



Liverpool
City
↗

Taking
Off
↗



2016 →
→ 2036

Great
South
West



Introduction

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The Committee for Liverpool is a powerful voice for the city, bringing together a stellar group of leaders from across business, three levels of government, health, media, property, education, arts, sport and tourism. It encompasses people with both a life-long connection to South West Sydney and those who have a national and global perspective on city building.

Its primary role is to provide frank advice to the Mayor and the Council about public policy, marketing, development, social equity and governance. Serving in an honorary capacity, its members are fearless advocates for the city.

Committee for Liverpool members are a highly credentialed and very experienced group of leaders who have been assembled to advise the Council on how best to shape the Great South West.

In commissioning this investment prospectus, the Committee deliberately targeted a wide range of stakeholders, to provide information to those who wanted to either invest in commercial property, to raise a family and further their career, to build public infrastructure, to locate a university, to plan and build roads and rail lines, to leverage the new airport or to establish local artistic, sporting and tourism facilities.

The city is proud of both its economy and its community and the Committee for Liverpool has attempted to quantify the financial and social capital of this dynamic region to provide evidence-based advice to prospective investors.

Christopher Brown AM
Convenor, Committee for Liverpool
Chair, Western Sydney Leadership Dialogue



“Liverpool, as the capital of South West Sydney, is at the centre of one of the nation’s leading economies. Fuelled by unprecedented development, the region and the city can play a key role in providing the necessary jobs, homes, services and recreational options for a growing population.”

HON. MIKE BAIRD, PREMIER OF NSW

Mayor of Liverpool



The Great South West is the fastest growing subregion in Sydney. With Liverpool as its capital, the South West provides a place to escape the hustle and bustle of Sydney, but still offer the lifestyle and work opportunities of the big city. It’s a place to work, a place to live, and a place to play.

From the undulating hills and greenery of Macarthur to the steel and glass canyons of Sydney’s manufacturing heartland, every corner of the South West has something to offer the aspiring resident and company operator. Business is especially welcome.

There are many reasons to invest in the region. Over \$21 billion worth of major building works will be carried out over the next decade, culminating in the Western Sydney airport. In Liverpool over \$658 million in development projects are currently under consideration by Council as the city prepares to revitalise its CBD.

But the Great South West also has the natural advantage in ways you might not imagine. Council understands that it is bright people who attract the best in business, and it is only first-rate amenities that attract the brightest people.

The Great South West provides some of the finest amenities in Sydney, which make it a great place to work and live.

More to the point, the people of the South West are already very bright. It is a young population, and ready to work. It is skilled in the ways that matter to industry. Its people are diverse in their backgrounds but singular in their attitude that their star is on the rise.

Our new City brand has captured the potential and diversity of our people and provides our communities, as well as our external partners, with an understanding of who we are, and, importantly, our aspirations.

If you decide to invest in the Great South West you can be assured that you’re not only investing in a place, you’re investing in its people. We have a bright future and invite you to come and explore it with us.

Councillor Ned Mannoun
Mayor of Liverpool

Premier of NSW



Liverpool, as the capital of South West Sydney, is at the centre of one of the nation’s leading economies. Fuelled by unprecedented development, the region and the city can play a key role in providing the necessary jobs, homes, services and recreational options for a growing population.

The NSW Government recognises the significance of Liverpool, as one of Sydney’s three regional cities, in our Plan for Growing Sydney (the Sydney metropolitan strategy), particularly in the manufacturing, transport and freight, education and health, and retail sectors. We have recently appointed a coordinator within the Department of Premier & Cabinet to help drive this partnership.

My government’s own commitment to the delivery of vital transport projects such as the South West Rail Link, WestConnex, and Bringelly, Northern Road and Elizabeth Drive upgrades and M12 motorway, will go a long way towards sustaining the productivity of our major centres such as Liverpool, reduce traffic congestion, and importantly, improve accessibility for residents and businesses alike.

The decision by the Commonwealth to develop the Western Sydney Airport at Badgerys Creek represents perhaps the biggest development in Liverpool’s history. In response, I commend the Council for its efforts to ensure strategic planning for this critical piece of infrastructure is well-considered, and takes into account a full range of community and stakeholder views.

The Council’s creation of the powerful Committee for Liverpool, to lend advice and expertise on key issues, will deliver a number of positive results. In addition to the inclusion of significant business and community leaders, I am delighted that both NSW and the Commonwealth are represented on the Committee, marking the type of productive partnerships I favour.

It’s not just on the infrastructure front that Liverpool is taking off. As the gateway to a strong and inclusive South West region, it is providing better access to acclaimed educational and research facilities like the Ingham Institute, and delivering skills training to young people, through TAFE NSW and Western Sydney University—to produce better social and economic outcomes.

The diversity of its people remains a key strength, with 40 per cent of Liverpool residents born abroad. Coupled with the fact that 40 percent of the population are also under the age of 30, and you have a young and dynamic demographic that is set to help lead Sydney’s next generation.

I’m proud to help launch Liverpool’s Investment Prospectus and look forward to working with Liverpool Council to continue the city’s rising trajectory.

Hon. Mike Baird
Premier of NSW

Deloitte.

Deloitte and Deloitte Access Economics has contributed content and analysis to this prospectus using the following sources:

- ABS CENSUS, 2011
- ABS COUNTS OF AUSTRALIAN BUSINESS, 2010–2014
- ABS AUSTRALIAN NATIONAL ACCOUNTS, 2009–2010
- DELOITTE INVESTMENT MONITOR, 2015
- NSW BUREAU OF TRANSPORT STATISTICS
- LIVERPOOL CITY COUNCIL
- NSW GOVERNMENT REPORTS
- JOINT REGIONAL STUDY ON AVIATION CAPACITY IN THE SYDNEY REGION

Prepared with the assistance of:

TAYLOR STREET Advisory
Strategy | Communications | Analysis | Advocacy



The Great South West

2.3% growth

population growth almost twice the NSW average

One in three

new residents of NSW will live in the Great South West by 2036

Over 77 per cent

increase in Great South West population by 2036

\$22 billion contribution to the national economy

4,500 ha of employment land ready for development with potential for 212,000+ jobs over the longer term

Home to 43,000 businesses

246,000 jobs 2015

416,000 jobs by 2036

\$562m

28% of the NSW 2015-16 capital expenditure budget will go direct to projects in the GSW

\$3.6b

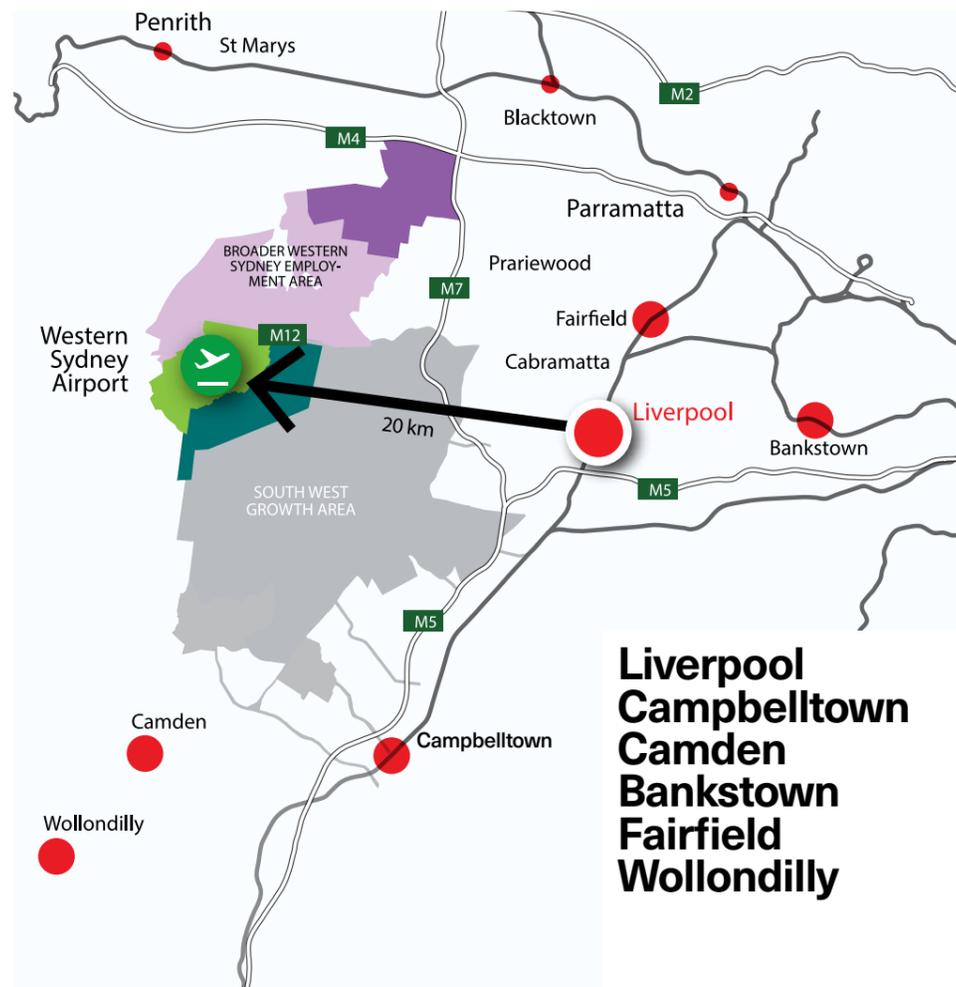
Federal government roads package to support Western Sydney Airport

Liverpool the first regional city to be connected to the National Broadband Network

\$21.5b

of major projects and residential developments are underway or planned:

9280 residential lots available
27,783 proposed new dwellings



Our People

A young, dynamic population

- » 140 languages spoken
- » Nearly 53% of Liverpool's residents are less than 34 years old, 3 years below the Sydney average
- » 20% are in school
- » 37% of residents born abroad



Strong economy Skilled workforce

- » One quarter of the available workforce have a TAFE accreditation
- » A growing labour force of nearly 330,000, half of whom leave the region each day for work



A place to live A place to play

- » 400 preschools, primary schools, secondary schools and university campuses
- » 24 general and specialist hospitals
- » Nearly 250 sporting facilities, including active open spaces and indoor sporting complexes
- » Over 40 shopping centres and community meeting points
- » More than 20 libraries
- » Home to the Western Sydney Parklands, one of Sydney's biggest recreational and tourism precincts



The NSW Premier's 2015 Woman of the Year, Professor Minoti Apte OAM is from Liverpool's world class medical research centre, the Ingham Institute.

Professor Minoti is a leading researcher in the field of pancreatic cancer and the first in the world to develop a method to isolate pancreatic stellate cells. She is an active member of the Marathi Association of Sydney, which services a large section of the Indian diaspora in Sydney.



Two world class health and education precincts employing 24,000 skilled health professionals



Great South West

Taking Off



2011

796,211

Population Great South West

43,000

Businesses in Great South West

\$22 bn

contribution to the national economy

328K

Resident workforce of Great South West

53%

Residents leave Great South West for work purposes

WITH WAVES OF GROWTH

Links

Strong connection to Asia

Industry

Employment Lands Enterprise Zone

Education

Western Sydney University Facilities

Connects

Digital and physical connection



2036

1.23m

Population GSW by 2036

53,000

Businesses in GSW

\$34 bn

contribution to the national economy

508K

Resident workforce of GSW

9,335

Cars drive to Sydney CBD for work purposes

WITH

Game Changers



+ WAVES OF GROWTH



New Western Sydney Airport

2036

1.41m

Population GSW by 2036

Georges River Activation Project

58,000

Businesses in GSW

National Broadband Network Roll Out

\$51 bn

contribution to the national economy

Major Transport Projects

729K

Resident workforce of GSW

M9 Link South West Rail Link WestConnex

Great South West's growth projections will be influenced by these game changers

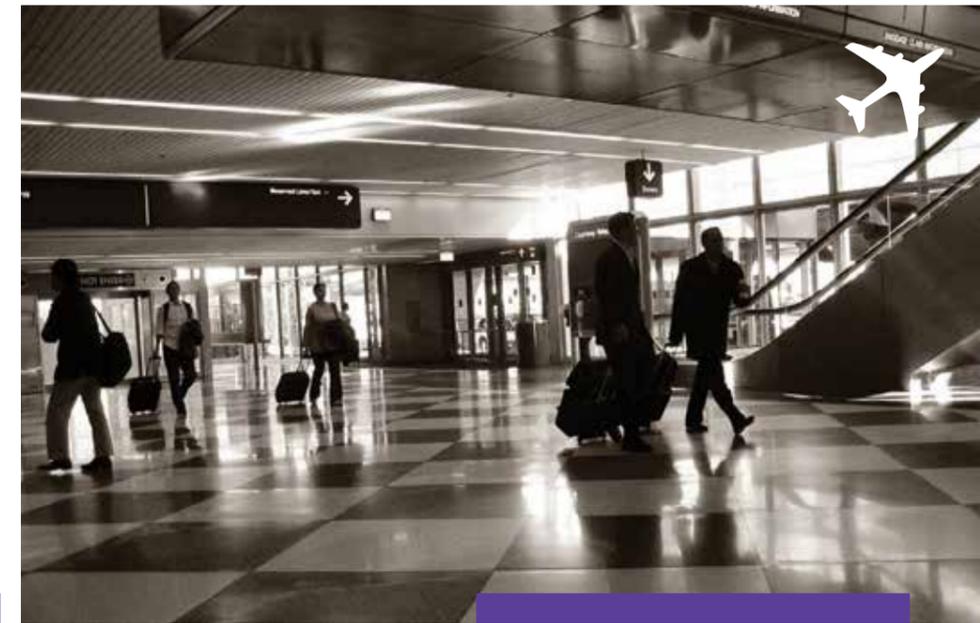
Western Sydney Airport at Badgerys Creek—to account for one quarter of the region's economic growth over the next 20 years

Liverpool CBD activation, including a new masterplan to develop the Georges River Lifestyle Precinct

Major connectivity projects: M9 Link, South West Rail Link and WestConnex and NBN

Metro Rail

Western Sydney Airport



The first international airport to be constructed in Australia in over 50 years at Badgerys Creek, will be built less than 19km from Liverpool CBD. An airport at Badgerys Creek—the 'Black Caviar' of the proposed sites for Sydney second airport—was announced in early 2014 to much fanfare. Total demand for services into the future is expected to increase by over 1 million passenger movements a year, much of it from Western Sydney, ensuring continued growth for Liverpool and the Great South West.

Badgerys Creek will eventually support an additional 15,800 to 20,656 full time jobs in the Liverpool area and will be responsible for up to an \$11.5 billion increase in the region's output. In the early days most of this increase will come from domestic passengers, but over time Badgerys Creek is expected to become a major international freight hub with 700,000 tonnes annually.

While the airport precinct itself is costed at several billion dollars, the attendant infrastructure servicing the area could be much more. In 2014 it was announced that government will invest \$3.6 billion to connect Badgerys Creek to Sydney's motorway network, making the proposed airport site easily accessible to Western Sydney residents. A metro rail connection through Liverpool could connect Sydney's metropolitan CBD and freight rail network to the airport precinct.

To begin with, only a small number of industry sectors will fully utilise the airport—logistics and transport for the most part. Of the four industries that account for over 50% of airport use: professional services, wholesale trade, public administration and ICT, the Great South West has huge potential. The labour force in the region is relatively untapped in these sectors with over 30,000 workers leaving the region each day for work.

Ref: NSW Business Chamber, *Economic Impact of a Western Sydney Airport 2013* and *Joint Study on Aviation Capacity in the Sydney Region 2012*.



Western Sydney Airport will account for a quarter of the region's economic growth over the next 20 years

Potential for a \$5.3 billion dual runway international airport as early as 2035*

297 km of new roads or upgrades to support Badgerys Creek Airport

Proposed extension of the \$1.8 billion South West Rail Link to the airport precinct and St Marys on the western line

Up to 3,700 small businesses and 310 medium sized businesses in Liverpool supported by the Airport by 2050

* Final costing subject to Department of Infrastructure and Planning Environmental Impact Statement



THE CONNECTED REGION

The Government will spend more than \$3.6 billion on road improvements in the next decade, with projects such as the WestConnex, M5 expansion and M12.

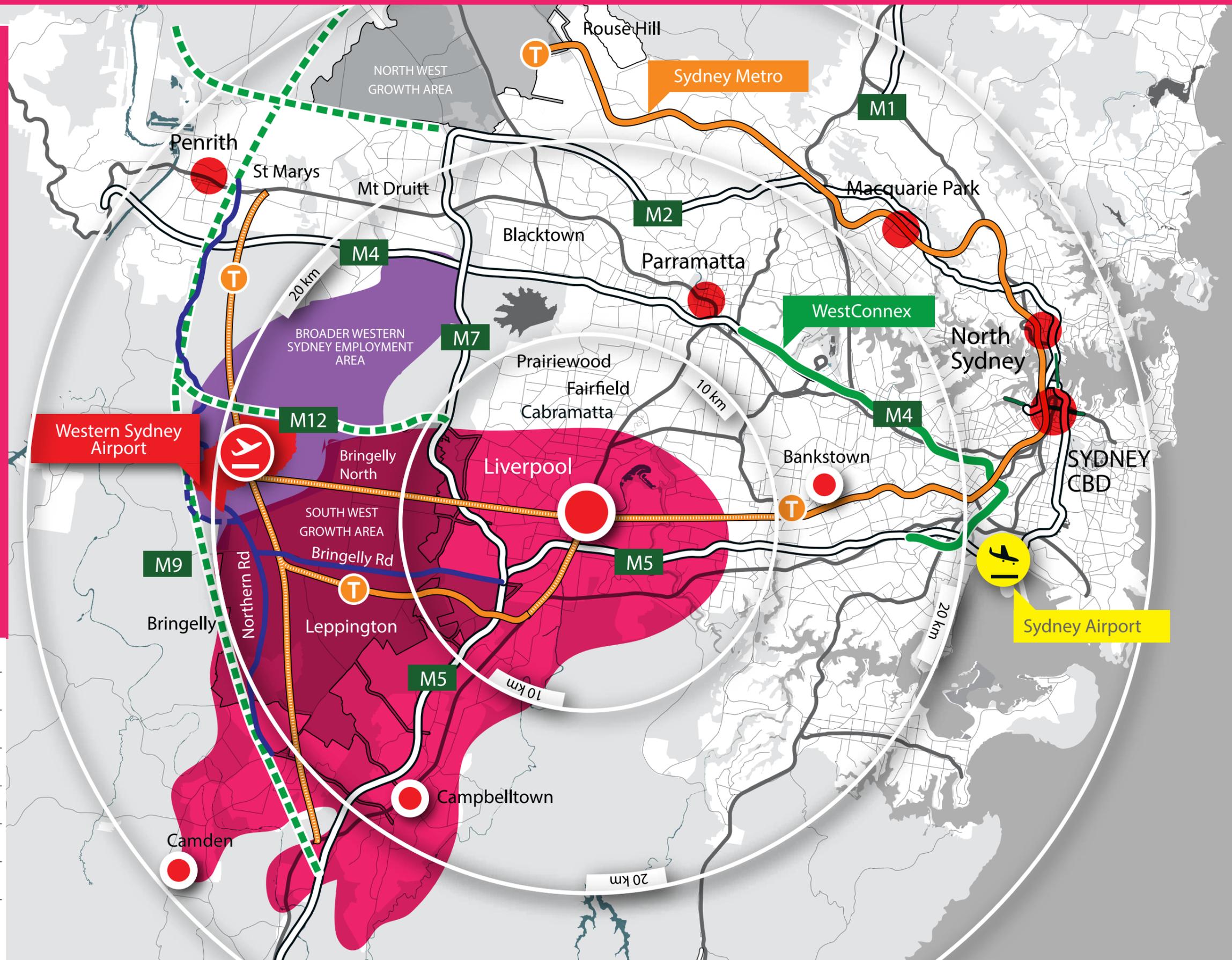
The new M12 motorway will provide direct access to the Western Sydney Airport at Badgerys Creek and also connect to Sydney's other motorway connections the M7, M4 and M5.

Liverpool city centre is part of the first stage of the NBN roll-out and will deliver fibre to the premises. Planning is underway to deliver NBN to the broader Liverpool local government area.

Direct connections to Parramatta CBD and potential for direct connections to Bankstown and Macquarie Park.

Access to Western Sydney Employment Area and Newcastle — and beyond to Brisbane, Canberra and Melbourne via regional rail freight network Hume Highway and M1 Pacific Highway.

Potential for improved rail connections via extensions to the existing Sydney Metro City & Southwest line from Bankstown through to Liverpool and a direct rail link to the Western Sydney Airport at Badgerys Creek.



Legend

-  Sydney Metro
-  Potential Rail Extension
-  Existing Rail Network
-  Motorway Network
-  Motorway Project
-  Future Motorways
-  Road Upgrade

Liverpool

Capital of the Great South West of Sydney

Proposed site at Woodward Park to house 30,000 capacity rectangular stadium and entertainment precinct.

Woodward Park Sports & Entertainment Centre



\$170m

redevelopment of the Paper Mill Precinct with a high quality 500 unit residential development overlooking Georges River

\$5b

Riverbank Development
An activated lifestyle precinct along the Georges River, providing new mixed-use opportunities and integrated open spaces.

Liverpool Council has recently introduced fast track planning to approve houses in just 10 days

Nearly \$3 billion worth of development applications

Determined in the last five years, more than doubling from \$313m in 2010-11 to \$789m in 2014-15

More than \$650m

In current or near future developments for Liverpool City

Almost \$13b

In upcoming residential development in the South West Growth Centre

INDUSTRY OVERVIEW

The Great South West economy is driven by logistics and freight, professional services, agribusiness, health and education, manufacturing and building and construction.

328,000

RESIDENT WORKERS

153,611 live and work in the GSW

174,536 leave the region for work

222,000

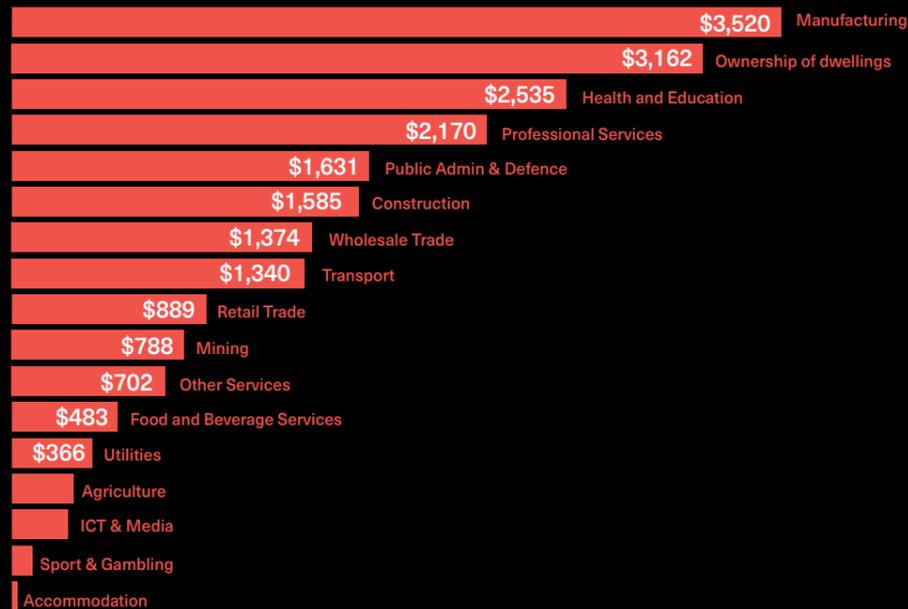
JOBS IN THE GSW

of which one third (or 68,692 jobs) are held by non-residents

Total jobs deficit of 105,844

43,000
businesses

Contributes over **\$22b** to the national economy



Great South West's contribution to Australian GDP by industry (\$m)

MANUFACTURING



Overview

Typically the story we hear is that manufacturing has seen its final chapter in Australia, but the Great South West could buck the trend. As manufacturers transform their businesses from low-value into high-value add operations, the Great South West is uniquely positioned to capitalise on the trend.

Currently, manufacturing provides 40,848 jobs in the Great South West, with a similar number of workers, 45,529, living in the region. 2,490 manufacturing businesses operate in the South West, contributing nearly \$3.5 billion to the national economy. It is the South West's number one industry.

Industrial land is accessible and very affordable in the South West. The average industrial rent is between one-third and one-quarter the cost of land in Eastern Sydney.

Strategic opportunities

Strategic manufacturing centres with attendant infrastructure and warehousing already built

An opportunity to invest in chemical products manufacturing

Strong base of manufacturing knowledge and skill-sets already present

Potential advanced manufacturing and aerospace hubs at Bankstown and Badgerys Creek

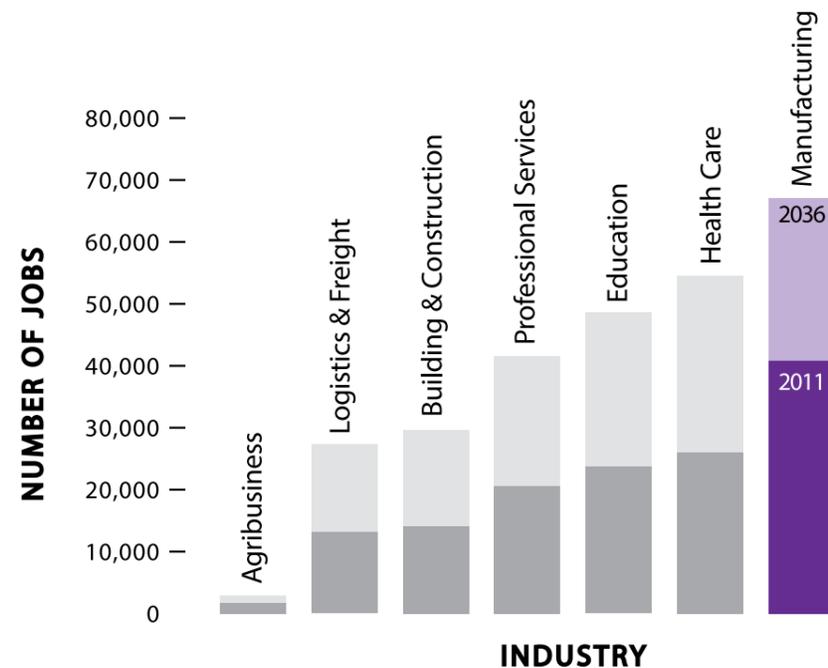
Strategic advantages

20 hectares of new industrial land soon to be available near Badgerys Creek under the Broader Western Sydney Employment Area

Six specialised industrial precincts in key areas such as Smithfield, Wetherill Park, Ingleburn, Milperra, Moorebank and Smeaton Grange. Total area of over 46.7 hectares.

26% of Sydney's manufacturing workforce lives in the GSW

Competitive labour costs up to 12% below the Sydney average



Liverpool has major parcels of prime industrial land with great transport links at prices that are more than 60% below other areas in Sydney

SAVILLS 2014

HEALTH CARE



Ingham Institute



Overview

As Australia's population ages, health services and age-related infrastructure will become increasingly vital. This year, the NSW State Government has announced over \$151 million in new health spending for Campbelltown Hospital alone.

Health Care provides 26,043 jobs in the Great South West, with a little over 32,000 health workers living in the region. A small number of health-related businesses, only 2,474, operate in the Great South West, however the industry contributes nearly \$1.4 billion to the state economy.

The region also serves as an excellent testing ground for preventative health care research. Liverpool is currently the number one diabetogenic hotspot in NSW, which draws clinicians worldwide to facilities such as the Ingham Institute.

Existing health care businesses in the Great South West include: NSW Health, Ambulance NSW, IVF Australia, Sydney Southwest Private Hospital (Healthscope) and the Ingham Institute.

“Liverpool Hospital is at the heart of an internationally renowned health and education precinct that is home to one of most advanced health and medical research facilities in the southern hemisphere.”

ROBYNNE COOKE, GENERAL MANAGER
LIVERPOOL HOSPITAL

Strategic opportunities

Ready access to a highly skilled labour force in health

Construction of new health infrastructure

A growing population overburdened by preventable lifestyle disease

Preventative health care research opportunities

NSW's largest hospital is located at Liverpool

Strategic advantages

Two established Health Care and Education Precincts at Liverpool and Campbelltown where 50% of health workers are concentrated

20% of all clinicians in NSW work in the Great South West

2,122 specialists in the Great South West representing 45% of all clinicians in the area (4,854)

A world recognised medical research facility, the Ingham Institute, located in Liverpool CBD

Western Sydney University (WSU) School of Medicine and School of Nursing and Midwifery located at Campbelltown

In 2014 WSU researchers successfully secured National Health and Medical Research Council grants totalling \$1.46 million

The Ingham Institute is a not-for-profit medical research organisation working in collaboration with the South Western Sydney Local Health District (SWSLHD), the Western Sydney University (WSU) and the University of NSW Australia.

The Institute has positioned itself as the place to be and the research facility to attend for advanced cancer research in Australia, and across the southern hemisphere.

Initially founded with a bequest from Bob Ingham the Institute was officially opened in October 1997. Following the construction of a new research building, it now boasts a five storey research facility, encapsulating a Clinical Skills & Simulation Centre and a Research Bunker along with various offices and research spaces for its 200 staff. Over 35 research groups—in both the wet and dry research space—make up the Institute, and host some of the world's leading researchers and clinicians.

The Institute is the first facility in the southern hemisphere to develop an MRI-Linac device (Magnetic Resonance Imaging device combined with a Linear Accelerator machine). At a staggering \$16 million the MRI-Linac is the next generation of cancer therapy treatment, allowing doctors to visualise both a patient's anatomy and physiology during treatment.

In addition to an MRI-Linac, the Ingham Institute is developing other powerful new technologies that will have a lasting impact in medical research. The Circulating Tumour Cells (CTC) Facility for example is a NSW first. This powerful new cancer screening technology eradicates the need for cancer patients to undergo biopsies.

In its short history the Institute has already won many prestigious awards in research for cancer, clinical science and community and population health.

Strategic opportunities

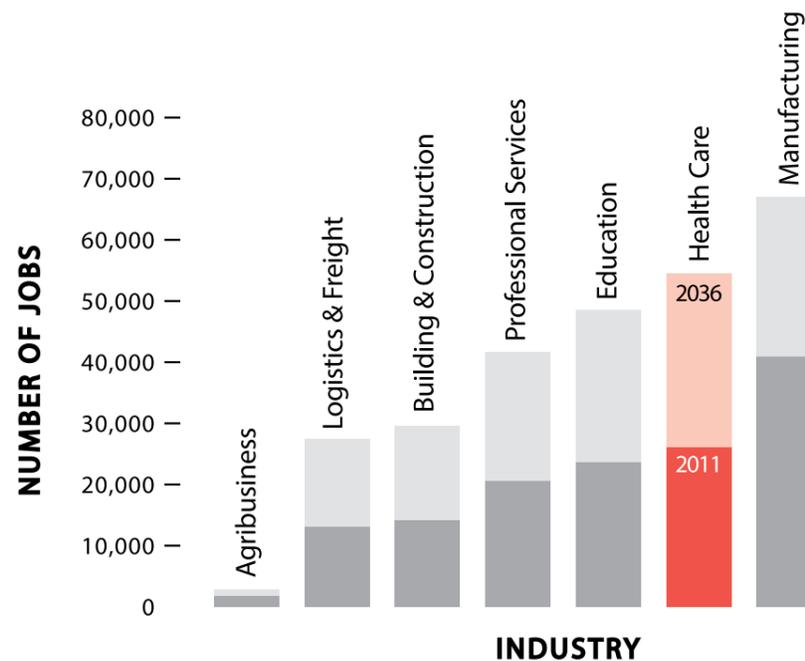
Over 300 researchers and clinicians

One of only three MRI-Linac machines in the world

World-class research in world-class publications

NSW Premier's 2015 Woman of the Year awarded to the Institute's Professor Minoti Apte OAM and finalist, Associate Prof Lynn Kemp

The institute also engages the broader community with health and education outreach programs, for instance scientists hold frequent seminars in local secondary schools to broaden knowledge and engagement with the sciences among students.



Liverpool Hospital (left) is NSW's largest hospital.

EDUCATION

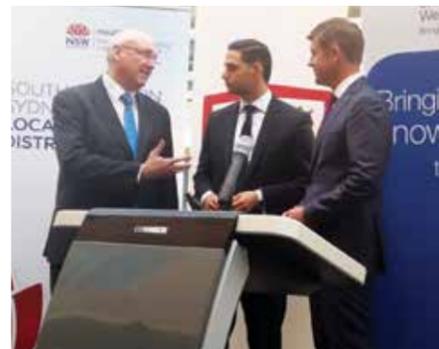


Overview

Education is Australia's fourth largest export by industry sector. Demand for local education in the Great South West is not only growing, the quality is getting better as well. As incomes rise in the region and more international students come to study in the Great South West, demand for top quality education is anticipated to drastically increase.

Education is already a burgeoning industry in the Great South West. Over 23,660 jobs are located in the area, along with about 24,550 education and training workers. There are 864 companies in the education business currently based in the Great South West and the sector contributes \$1.15 billion to the national economy.

Students in the Great South West will not just be learning from behind a desk. Investment is pouring into cultural education in Western Sydney with the average age of venues in the region less than 19 years old. Research and training for elite and recreational sports will also see a boost with several key sports facilities under negotiation. Major education providers in the Great South West include: Navitas, Evocca, TAFE South Western Sydney Institute, Kip McGrath, the University of Sydney, University of New South Wales and Western Sydney University.



Professor Barney Glover with Liverpool Mayor Ned Mannoun and NSW Premier Mike Baird.

Strategic opportunities

A new Western Sydney University (WSU) Liverpool campus scheduled to open in 2016, with WSU being ranked in the top 100 global universities under the age of 50

Demand for cultural education:

- » Campbelltown Arts Centre
- » Casula Power House
- » Mt Annan Gardens
- » Train Works

Two of Australia's top 20 research universities (University of Sydney and Western Sydney University) located in the Great South West

Strategic advantages

81,000 tertiary students in the region

104,700 primary and secondary students

221 primary, secondary and special schools

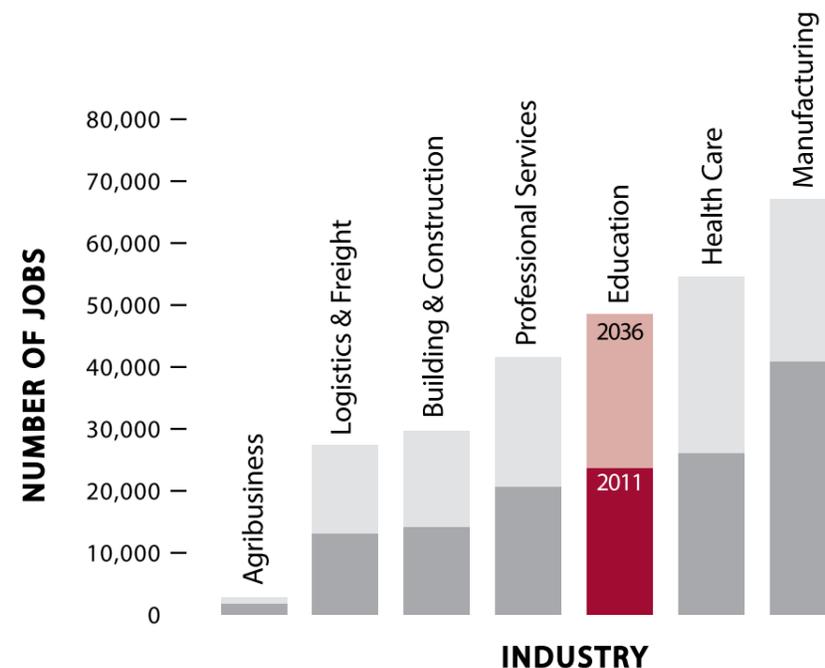
A strong base for sports education

Untapped demand for education and training with more than 64% of the population having no qualification greater than a high school certificate and 9% attaining a university degree

Cultural worker surplus of 31,381 people who leave Western Sydney for work each day

“We are delighted to add Liverpool to our network of sites across Western Sydney... The Centre will be a pivotal contributor, along with government and industry, to the shaping of the Western Sydney Aerotropolis.”

PROFESSOR BARNEY GLOVER, WSU VICE CHANCELLOR



PROFESSIONAL SERVICES



Overview

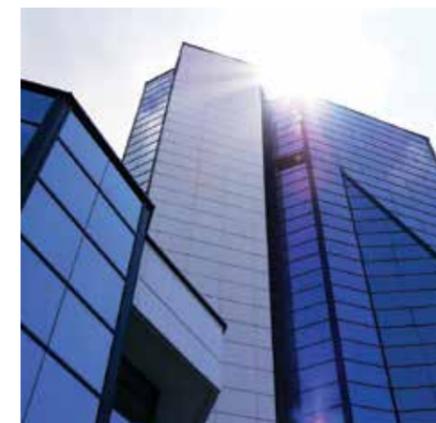
As Australia's population increases demand for local professional services will continue to grow. The Great South West will see the benefit of renewed business investment to service its burgeoning population.

Professional services provide 20,579 jobs in the Great South West, with more than double that number working in professional services outside the region. Just under 10,000 professional services businesses operate in the Great South West, and the industry contributes nearly \$2.2 billion to the national economy, making it the region's fourth largest industry.

Already the Great South West plays host to the headquarters of 18 of Australia's largest businesses with combined revenues of over \$9.1 billion. Overall, the number of professional services firms locating to the Great South West has been on the increase; in the last two years alone more than 200 businesses have identified market opportunities in the Great South West.

Existing professional services companies in the Great South West include: Slater & Gordon, Brydens Law Firm and Service NSW.

Ref: IBISWorld, NBNCo.



Strategic opportunities

42,776 businesses in the Great South West and growing

Knowledge worker surplus of over 30,000

Liverpool to host a brand new Western Sydney University facility by 2016

12,396 additional NBN connections in the Liverpool area ready by February 2016 with another 32,400 connections anticipated in the following 18 months

The Great South West has a rapidly expanding economic catchment of 900,000 people

Strategic advantages

98% of all businesses in the Great South West are small businesses requiring professional services

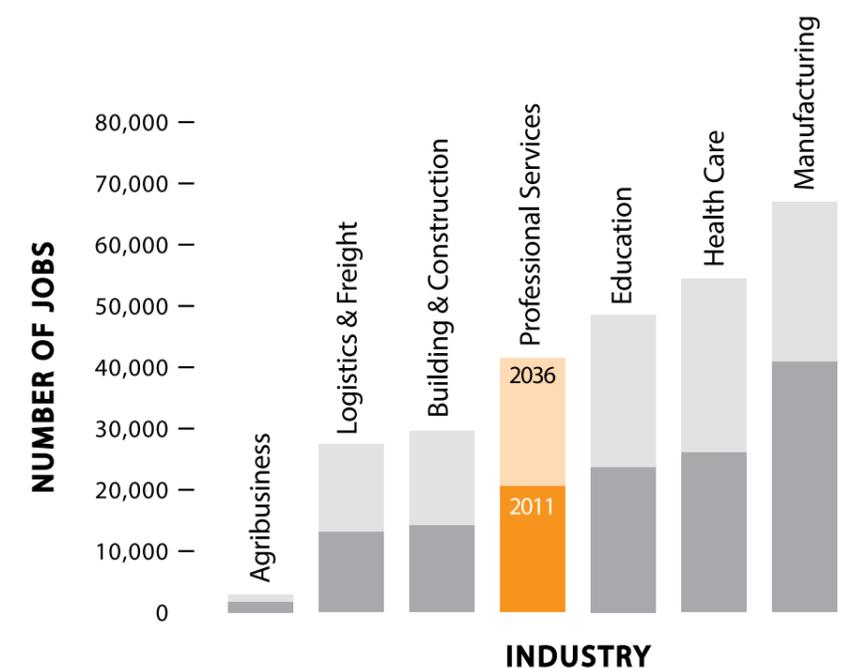
Free Wi-Fi access throughout Liverpool CBD

Commercial office space in the centre of Liverpool City is \$358/m², which represents a saving of 59% on equivalent space in Sydney's CBD

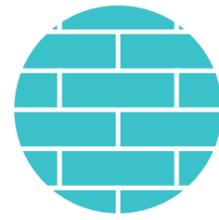
1 in 5 residents of the GSW hold a tertiary qualification or greater

Brydens Law Firm has made Liverpool CBD its home and is developing a commercial office building on Elizabeth Street to consolidate and cater for its own growth in legal services as well as providing other commercial premises.

brydens
lawyers



BUILDING & CONSTRUCTION



LOGISTICS & FREIGHT



Overview

Currently, there is \$21.5 billion worth of major projects and residential developments underway or planned in the Great South West. Historically, the region has suffered from a chronic under-investment in infrastructure, but with rapid population growth the stage is set for cranes to once again line the sky.

The construction industry provides on average about 14,000 jobs in the Great South West; this is about half the number of resident construction workers in the area. At present, in the South West there are 9,602 businesses in the building and construction industry, contributing about \$1.6 billion to the national economy.

A seemingly inexhaustible pipeline of new infrastructure projects is electrifying the sector. The Western Sydney Airport at Badgerys Creek will certainly be a game changer, but the attendant infrastructure surrounding the airport is no less important. Residential construction will also continue for some decades to come with 110,000 homes planned to be built in the South West Growth Centre.

Large scale building and construction companies already working in the Great South West include Laing O'Rourke, ADCO Construction, Thiess and Lend Lease.



Strategic opportunities

Rapidly increasing residential population

NSW's largest land release in history includes the South West Growth Centre located in Camden, Campbelltown and Liverpool

Over 17,000 hectares of land with capacity for 110,000 new dwellings and over 300,000 people across 17 new suburbs

Nation defining projects in the pipeline: WestConnex, South West Rail Link extension, Western Sydney Airport, Outer Western Sydney Orbital

Redevelopment of the Liverpool CBD, with more than \$650 million in projects currently being planned in the CBD

The NSW Government has allocated \$562 million for capital projects in the Great South West as part of its 2015-16 Budget

Strategic advantages

Liverpool Council is a prodevelopment council and anti-redtape

In the Great South West there are six technical colleges and eight specialist skills centres for vocational education and training

It takes 18 days less on average to process a significant DA than anywhere else in Sydney

The median housing price in Liverpool is more than \$650,000

28,000 skilled construction workers already reside in the South West region

Overview

The Great South West is one of Australia's fastest growing freight hubs, with Liverpool providing direct access to national, regional and global markets. Liverpool's accessibility will increase further with the addition of Sydney's second airport at Badgerys Creek and other proposed transport infrastructure.

Freight and Logistics provide over 9,000 jobs in the region, with a skilled workforce of over 25,000 freight and logistics workers living in the Great South West. With over 5,000 freight and logistics businesses operating in the region, the industry contributes over \$1.3 billion of value to the national economy.

The Commonwealth and State governments have announced that a \$2b Intermodal at Moorebank will be established in the Liverpool Local Government Area to service inbound regional and outbound interstate freight. Liverpool Council totally supports the establishment of an Intermodal in Sydney's west because of the employment opportunities it provides. However Council is adamant the intermodal would create traffic chaos at Moorebank and is vigorously campaigning to have it built near Badgerys Creek Airport.

The Great South West region continues to consolidate its position as one of the most strategically important transport and logistics hubs in Australia. Strategically located at the intersection of the M5 Motorway, M7 Motorway, the Hume Highway and with ready access to Port Botany, the industry is set to continue as one of the region's fastest growing sectors. Existing freight and logistics companies in the Great South West include: Transit Systems, Ikea, Salmat, Defence National Storage & Distribution Centre, Multipack, Aldi, Dick Smith, Big W, Fleet Pro, Costco.

Strategic opportunities

Distribution Centres for major retailers

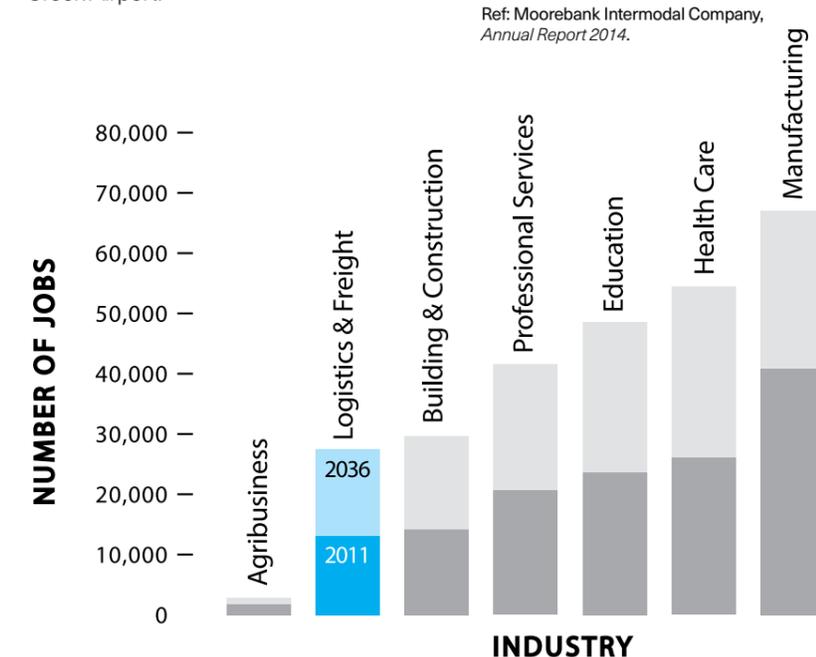
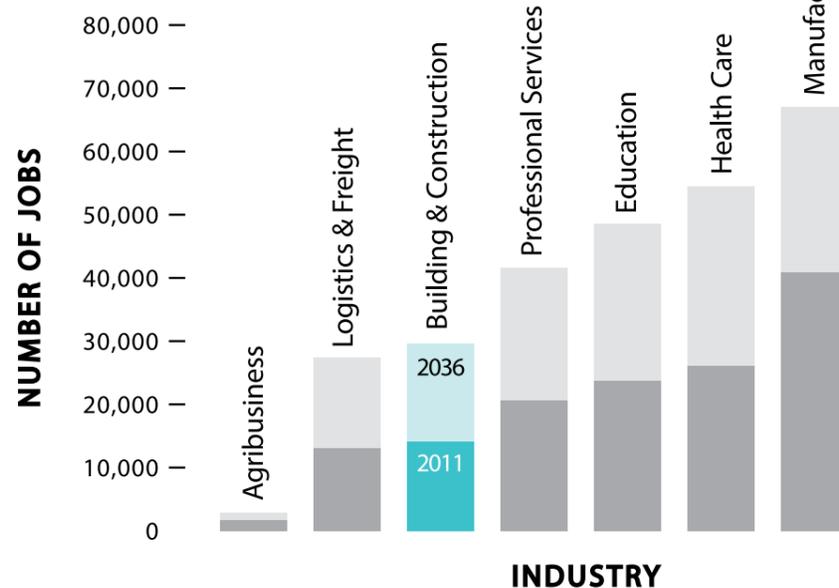
Road Transport Operators and Couriers

Warehousing and Storage facilities

Supply Chain Management and Logistics Services

New Western Sydney Airport at Badgerys Creek

Ref: Moorebank Intermodal Company, Annual Report 2014.



Strategic advantages

Over 80% of the 13,548 hectares zoned for industrial use in Sydney is located in areas proximate to the growing population of Western Sydney

Location at the intersection of the M5 Motorway, M7 Motorway and Hume Highway

Further time savings on completion of WestConnex

Upgrade of key roads in Badgerys precinct (Bringelly Road, The Northern Road, Elizabeth Drive)

Outer Western Sydney Orbital (M9) investigation underway

Australia's second largest container port, Port Botany, is less than 30 minutes from Liverpool by road (one-third of Australia's container trade)

Completion of the South West Rail Link; likely extension to Badgerys Creek Airport and St Marys

Sydney International Airport is less than a 25 minute drive from Liverpool CBD

Four existing freight intermodals within the Great South West with the new airport providing the impetus for additional facilities in close proximity to that site





Riverbank Development

Overview

By 2050 the world will export 60% of its agricultural produce to Asia. This trend along with local population growth in Sydney and a close proximity to Australia's largest city, means prime agricultural land in the Sydney basin will become increasingly valuable.

Incredibly, agribusiness is still a relatively small operation in the Great South West. Only 1,734 jobs are located in the area, mostly around Wollondilly and Camden. There are similarly small numbers of agricultural workers, about 2,000.

Over 1,052 agribusinesses operate in the Great South West, contributing \$282 million to the national economy.

The Great South West captures close to a third of Western Sydney's agribusiness market; naturally, many agribusinesses are based in the region. For the most part these are smaller operations indicating there is great opportunity to upscale the industry.

Agribusinesses already in the Great South West include: NuFlora International, Leppington Pastoral Company, Inghams, Dairy Farmers, Primo Smallgoods and Fresh Start Bakeries.



Strategic opportunities

Growing export market for Australian produce

Arable land in the Sydney basin is rapidly rising in value

Repurposing of significant tracts of agricultural land for residential development

Opportunity to capitalise on economies of scale

Strong research potential — with potential for an agrisciences hub

The Great South West forms part of Sydney's 'fertile crescent' with large tracts of highly arable land identified along the Nepean River

Strategic advantages

30% of all agribusinesses in Western Sydney are headquartered in the Great South West

University of Sydney's 1,500ha Camden Farms Network is spread throughout the Great South West. Additionally, its Plant Breeding Institute is located in the area

The Department of Primary Industry's Elizabeth Macarthur Agricultural Institute employs 180 ecoscientists

The Riverbank Development along the Georges River precinct provides an opportunity to transform an old and degraded industrial area into a revitalised mixed use urban waterfront precinct in close proximity to Liverpool CBD.

The precinct could potentially deliver thousands of new homes, while also providing premium waterfront recreational and leisure space. Some of the options that have been proposed for the site include new community spaces for concerts, markets and events, new sports and bbq/picnic facilities, a floating public swimming pool and open-air cinema.

Connectivity is a major focus for the Riverbank Development with a variety of bridges and pathways aimed at linking the site with the CBD and Liverpool's communities.

The redevelopment of this precinct will also benefit from a high level of public transport accessibility and upgrades to local bus routes, potential realignment of local roads and improvements for active transport options, including pedestrian and cycle routes.

Its strategic location is enhanced by virtue of its closeness to Liverpool's business hub and Liverpool Station, a key piece of public transport infrastructure, and also its connectivity to the South-Western Region and Greater Western Sydney through major road connections which include the M5 Motorway, Hume Highway, Newbridge Road, and Heathcote Road.

The activation of the foreshore precinct is further boosted by the \$170m The Papermill development, located on the site of one of the oldest and largest paper mills in Australia, combining contemporary homes, retail and community space, while respecting the area's rich history.



“This area provides a unique opportunity for Liverpool to help meet Sydney's future housing needs and make a major contribution to providing for the additional 1.6 million people who will live in Sydney over the next 20 years. It has the potential to be developed as a premium mixed use riverside lifestyle precinct with quality housing and local employment opportunities.”

COUNCILLOR NED MANNOUN, LIVERPOOL MAYOR, 2015

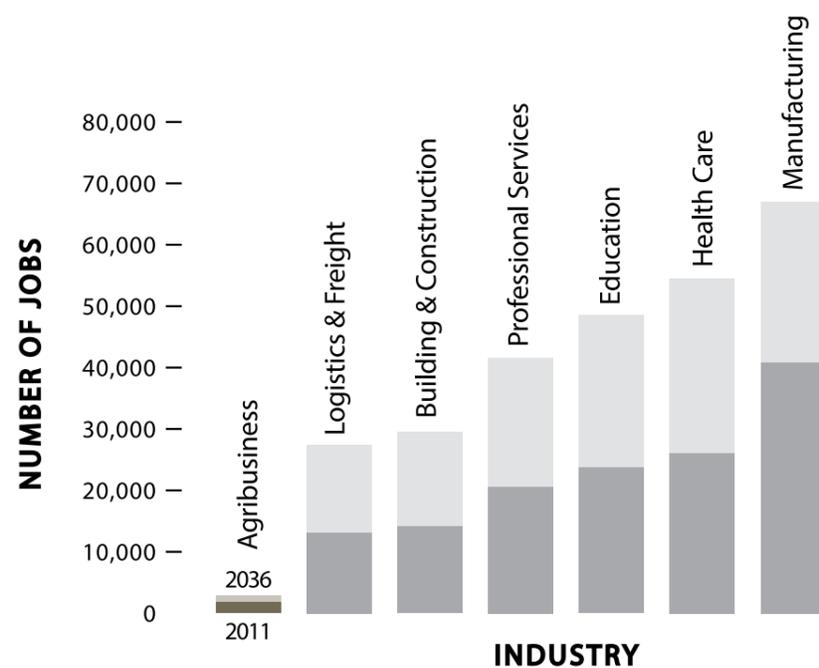
Inglis Warwick Farm

Australia's oldest and leading thoroughbred auctioneers and enterprises, Inglis, will relocate its headquarters to Warwick Farm as part of a new \$115m development that is expected to be completed in late 2018.

Inglis' thoroughbred auctions are an integral and well-renowned part of the Australian horse racing culture, and not only feature the best breeds, but attract some of the wealthiest and successful

buyers from across the globe. Major sales days attract up to 2000 guests.

The new Ingis development will include a state of the art sales facility, stalls for almost 900 horses as part of the stable complex, a fully enclosed selling auditorium, the Inglis corporate headquarters and a high quality 145 room hotel and associated function and dining facilities.



DESTINATION LIVERPOOL

A place to play and visit

Western Sydney Parklands



Western Sydney Parklands is more than just a place for visitors to relax and explore, with the 5000 ha space set to deliver more than 8000 jobs and over \$2 billion in economic activity over the next 15 years.

Spread across three local government areas, Liverpool, Fairfield and Blacktown, and bordering the Western Sydney Airport at Badgerys Creek, when fully developed, the Western Sydney Parklands will form the largest urban park in Australia and service one of the fastest growing regions in the nation.

Located within the parklands are a number of recreation facilities, such as the Sydney International Equestrian and Shooting Centres, Sydney Motorsports Park and Western Sydney International Dragway, with more sports fields and sports centres planned for development.

A small percentage of the parklands has also been set aside for tourism and business hubs, which contribute economic activity and generate employment opportunities. Hotels, theme parks, camping areas, cinemas and function centres are planned for these precincts, providing diverse visitor experiences and helping increase visitation. The business hubs are expected to generate recurrent annual income of up to \$10 million by 2020. The first business hub was announced at Eastern Creek in 2015, with the site allowing for convenience retail, bulky goods and large format retail.

A \$129 million project, the Eastern Creek business hub is expected to support around 1,000 permanent full and part time retail jobs, and approximately 500 construction jobs.

Within the parklands, urban farming and rural precincts have also been identified, providing the opportunity for viable commercial farming activities to be pursued. In addition to a large number of picnic, play and bicycle areas, the parklands also support a range of community services and facilities, including meeting rooms, youth centres and education facilities.

“The people of western Sydney will benefit from the convenience and improved choice provided by the new shopping outlets that will open at the business hub... making the project a winner for the environment, the community and the economy.”

ROB STOKES, NSW PLANNING MINISTER

Eat Street



Located on the southern end of Macquarie Street — Liverpool's 'Eat Street' plans incorporate a lively café strip, with restaurants, coffee shops and nightlife.

Over the past 12 months a number of new restaurants have opened in the precinct and building on the popularity of existing eateries, many more are on their way.

Liverpool City Council's plans for Eat Street are aimed at reinforcing the dining precinct's links to surrounding streets, new developments and business and providing a diverse and appetising food offer.

Outdoor dining and vibrant shop frontages are encouraged by Council, along with pop-up stalls, activated laneways and food festivals that will forge stronger communities and create a more dynamic urban environment.



Shopping

Westfield Liverpool attracts millions of visitors per year, but there are also plenty of other hidden gems to be found as part of the Liverpool shopping experience.

There are a large number of stores specialising in sub-continent fashion, jewellery and beauty products, with Liverpool home to some of the more popular Indian clothing outlets, specialising in Saris, Sharara and Kurta Pajama suits.

In addition to the bright designs and colourful fashion on offer, there is also a selection of delicious Indian sweet shops, grocery stores and renowned Indian restaurants, making Liverpool's south-Asian experience, one that tempts the tastebuds and excites the senses.



OVER THE HORIZON

Sports, Major Events & Tourism

Carnes Hill Recreation Precinct

Stage One of a \$30 million recreation precinct stretching across 7,000m² in Carnes Hill is expected to open in 2016, with further plans for a \$22 million Centre for Excellence, also in the pipeline.

The Centre for Excellence will include high performance facilities as well as community assets like a swimming pool, with the potential to act as a high performance training centre for elite sports teams.

The entire Carnes Hill Recreation Precinct, on the corner of Kurrajong and Cowpasture Roads, will include an indoor recreation centre, multipurpose gym, library, cafe, skate park and outdoor sports courts — comprising the biggest sports investment in Liverpool Council's history.



The Carnes Hill Centre for Excellence will include high performance facilities as well as community assets like a swimming pool, with the potential to act as a high performance training centre for elite sports teams.

Liverpool Sports and Entertainment Arena

Liverpool, with its growing population and reputation as one of Australia's finest sporting nurseries, is the perfect place for a world-leading, innovative multi-use sports and entertainment facility that puts fans at the centre of the experience.

The city has a site at Woodward Park that offers the opportunity for a world-class sports and entertainment precinct. The site is highly visible, walkable to the city centre and well connected by transport links, including the M5 expansion, south-west rail link and the Western Sydney Airport at Badgerys Creek.

The multi-use facility, with its 30,000 seat capacity for sports events and rectangular pitch, will provide an intimate feeling of being 'close to the action' and offer a broad range of seating choices, including general admission, reserved seats, 'field clubs', premium lounge and corporate



suite options. It will be a smart facility built to meet the needs of sports fans now and in future with WiFi technology, digital integration and flexible event theming that creates a 'home ground' environment.

The facility will also have the flexibility to be utilised for major entertainment, cultural and corporate events. It will offer a vibrant and multipurpose configurations that includes a 'Live Site' as well as sponsor friendly activation zones.

The 30,000 capacity multi-use sports and entertainment facility will be a smart facility and have the flexibility to be utilised for major entertainment, cultural and corporate events.

Investment

Civic Place

Liverpool Council's \$150 million Civic Place development is expected to breathe new life into the southern part of the city centre, providing a mix of commercial, residential and retail space.

Located at 52 Scott Street, and with a total floor space of 33,000m², Civic Place is set to become the new headquarters for Liverpool Council.

Other options that have been discussed for the site, include a new arts centre to complement the programs and services currently operating at the Casula Powerhouse Arts Centre and the possible relocation of public broadcaster, SBS, which would align, and tap into the region's cultural demographic.

Liverpool Metro

The Sydney Metro is Australia's largest public transport project, delivering more trains and faster services across all of Sydney.

The stand alone train network is expected to reshape the way Sydney travels, moving an estimated 100,000 people an hour and boosting current capacity by about 60%.

The State and Federal Governments are examining the feasibility of extending the Metro City and South West Line to Liverpool and on to Badgerys Creek as part of a broader study that addresses the transport needs of Western Sydney.

A metro extension from Bankstown to Liverpool would help support the growth of the region, greatly reduce travel-time for the thousands of workers who commute to the city CBD every day and improve connections to Sydney's second airport.



Liverpool City Council's \$150 million Civic Place development could potentially house a new headquarters for SBS.

Edmondson Park

Edmondson Park Town Centre, a 24 hectare site with the capacity to deliver a minimum of 900 new homes and up to 45,000m² of retail and commercial space, adjoins the Edmondson Park train station which opened in February 2015.

One of the best connected new urban developments in Sydney, Edmondson Park is located 8km from Liverpool CBD and about 45 km from the Sydney CBD. It has a centrally located new bus-rail interchange and easy access to the M5 and M7 motorways.

"Edmondson Park Town Centre presents an ideal opportunity to locate homes near new transport infrastructure. This is the very best starting point for great residential communities," Frasers Australand CEO, Rod Fehring said.

Construction on Stage One is expected to start in 2016. Upon completion the Edmondson Park Town Centre is expected to deliver 1500 retail jobs, 2500 construction jobs and 900 new homes.

"Through good planning, we can bring the full benefits of the new airport at Badgerys Creek to the people of Western Sydney and NSW as a whole."

NSW PLANNING MINISTER, ROB STOKES

Western Sydney Priority Growth Area

The Western Sydney Priority Growth Area has been created to assist with planning around the Western Sydney Airport at Badgerys Creek.

The NSW Government, Liverpool and Penrith Councils will work together to develop a new strategic framework for the precinct, providing a co-ordinated planning approach for new homes, jobs and infrastructure.

One of the key aims of the 14,000ha Western Sydney Priority Growth Area, is to maximise the economic and strategic benefits that the Western Sydney Airport at Badgerys Creek will deliver.

The area stretches from Penrith and Blacktown down to Leppington. It is bound by The Northern Rd to the west, Bringelly Rd to the south and the Western Sydney Parklands and the suburbs of Horsley Park and Mount Vernon to the east.

The Committee for Liverpool



The City has convened the most high-powered forum to ever to discuss key strategic issues facing Sydney's Great South West, the Committee for Liverpool. Committee members include:

Chair
Councillor Ned Mannoun
Mayor, Liverpool City Council



Ms Monica Barone
Chief Executive Officer
City of Sydney



Ms Robynne Cook
General Manager
Liverpool Hospital



Convenor
Mr Christopher Brown AM
Chairman, Western Sydney
Leadership Dialogue



Mr David Borger
Western Sydney Director
Sydney Business Chamber



Mr Tony Costantino
Executive Director
Lendlease Group



Mr Glenn Byres
Executive Director
NSW Property Council of Australia



Ms Suellen Fitzgerald
Director, Western Sydney
Parklands Trust



Mr Phil Cameron
Head of NSW Government
& Higher Education, SAP Australia



Professor Barney Glover
Vice Chancellor
Western Sydney University



Mr Joseph Carrozzi
Managing Partner
PwC Sydney



Ms Marina Go
Chair
Wests Tigers NRL Club



“The Federal Government’s decision that Badgerys Creek would be the location of the Western Sydney Airport has galvanised broad-based support, interest and optimism about the significant economic impact that a full service airport will have on the future of Western Sydney.”

KERRIE MATHER, MANAGING DIRECTOR & CEO SYDNEY AIRPORT



“Goodman has an extensive property portfolio in Liverpool and across South West Sydney and is keen to invest further in the development of productive projects in this exciting region.”

JASON LITTLE, GENERAL MANAGER, GOODMAN AUSTRALIA



“I was raised and educated in Liverpool, so being part of this Committee and contributing to the city’s future, is a personal honour for me. The upgrade of the downtown area plus the development of Badgerys Creek and its associated infrastructure means Lendlease sees great commercial potential in Liverpool.”

TONY COSTANTINO, EXECUTIVE DIRECTOR LENDLEASE BUILDING

Tony Hadchiti
President, Western Sydney
Regional Organisation of Councils



Mr John Lehmann
Editor-at-Large
Daily Telegraph/News Ltd



Mr Danny Rezek
Managing Partner
Western Sydney Office, Deloitte



Dr Phil Hamdorf
Western Sydney Regional
Coordinator
NSW Department of Premier & Cabinet



Mr Jason Little
General Manager, Australia
Goodman



Mr Roderick Simpson
Associate Professor
University of Sydney



Mr Andrew Head
Group General Manager
Transurban NSW



Ms Kerrie Mather
Managing Director & CEO
Sydney Airport Corporation



Mr Chris Tooher
Executive Director
Sydney Festival



Professor Chris Johnson
Chief Executive Officer
Urban Task Force



Mr Brendan McRandle,
Director, Western Sydney Unit
Federal Department of Infrastructure



Ms Judith Whelan
News Director
Sydney Morning Herald/Fairfax Media



Hon. Craig Knowles AM
Former NSW Minister for
Planning & Health

Mr John Papagiannis
Director, Development & Asset
Management, Scentre Group/Westfield



Dr Tim Williams
Chief Executive Officer
The Committee for Sydney



Ms Amanda Larkin
Chief Executive Officer,
South West Sydney Local
Health District



Mr Darren Pearce
Chief Executive
Australian Turf Club



Mr Carl Wulff
Chief Executive Officer
Liverpool City Council



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