,000 hectares of agricultural land to reach a total area of 28,000 hectares plus significant social, community and common-use infrastructure development.

The project provides the ideal venture for potential investors to capitalise on the future development of the Kimberley region and benefit from proximity to Asian food markets.

Resources
The development potential created by the global demand for the region’s resources, global food security and proximity to Asia are yet to be fully realised. As the region develops
and improves logistics networks and key transport infrastructure, access to Asian markets will be an important highlight of economic development.

The Kimberley has significant resource potential creating opportunities for investors. Strategically valuable minerals, offshore gas and potentially onshore gas will all heavily impact on future development and provide regional competitive advantage.

The Kimberley region’s established natural resource industries include diamonds, gold, iron ore and nickel. There is a range of opportunities in supporting service industries to capitalise on existing and potential resource developments across the region.

Land development

The Kimberley region has land resources that can provide a variety of economic, multiple use and diversification options. Land releases for residential and industrial purposes are key enablers for regional growth and investment. Across the region residential land availability continues to be developed to meet the demand of population growth.

Potential large regional projects will require increasing levels of local support through the provision of goods and services. New and planned industrial land developments provide opportunities for investors to capitalise on regional growth through the development of new and existing industries.

Traditional owner Native Title holders have emerged as key land owners in and around many regional towns. There are opportunities to develop a range of projects in partnership to achieve objectives for traditional owners and investors and to achieve culturally appropriate and sustainable regional development.
Contact us

Kimberley Development Commission

KUNUNURRA OFFICE
7 Ebony Street
PO Box 620
KUNUNURRA WA 6743
Telephone: (08) 9148 2100
Facsimile: (08) 9168 1473

BROOME OFFICE
Upstairs, Corner Napier & Dampier Terrace
PO Box 172
BROOME WA 6725
Telephone: (08) 9194 3000
Facsimile: (08) 9193 6142

DERBY OFFICE
West Kimberley House
16 Loch Street
PO Box 845
DERBY WA 6728
Telephone: (08) 9193 1444
Facsimile: (08) 9193 1445

Department of Regional Development

Level 2, Gordon Stephenson House
140 William Street
PERTH WA 6000
PO Box 1143
WEST PERTH WA 6872
Telephone: (08) 6552 1800
Free call: 1800 049 155 (Country only)
Facsimile: (08) 6552 1850
Email: info@drd.wa.gov.au
Web: www.drd.wa.gov.au

All correspondence should be directed to:
Chief Executive Officer
Kimberley Development Commission
PO Box 620
KUNUNURRA WA 6743
Email: info@kdc.wa.gov.au
Website: www.kdc.wa.gov.au

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