

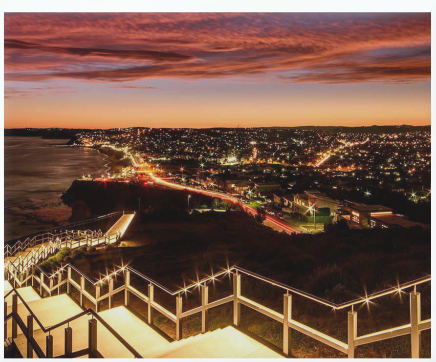


The Hunter

Regional Profile



Key Growth Drivers



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The Hunter

The Hunter is one of Australia's economic power houses, located approximately two hours' drive north of Sydney. The area spanning 31,000 square kilometres is made up of the Lower Hunter (Newcastle, Port Stephens, Lake Macquarie, Maitland, Cessnock, Gloucester, and Dungog) and the Upper Hunter (Singleton, Muswellbrook and the Great Lakes).

The Hunter property market is predicted to be among the best performers in Australia over the next two years, with values forecast to rise by 15% or more in some suburbs.

- > One of Australia's largest regional populations
- > Australia's oldest wine-growing region
- > World's largest coal export port
- > Australia's equine capital
- > Energy powerhouse
- > Fastest growing regional airport
- > Major defence bases
- > Huge tourism industry

Population - 661,466

Area - 31,000 km²

Cities - Newcastle, Port Stephens, Cessnock, Maitland, Singleton, Muswellbrook & Lake Macquarie

Housing Affordability

Housing is more affordable in the Lower Hunter than other parts of the Greater Metropolitan Region. The cost of housing in the Lower Hunter is lower than the state average and the rate of home ownership is higher. Nevertheless, the New South Wales government recognises that housing affordability is an issue for current and future households within the Hunter region.

Property Investment

Newcastle and the Hunter Valley have been identified among the nation's top regions for property investment by a panel of industry experts, with Newcastle, Cessnock and the Hunter Valley ranked among the area's top investment locations. The strength of the Hunter's mining sector has contributed to the strong showing, along with its relatively affordable housing.

Capital Growth

The Hunter property market is predicted to be among the best performers in Australia over the next two years, with values forecast to rise by 15% or more in some suburbs. Experts predict that a growth rate of 15 to 20% would be sustainable over the next three years, which would see Hunter property prices outstrip those in Sydney. Numerous Hunter suburbs are also regularly listed on Residex's State Market Reports for their outstanding capital growth. Despite declining property markets throughout much of the state, double-digit growth in some areas in the Hunter could be considered conservative.



Population & Employment

The Hunter region is home to over 9% of New South Wales' population. It is also the state's largest growth centre outside the Sydney basin. The Hunter offers steadily growing employment and investment opportunities across the region as well as a quality lifestyle. The Hunter is predicted to become home to a population of one million people by 2050.

The population of the Hunter region has recorded the largest increase of any New South Wales region outside Sydney in recent years.

Population

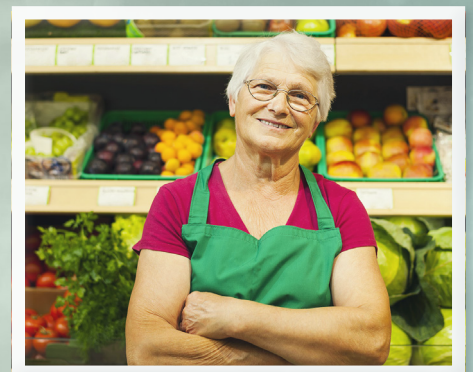
The population of the Hunter region has recorded the largest increase of any New South Wales region outside Sydney in recent years. Maitland is the state's fastest-growing inland city, adding more than 1,000 residents per year since 2006. The city's population grew 14.7% from 63,505 at the 2006 Census to 73,447 in 2013 and 78,200 in 2016. Cessnock reported the second highest increase in the Hunter with 13.7% growth.

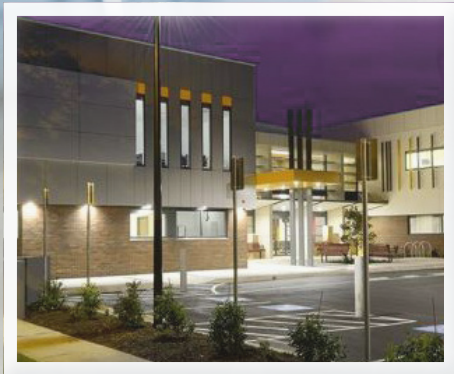
Lake Macquarie is also on the rise, with 18,000 new residents expected to arrive between 2016 and 2031. Strong growth was also reported in Gloucester and Muswellbrook (Australian Bureau of Statistics).

Employment

The Hunter has a large professional, skilled labour force and strong industrial relations record. Its 288,600-strong workforce has a large proportion of residents with certificate, diploma, or tertiary qualifications. The Hunter Valley Research Foundation reports that employment levels are stable throughout the Hunter region.

The foundation adds that employment in the Hunter is likely to increase if local businesses seize opportunities to invest and grow, particularly in Asia. A range of industries, from agriculture to manufacturing, are likely to reap these rewards. Businesses that look beyond the Hunter for growth should help the region's 8.04% unemployment rate fall.





Health

The Hunter has a reputation for providing quality health care, with 24 public and more than 20 private hospitals dotted around the region.

John Hunter Hospital

The John Hunter Hospital, one of Australia's newest teaching hospitals, is at the core of the local healthcare sector. John Hunter Hospital has over 550 beds. It is the busiest trauma centre in the state and the only major trauma service outside Metropolitan Sydney.

John Hunter Children's Hospital, part of the John Hunter Hospital, is a tertiary referral centre for children and young people ranging in age from just 23 weeks gestation to 18 years. The hospital cares for patients throughout the Hunter Valley and Northern New South Wales. Specialty areas of care include asthma, cancer, cleft palate, child protection, cystic fibrosis, diabetes, orthopaedics, spina bifida, trauma and head injuries.

Royal Newcastle Centre

The Royal Newcastle Centre is a \$112 million state-of-the-art health facility, which opened on the Rankin Park campus, next to John Hunter Hospital, in April 2006. It is home to many specialist services and some medical, diagnostic and outpatient services previously provided at the John Hunter Hospital.

Calvary Mater Newcastle

Calvary Mater Newcastle is situated in Waratah, Newcastle, in the heart of the Hunter region. With 195 beds and supported by an emergency department and intensive care unit, Calvary Mater Newcastle is the Hunter region's major centre for oncology (cancer) services, haematology, clinical toxicology and research.

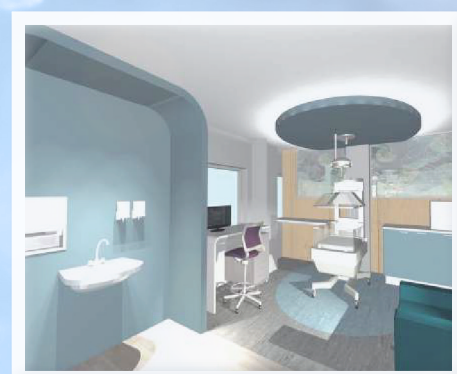
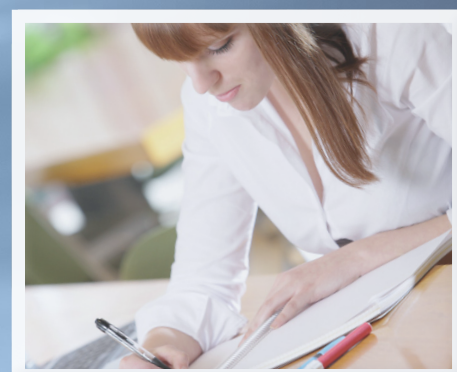
Maitland Hospital

Maitland Hospital is a 158-bed health facility located 35 minutes from the John Hunter. It offers a comprehensive range of health services, including a 24-hour emergency department, maternity ward, coronary care, mental health facilities, and surgical and rehabilitation services. It will be replaced by a new larger hospital in nearby Metford, which should be operational by 2019.

Belmont Hospital

Belmont Hospital is a 75-bed acute facility in Lake Macquarie. Services provided include general medicine and surgery, day surgery, coronary care, gynaecology, neonatal, obstetrics and a 24-hour emergency department.

The Hunter also offers aged care services, Aboriginal health services, children and youth care, migrant health services, mother and baby care, physiotherapy, chiropractic, and alternative therapies.





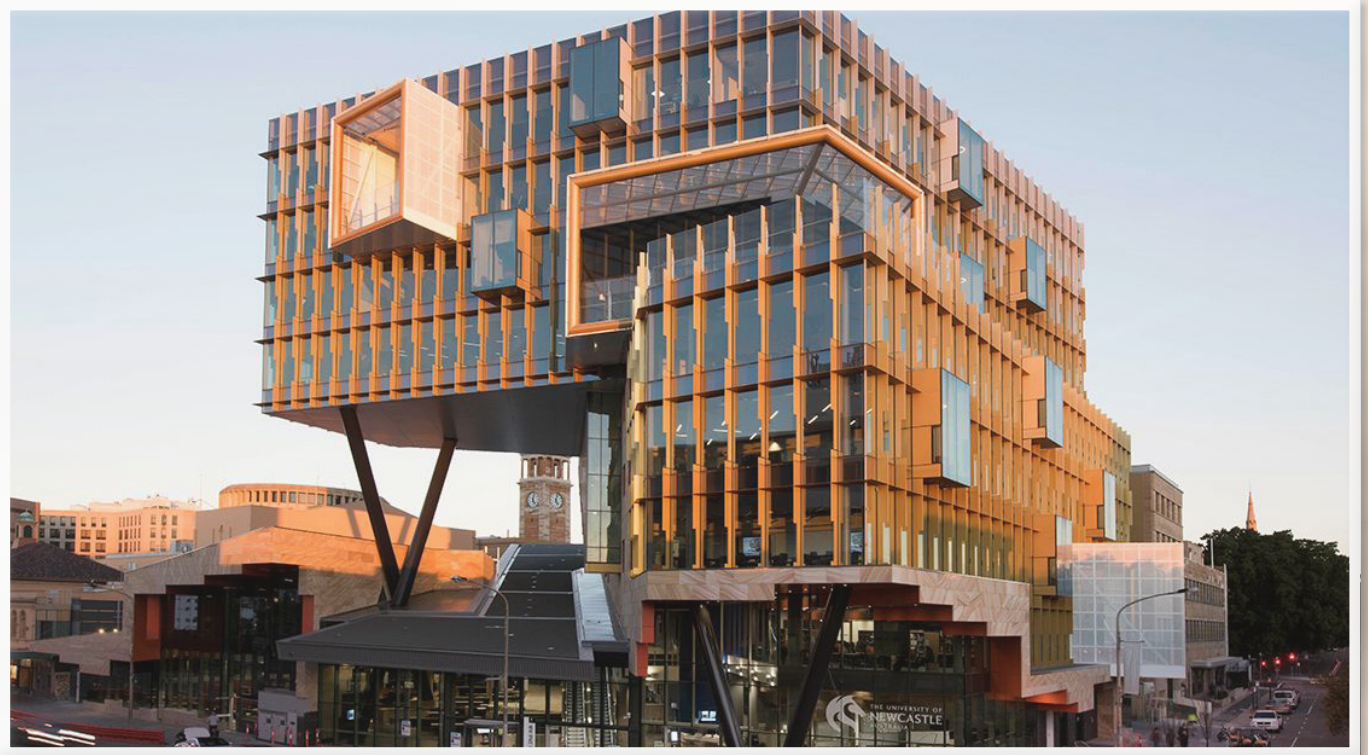
Education



Tertiary education is offered through the University of Newcastle, which is ranked in Australia's top ten universities and is renowned for world class researchers. The University has outlined plans for its new \$95 MILLION CBD campus, NeW Space, which will be a catalyst for growth in the city centre.



More than 64,000 students are enrolled across a wide range of courses.

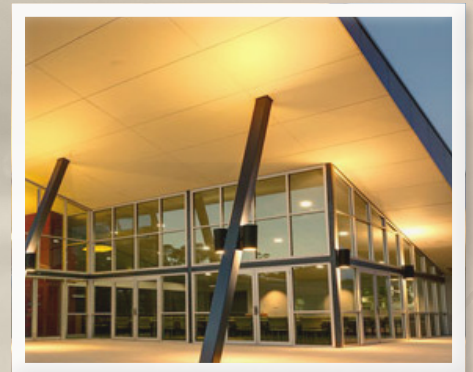


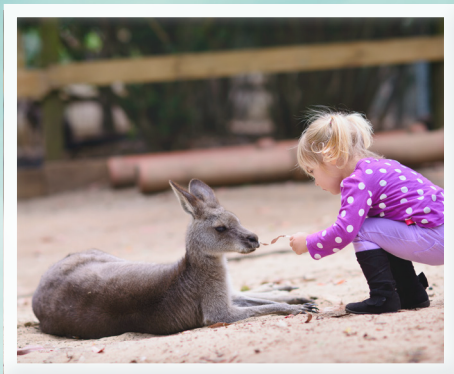
The Hunter has an excellent educational system with public and private schools spread throughout. Private schools include Hunter Valley Grammar School at Ashtonfield, Newcastle Grammar School, Scone Grammar School, St Catherine's Catholic College at Singleton, Bishop Tyrrell Anglican College at Fletcher, Macquarie College at Wallsend, and St Philip's Christian College which has campuses at Waratah, Salamander Bay & Cessnock.

The University of Newcastle is a multi-campus institute located across 10 sites worldwide: Newcastle, Central Coast, Port Macquarie, Orange, Sydney, Tamworth, Armidale, Taree, Moree, and Singapore. The Hunter Institute of Technology TAFE is the largest provider of vocational education and training in the Hunter. More than 64,000 students are enrolled across a wide range of courses.

Currently a large number of its apprentices work in mining, manufacturing, and rail companies. The Hunter Valley Training Company has employed and trained more than 18,000 Australians over the last three decades.

Total College is situated in Paterson, in the picturesque Hunter Valley. It provides a unique blend of agricultural training and practical experience for school-leavers and others interested in pursuing careers in the agricultural industry.





Lifestyle

The Hunter is a vibrant, cosmopolitan region. With Newcastle as its heart, the region offers the services and facilities of a city with the relaxed pace of a regional centre. Some 600,000 people, Australia's largest regional population, enjoy the pleasures of urban, beach, lakeside or rural living in the Hunter.

Something for Everyone

The area has it all, and all within easy commuting distance of Sydney, just two hours south. A perfect combination of vibrant city life and relaxed regional living, the Hunter is the ideal place to work, rest, and play.

Residents enjoy diverse employment choices, the chance to choose a lifestyle by the beach or in a rural setting, excellent health and education facilities, and the luxury of time that comes from short commuting distances between work and leisure pursuits. The Hunter also offers a range of affordable housing options for residents.

The Great Outdoors

The Hunter's superb waterways, national parks and wildlife reserves beckon outdoors enthusiasts. For water lovers, the region has pristine beaches, the largest saltwater lake in Australia (Lake Macquarie), the Hunter River flowing from the Upper Hunter, and the beautiful bays of Port Stephens just a short drive away. Residents and visitors can indulge in all kinds of water sports including sailing, water-skiing, surfing, fishing, swimming, white water rafting, and even dolphin watching.

For those that prefer dry land, world-heritage listed Barrington Tops National Park, Myall Lakes National Park, and Watagan State Forest will not disappoint. Their bushwalking trails and ecotourism facilities are sure to excite even the most seasoned adventurer. Blackbutt Reserve, just 15 minutes from Newcastle CBD, is another must see for nature lovers. Its native flora and fauna is showcased in vast unspoilt bushland.

Wining & Dining

The Hunter's culinary delights are sure to tempt, with a vast array of dining experiences to enjoy throughout the region. Choose from alfresco dining in cosmopolitan cafes to seafood restaurants by the ocean. There's a place and taste to suit any mood and any budget. Of course there's no better way to enjoy the local cuisine than at one of the region's world famous wineries. Vineyards stretch throughout the region, where you'll find gourmet restaurants, world class resorts, quaint bed and breakfasts, and cellar doors.





Utilities

The Hunter region is one of Australia's fastest growing regions and, with a dispersed local population, utilities and telecommunications are all integral services for the area. From pristine feeding into three dams, to being one of the first locations in Australia to receive NBN access, the Central Coast is well-serviced both now and into the future.

The Hunter's telecommunications network rivals that of capital cities.

Electricity

The Hunter has four power stations, with ample capacity to service any size development. Heavy industry can liaise directly with the generation companies Origin Energy and AGL Macquarie.

Ausgrid is the largest retailer of electricity in Australia. It supplies electricity to nearly half of New South Wales residents, including more than 240,000 customers in the Hunter, including Tomago Aluminium and OneSteel. Other electricity retailers supplying power in the Hunter Region include AGL Electricity, Integral Energy, and Origin Energy.

Gas

Reticulated natural gas is available to most industrial sites in the Hunter. Supply is subject to national structural reform which encourages competition to keep prices down.

Water supply

The Newcastle, Lake Macquarie, Port Stephens, Maitland and Cessnock local government areas are serviced with mains water supplied by the Hunter Water Corporation (HWC).

The HWC owns three sources of water: Chichester and Grahamstown Dams and the Tomago Sandbeds.

State Water owns dams at Glenbawn, Glennies Creek and Lostock in the Upper Hunter. It supplies water to Muswellbrook, Singleton and Scone, with the local councils providing the distribution network.

Drinking water in the Hunter is of a very high standard and well within the national guideline requirements.

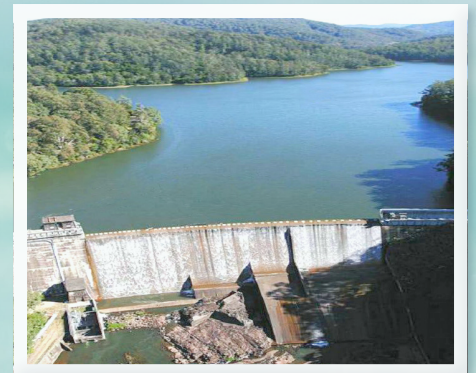
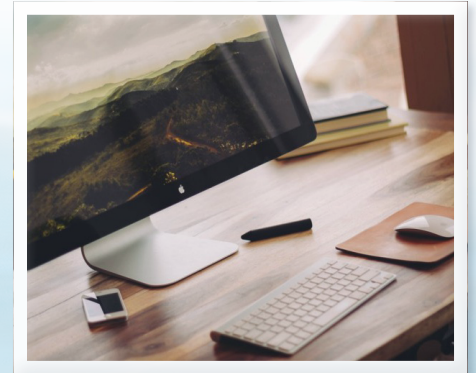
Sewage and Waste Management

The Hunter Water Corporation is an Australian leader in innovation for effluent use. It provides the reliable transport of sewage throughout its area of operations via a waste water pipe network and treatment system. Waste water charges vary according to the strength and volumes generated, as well as the organisation's proximity to the treatment works.

Telecommunications

The Hunter's telecommunications network rivals that of capital cities. The region is serviced by national carriers including Telstra, Telstra Country Wide, Optus, and AAPT.

The Federal Communications Minister announced several Hunter suburbs, including Warners Bay, Belmont, Mount Hutton, Merewether, and Newcastle, would be amongst the first in New South Wales to receive the National Broadband Network. This high-speed service is believed to be the key to reviving the local small business sector. The fibre to the node rollout is expected to be delivered by June 2015.



The newly opened \$1 billion Hunter Expressway



Transport

The Hunter's central location and impressive transport infrastructure give it a competitive edge in accessing Australian and international markets. Centrally located on Australia's eastern seaboard, between Melbourne and Brisbane and within two hours' drive from Sydney, the Hunter is ideally situated to access the 10.7 million people living in these cities.



The Port of Newcastle is the economic and trade centre for the resource-rich Hunter Region. It is Australia's oldest and the largest port by tonnage.

The Hunter has a highly efficient transport infrastructure, providing fast and integrated links within the region and to the rest of Australia.

Air

The region's major airport, Newcastle Airport (Williamstown), is serviced by direct daily flights from Sydney, Brisbane, Melbourne, Canberra, Ballina, and the Gold Coast. All three major domestic carriers (Qantaslink, Virgin Australia, Jetstar) as well as regional carriers (RegionalExpress and Fly Pelican) operate services in and out of Newcastle Airport.

In February 2015, Newcastle Airport Limited added a new arrivals hall and dedicated customs, immigration, and quarantine facilities as part of the first stage of \$80 million worth of upgrades. These services will allow Newcastle Airport to welcome international flights in future. The second stage of the development will see the original terminal space transformed into a departure lounge.

More than 1.25 million passengers passed through Newcastle Airport in 2017 - up almost 60,000 compared to the previous year.

Road

The Hunter has a highly developed network of highways and arterial roads. This combined with more than 100 national and regional transport companies operating in the region allows for fast and efficient movement of freight. A core road network consisting of a freeway and key highways facilitates the smooth flow of traffic into and out of the Hunter.

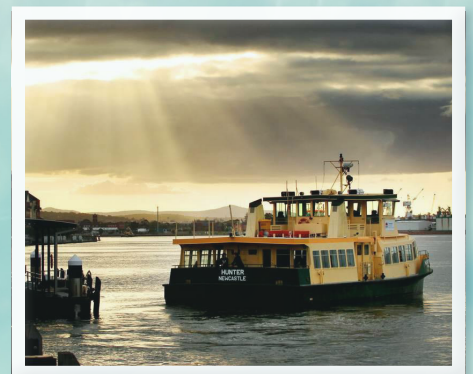
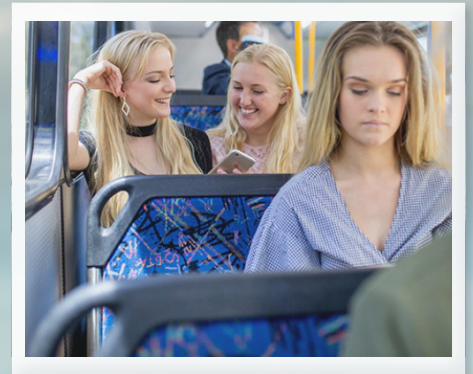
The Sydney to Newcastle M1 Freeway is part of the National Highway network. It is the main corridor linking Newcastle to Sydney, providing a driving time of a little more than two hours between the two cities. The M1 also connects Newcastle with Brisbane, regional Queensland and north-western New South Wales. It has links to the New England and Pacific Highways and Hunter Expressway. It carries more than 75,000 cars and 7,000 heavy vehicles each day.

The New England Highway provides passage to Brisbane and to the north-west of New South Wales via the New England region. It is the preferred route for road freight through to Brisbane, and the best way for locals to access the Upper Hunter towns of Maitland, Singleton, Muswellbrook and Scone.

The Pacific Highway runs from Sydney to Brisbane along the New South Wales coastline, passing through the centre of Newcastle.

The Hunter Expressway allows motorists to bypass Hunter Valley towns as they make their way from Newcastle to Cessnock, Lochinvar, Weston, or Maitland.

The Hunter also has a network of arterial roads that link the major industrial suburbs of Newcastle and Lake Macquarie with the Port of Newcastle, Newcastle Airport and the major highways.





Rail Transit

A comprehensive rail network operates within the Hunter region. Passenger and general freight train services link the Hunter with Sydney, Brisbane, and regional cities in the state's northwest including Tamworth and Moree.

The rail network is also linked to the Port of Newcastle, providing a smooth transition between sea and land for the movement of bulk items such as coal, alumina and containerised cargo. Much of the agricultural produce from the state's northwest is exported through the Port of Newcastle via the rail links to these areas.

The Central Coast and Newcastle train line from Sydney passes through Fassifern, Cardiff, Broadmeadow, and Hamilton. Passengers can then take a shuttle bus to the Newcastle city centre or catch connecting train services to Maitland.

The Hunter line commences at Maitland and passes through Dungog, Gloucester and other Hunter Valley towns before arriving in Hamilton.

The aptly named coal lines are dedicated rail lines for the coal trains that travel from the Hunter Valley to the Port of Newcastle.

CityRail operates regular daily services between Hamilton and Sydney with a travel time of 2.5 hours. Half-hourly services run from Hamilton to Maitland, while three services per day operate between Muswellbrook and Hamilton.

Bus/Ferry

State Transit operates bus services throughout Newcastle and Lake Macquarie suburbs. Private bus services also provide connections with Upper and Lower Hunter towns and Newcastle to complement the government-operated services. In addition, a ferry service from Newcastle to Stockton across the Hunter River links residents in the beachside suburb to the central business district.



Regional Investments

Rebuilding of Hunter Sports High School

Hunter Sports High School in Gateshead, which nurtures the talents of the Hunter's most athletic students, will be completely rebuilt, after being allocated over \$20 million dollars from the state budget to redevelop the school. The improvements, including new playing fields, classrooms, and arts and science labs, will benefit more than 800 enrolled students and teachers. Construction commences in September 2015 and nears completion.

\$8.6 Million Maitland Sportsground Upgrade

The State Government and Maitland City Council have so far invested a total of \$8.6 million to upgrade the Maitland Sportsground. The site received a brand new grandstand and improved player facilities.

Maitland Sportsground will be transformed into a hub for a variety of Hunter sports, with stage two of the complex's upgrade to top more than \$10m in infrastructure spending.

Construction of New Hospital at Metford

A new public hospital will be built on the eastern side of Metford Road, Metford. It will replace the current Maitland Hospital, as it will be six times larger than the existing public facility. It is expected to open its doors by 2019.

Establishment of Newcastle Light Rail

A new light rail system is part of a range of measures designed to revitalise Newcastle. The service will travel east from the new Wickham transport interchange along the original rail corridor before moving south down Hunter Street and terminating at Pacific Park.

Construction of the University of Newcastle's NeW Space

NeW Space will be a \$95 million education precinct, part of the University of Newcastle, located in the Newcastle central business district. This learning centre will host business and law programs, social learning spaces, collaborative research spaces, digital library services, and facilities which allow students to connect with local businesses and the wider community. Construction will commence in April 2015. NeW Space is now fully operational.





Major Industries

Australian wine exports in 2014 were estimated at 700 Mega Litres and valued at \$1.82 billion.

The Hunter Valley wine-growing area is Australia's oldest wine region and one of its most famous with around 1800 hectares under vine.

An estimated 8.8 million people visit the Hunter Region each year.

Wine

The region is home to more than 120 wineries and cellar doors, far surpassing any other wine-growing district in the country. Most of these are boutique operations, producing 500 tonnes of wine or less per annum.

Built on the solid foundations of semillon and shiraz, the Hunter's wine range is expanding, with excellent verdelho and chardonnay and, more recently, chambourcin, a variety that has had only a limited following to date. Hunter Valley wines reflect the region's temperate climate, healthy rains, and fertile soils, which are set below the dramatic backdrop of the Brokenback Ranges.

Power Generation

The Hunter's four power stations generate over 80% of New South Wales' electricity supply. Origin Energy owns a power station at Eraring, in the Lower Hunter, and AGL Macquarie operates the other three: Bayswater, Liddell, and Hunter Valley GT.

Mining

The Hunter has a \$12 billion a year coal industry with more than 150 million tonnes exported annually comprising approximately 94% of the region's total exports. The Hunter produces over 36% of Australia's aluminium. Newcastle is the biggest coal port in the world, exporting \$12.47 billion worth of goods in the 2014 fiscal year, and it continues to grow.

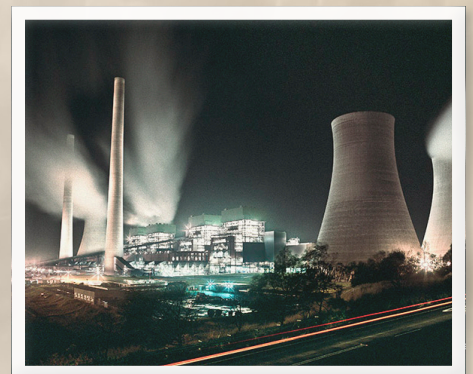
Tomago Aluminium: Tomago Aluminium is one of Australia's leading aluminium smelters. Tomago employs around 950 people and produces nearly 550,000 tonnes of aluminium each year. It contributes more than \$1.5 billion annually to the country's economy. Tomago Aluminium has been a part of the Hunter region for over 25 years.

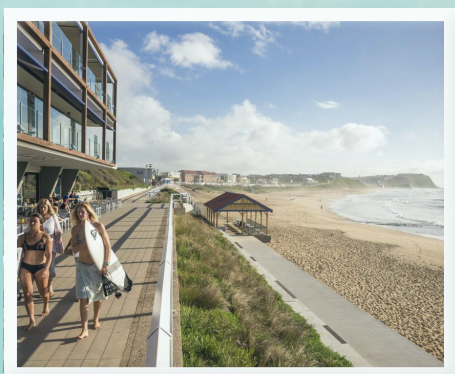
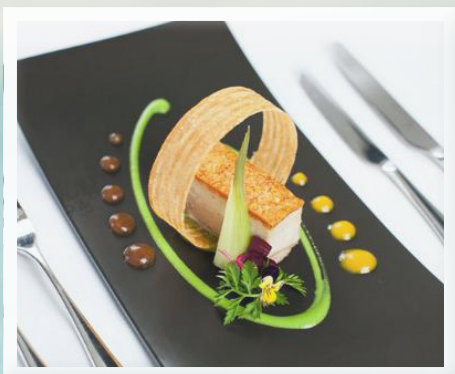
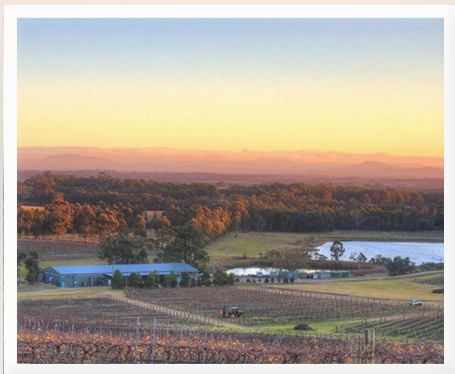
BHP Billiton: BHP Billiton's open cut thermal coal mine at Mt Arthur is the largest individual coal production site in the Hunter Valley. Mt Arthur Coal currently produces around 32 million tonnes of run-of-mine coal each year for local and international customers in the energy sector. The mine recently received approval for operation until 2026.

Coal & Allied (Managed by Rio Tinto): Hunter Valley Operations (HVO), located 24km northwest of Singleton, supplies international markets with more than 13 million tonnes of thermal and semi-soft coking coal each year. Hunter Valley Operations is managed by Coal & Allied Industries Limited, a joint venture between Rio Tinto and Mitsubishi Development.

Equine

Australia's equine capital of Scone is the annual destination for the world's top breeding stallions with over 70 studs. Over \$2 billion has been invested in the region's stud farms and horses in recent years. This "Horse Capital of Australia" is second only to Kentucky for the largest concentration of horse studs. Scone also boasts a world-class equine research, training, racing and education centre.





Defence and Aerospace

The Hunter has several major military bases including Australia's primary jet fighter base. The region is home to the Australian headquarters of key defence companies Boeing, Thales, Varleys, Forgacs, Lockheed Martin, L3, and Raytheon. It also serves as a maintenance base for major aerospace companies BAE and Jetstar. The Royal Australian Air Force (RAAF) base at Williamtown and Singleton army barracks are also key defence locations in the Hunter. Williamtown's RAAF base employs approximately 3500 personnel and injects \$280 million per annum in salaries into the Hunter's economy.

Manufacturing

The manufacturing industry is a major economic driver in the Hunter thanks to key sectors including metals processing, transport, machinery and equipment manufacture, chemical processing, mining, defence, and light industry.

Agribusiness

The local agribusiness industry is valued at more than \$1 billion annually. It includes agriculture, horticulture, timber/paper products, aquaculture, food processing, and manufacturing of products such as fertilisers.

Tourism

Tourism, a key component of the Hunter's economy, is mainly based in the vineyards district. This wine-growing area is one of the most important markets for national and international tourism in the state, ranking as the most popular tourist destination outside of Sydney. In turn, the Lower Hunter vineyards represent the single most important tourist attraction within the Hunter region. Wine tourism in the Hunter Valley is estimated to be worth \$521 million.

Major wine industry publications from around the world say the Hunter is one of the best wine tasting regions on the planet. Wine Enthusiast, which bills itself as the world's largest wine and spirits periodical, named the region among its ten best wine travel destinations worldwide. The award recognised the Hunter based on overall cultural experience, timeliness, travel infrastructure, and wine quality.

The Hunter's close proximity to Sydney and its broad range of tourism activities attracted 2.9 million domestic overnight visitors, almost 5.7 million domestic day trip visitors, and 141,600 international visitors.

The Hunter Valley has earned a reputation as one of the world's best wine travel destinations. It is also listed as one Australia's top 10 most popular holiday spots.



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REVITALISING NEWCASTLE <http://revitalisingnewcastle.com.au/projects/light-rail.aspx>



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