

Western Sydney

AEROTROPOLIS

Investor Guide

Envisage the future, starting now



Australian Government



The Western Sydney Airport, currently under construction, brings with it a unique opportunity: the chance for investors to define their place in a thriving Aerotropolis surrounding the Airport.

The Aerotropolis is strategically located on the edge of Sydney, Australia's largest city, and within one of the fastest-growing regions in the country, Western Sydney.

Western Sydney is a focus of development and growth for both the Australian and New South Wales governments. The Aerotropolis and the region surrounding the Airport is a priority for both governments, already attracting public investment of more than A\$20 billion across transport, health and education infrastructure.

Government and the private sector will join together to create a purpose-built Aerotropolis that will emulate the success of comparable developments around the world. By leveraging the economic benefits of the new Airport, we will create an integrated city equal to the successful aerotropolises of the world.

Starting now, businesses have the opportunity to be part of the creation of the Western Sydney Aerotropolis, designing facilities to their specifications and driving the development of industry-specific precincts.

Precincts incorporating industries such as aerospace and defence industries, food and agribusiness, advanced manufacturing, and health and education will be backed by government support and senior industry leadership. A metropolitan centre catalysed by government land will support high-skilled jobs, businesses and critical public transport connections.

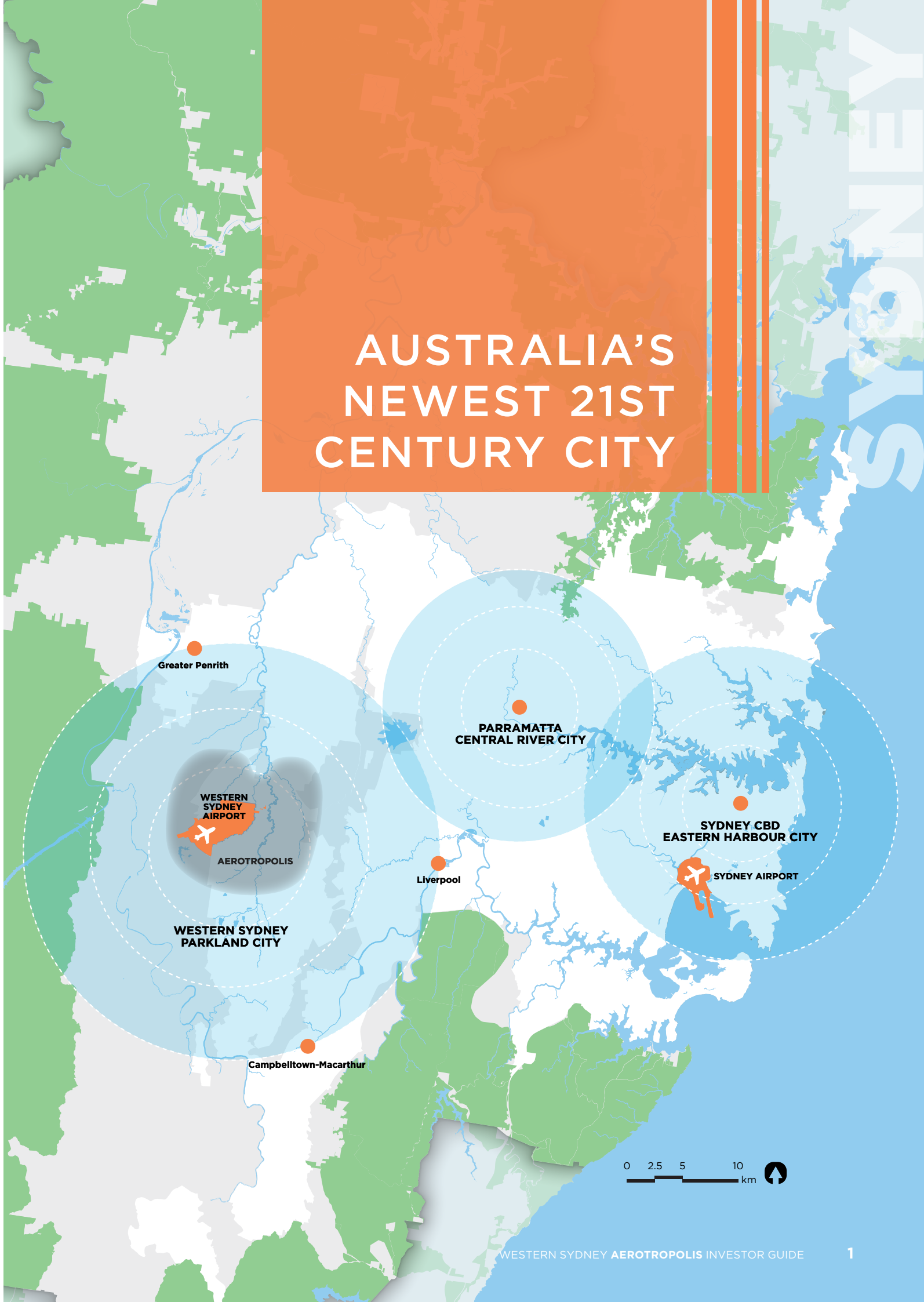
Planning for the Aerotropolis is moving at a fast pace. The Airport is underway, as wide-reaching road and rail networks grow around it. Now is the time to join together as we create Australia's newest 21st century city.



The Hon. Malcolm Turnbull MP
Prime Minister
Commonwealth of Australia



The Hon. Gladys Berejiklian MP
Premier
New South Wales



WHY INVEST NOW?

By the time the Airport opens in eight years, the Aerotropolis will already be taking shape. Through government investment, there will be integrated public transport running, corridors in place, and education and training institutions established.

These major infrastructure developments can take years to complete, which is why the decisions are happening now.

To help shape the Aerotropolis, you are invited to be a foundation investor and partner in this 21st century city.

Early investors will help determine the shape of industry clusters, establish themselves at the heart of collaborations and develop strong alliances.

The long-term success of the Western Sydney Aerotropolis awaits. To gain the competitive advantage, now is the time to invest.

2050

Western Sydney Airport forecast to have more passengers pass through than Heathrow Airport does today

2026

The Aerotropolis will be connected by a new rail link to the operational, 24-hour Western Sydney Airport

2021

\$20 billion of public funding will be invested to develop the Airport, Aerotropolis and surrounding precinct

2018

Now is the time to invest

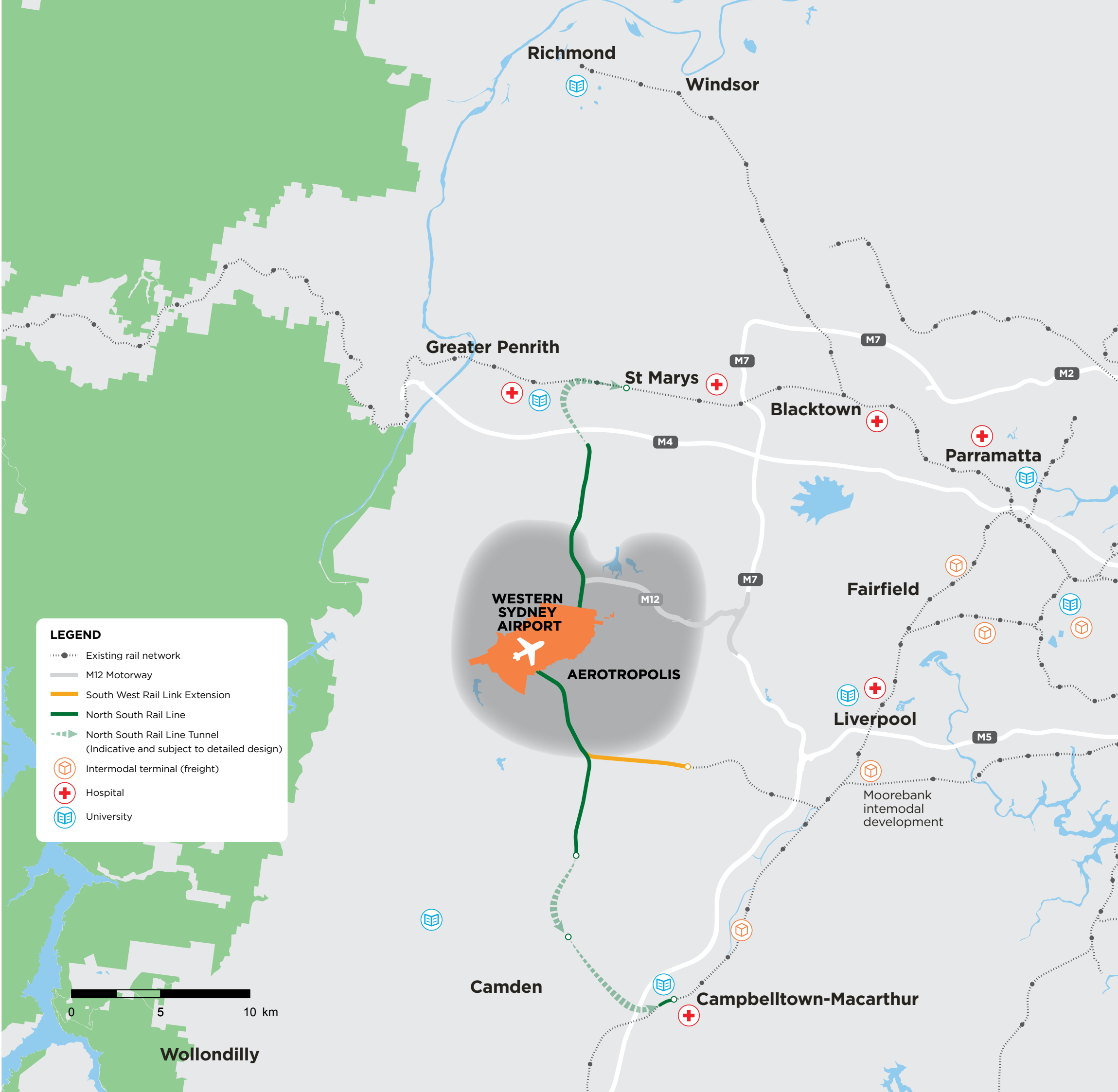
THE HARD WORK HAS BEEN DONE

The Western Sydney Aerotropolis has been a long time coming. Effective planning and infrastructure is in place to ensure that your investment here is a certain one.

-  **The Western Sydney Airport** is under construction and will open in 2026 as a 24-hour international airport.
-  **Local land-use planning**, including the alignment of metropolitan land use, transport and infrastructure priorities, provides certainty to the private sector on precincts, contributions and planning pathways.
-  **Existing transport networks**, including the first stage of the North South Rail Link, will connect the Aerotropolis to Western Sydney Airport and more than one million residents of the Western Parkland City.
-  **Future corridors** for rail, road and freight are being protected to allow further development and connectivity across the region.
-  **Freight and logistics networks** have dedicated space in the Aerotropolis and will connect to the Airport, Greater Sydney and satellite cities across New South Wales.
-  **A dedicated authority** will master plan and curate development within the Aerotropolis, working with industry partners on their facilities and developments.
-  **Digital connectivity** will support businesses and communities in the Aerotropolis.
-  **A skilled and supported workforce** is ready, with plans for further education and training to meet the skill demands of a 21st century city.
-  **A Chief Coordinator** will ensure a joined-up government approach to land use and infrastructure decision-making, eliminating red tape.

Development is already underway. Now is the time to discuss the opportunities available to you in the Western Sydney Aerotropolis.

Talk to us today. Email: wsiao@industry.nsw.gov.au or visit industry.nsw.gov.au/invest-western-sydney



THE AIRPORT IS UNDERWAY

Already under construction by the Australian Government, the new 24-hour international Airport will generate economic growth and create new channels between Sydney and Australia's global trading markets. With passenger demand in Sydney more than doubling in the next 20 years, the new Airport will be a critical link for tourists and visitors.

Industries will have quicker and more convenient access to overseas markets, and access to Asia overnight. The Airport will be curfew-free, operating 24 hours a day. Five million passengers will pass through when it opens in 2026. This figure will grow to more than 80 million each year by 2063 - more than the number of passengers who pass through London's Heathrow Airport today.

Only 50 kilometres from the Sydney central business district (CBD), the Airport will be connected to the Aerotropolis and surrounding areas by strong transport networks. A North South Rail Link will bring passengers between St Marys, the Aerotropolis and Western Sydney Airport. A detailed business case is also underway for a link south to Macarthur, and a South West Rail Link connecting Leppington to the Airport. A future rail connection will provide rapid service between the Airport, Aerotropolis and Parramatta CBD.

Western Sydney Airport itself will generate operational jobs and commercial, retail and business park development within the Airport site. By 2031, the Airport is expected to support almost 28,000 jobs.

The success of Western Sydney Airport will flow through to the Aerotropolis. On-Airport development will provide infrastructure and connections to enable the Aerotropolis to flourish.

With a connected Airport at their core, the Aerotropolis precincts will offer a diversity of jobs across aerospace and defence industries, agribusiness, health, education, tourism and other sectors.



Western Sydney Airport and surrounds
Artist impression only



CURFEW-FREE



3,700m RUNWAY



5 million | 2026



10 million | 2031



82 million | 2063

AIRPORT PASSENGER FORECAST

A UNIQUE GREENFIELD OPPORTUNITY

The Western Sydney Aerotropolis represents the chance to build a city from the ground up – not just an airport.

Strategically located towards the western edge of Sydney, Australia's largest city, this greenfield site offers a unique opportunity: a thriving economic centre that will flourish on more than 10,000 hectares of land, uniquely located in one of the fastest growing regions in the country.

Investors can join with the three levels of government in creating the Aerotropolis. As construction commences on this significant greenfield site, investors will be able to establish themselves in this growing market and help build this economic centre from day one.

The development of the Aerotropolis will be guided by a number of designated industry precincts, three of which are already in planning. These will support the development of key industries including aerospace and defence industries; food and agribusiness; health, research and advanced manufacturing; and freight and logistics. These will be serviced by a network of public transport and road infrastructure, with convenient access to the Airport and businesses in complementary industries.



AEROSPACE & DEFENCE



FOOD & AGRIBUSINESS



HEALTH, RESEARCH & ADVANCED MANUFACTURING



FREIGHT & LOGISTICS



BUILDING & CONSTRUCTION



TOURISM

CREATING SYDNEY'S THIRD CITY

The New South Wales Government has set out its strategy to boost growth and liveability through a redesign of Greater Sydney as a 'metropolis of three cities':

- the Western Parkland City
- the Central River City
- the Eastern Harbour City.

The Western Parkland City incorporates the existing centres of Liverpool, Greater Penrith and Campbelltown-Macarthur, with the new Airport and Aerotropolis at its centre.

It offers residents and workers liveability and natural beauty, with large areas of green space and the recreational opportunities of the Nepean River and Greater Blue Mountains World Heritage Area at its doorstep.

The economy of the Western Parkland City is powered by retail, hospitality and industrial activities including advanced manufacturing, tourism, and trade and logistics, and anchored by thriving health and education precincts already established in Liverpool, Greater Penrith and Campbelltown-Macarthur.

Defence organisations and the defence industry already have a

strong presence in the Western Parkland City:

- The region is home to the Royal Australian Air Force Richmond and Glenbrook air bases.
- Western Sydney is a major driver of advanced manufacturing, with links to aerospace and defence industry organisations including Northrop Grumman, Thales, Safran Defence, Airbus Group, Hawker Pacific and Aviall.



BRINGING THE AEROTROPOLIS TO LIFE



THE LARGEST PLANNING AND INVESTMENT PARTNERSHIP IN AUSTRALIA'S HISTORY

The Australian Prime Minister, New South Wales Premier and eight Western Sydney mayors have signed the Western Sydney City Deal, a 20-year agreement to deliver significant infrastructure, lifestyle and amenity investments, and employment opportunities for the Western Parkland City, in which the Aerotropolis is located.

The deal helps grow the Western Parkland City as a vibrant and thriving area – with improved connectivity, jobs for the future, and new skills and education opportunities.

The deal includes:

- delivering a new North South Rail Link to the existing Sydney rail network, including connections from the Aerotropolis to the new Airport and beyond
- supercharging the Aerotropolis and delivering industry precincts to create 200,000 new jobs across Western Sydney

- skilling residents in the region for this new opportunity by creating an Aerospace Institute – including a vocational training facility, high-performance secondary school, a science, technology, engineering and mathematics (STEM) university, and skills exchange
- more efficient planning outcomes through better coordination
- an enduring governance arrangement involving all levels of government and the private sector to deliver the Western Parkland City
- a A\$150 million Liveability Program to enhance local amenity.

The City Deal is the single largest planning, investment and delivery partnership in the history of Australia, and it is now underway. It creates a once-in-a-generation opportunity for industry and governments to work together to develop the new Aerotropolis, which is specifically designed to support private-sector access to markets in Australia and overseas, and drive economic growth.

A Chief Coordinator for the Western Parkland City will ensure land-use and infrastructure planning are integrated.



The Premier and Prime Minister (centre) with representatives from the local councils at the announcement of the Western Sydney City Deal

Cr Mark Greenhill
Cr Mark Greenhill OAM

Mayor, Blue Mountains City Council

Cr Mary Lyons-Buckett
Cr Mary Lyons-Buckett

Mayor, Hawkesbury City Council

Cr Lara Symkowiak
Cr Lara Symkowiak

Mayor, Camden Council

Wendy Waller
Wendy Waller

Mayor, Liverpool City Council

Cr George Brticevic
Cr George Brticevic

Mayor, Campbelltown City Council

Cr John Thain
Cr John Thain

Mayor, Penrith City Council

Frank Carbone
Frank Carbone

Mayor, Fairfield City Council

Cr Judith Hannan
Cr Judith Hannan

Mayor, Wollondilly Shire Council

LOCAL LAND-USE PLANNING IS UNDERWAY

Planning for the early-activation of the Aerotropolis and Western Sydney Airport is on track. Major infrastructure investments are in planning, establishing a clear and simple regulatory environment for the Aerotropolis.

Fundamental to this environment is a tri-government approach to land-use planning – under the Western Sydney City Deal between the Australian, New South Wales and local governments – to provide certainty and clarity for investors. Early activation of the Aerotropolis will be focused on the precincts around the significant infrastructure investments already identified by the Australian and New South Wales governments, including Western Sydney Airport and stage 1 of the North South Rail Link.

The central Aerotropolis area at Badgerys Creek is expected to be focused on high-tech, education and health, defence and aerospace industries, and retail land uses.

A Northern Gateway area runs along the proposed North South Rail Link corridor, and will likely include technology-based, mixed-use communities centred around the new rail stations. The areas near Elizabeth Drive, particularly those that will be noise-affected, will be suitable for freight and logistics services.

The South Creek area will be aimed at retaining water within the landscape, including through lakes, water for new urban forests and the creation of green spaces.

The Western Sydney Airport Growth Area Land Use and Infrastructure Implementation Plan will be released by the New South Wales Government in 2018. This plan, and the subsequent State Environmental Planning Policy, will set out the approach to the identification and funding of infrastructure including value sharing.

Commercial development of the Airport will be planned and managed by WSA Co in parallel with the early activation precincts for the Aerotropolis.

Flexibility and adaptability will be built into the zoning process for the Aerotropolis precincts to allow diversity and innovation in industries and land uses. Precinct plans will be prepared to enable accelerated re-zoning and to support the design and construction of the new rail line.

Land owners and developers will be able to participate in the development of the precinct plans, with procedures for this participation to be included in the Western Sydney Airport Growth Area Land Use and Infrastructure Implementation Plan.

The Western Sydney Development Authority, to be established by the New South Wales and Commonwealth Governments, will have a central role in developing the Aerotropolis, consistent with the Land Use and Infrastructure Implementation Plan.



FREIGHT NETWORKS ARE ESTABLISHED

Freight and logistics connectivity will be enabled through dedicated space within the Aerotropolis, connected to key freight and logistics precincts throughout Greater Sydney.

For example, the Moorebank Intermodal Company is building its intermodal terminal situated between the existing Sydney Airport and the Aerotropolis. The terminal will deliver facilities such as:

- an import-export terminal with a capacity to handle up to 1.05 million twenty-foot equivalent units (TEU) per year of international containerised freight
- an interstate terminal with a capacity to handle up to 500,000 TEU of interstate and regional freight per year
- up to 850,000 square metres of high-specification warehousing, where containers can be unpacked before delivery of their contents to its final destination.

The New South Wales Government has identified a new Western Sydney Freight rail corridor.

The corridor will:

- link to existing freight lines in Sydney
- ensure businesses operating in the Aerotropolis have access to a dedicated freight line and intermodal
- allow efficient rail transport of goods and services in and out of the Aerotropolis.



DIGITAL CONNECTIVITY PLANS ARE IN PLACE

Investors will have access to world-class digital connectivity through the rollout of four key initiatives:

1. Western City Digital Action Plan – This plan will set out a vision for information and communications technology and digital connectivity in a 21st century city. It will be led by local governments in collaboration with the Australian and New South Wales governments, and industry partners.

2. Smart Western City Program – This is planned by the New South Wales Government to enable state government agencies to embed interoperable smart and secure technology (e.g. transport and utility monitoring systems) into new infrastructure as it is rolled out in the city.

3. 5G Strategy – The New South Wales and local governments will develop a 5G strategy for the Western Parkland City, which will include partnering with a telecommunications carrier to deliver a trial of 5G technology, with a view to rolling out the technology to metropolitan centres as it becomes available. The future rollout of 5G mobile technology will be a step-change for mobile wireless communications – unlocking new possibilities for the Western Parkland City, with far-reaching economic and social benefits.

4. Western Parkland City Data Catalogue – New South Wales and local governments will make data publicly available in line with open-data principles. To facilitate this, the Australian Government will establish a Western Parkland City data catalogue on both data.gov.au and NationalMap, and support local governments to fully utilise the platform. Better access to local data has the potential to drive innovation and improve service delivery across the Western Parkland City.



ONE AUTHORITY TO IMMEDIATELY START DEVELOPING THE AEROTROPOLIS

The Australian and New South Wales governments are establishing a Western Sydney Development Authority to master plan and curate development within the Aerotropolis, with an initial focus on the Commonwealth lands at North Bringelly.

With a simplified and efficient approach, development of industry facilities will proceed at a faster rate. The authority will also improve planning, integration and connection to other services.

It will have the capacity to work directly with industry partners to plan and design tailored facilities and developments to cater for industry needs. This includes providing enabling infrastructure and services to enhance connectivity, and efficient access to key enablers such as the new Airport and freight links.

A Western Parkland City Planning Partnership will be established with local councils to streamline planning processes.

CONNECTING INVESTORS WITH LOCAL PARTNERS AND GOVERNMENT

The Western Sydney Investment Attraction Office



A joint government initiative, the Western Sydney Investment Attraction Office based in Liverpool will coordinate the approach to attract new domestic and international investment and business into the Western Sydney Aerotropolis, across all three levels of government (Australian, New South Wales and local governments).



The office will play a critical role as a conduit for those looking to capitalise on the competitive advantages of the Aerotropolis. It will provide facilitated concierge services for investors and access to governments at decision-making levels. It will help investors more easily establish their presence in the Aerotropolis and drive jobs growth in the Western Parkland City.



The office will help investors connect to partners in Western Sydney, including government agencies, planning officials, and industry groups to assist in identifying opportunities and realising investment potential in the Aerotropolis and across Western Sydney.

Visit industry.nsw.gov.au/invest-western-sydney
To contact the team, email wsiao@industry.nsw.gov.au

A SKILLED AND SUPPORTED WORKFORCE IS READY

The Western Parkland City has a young demographic profile, providing an agile and educated workforce for industries investing in the Aerotropolis.

Western Sydney is a culturally diverse region of Sydney linked to communities across with the world, with more than 200 languages spoken. More than 35 per cent of residents speak a language other than English at home.

This population is set to grow by almost 500,000 people over the next 20 years, attracting a wider range of skills to the region.



The development of the Aerotropolis will further attract a quality workforce. The New South Wales Government has committed to delivering the best in education and skills training opportunities for residents, and by 2031 is planning for more than half of all new jobs in Sydney to be created in Western Sydney.

To make this a reality, plans include constructing new schools and a vocational education and training facility to align with the high-skilled businesses and industries of the Aerotropolis.

The government is seeking industry partners to invest in tertiary educational institutions, allowing direct links to training and access to the expanding workforce.

While high-quality education, training and research facilities already exist in Western Sydney, current and future developments include:

- 11 new and relocated schools and 21 major upgrades are already in planning, design or construction following an investment of more than A\$700 million by the New South Wales Government.
- By 2020, the New South Wales Government will call for proposals from leading global universities and industries to establish an Aerospace Institute in the Aerotropolis.
- Greater funding for apprenticeships, traineeships and pre-vocational qualifications across Western Sydney will support skills development.
- A Skills Exchange near the Western Sydney Airport will support training delivery and career pathways for the many jobs expected to be supported in the construction phase of the Airport.

Universities have a strong presence across Western Sydney

Sydney is home to highly ranked universities and is one of the most popular destinations in the world for international students.

Western Sydney is leveraging this thriving sector. New campuses are under construction. High-growth tech business incubators are being rolled out. Universities are building significant connections to hospitals in the area, creating health and research precincts.

The New South Wales Government has a vision to achieve a ring of university cities in Western Sydney in collaboration with the university sector.

- Western Sydney University has campuses at Penrith, Campbelltown and Richmond, and recently opened a new campus in Liverpool.
- The University of Sydney campus in Camden provides an extensive network of farms and research units, which conduct veterinary teaching, livestock veterinary teaching, plant breeding and agricultural research.
- The University of Wollongong opened a Liverpool campus in early 2017, with courses in computer sciences, law and information systems.
- The University of Sydney has a clinical school at Westmead, and in 2016 committed to contribute more than A\$60 million of funding for new education facilities, upgrades to existing spaces, and a suite of new academic programs.

WESTERN PARKLAND CITY JOBS BY SECTOR (2016)



17%
HEALTH & EDUCATION



35%
POPULATION SERVING



25%
INDUSTRIAL



23%
KNOWLEDGE INTENSIVE



464,450
population growth
2016-2036

THE ESSENTIALS FOR SUCCESS ARE HERE

24-hour
international
Airport
already
under
construction



The largest
planning
and
investment
partnership
in Australia's
history



A greenfield
site within
a thriving
region



Dedicated
resources
to navigate
engagement
and identify
local partners





INVESTMENT
OPPORTUNITIES
WITHIN THE
AEROTROPOLIS

Aerotropolis CBD
Artist impression only

AEROSPACE AND DEFENCE INDUSTRIES



AEROSPACE & DEFENCE

Western Sydney is already attracting world-leading aerospace and defence industries (ADI) organisations. Investors will be establishing themselves in a region with links to new and existing ADI investments and facilities. This greenfield opportunity allows businesses to design and build their facilities to their specifications and futureproof their operations to deliver their long-term business needs.

The Australian and New South Wales governments will work with industry to foster a sustainable cluster of industry, research and development (R&D) and educational ADI activities that will:

- integrate and drive collaboration between industry, education and research

- create opportunities for start-ups and small to medium enterprises to leverage university R&D facilities and incubate their cutting-edge ideas
- focus on building and accessing global supply chains within the aerospace, space and defence industries sectors
- integrate world-class STEM educational opportunities with highly attractive career options within the precincts
- help improve the broader social amenity of the Western Parkland City by creating a distinctive, differentiated and attractive work environment
- build a distinctive identity that complements and offers synergies with other New South Wales and interstate ADI precincts
- form a key part of a greater Sydney ADI network
- draw from a supply chain flowing across the Western Parkland City.

The precincts will provide the opportunity for investment in key ADI capability streams, which align with the needs of major customers including the Department of Defence and prime contractors. These streams include:

- electronic systems development and sustainment
- information analytics
- communications technology
- cybersecurity
- advanced electronics
- simulation and training
- advanced component design and manufacturing.

The precincts will also provide opportunities for expansion into additional industry sectors. The precincts will build on the strength of local ADI supply chains, with the ability to undertake complementary business with existing ADI hubs across New South Wales and Australia.



Research and development opportunities



A\$200 billion
Investment in defence capability over the next 10 years

Forecast 2016-2026



Attractive work environment

THE WESTERN PARKLAND CITY AEROSPACE AND DEFENCE INDUSTRY COMMUNITY IS GROWING

Thales Australia employs more than 500 people in Rydalmere (25 kilometres east of the Airport), where it develops sonar systems for submarines and surface warships.

Royal Australian Air Force facilities at Richmond (25 kilometres north of the Airport) and Glenbrook (16 kilometres north-west of the Airport), and Holsworthy Army Barracks (27 kilometres south-east of the Airport) provide a defence presence in close proximity to the Aerotropolis.

Northrop Grumman, a major US defence contractor, has committed to invest A\$50 million in a site within the aerospace and defence industries precincts.

Agriculture is a sector with substantial existing export activity and opportunity for growth. It is also a significant generator of air freight volumes.

The new Western Sydney Airport will offer an efficient way to get extra volumes to existing and new international markets. Together with the productive agricultural lands available in the region and Australia's reputation as a safe and reliable source of quality produce and premium products, the Airport will provide the ultimate gateway to build export volumes and meet future demand.

Having food and agribusiness precincts in the Aerotropolis will enable the delivery of fresh produce and pre-prepared food anywhere in the world within 36 hours from production to consumption – providing access to premium food markets and consumers willing to pay for these products.

Food and agribusiness opportunities include:

- producing fresh food on-site, close to the point of export, reducing transport loads in the supply chain and time to market. Rapid delivery by air to markets will grow further food and beverage exports compared to competitor nations who do not have the same 'speed to market' advantage
- assisting niche brands to extract the maximum value from international customers from just-in-time harvest, process and distribution. Ensuring the value-add components can be done on-site will generate extra profits and additional markets
- advancing technological solutions to support emerging export agribusiness, in areas such as biosecurity, cold storage and quarantine
- establishing groundbreaking research programs with universities, advancing new technologies and systems to improve agricultural productivity, biosecurity and sustainable use of resources
- the synergy potential of linking agri-precincts with high-tech businesses across the Aerotropolis. A recent report shows agtech has a potential value-add to the agriculture sector of A\$20 billion.

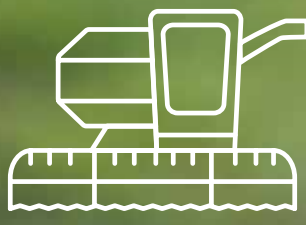
The Aerotropolis is also located near several food and agricultural research institutes, including Western Sydney University's Hawkesbury Agripark in Richmond (39 kilometres away); the University of Sydney's Centre for Carbon, Water and Food in Camden (26 kilometres); the New South Wales Government's Elizabeth Macarthur Agricultural Institute in Menangle (40 kilometres); and the University of Sydney's Livestock Veterinary Teaching and Research Unit in Brownlow Hill (27 kilometres).



36 hours
delivery of produce
worldwide

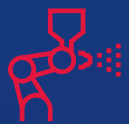


3.5 billion
size of Asian
market in 2030



A\$806 million
gross value of Western
Sydney agriculture
production 2016

HEALTH, RESEARCH AND ADVANCED MANUFACTURING



HEALTH, RESEARCH
& ADVANCED
MANUFACTURING

Government investment in the Western Sydney Airport and the Western Sydney Aerotropolis will help to establish a fourth health and education precinct in the Western Parkland City, connected to the existing health and education precincts in Liverpool, Greater Penrith and Campbelltown-Macarthur.

Government investment in the growth of these health and education precincts will:

- diversify job opportunities across Greater Sydney
- help realise the vision of a '30 minute' city by creating high-value jobs closer to home for the population of the Western Parkland City
- strengthen the international competitiveness of the economy, particularly in innovation.

By 2020, the Asia-Pacific region is expected to become the world's second-largest medtech market, providing significant export opportunities and market accessibility for businesses based in the Western Parkland City.

Medical expertise in the Western Sydney Aerotropolis will be connected to the three established health and education precincts, as well as four Western Sydney University campuses and the new University of Wollongong campus in Liverpool. Health and education precincts offer many opportunities to drive and support international competitiveness.

There are already a number of investments underway to support the delivery of health activities in Western Sydney, including:

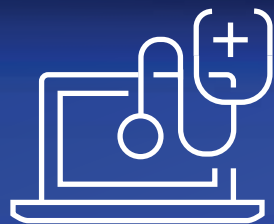
- Nepean Hospital redevelopment – A\$1.026 billion
- Campbelltown Hospital redevelopment and expansion – A\$1.282 billion
- Blacktown and Mount Druitt Hospitals redevelopment – more than A\$700 million.

The commitment to build an Aerospace Institute in the Aerotropolis will be a significant opportunity for this metropolitan centre to provide education and research for its growing industries. The world-class institute will include a STEM university, a high performance secondary school and an advanced vocational education and training facility.

WESTERN SYDNEY IS HOME TO ONE OF THE LARGEST INDUSTRIAL ESTATES IN THE SOUTHERN HEMISPHERE

The Smithfield-Wetherill Park Industrial Estate is the hub of manufacturing and distribution in Western Sydney. At the geographical centre of Sydney's major industrial zones (and 13 kilometres east of the Airport) it sits strategically between the major growth zones in the north-west and south-west.

The estate is home to more than 1,000 manufacturing, wholesale, transport and services firms, which employ more than 20,000 people.



55%
of Australia's medtech
companies are in
New South Wales



#1 for R&D
New South Wales has
the highest rate of
business spending on
R&D in Australia



75,000+
people employed in
manufacturing in
Western Sydney

FREIGHT AND LOGISTICS



FREIGHT &
LOGISTICS

Airport-related investment, a potential new intermodal terminal and new road infrastructure will support existing regional specialisations in freight and logistics. As more industrial lands are renewed in the Eastern and Central cities of Greater Sydney, the Aerotropolis in the Western Parkland City will offer a well-connected and serviced alternative for businesses looking to relocate.

Demand for aviation services in Greater Sydney is forecast to double in the next 20 years. Currently, goods moved by air freight through Sydney Airport in Mascot almost equal the value of Australia's entire agricultural production. The 24-hour Western Sydney Airport and the area's less congested roads will give the Aerotropolis a competitive advantage and draw a large share of Sydney's freight (air and ground). The new Airport's freight demands are estimated to grow to around 265,600 tonnes in 2031, nearly 1 million tonnes in 2052 and 1.8 million tonnes in 2064.

Agribusiness is already a substantial industry in the Western Parkland City. The new Airport will provide an effective means to transport extra volumes to international markets quickly. A growing international demand for fresh Australian food will generate greater direct exports. The presence of agricultural precincts adjoining the Airport will allow faster delivery and reduce costs as goods will spend less time in transit.

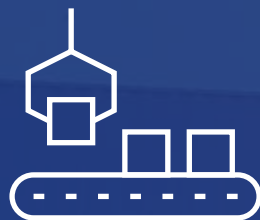
The Airport will be well-located for the transport of goods to and from Greater Sydney and New South Wales. The Aerotropolis will support the logistics and distribution needs of Greater Sydney with dedicated freight connections to Port Botany (Sydney), the Port of Newcastle and Port Kembla (Wollongong), and will be the central hub for the movement of goods throughout the state.

Serviced by new intermodal terminals, the Aerotropolis will be sought after by major international freight distribution companies wanting to access the growing Sydney market. With a projected increasing share of freight movement by rail, the Aerotropolis will facilitate the efficient distribution of goods to local, regional and national markets without impacting road or passenger rail networks.

To deliver an effective freight and transport system, the Australian and New South Wales governments will provide A\$3.6 billion in funding for Western Sydney roads over 10 years. Land has also been set aside to allow for future logistic hubs and infrastructure to support the growing freight network.



2x freight
volumes forecast to
double in Sydney
in 40 years



A\$66 billion
Yearly value of freight
to New South Wales
economy



More than
A\$1 billion
spent on upgrading
Western Sydney roads
(2017-18)

TOURISM AND VISITATION



TOURISM

Western Sydney is a key contributor to the New South Wales visitor economy, which has experienced strong growth over the past five years.

Western Sydney offers areas of outstanding natural beauty, diverse experiences, and great dining options and attractions. It borders the Greater Blue Mountains World Heritage Area – one of Australia’s most visited places – and is creating new destinations through significant infrastructure investment such as the Parramatta riverfront development.

As part of a state that is experiencing significant population, industry and tourism growth, Western Sydney has unique opportunities ready to be leveraged.

The New South Wales Government invests strongly in bringing visitors to the state, and each year spends A\$38 million in Western Sydney alone on event acquisition and retention, public relations and travel packaging. To take advantage of the new developments in Western Sydney, the New South Wales Government is consulting widely to identify ways to further drive growth in the Western Sydney visitor economy.

This plan will guide the growth of infrastructure and facilities, and upgrades to attractions to meet the growing demands of tourism. New Western Sydney marketing plans will reflect the development of Western Sydney Airport, a new Western Sydney zoo, Western Sydney university campus developments and the Inglis Riverside Stables development.

The business district of the Aerotropolis will further enhance this industry sector by delivering a night-time economy with entertainment, dining and accommodation options close to the Airport.

From 2026, Western Sydney Airport will provide an international gateway for tourists to explore the Blue Mountains, Nepean River and Southern Highlands, and to experience the vibrant multiculturalism of Western Sydney.

Medical precincts at Greater Penrith, Liverpool and Campbelltown-Macarthur present opportunities to serve health education students, study tours, sports medicine professionals, business events and medical tourism.

An abundance of conference and meeting venues can be found in stunning parks, gardens, historic houses and waterside locations. They are complemented by cultural tours, trails, festivals, performing arts events and Aboriginal cultural attractions, and framed by wide expanses of national park. They are also priced more competitively than those found in comparable cities.

The development of new centres within the Aerotropolis over the coming decades will attract local and international visitors, and encourage further expansion of accommodation options, conference venues, visitor attractions, tours and services.

1. Blue Mountains
2. Camden
3. Campbelltown
4. Fairfield
5. Hawkesbury
6. Liverpool
7. Penrith
8. Wollondilly



12.2 million
visitors to
Western Sydney
in 2017



32%
of all visitors
to the Greater Sydney
region went to
Western Sydney



A\$4.2 billion
in expenditure
from overnight
visitors to Western
Sydney in 2017



BUILDING AND CONSTRUCTION



The development of the Aerotropolis, completion of Western Sydney Airport and construction of associated transport connections present a wealth of opportunities for the building and construction industry.

- These will include projects in the areas of:
- public transport and roads
 - health infrastructure
 - education infrastructure, including the Aerospace Institute, schools, and university and training facilities
 - water infrastructure.

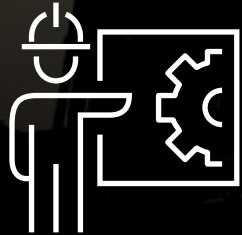
The first stage of a North South Rail Link from St Marys to Western Sydney Airport and the Aerotropolis will be funded by the Australian and New South Wales governments. Ongoing investigations will be held for transport options including major road and rail projects across the Aerotropolis.

The Australian and New South Wales governments will explore opportunities for the release of government land to drive development and new construction. This will start with the sale of the Penrith Multi-User Depot (13 kilometres north-west of the Airport). A new growth area will also be delivered between Greater Penrith and Eastern Creek – the area directly north of the Aerotropolis. This will allow new housing to be planned and constructed, along with new infrastructure including schools, healthcare facilities and transport.

The Western Parkland City is set to grow by 500,000 people over the next 20 years. The New South Wales Government has set a target for 184,500 new homes in that period to meet that demand. The construction industry will be relied upon to deliver the boom of homes needed for the growing population.



9.7%
of Western Sydney workers are in the construction industry



NSW #1
in Australia for construction work and dwelling starts



50%
of active cranes in Australia are in Sydney

WESTERN SYDNEY AEROTROPOLIS AT A GLANCE

New South Wales: Australia's economic engine room

TRIPLE-A
CREDIT RATING
AAA
By the two major
credit rating agencies

26 YEARS
OF UNINTERRUPTED
GROWTH



A\$80.1
BILLION
CAPITAL INVESTMENT
PROGRAM OVER THE
NEXT 4 YEARS



Western Sydney Airport: Connecting Western Sydney to the world

24
HOUR

CURFEW-FREE

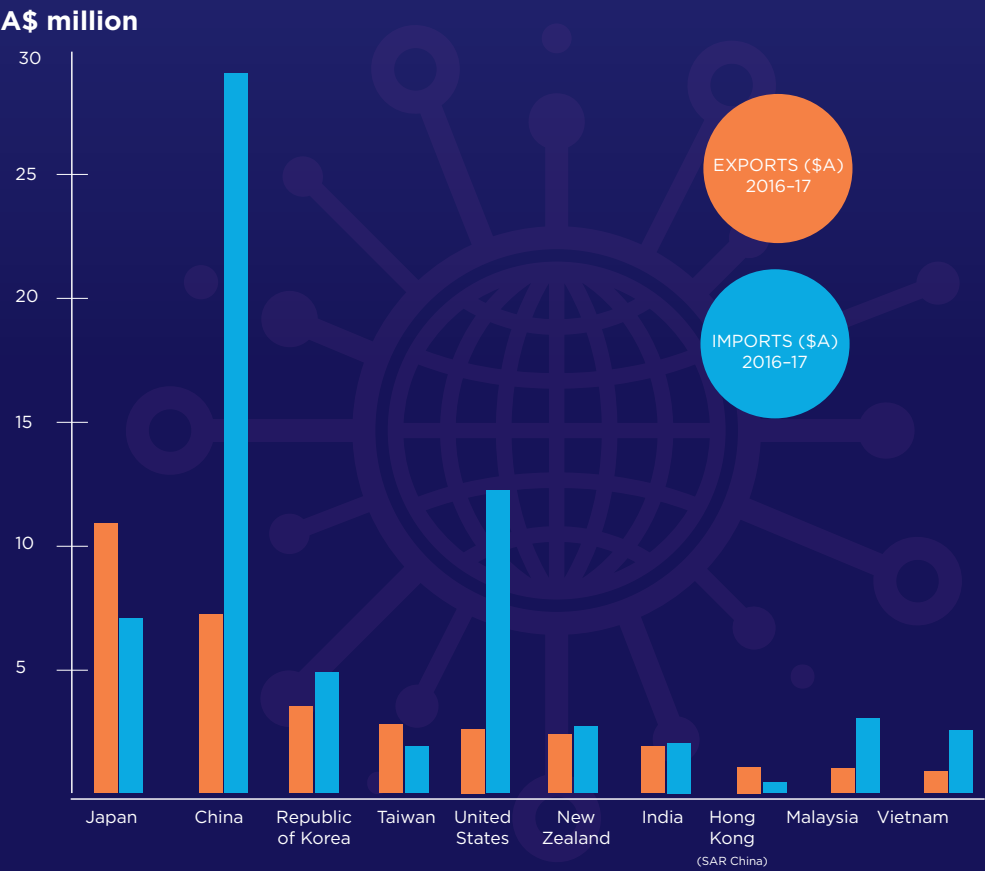


3,700m RUNWAY

5 million | 2026
10 million | 2031
82 million | 2063

AIRPORT PASSENGER FORECAST

Access to global supply chains and the state's major trading partners

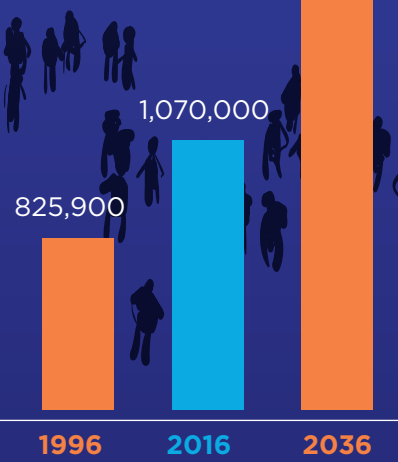


Western Parkland City: Growing and connected

464,450
POPULATION
GROWTH
2016-2036

27%
OF GREATER
SYDNEY
POPULATION
GROWTH

Projected population
1,534,450



Western Sydney
is Australia's **3rd**
largest economy



JOBS BY SECTOR (2016)

17%
HEALTH & EDUCATION
35%
POPULATION SERVING
25%
INDUSTRIAL
23%
KNOWLEDGE INTENSIVE



Jobs — 54%
OF RESIDENTS WORK IN
WESTERN PARKLAND CITY

Western Sydney Aerotropolis: A thriving economic centre in the making

- ✓ SET ON OVER **10,000 HECTARES** OF LAND
- ✓ INCORPORATING **3 FIRST-STAGE PRECINCTS** IN PLANNING
- ✓ UNDERPINNED BY A **20-YEAR AGREEMENT** BETWEEN ALL LEVELS OF GOVERNMENT



WESTERN SYDNEY INVESTMENT ATTRACTION OFFICE

Concierge service: The office will provide an individually tailored end-to-end service to potential investors, with the ability to align business objectives to potential opportunities, and help create the required connections to complete the investment journey.



Our team is already working with existing and potential investors. You can connect to this service directly, or through one of the many New South Wales Trade and Investment international offices.

Talk to us and secure your place in the Western Sydney Aerotropolis today.

Email wsiao@industry.nsw.gov.au
or visit industry.nsw.gov.au/invest-western-sydney

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May 2018

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Page 35, image 1: James Horan, Destination NSW; image 5: Sydney Seaplanes.