



Mid North Coast
[Connected]

2016

Investment Prospectus

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Department
of Industry



The Mid North Coast is one of Australia's most diverse regional economies. Everyone knows this region is famous for tourism, but we think there is an untold story here.

The Mid North Coast is a \$12 billion regional economy. We currently have ten industries that gross more than half a billion dollars each year.

Overall, our regional economy is growing at 4.7% p.a. however, many of our key industries are showing annual growth of between 5% - 10% p.a. and some as high as 20% p.a.

These industries are being backed up by unprecedented investment. In recent times around \$4 billion has been invested in local infrastructure.

With the upgrade of the Pacific Highway in full swing this region is now a stone's throw from some of Australia's largest industrial centres and an ideal distribution point for businesses trading between Sydney and Brisbane.

By launching **Mid North Coast [Connected]** we want to show potential investors another side to this region: an industrial paradise of low cost land, affordable housing, ever-increasing connectivity and a highly skilled workforce.

We invite you to discover a world of business opportunities right on our doorstep, all within the setting of one of the most beautiful regions in Australia.



Lorraine Gordon, CEO
Regional Development Australia -
Mid North Coast



Mid North Coast

The Mid North Coast comprises an area of 15,070 square kilometres between the Great Divide and the east coast of Australia.

Our region is made up of six local government areas: Coffs Harbour, Bellingen, Nambucca, Kempsey, Port Macquarie – Hastings and Greater Taree. It also includes the World Heritage Area of Lord Howe Island.

The region is home to an array of vibrant, modern and sometimes eclectic townships that attract 4.9 million visitors each year. The Pacific Highway acts as the main transport artery through the region and puts it within easy reach of Sydney, Newcastle, the Gold Coast and Brisbane.

The Mid North Coast has a population of around 259,000. Fuelled by business opportunity and lifestyle advantages, the population has been growing steadily at 1% p.a. for the past 10 years. The latest forecasts estimate the region to grow to 277,450 by 2021.

The landscape of the Mid North Coast is typified by winding rivers that feed lush hinterland and over one hundred kilometres of pristine beaches. Our region benefits from a high annual rainfall and has been referred to as having the most ideal climate in Australia.

Indigenous culture enjoys a rich presence in our region; which includes the Traditional Nations of the Gumbaynggirr, Dunghutti and Biripi Aboriginal peoples.



See *Research Sources*, page 30.

As the half-way point between Sydney and Brisbane, the Mid North Coast is connected to some of Australia's largest centres, with easy access by road, air or rail.

Road Travel

A total of 285 km of the Pacific Highway passes through the Mid North Coast. This section of road is currently being upgraded to a four lane dual carriageway, scheduled for completion by 2020.

Distances to Major Centres

Regional Centres	To Sydney (km)	To Brisbane (km)
Taree	308	618
Port Macquarie	383	551
Kempsey	419	503
Nambucca Heads	486	439
Bellingen	522	427
Coffs Harbour	534	392

Major arterial roads feed into the Pacific Highway from the many commercial precincts throughout the region.

Rail Travel

NSW TrainLink Express Passenger Trains (XPT) provide daily rail transport to the Mid North Coast between Sydney and Brisbane. The stops in the Mid North Coast are:

- Wingham
- Taree
- Kendall
- Wauchope
- Kempsey
- Eungai
- Macksville
- Nambucca Heads
- Urunga
- Sawtell
- Coffs Harbour



Aviation Precincts

The Mid North Coast is on the move, with many prime business locations currently available in our key airport precincts.

The region's two major airports at Coffs Harbour and Port Macquarie offer regular services to Sydney, Brisbane and Melbourne.

Flight Times

	Coffs Harbour	Port Macquarie	Taree
To Sydney	1 hr 10	1 hr 5	1 hr
To Brisbane		1 hr 20	
To Melbourne	1 hr 55	3 hr 25 (via Sydney)	

Air transport from the Mid North Coast continues to go from strength to strength. Recent investments in the Mid North Coast Aviation Plan, totalling \$25 million, have funded:

- Upgrades to the main runway at Port Macquarie Airport to cater for larger B737-800 and A320 series aircraft.
- Upgrades to the passenger terminal and car park at Port Macquarie Airport.
- Resurfacing of the runway at Kempsey Airport and development of the Kempsey Aviation Business Park.
- Upgrades to Taree Aviation Business Park providing additional affordable lots available for business.

Our regional airports are very popular with business travellers and tourists alike. Over the past 10 years passenger movements have doubled, and now, over 594,151 passengers pass through our airports every year.

Passenger and Aircraft Movements 2014/15

Airport	Passengers	Aircraft
Coffs Harbour Regional Airport	354,212	5,572
Port Macquarie Airport	225,198	5,802
Taree Regional Airport	14,741	2,392
TOTAL MOVEMENTS	594,151	13,766





Coffs Harbour Regional Airport

The largest regional airport, capable of wide body aircraft up to Boeing 767. Operates direct daily flights to and from Sydney and direct flights to Melbourne on the weekends.

- Qantas, Virgin and Tiger Commercial Airlines.
- Air freight - Qantas, Startrack Express, Toll.
- Catchment for surrounding areas of Bellingen, Nambucca and Dorrigo.
- Airport business precinct in planning.

Airport Manager: 02 6648 4767

Kempsey Airport

General aviation airport and light industrial business park.

- New \$2.5m Business Park development.
- Light industrial opportunities.
- Flight training opportunities.
- Airfield space available for lease and hanger development.

Airport Manager: 02 6566 3200

Port Macquarie Airport

Second largest airport capable of wide body aircraft up to A320/B737-800. Operates direct daily flights to Sydney and Brisbane, and seasonal flights to Lord Howe Island.

- Qantas and Virgin commercial airlines.
- Air Freight.
- Hangers and airfield space available for lease.
- Airport business precinct in planning.

Airport Manager: 02 6581 8111

Taree Regional Airport

Serviced by Regional Express (REX) with daily flights to Sydney, Newcastle and Grafton.

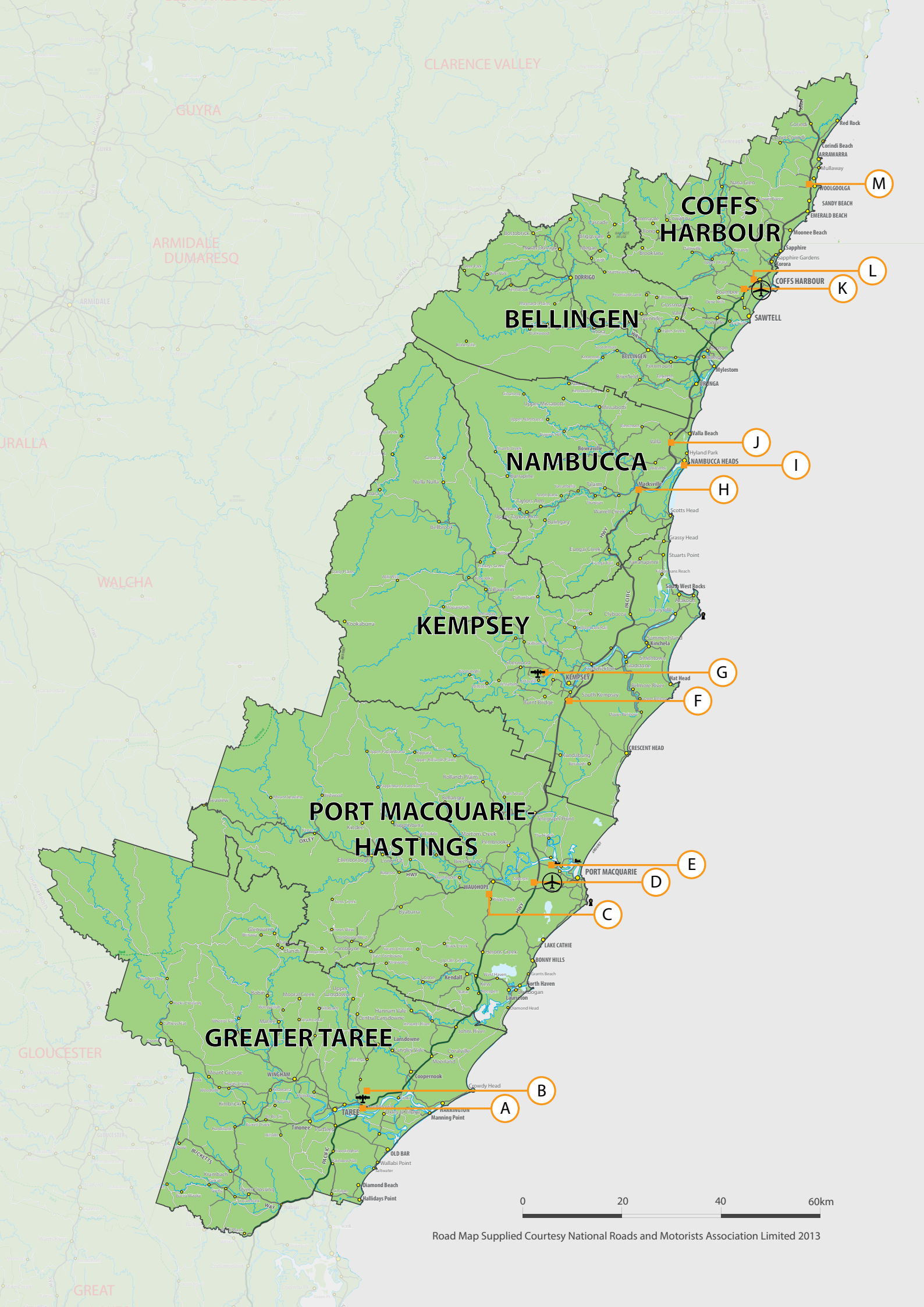
- New \$2.4m Business Park development.
- Light and heavy industrial lots available.
- Hangers and airfield space available for lease.

Airport Manager: 02 6553 9863

Investment Ready Industrial Sites

	Name	Opportunities	Contact
A	Northern Gateway Commercial Precinct Emerton Close, Cundletown	Suit freight, distribution and storage services and operators, plus general industrial and commercial.	Steve Attkins Manning Valley Chamber T: 0488 788 169
B	Taree Airport Business Park Lansdowne Rd, Cundletown	Light and heavy industrial lots available. Hangers and airfield space available for lease.	Airport Manager T: 02 6553 9863
C	Bago Industrial Estate Production Drive, Wauchope	Industrial land with lot sizes from 2000m ² . Purchase or construct/lease to client specifications available. Suit local service based businesses or small to medium manufacturing, transport and warehousing.	Bill Linney Developer T: 0413 137 778
D	Sancrox Employment Precinct Pacific Highway, Port Macquarie	Industrial land with direct highway access. 85.4 hectares of industrial zoned land. Lot sizes from 3500m ² to 10ha. Purchase or construct/lease to client specifications available. Suit medium to large manufacturing, transport and warehousing. Precinct currently home to Expressway Spares, HF Hand and TNT.	James Dunn Developer T: 02 6586 9369
E	Fernbank Park Industrial Estate Pacific Highway, Port Macquarie	Industrial land with direct highway access. 23.3 hectares of industrial zoned land. Proposed lot sizes from 1000m ² to 7700m ² or purchase entire site.	Gary Murcott Developer T: 0408 653574
F	Farrawell Highway Business Park (Located next to the new South Kempsey Service Centre)	Industrial land sales. Excellent highway access, strategically located adjacent to the new South Kempsey Service Centre.	Benn Farrawell Developer T: 0438 627 244
G	Kempsey Airport Aviation Business Park Aerodrome Road, Aldavilla	Airfield space available for lease.	Airport Manager T: 02 6566 3342
H	Macksville Centra Park Centra Park St, Macksville	7 industrial lots developed ready for sale. Suitable for IN1 zoned heavy industrial, manufacturing and fabrication, food processing and value adding, storage and warehousing.	Wayne Lowe Nambucca Shire Council T: 02 6568 0226
I	Nambucca Heads Industrial Estate Railway Road, Nambucca Heads	Last remaining lots. IN1 zoned industrial land. 9,000 m ² – 2 x 4500 m ² lots, \$75.00 per m ² .	Wayne Lowe Nambucca Shire Council T: 02 6568 0226
J	Valla Industrial Park Pacific Highway, Valla	35ha of available IN1 zoned industrial land. Suitable for transport and logistics, general manufacturing, light manufacturing and heavy manufacturing, warehousing and distribution, food processing and production/value adding.	Wayne Lowe Nambucca Shire Council T: 02 6568 0226
K	Isles Industrial Park Pacific Highway, Coffs Harbour	3 Lots available. 2005m ² to 3590m ² . Pacific Highway, 3 kilometres south of the Coffs Harbour CBD.	Ian Isles Developer T: 0427 654 761
L	Lot 2 Stadium Drive Cnr Pacific Highway and Stadium Drive, Coffs Harbour	3.48ha on the south eastern roundabout corner of the Pacific Highway and Stadium Drive, approximately 3 kilometres south of the Coffs Harbour CBD.	Troy Mitchell Developer T: 0417 695 515
M	Woolgoolga Industrial Park 1670 Solitary Islands Way (Old Pacific Hwy) Woolgoolga	43,354m ² total parcel or DA approved 11 lot sub-division. High visibility and 200m from new Pacific Hwy bypass on/off ramps. IN1 zoned industrial land. Ideal transport terminal.	Anthony Smith Developer T: 0419 982 888

These opportunities are correct as at December 2015 and are subject to change.



261,530

Population

15,070

Area (km²)

17.35

Population Density
(people per km²)

\$12.16 billion

Gross Regional Product (GRP)

4.7% p.a.

GRP Growth (3 years)

\$22.5 billion

Total Revenue

19,430

Businesses

79,038

Workforce

25,000

Managers & Professionals

\$4.90 billion

Regional Exports

4.6% p.a.

Export Growth (3 years)

4,891,400

Visitors Per Annum



The Regional Economy

As one of Australia's most diverse regional economies, the Mid North Coast supports a variety of flourishing industries.

Our regional economy is growing at a healthy 4.7% p.a. and produces an annual Gross Regional Product of \$12.2 billion.

There are 19,430 registered businesses throughout the Mid North Coast and a workforce of over 79,000. The majority of businesses are small to medium enterprises, typifying an entrepreneurial culture with its eyes on growth.

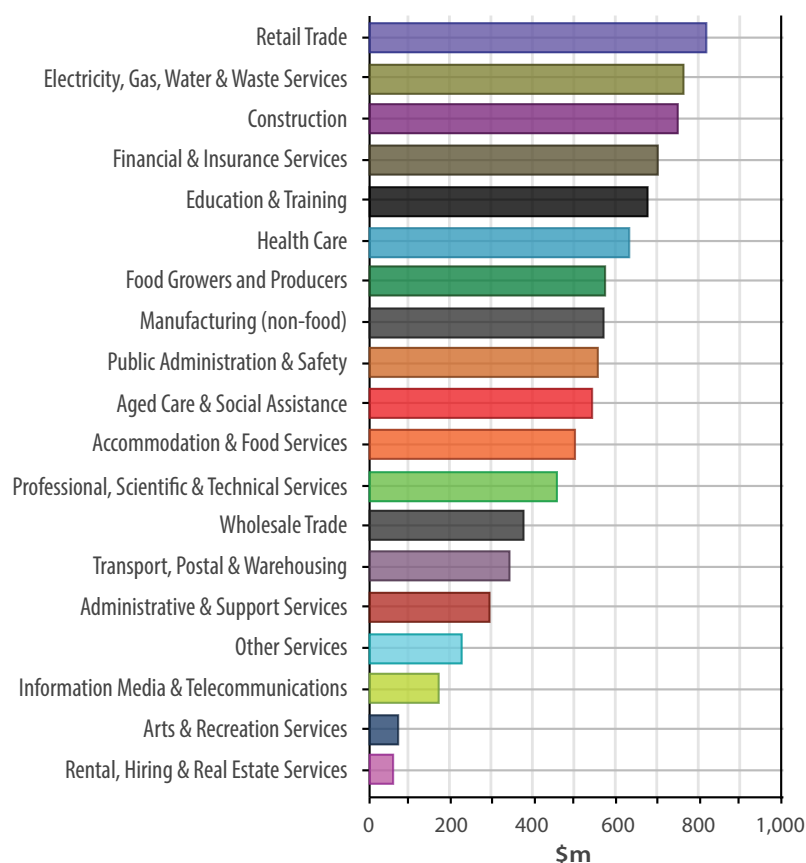
Digital connectivity is driving a burgeoning digital economy. High speed broadband is widely available in a variety of options throughout the region, with an existing or imminent NBN rollout present in most areas.

As one of Australia's most diverse regional economies, the Mid North Coast supports a variety of flourishing industries. Ten local industries currently gross over half a billion dollars each year.

The value of our region's close geographic connection to the major industrial centres of Sydney, Newcastle, the Gold Coast and Brisbane is evidenced by our regional exports which are currently sitting at \$4.9 billion per annum, with solid annual growth.

Tourism also plays a significant role in the regional economy. As one of Australia's most celebrated tourist destinations each year 4.9 million visitors spend around \$1.3 billion each year.

Industry Value Added (\$m) (Aug 2015)



Education and Training

The education and training industry has emerged as a powerhouse of regional employment and skills growth, making it a key industry to watch. Currently 9.4% of the region's workforce is employed in education and training.

Education and training plays a crucial role in enlarging the pool of skilled workers throughout the region. It addresses skills needs in other growth industries and helps to retain our young people by providing viable pathways to employment.

Education and training is a key growth industry for the region with value added (or gross profit) growing at 7.7% p.a. This growth has been partly fuelled by sustained investment.

For parents, the Mid North Coast offers a wide choice of schools with many options for public and private schooling to choose from. Our region also plays host to a number of world class universities, TAFE campuses and trade training centres.

In the last 5 years more than \$85 million has been invested in tertiary education facilities throughout the region, including \$46 million towards the first stage of a new Charles Sturt University Campus in Port Macquarie set to open in April 2016. By 2030 this campus will play host to as many as 5,000 students.

Some of our largest tertiary institutions are also attracting international students to the area. In 2013, Southern Cross University International was ranked first in Australia for support to international students by the International Student Barometer.

Key Points

- \$68m investment in tertiary facilities.
- Value added growing at 7.7% p.a.
- 9.4% of region's jobs.

Tertiary Infrastructure Investment Since 2011 (\$m)	
Charles Sturt University (CSU) campus, stage 1	\$46
Joint Health Education Facility (UNSW, UoN and NC TAFE)	\$20
North Coast TAFE	\$17
National Marine Science Centre (SCU)	\$2
TOTAL INVESTMENT (\$m)	\$85

Quick Look

\$685m

Value Added (6.2%)

\$906m

Revenue (4.0%)

\$149m

Local Expenditure (2.2%)

\$114m

Regional Exports (2.3%)

\$604m

Wages (10.7%)

7,435

Jobs (9.4%)

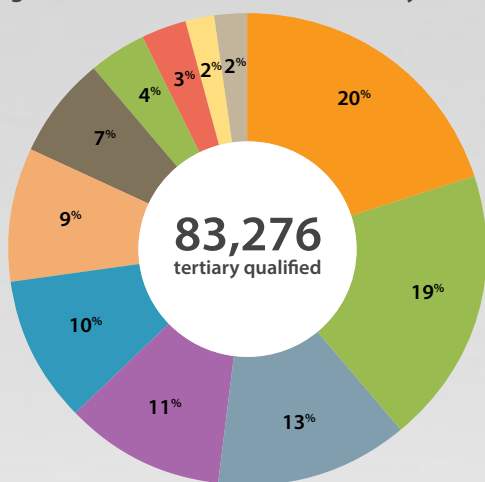
(Shows % of total for all regional industries)

Research Sources, page 30.
Glossary of Terms, page 31.

Tertiary Education institutions:

- Charles Sturt University
T: 1800 334 733
- North Coast TAFE
T: 1300 628 233
- Rural Clinical School (UNSW)
T: 02 5524 1523
- Southern Cross University
T: 1800 626 481
- University of Newcastle
T: 1300 275 866
- University of New England
T: 1800 818 865

Main Field of Study for Mid North Coast
(highest level of education, for over 15 year olds)



- Engineering and Related Technologies
- Management and Commerce
- Health
- Society and Culture (Social Services)
- Education
- Architecture and Building
- Food, Hospitality and Personal Services
- Agriculture, Environmental and Related Studies
- Creative Arts
- Natural and Physical Sciences
- Information Technology

[Case Study]

North Coast TAFE

North Coast TAFE's stated purpose is to provide prosperity through learning - for students, employers, communities and the economy.

In recent years, education delivery has evolved from traditional campus-based learning to include mobile, online, technology-connected and enterprise-specific training solutions. North Coast TAFE is at the forefront of this change.

The organisation is working closely with local enterprises and communities to develop a range of face-to-face, mobile, online and work-based training solutions.

These solutions help deliver skills training, professional development and vocational qualifications that meet the needs of not only local enterprises and communities but also of regional, national and international industries.



Over the last five years North Coast TAFE has invested more than \$17 million in infrastructure across its campuses to address this rapidly shifting customer demand for more flexible and customised learning options.

This infrastructure includes specialist high tech learning centres, mobile training units, simulated digital learning spaces and other facilities and equipment that deliver more blended learning and increased training in the workplace.

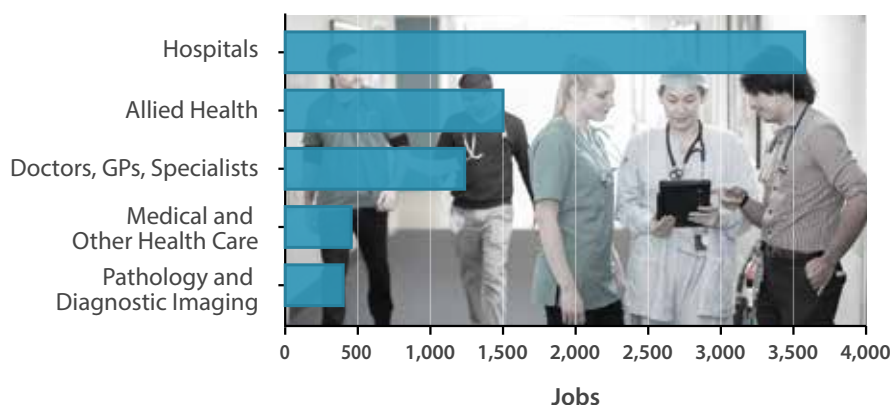
Health Care

“Healthy” is the word to describe the health care sector on the Mid North Coast, generating \$865 million in annual revenue and growing at 6.7% p.a.

The flow-on effects from the health care industry are significant: for every \$1m in increased revenue in health care, \$1.82m flows into the regional economy.

Health care is also one of the region’s most important employers, accounting for close to one in every ten jobs. These job numbers are growing steadily at 4.9% p.a.

Health and Aged Care Workforce Distribution



In recent years, public investment has been pouring into this sector. Since 2010, more than \$198.4 million has been invested across the region in public hospital infrastructure. A number of privately owned health “Super Clinics” were also built during this period.

The rapid growth of the industry has created an unprecedented demand for health care related skills, particularly in allied health services and specialist nursing. This presents wide ranging opportunities for health care professionals and businesses thinking of relocating to the Mid North Coast.

Training in health care is also on the rise. From 2017, the University of NSW will offer the first full medical degree in a regional or rural location. This will be available in Port Macquarie.

Key Points

- Industry revenue growing at 6.7% p.a.
- Around \$200 million in recent public investment.
- 9.3% of region’s jobs.

Quick Look

\$631m

Value Added (5.7%)

\$865m

Revenue (3.8%)

\$147m

Local Expenditure (2.2%)

\$83m

Regional Exports (1.7%)

\$499m

Wages (8.8%)

7,335

Jobs (9.3%)

(Shows % of total for all regional industries)

Research Sources, page 30.
Glossary of Terms, page 31.



Public Health Infrastructure Investment (2010-15)

Port Macquarie Base Hospital	\$104.0
Kempsey District Hospital	\$81.9
Bellingen Health Campus	\$6.0
Wauchope District Memorial Hospital	\$4.0
Nambucca HealthOne	\$2.5
TOTAL FUNDING (\$m)	\$198.4

2016 Employment Opportunities

- Anaesthetist
- Audiologist
- Clinical Haematologist
- Dentist
- Emergency Medicine Specialist
- Endocrinologist
- General Medical Practitioner
- Medical Diagnostic Radiographer
- Medical Oncologist
- Medical Radiation Therapist
- Obstetrician and Gynaecologist
- Occupational Therapist
- Psychiatrist
- Radiation Oncologist
- **Registered Nurse** (Child and Family, Disability and Rehab, Emergency, Medical, Mental Health, Perioperative, Surgical)
- Sonographer
- Specialist Physician

Contact Mid North Coast Local Health District:
T: 1800 726 997 | W: mnclhd.health.nsw.gov.au

Aged Care and Social Assistance

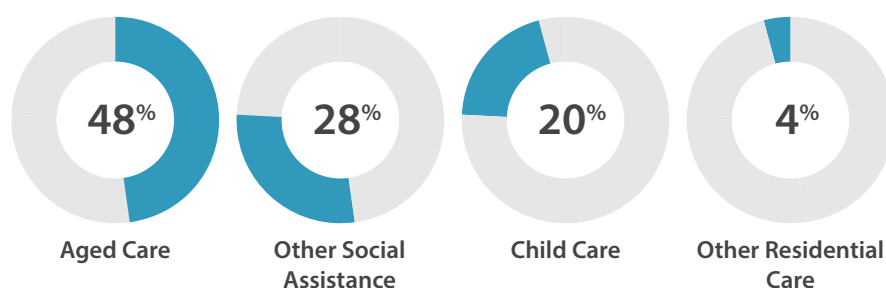
Like many of Australia's key lifestyle regions, a growing proportion of the Mid North Coast population is of a mature age. One industry that is thriving on this demographic shift is aged care.

This booming regional industry is currently experiencing unprecedented growth. Value added (or gross profit) is growing at an astonishing 20.9% per annum.

For every \$1m in increased revenue in aged care and social assistance, \$1.88m flows into the regional economy.

Job numbers are also exploding with 13.5% growth per annum. This figure is made more significant when you consider that for every 2 jobs created in aged care and social assistance, a third job is spawned in other local industries.

Industry Workforce Distribution



Child care is another growth area, catering to increasing numbers of young children in recent years. At last count there were 1,250 child care workers in the region accounting for one fifth of the total industry workforce. Job numbers in child care are growing at around 10% p.a.

Key Points

- Value added growing at 20.9% p.a.
- 8.0% of region's jobs.
- Job numbers growing at 13.5% p.a.

There are employment opportunities throughout the region for Registered Nurse (Aged Care), Personal Care Attendant and Community Care Worker roles.

Contact Mid North Coast Local Health District:
T: 1800 726 997 | W: mnclhd.health.nsw.gov.au

Quick Look

\$546m

Value Added (4.9%)

\$659m

Revenue (2.9%)

\$80m

Local Expenditure (1.2%)

\$146m

Regional Exports (3.0%)

\$493m

Wages (8.7%)

6,299

Jobs (8.0%)

(Shows % of total for all regional industries)

Research Sources, page 30.
Glossary of Terms, page 31.



[Case Study]

Nambucca Valley Care

Nambucca Valley Care is an aged care provider servicing the Nambucca Valley and surrounding areas. The organisation provides quality aged care and support services from Nambucca Heads to Macksville.

Nambucca Valley Care believes education is a vital part of delivering quality aged care and in recent years they saw a need for more skilled professionals to be trained in this rapidly growing industry.



In 2012, the organisation made the decision to establish its own Registered Training Organisation, "Nambucca Vocational College", to ensure that excellence and quality of staff was guaranteed.

Lisa Ellem, College Operations Manager, says, "the decision to take the pathway of establishing the College was related to the continuing challenges in the recruitment and retention of appropriately qualified and skilled staff in the Aged Care industry."

The College enables Nambucca Valley Care to draw from its extensive experience in Aged Care service delivery. They currently offer a Certificate III traineeship in Aged Care, a Certificate IV in Aged Care and a course in First Aid for staff and the wider community.

In 2017, the College will move to a new purpose-built training facility at Macksville where they hope to begin accepting international students.

Food Growers and Producers

Food growers and producers on the Mid North Coast generate a total revenue of \$1.6 billion a year. This represents 7.2% of the total revenue for our regional economy. The industry also employs 4,610 people.

Food and beverage manufacturing alone accounts for 3.7% of the region's total revenue (\$824m). Add in the agriculture and fishing sector, of a comparable size, and the value of our food industry is enormous.

The region's mild climate and high rainfall provides ideal growing conditions for a wide variety of horticulture and livestock. Its seaside location and healthy river systems also present a perfect nursery for our aquaculture industry.

There is a strong presence of agricultural co-operatives throughout the region creating significant market opportunities. Specialised producer co-operatives operate within many of our largest export industries including dairy, blueberries and macadamias.

Looking to the future, growth potential has also been identified in intensive horticulture, aquaculture and value adding. Organic production is another growth area. Although currently representing less than 2% of total production, nationally, the organic industry is growing at over 15% p.a.

Another exciting market opportunity for our food producers is in exports, particularly to the Asian markets. Currently, 15.8% of all regional exports are from the food sectors, totalling \$777 million a year. This makes the food industry our third highest exporting industry and food exports have been growing at 3.8% p.a.

Key Points

- Third largest export industry.
- Strong presence of food-related co-operatives

Agricultural Co-operatives and Consortiums	
Co-operative Food Group (Food Wholesale & Retail)	T: 02 6562 2455
Hastings Co-op (Food Retail)	T: 02 6588 8999
Macleay Regional Co-operative (Food Retail)	T: 02 6562 4116
Nambucca Macnuts Co-op (Macadamias)	T: 02 6568 4210
Nambucca River Co-op (Food Retail)	T: 02 6568 1411
Norco Co-op (Dairy)	T: 02 6627 8255
Oz Berries Co-op (Blueberries)	T: 02 6654 7119
The Organic Marketing Company (Organic Food)	T: 0424 664 291

For a complete list call the Co-operative Federation of NSW on 02 6562 4116

Quick Look

\$570m

Value Added (5.2%)

\$1,619m

Revenue (7.2%)

\$544m

Local Expenditure (7.9%)

\$777m

Regional Exports (15.8%)

\$179m

Wages (3.2%)

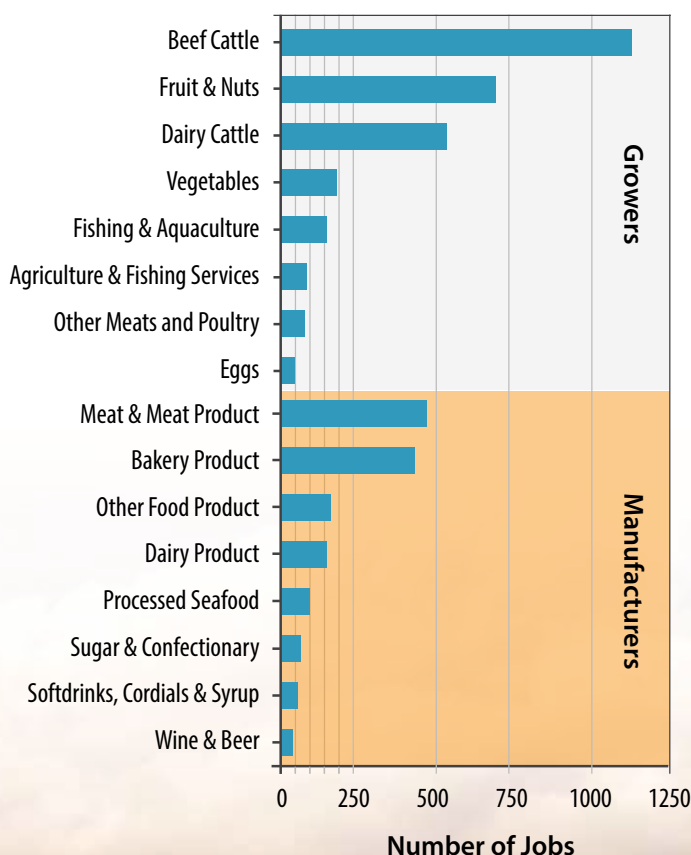
4,610

Jobs (5.8%)

(Shows % of total for all regional industries)

Note: Food industry figures have been calculated by totalling the Food and Beverage Manufacturing Sectors and the Agriculture and Fishing sectors (excluding Forestry and Logging).

Jobs by Regional Food Industries (2011)



[Case Study]

The Hastings Co-operative

The Hastings Co-operative has been a cornerstone of the Hastings community for the past 99 years. From humble beginnings as a dairy factory in 1916, "The Co-op" has steadily grown into a diverse range of 13 businesses all operating under the motto: We are 'Locals Supporting Locals.'

In 2016 the Hastings Co-operative will celebrate its centenary of trade, an elite milestone of achievement. Over the past 100 years The Co-op is proud to have supported many local food producers and community organisations.



Back in May 2014, The Co-op's commitment to local producers was again demonstrated when a mutually beneficial arrangement was set up to put local producers front and centre on supermarket shelves. "Local Product" shelf tags have now been positioned throughout the three Hastings Co-op IGA Supermarkets, clearly identifying locally owned and operated brands.

Hastings Co-op CEO, Allan Gordon, said, "The shelf tags will allow customers who want to support local business to identify those products."

This initiative has been proven to increase sales of local products by up to 20%. It's a concept designed to benefit customers and producers alike.

The Co-op currently promotes over 40 local products in this way ranging from honey, eggs, dairy products, bread, wine, fruit and vegetables.

Manufacturing (non-food)

Manufacturing is our peak export industry, representing 22.0% of total regional exports.

The industry primarily consists of metal, transport and sawmill manufacturing and is characterised by a highly educated workforce with more than half of its workers holding tertiary qualifications.

Manufacturing is also the Mid North Coast's highest revenue industry, contributing 11.3% of the region's total revenue or \$2.5 billion per annum.

Over the past decade the industry has been undergoing a steady transformation towards more sophisticated manufacturing of specialised, high value products. This momentum has helped many of our regional manufacturers to compete with success against national and even global competitors.

The manufacturing industry is a major contributor to other regional industries, spending \$606m on purchases of intermediate goods and services from other industries each year. These flow on effects show why manufacturing is also extremely valuable to local employment.

New manufacturing industry hubs are now popping up right across the region, with many located adjacent to the Pacific Highway. If your business needs affordable industrial land coupled with affordable housing for staff and convenient access to transport then look no further!

Key Points

- 22.0% of total regional exports.
- 11.3% of region's revenue.

New Manufacturing Industrial Precincts

Farrawell Highway Business Park Pacific Highway, South Kempsey	Benn Farrawell, Developer T: 0438 627 244
Northern Gateway Commercial Precinct Emerton Close, Cundletown	Steve Attkins Manning Valley Business Chamber T: 0488 788 169
Sancrox Employment Precinct Pacific Highway, Port Macquarie	James Dunn, Developer T: 02 6586 9369
Valla Industrial Park Pacific Highway, Valla	Wayne Lowe Nambucca Shire Council T: 02 6568 0226
Woolgoolga Industrial Park 1670 Solitary Islands Way (Old Pacific Hwy) Woolgoolga	Anthony Smith, Developer T: 0419 982 888

Quick Look

\$569m

Value Added (5.1%)

\$2,539m

Revenue (11.3%)

\$606m

Local Expenditure (8.9%)

\$1,077m

Regional Exports (22.0%)

\$350m

Wages (6.2%)

3,754

Jobs (4.7%)

(Shows % of total for all regional industries)

Note: Typically, the manufacturing industry also includes food and beverage manufacturing which accounts for around 25% of the total industry value added and jobs.

However, in this prospectus these sub sectors have been incorporated into the section on food growers and producers to show the food value chain.

Annual Regional Exports
(Sales outside of the Mid North Coast)

Manufacturing Sub-sector	\$m
Metal & Metal Product	\$291.58
Transport Equipment & Parts	\$245.85
Saw Mill, Wood & Paper Product	\$220.45
Non-Metallic Mineral Product	\$145.88
Technical Equipment & Appliance	\$64.87
Other Manufactured Products	\$49.78
Basic Chemical, Cleaning & Polymer	\$43.24
Apparel	\$13.06
Printing	\$0.74
Pharmaceutical Product	\$0.74
Furniture	\$0.71
Total Regional Exports (\$m)	\$1,076.90

[Case Study]

Birdon

The next time you stand on a commuter wharf at Sydney, just think, it may have been built by Birdon.

Back in 2014, Birdon made a name for itself on the global stage by securing a quarter of a billion dollar contract to manufacture bridge erection boats for the US Department of Defense.

Now the Port Macquarie based manufacturer has another claim to fame, this time a little closer to home. In 2015 the NSW Government announced that Birdon had won a construction tender to build nine new pontoons for commuter ferry wharves in Sydney.

The pontoons will help commuters get on and off Sydney's iconic ferries in nine locations, spread across Sydney Harbour and Parramatta River.



The largest of the pontoons is 27 metres long by 12 metres wide and weighs over 60 tonnes. The first of these pontoons was rolled out in October 2015.

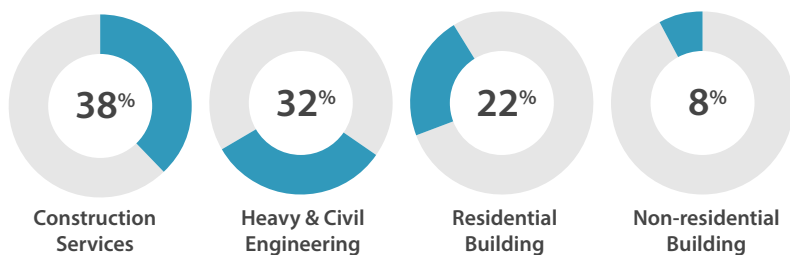
Birdon's Managing Director, Terri Benson, believes the project is a testament to the outstanding quality of Birdon's products and services, having been selected in a competitive tender process including national and international bidders.

"Everyone here knows that our success is built on the quality of the products that go out of the door," Terri says. "So we all take a great deal of pride in delivering the very best for our clients".

Construction

The construction industry produces 11% of the region's total revenue. Fuelled by sustained investment at the public and private level the industry boasts an average three year growth in value added (or gross profit) of 9.4% p.a.

Regional Construction Revenue



The flow on effects from the construction industry are immense. 18.1% of all local expenditure (\$1.24 billion) is attributed to construction, the highest of any industry.

When you consider that major construction projects in the region currently total around \$4 billion, there are clear opportunities for many other industries to benefit.

Residential building is another area of growth and there are employment opportunities across the full range of trades. 1,500 construction certificates were issued across the region in 2014, a 12% increase on the previous year.

Key Points

- Around \$4 billion in infrastructure upgrades.
- Value added growth of 9.4% p.a.

Major Construction in the Region	\$m
Pacific Highway upgrades	\$3,600
Public health care infrastructure	\$198
Education facilities	\$68
Bowraville Off River Storage project	\$54
Nabiac Borefield and Water Treatment Plant	\$32
Mid North Coast Aviation Plan	\$25
TOTAL (\$m)	\$3,977

Quick Look

\$752m

Value Added (6.8%)

\$2,474m

Revenue (11.0%)

\$1,240m

Local Expenditure (18.1%)

\$177m

Regional Exports (3.6%)

\$392m

Wages (6.9%)

4,975

Jobs (6.3%)

For residential building opportunities contact the Master Builders Association.
T: 02 6581 4033

Pacific Highway Upgrade \$3.6b

Bellingen Health Campus \$6m
Kempsey Retail Precinct \$3.4m
Wauchope District Hospital \$4m

National Marine Science Centre \$2m
Nambucca HealthOne \$2m

Kempsey District Hospital \$81m
Kempsey Bypass \$615m

Port Macquarie Base Hospital \$104m
Urunga Bypass \$780m

Charles Sturt University \$42m
NBN Taree \$34.4m
Port Macquarie Airport \$21m
Joint Health Education Facility \$20m

Bowraville Off River Water Storage \$54m

Nambucca Heads Highway Service Centre \$12m

Nabiac Borefield and Water Treatment Plant \$32m

NBN Coffs Harbour \$84.6m

Retail

The Mid North Coast sustains a large and diverse range of retail businesses catering to every need. Our retail industry is experiencing steady growth in value added of 5.4% p.a. across the region.

With a steadily growing population and some of the highest visitation rates in Australia, retail has become a keystone industry for the Mid North Coast.

The industry is a vitally important employer, comprising 14.6% of the total workforce, or one in every seven jobs. As you would expect, part time and casual work is common in this industry, with 39.5% of people working less than 25 hours per week.

Largest Employing Sectors of Retail Trade



Many regional centres are currently undertaking significant upgrades and improvements to their retail precincts to support the growth of this industry.

Key Points

- Major regional employer.
- Value added growth of 5.4% p.a.
- Significant upgrades to retail precincts.

Current Retail Precinct Upgrades

Kempsey Smith Street upgrade	\$3.6m
Port Macquarie Clarence Street upgrade	\$2.0m

Quick Look

\$809m

Value Added (7.3%)

\$1,366m

Revenue (6.1%)

\$388m

Local Expenditure (5.7%)

\$171m

Regional Exports (3.5%)

\$523m

Wages (9.3%)

11,522

Jobs (14.6%)

For retail opportunities contact
NSW Business Chamber on
T: 02 6590 2402 or the local
business chamber.

[Case Study]

Kempsey Retail Precinct

In 2013 the Kempsey Bypass was completed, diverting traffic on the Pacific Highway away from the Kempsey CBD. This was seen as a positive move for pedestrian safety, traffic flow and the town's aesthetics, but measures needed to be taken to ensure the retail sector of Kempsey remained vibrant and enticing to visitors.

Retail is the largest employer in the Kempsey Shire, making it a vital industry.



With this in mind, Kempsey Shire Council began an upgrade of the retail precinct to refurbish the streetscape and provide an attractive, shopper-friendly urban environment.

Their plan identifies almost 30 projects the community believes are important to revitalising the former highway corridor now known as Macleay Valley Way. These projects are valued at a total of \$6.8m.

Of these projects, the \$3.6m revitalisation of the CBD is the largest and most significant investment. It includes new paving, street furniture, landscaping and lighting, and upgraded utility services and telecommunications.

The Kempsey CBD works are scheduled to be completed in March 2016.

Skilled Workforce

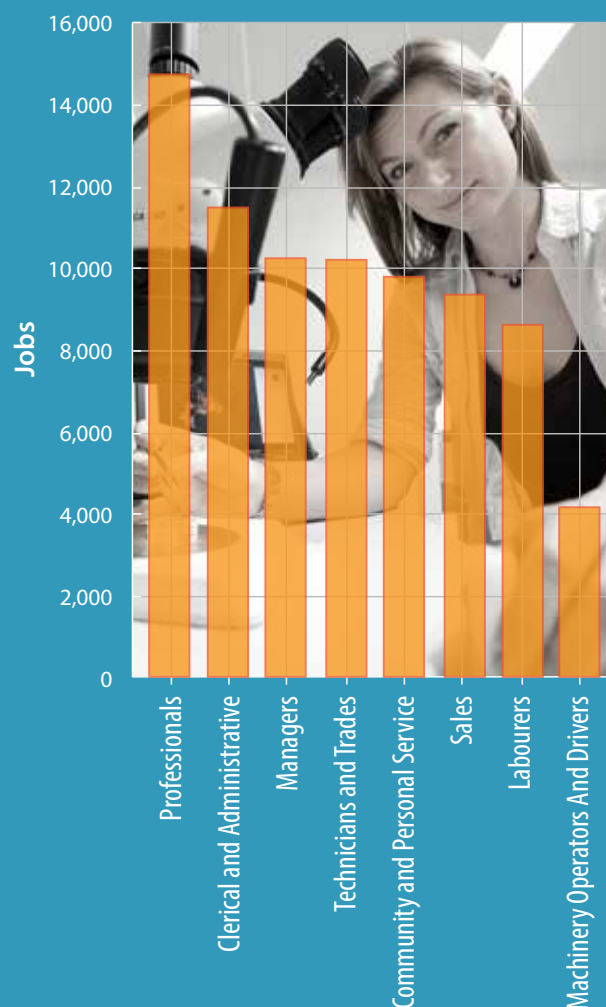
The Mid North Coast has access to a large and diversified labour force, helping businesses to connect with the right people.

The pool of local talent will continue to grow as new higher education facilities open up across the region.

Our population already has the second highest level of attainment of technical qualifications in Australia. We are also one of the top regions in the country for English proficiency and lifelong learning.

The region continues to attract a steady stream of experienced professionals from the major cities, particularly those between the ages of 30-55.

Workforce Breakdown (Jobs)



The Visitor Economy

Over a hundred kilometres of pristine beaches, an array of cultural delights and arguably Australia's most ideal climate make the Mid North Coast a renowned tourist destination. 4.9 million people visit the Mid North Coast each year, spending around \$1.3 billion.

You heard right, that's an average of 30,000 visitors on any given day (both day visitors and overnight stays). Among its many attractions, the region boasts a full calendar of cultural and sporting events, including IRONMAN Australia, the World Rally Championship and the International Buskers and Comedy Festival.

The proximity of the Mid North Coast to Sydney and Brisbane position the region as both an ideal holiday destination and a perfect half-way point for the tourist drive. The upgrade of the Pacific Highway is expected to increase tourist numbers even more as the drive time improves.

In fact, the value added (or gross profit) attributed to visitor spending has been growing at 7.9% p.a.

A large component of the region's tourism activity is captured by the accommodation and food services industry. This industry collects 54 cents for every \$1 spent by tourists and is one of the region's highest employers.

The World Heritage Area of Lord Howe Island, located approximately 600km east of Port Macquarie, is another tourist magnet. Just a 2 hour flight from Sydney or Port Macquarie, Australian Traveller Magazine voted Lord Howe Island the best holiday island in Australia in 2014.

Key Points

- \$1.3 billion tourist spend per annum.
- Average 30,000 visitors on any given day.
- Value added growth of 7.9% p.a.

LGA	Tourism Businesses	Visitors ('000)	Visitor nights ('000)	Domestic Day ('000)	Spend (\$m)
Coffs Harbour	810	1601.4	2677.3	829.8	441.3
Bellingen	182	220.1	330.8	125.0	50.4
Nambucca	205	266.9	455.8	132.8	50.6
Kempsey	309	544.7	1113.5	271.3	139.8
Port Macquarie	866	1541.8	2837.4	779.3	469.2
Greater Taree	463	716.5	898.5	428.3	123.7
TOTAL	2,835	4,891.4	8,313.3	2,566.5	\$1,275.0

For tourism business opportunities contact North Coast Destination Network on: 02 6569 4058.





[Case Study]

Opal Cove Resort

Situated on the Coffs Harbour beachfront, Opal Cove Resort has an enviable reputation amongst holiday makers, business travellers and conference groups for its stunning location, superb facilities and award winning cuisine.

But this 4 star resort is about to launch an exciting new visitor experience like no other. Opal Cove Resort is working with local Indigenous leaders to provide a cultural experience for visitors and resort guests to learn about the local Gumbaynggirr history and culture.



The Cultural Experiences Program will involve a weekly show celebrating the language, dance, bush tucker, storytelling and music of the Gumbaynggirr people. Dinner featuring bush flavours will also be offered as an additional experience.

The Resort is creating an outdoor performance space surrounded by nature to provide the ideal atmosphere for these cultural experiences.

Tanya Watts, the program coordinator at Opal Cove Resort, says she is excited to be raising cultural awareness to the region's visitors and locals, along with boosting employment opportunities.

"As an extension of the Cultural program, in 2016 we will also be introducing a quarterly Indigenous art exhibition and looking into establishing a quarterly cultural market."

The Cultural Experiences Program is scheduled to launch in late 2015.

Lifestyle and Housing

With over 100km of turquoise coastline, rolling green hinterland and a warm sub-tropical climate, the Mid North Coast is a haven for business owners and skilled professionals seeking a work-life balance.

Our region has a wide variety of affordable housing options to meet everyone's taste. Whether it's a coastal apartment, a family home or a hinterland retreat, enjoy the luxury of living within a few minutes drive of where you work.

Right now there are plenty of new residential releases springing up across the region. These sites offer an affordable ticket into some of Australia's most enviable residential locations.

The Mid North Coast is a wilderness wonderland with around 20% of the area classed as protected. Rivers, estuaries and beaches provide an abundance of choices for fishing, boating and water sports enthusiasts.

Some of Australia's best surfing beaches are found here: Coffs Harbour currently hosts the Australian Surfing Festival; Port Macquarie is widely known as the body boarding capital of Australia; while Crescent Head, near Kempsey, is a National Surfing Reserve.

There's also plenty on offer for those who crave country roads and wide open spaces. Our hinterland provides a rich tapestry of picture postcard scenery, charming townships and off road adventure.

The Mid North Coast is a foodies' paradise, blessed with an abundance of award winning restaurants, cafés and food providores. There are also many gourmet food festivals and farmers markets that showcase the region's local produce throughout the year.

Cultural and sporting activities are a regular part of life here. Whether you're watching the ballet at Port Macquarie's famous Glasshouse or enjoying 18 holes at the Bonville International Golf Course near Coffs Harbour, there are plenty of world class facilities to enjoy.

Major events regularly feature on the cultural and sporting calendar such as the World Rally Championship, Toyota IRONMAN Australia, the International Buskers and Comedy Festival and the Wingham Akoostic Music Festival, to name a few.

Our Aboriginal culture is one of our most celebrated cultural assets and each year, on Australia Day, the Saltwater Freshwater Festival showcases modern Aboriginal culture to the region in an open extension of friendship.

Whatever part of the Mid North Coast you live in, there's always something to see and do.

Enjoy the
luxury of living
within a few
minutes drive
of where you
work.



Image courtesy of Kempsey Shire Council



Comparison: Median Weekly Rents (June 2015 Quarter)

	Flats/Units 2 bedrooms (\$)	House 3 bedrooms (\$)
Taree	220	290
Kempsey - Nambucca	240	320
Coffs Harbour	278	375
Port Macquarie -Hastings	290	395
Newcastle	360	400
Gosford	330	445
Sydney Inner City	730	880

Median House Sale Prices (March 2015)

Kempsey - Nambucca	\$285,000
Greater Taree	\$328,000
Coffs Harbour	\$385,000
Port Macquarie-Hastings	\$399,000
Newcastle	\$455,000
Gosford	\$560,000
Sydney Inner City	\$1,380,000

New Residential Releases

South West Rocks 2431	40 lots starting at \$120,000 Call SWR Real Estate: 0412 653 102 or Raine & Horne SWR: 02 6566 6116
Sovereign Hills 2444	66 lots starting at \$190,000 Call Lewis Land: 02 6581 1711
Wauchope 2446	70 lots starting at \$170,000 Call Andrew Briscoe on 0424 172 353
Macksville 2447	39 lots starting at \$145,000 Call Troy Vance 0473 732 739
Sandy Beach 2456	100 lots from \$179,000 Call Rich McKeon 0412 412 836
Woolgoolga Beach 2456	90 lots starting at \$208,000 Call Rich McKeon 0412 412 836

Developer Opportunity

Urunga 2455	D.A. approved 36 lot residential sub-division on the Kalang River. Call Barry Dawson: 0419 709 384
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These opportunities are correct as at December 2015 and are subject to change.

Research Sources

Mid North Coast (4-5)

- *Land area and population:* ABS 3218.0 Regional Population Growth: Estimated Resident Population by LGA in NSW.
- *Visitors per annum:* Tourism Research Australia, Tourism in Local Government Areas 2013.
- *Population projection:* New South Wales State and Local Government Area Population Projections: 2014.
- *Workforce and Economic measures:* REMPLAN v3 (using ABS Census, Gross State Product and National Input-Output Tables).

Airports and Aviation Precincts (6-7)

- *Airport data:* Bureau of Infrastructure, Transport & Regional Economics (BITRES), Airport Traffic Data 2014–15.

The Regional Economy (10-11)

- *No. of businesses:* ABS Counts of Australian Businesses, including Entries and Exits, Cat. 8165.0 (Jun 2012, 2013 & 2014).
- *Workforce and Economic measures:* REMPLAN v3 (using ABS Census, Gross State Product and National Input-Output Tables).
- *Growth figures:* based on average annual growth between 2010/11 and 2013/14 financial years.
- *Visitors per annum:* Tourism Research Australia, Tourism in Local Government Areas 2013.

Education & Training (12-13)

- *Workforce and Economic measures:* REMPLAN v3 (using ABS Census, Gross State Product and National Input-Output Tables).
- *Growth figures:* based on average annual growth between 2010/11 and 2013/14 financial years.

Main Field of Study: ABS Non-School Qualification, Field of Study (LGA) 2011.

Health Care (14-15)

- *Workforce and Economic measures:* REMPLAN v3 (using ABS Census, Gross State Product and National Input-Output Tables).
- *Growth in job numbers:* based on 5 year average (2006 to 2011), all other growth figures are based on average annual growth between 2010/11 and 2013/14 financial years.

Aged Care and Social Assistance (16-17)

- *Workforce and Economic measures:* REMPLAN v3 (using ABS Census, Gross State Product and National Input-Output Tables).
- *Growth in job numbers:* based on 5 year average (2006 to 2011), all other growth figures are based on average annual growth between 2010/11 and 2013/14 financial years.

Food Growers and Producers (18-19)

- *Workforce and Economic measures:* REMPLAN v3 (using ABS Census, Gross State Product and National Input-Output Tables).
- *Growth figures:* based on average annual growth between 2010/11 and 2013/14 financial years.

Manufacturing (non-food) (20-21)

- *Workforce and Economic measures:* REMPLAN v3 (using ABS Census, Gross State Product and National Input-Output Tables).

Construction (22-23)

- *Workforce and Economic measures:* REMPLAN v3 (using ABS Census, Gross State Product and National Input-Output Tables).
- *Growth figures:* based on average annual growth between 2010/11 and 2013/14 financial years.
- *Construction Certificates:* NSW Department of Planning 2014. (<http://localinsights.planning.nsw.gov.au>)

Retail (24)

- *Workforce and Economic measures:* REMPLAN v3 (using ABS Census, Gross State Product and National Input-Output Tables).
- *Growth figures:* based on average annual growth between 2010/11 and 2013/14 financial years.

Workforce (25)

- *Workforce data:* REMPLAN v3 (using ABS Census 2011).
- *Technical qualifications, learning and English proficiency:* [In]Sight Regional Competitive Index, Regional Australia Institute.

The Visitor Economy (26-27)

- *Visitors counts and spending:* Tourism Research Australia, Tourism in Local Government Areas 2013.
- *Visitor spending:* 2013-14, Australian Bureau of Statistics (ABS), Tourism Satellite Account.
- *Workforce and Economic measures:* REMPLAN v3 (using ABS Census, Gross State Product and National Input-Output Tables).

Lifestyle and Housing (28-29)

- *Median rent and sales prices:* NSW Department of Housing, Rent and Sales Report 2015, Report 112.

Glossary of Terms

Gross Regional Product (GRP)	Total value of final goods and services produced in a region over a period of a year. GRP can be measured by adding up all incomes: earned by individuals (wages); firms (profits) and collected by Governments (taxes).
Jobs	The total number of jobs, including: full time, part time and casual employment.
Local Expenditure	The value of intermediate goods and services purchased by a particular industry within a local region.
Registered Businesses (Business Counts)	A snapshot of actively trading businesses from the Australian Bureau of Statistics Business Register.
Regional Exports	Goods and services produced by industry sectors within a local region which are sold outside of the region.
Regional Imports	The value of intermediate goods and services imported into a region by industry sectors.
Revenue	Revenue, or “Output”, refers to the gross sales revenue generated by businesses and organisations. Also referred to as total sales or income.
Value Added	Similar to gross profit, equals the difference between gross revenue and the cost of intermediate inputs (local expenditure and regional imports). It is a measure of how productive each industry sector is at increasing the value of its inputs. The value added by industry is the major element in the calculation of Gross Regional Product.
Wages	The value of entitlements earned by employees, including cash and in kind (e.g. motor vehicle) payments for services rendered, superannuation and workers compensation premiums.

Regional Development Australia

Regional Development Australia Mid North Coast (RDA) is a voice and an advocate for the Mid North Coast region. Our primary focus is on economic development that affects the wider region and delivers a positive outcome. This might be to encourage more jobs, public or private investment, industry growth or a greater capacity for our region to compete. **Mid North Coast [Connected]** is one of our projects.

RDA promotes the economic development of the Mid North Coast through five core service areas.

Advocacy	We advocate for key issues and opportunities in the region.
Analysis	We analyse the economic health of the region and its industries.
Applications	We support applications for investment and funding by regional organisations.
Advertising	We advertise our region’s competitive advantages and investment opportunities.
Action	We take action by undertaking specific projects which address an identified need.

Contact RDA Mid North Coast on T: 02 5525 1500 | www.rdamnc.org.au | facebook.com/RDAMNC

How can you connect?

The Mid North Coast is open for business and we want to hear from you.

Regional Development Australia Mid North Coast

Works with industry to create opportunities for economic growth, investment and jobs.

T: 02 5525 1500 | www.rdamnc.org.au

NSW Department of Industry

Works with businesses and communities in regional NSW to help them grow and create local jobs.

T: 02 6583 5647 | www.business.nsw.gov.au

Local Government

Bellingen Shire Council	T: 02 6655 7300
Coffs Harbour City Council	T: 02 6648 4000
Greater Taree City Council	T: 02 6592 5399
Kempsey Shire Council	T: 02 6566 3200
Nambucca Valley Shire Council	T: 02 6568 2555
Port Macquarie Hastings Council	T: 02 6581 8111

Chambers of Commerce

Bellingen	bellingenchamber.com
Bowraville	bowraville.nsw.au
Camden Haven	camdenhaveninfo.org.au
Coffs Harbour	coffschamber.com.au
Kempsey / Macleay	macleayvalleychamber.com.au
Nambucca Heads	nambuccavallachamber.com.au
NSW Business Chamber	nswbc.com.au
Port Macquarie	portchamber.com.au
Sawtell	sawtellnsw.com.au
South West Rocks	southwestrocks.org.au
Taree / Manning	manningvalleychamber.com.au
Urunga Myleston	urunga.com.au
Wauchope	visitwauchope.com.au

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