



PROSPECTUS  
2020

# INVESTING IN PERTH'S EASTERN REGION









## CEO FOREWORD

Welcome to Perth's Eastern Region. The Region that offers exciting growth and opportunities for development and investment. If you are an international, national or local investor considering expanding or relocating your business or industry into Perth's Eastern Region this prospectus outlines why our Region is a great place to live, work, play and do business.

Perth's Eastern Region's major stakeholders are the EMRC's member Councils; the Town of Bassendean, City of Bayswater, City of Belmont, City of Kalamunda, Shire of Mundaring and the City of Swan, local and state government agencies, local businesses and alliances all of whom make valuable contributions to the efficiency and effectiveness of the Region's economic prosperity.

With current expansion and growth in major capital investments including intermodal freight terminal development, Metronet projects, extensive road improvements, major airport and major centre redevelopments the Region is presenting further opportunities for development and business investment. The Region makes up 1/3 of the Perth Metropolitan area and it is positioned to maximise the benefits from its competitive advantages in industry and business to deliver positive future investments and outcomes.

Supporting ongoing growth of industry and business in the Region is a priority for the EMRC, especially now with the impact of COVID-19. This Prospectus offers an examination of growth opportunities and areas of projected economic growth and we strive to make sure 'that the Region's businesses and industries are supported so they can achieve a high value of economic output. With a focus on promoting increased resilience, creativity and innovation.'

Marcus Geisler

EMRC Chief Executive Officer



## CHAIRMAN FOREWORD

The Eastern Metropolitan Region of Western Australia's capital city, Perth, is an ideal place to grow your business. Our Region is an outstandingly attractive place in which to live, work, and play. Our stable governance, skilled workforce, abundant transport infrastructure, vibrant services sector, diverse manufacturing base, and well-planned industry clusters make our Region an ideal place to invest.

In addition to the many infrastructure advantages our Region has to offer, which are outlined in further detail in this Prospectus, Perth also has world-class biosecurity. The State of Western Australia's response to, and recovery from, the Covid-19 pandemic demonstrates our Region's ability to manage and maintain economic output through the timely and appropriate use of public health measures.

There is evidence of strong public and private investment in our Region, which has supported growth in the Gross Regional Product of 5.7% per annum over the past five years.

The role of the Eastern Metropolitan Regional Council (EMRC) is to build on these impressive results by actively promoting Perth's Eastern Region through advocacy on major projects and investment opportunities that foster growth in economic capacity, productivity and social dividend.

This Investment Prospectus provides insights into the varied competitive advantages our Region. We thoroughly recommend this Prospectus as a practical resource for current and future global, national and local investors considering investment decisions in business and industry. We hope it proves to be a resource you can refer to when considering your future investment decisions, in Perth's Eastern Region.

Cr Jai Wilson

EMRC Chairman





# Acknowledgement

*We wish to acknowledge the traditional custodians of the land, the Whadjuk Noongar people. We acknowledge their continuing culture and the contribution they make to life in this region and we pay our respects to their elders both past, present and emerging.*



Mural by Amuck 37, Coventry Village, Morley



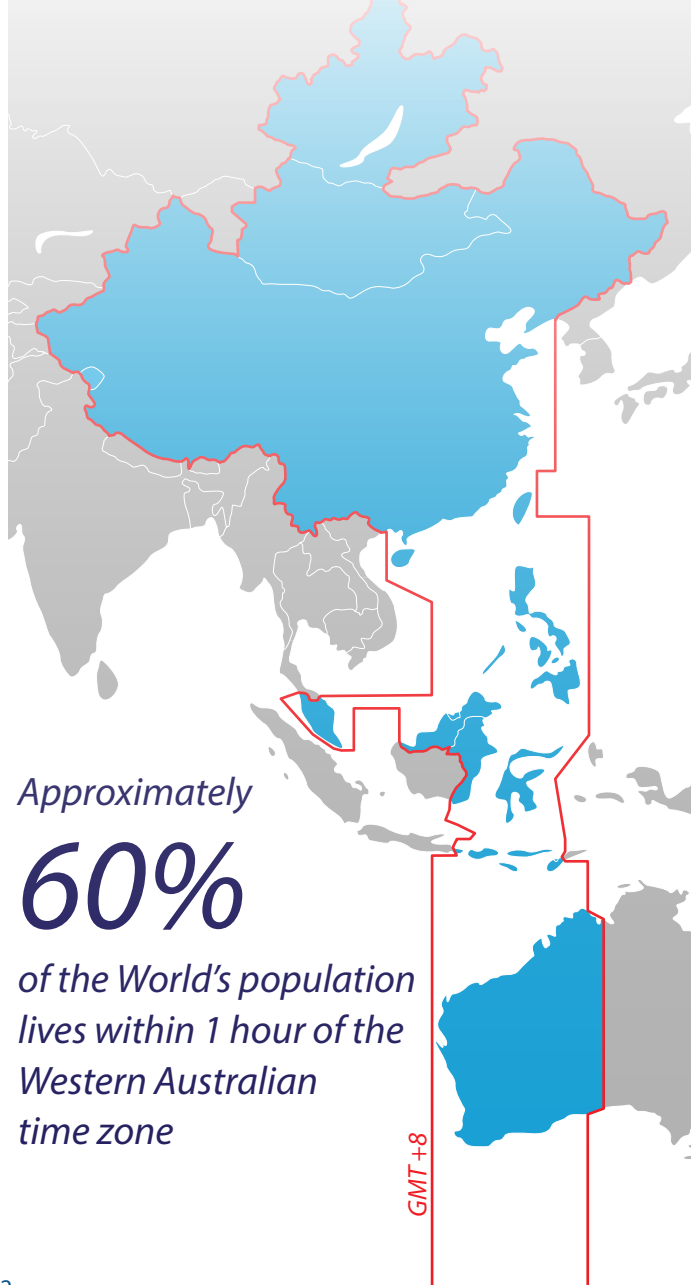


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# PERTH'S EASTERN REGION GLOBAL POSITION



Our country is home to a knowledge-based workforce and a growing economy that provides resources and services to the world. Australia is a secure and profitable place for international business and foreign direct investment (FDI).

**\$1,947 billion**

Australia's GDP

**\$406 billion**

Value of exports in 2018

**2.89% p.a.**

GDP Growth (2009 - 2019)

**1.57% p.a**

Australia Population  
Growth rate (2009 - 2019)



Western Australia's Gross State Product (GSP) continues to grow faster than the national rate with rising demand for our mineral and energy resources, agricultural products, and professional and technical services. Western Australia is an exceptional long-term value proposition for investors.

**\$285 billion**

GSP - 14.63% of total GDP

**46%**

of all Australian exports come from WA

**4.17% p.a.**

GSP Growth (2009 - 2019)

**1.56% p.a**

WA Population  
Growth rate (2009 - 2019)



Perth's Eastern Region value of exports continues to rise with demand from our mining, manufacturing, transport, postal, and warehousing industries. Exports are important for development and growth of the Region by increasing revenues, jobs and raising the standard of living.

**\$31.8 billion**

GRP - 11.15% of total GSP

**12.56%**

Value of all WA exports come from the Region

**5.75% p.a.**

GRP Growth (2009 - 2019)

**1.80% p.a**

Regional Population  
Growth rate (2009 - 2019)





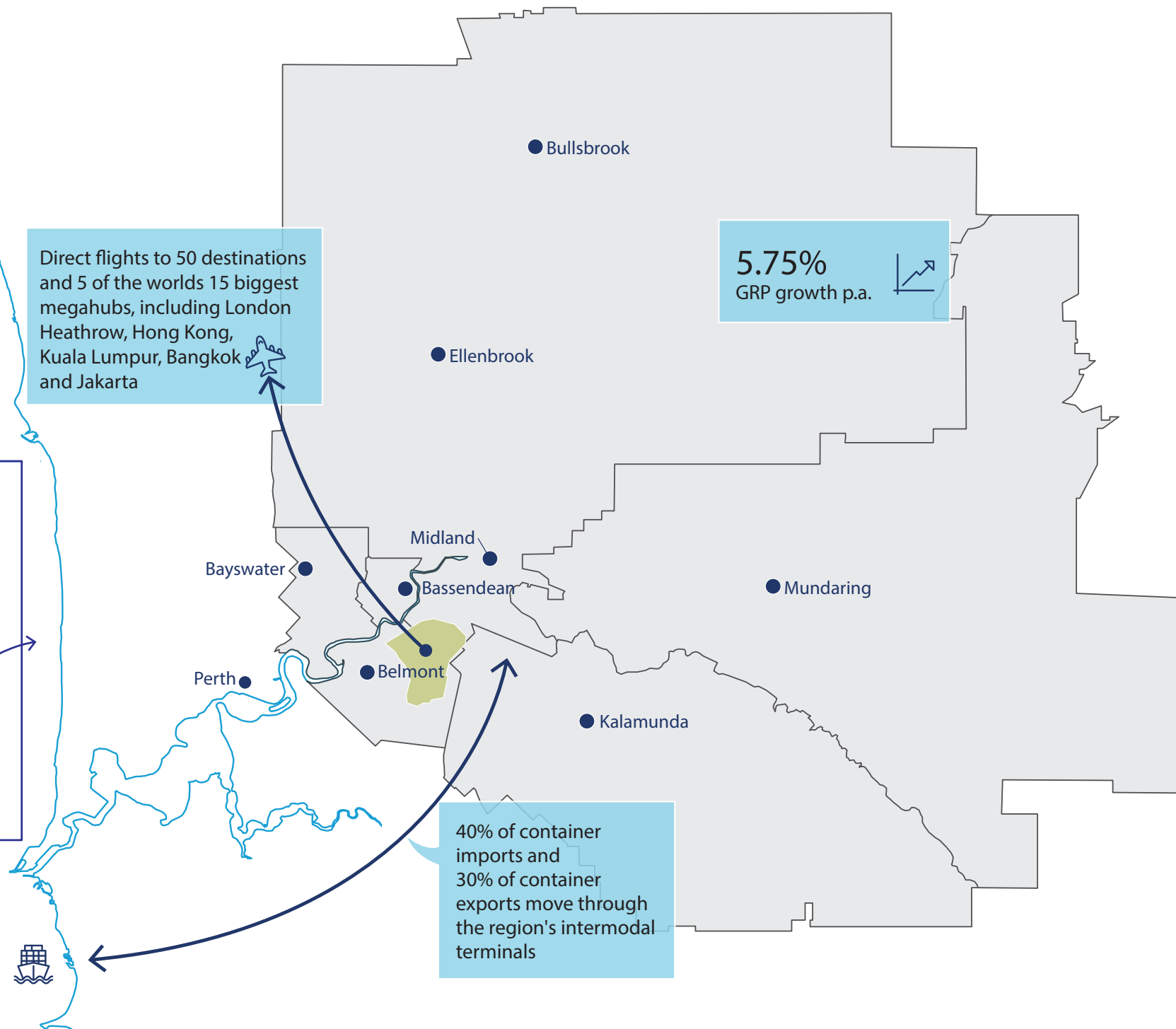
PERTH'S EASTERN REGION



The Region is located in close proximity to Perth CBD, with travel times between 10-40 minutes

Direct flights to 50 destinations and 5 of the worlds 15 biggest megahubs, including London Heathrow, Hong Kong, Kuala Lumpur, Bangkok and Jakarta

5.75%  
GRP growth p.a.



40% of container imports and 30% of container exports move through the region's intermodal terminals



# WELCOME TO PERTH'S EASTERN REGION

*Perth's Eastern Region (the Region) is the gateway to WA, connecting businesses, freight and people to our great state. The Region provides businesses with the physical connectivity and industry networks required to maximise their investment potential.*

Perth's Eastern Region is a nationally significant region made up of six local Councils, including the Town of Bassendean, City of Bayswater, City of Belmont, City of Kalamunda, Shire of Mundaring and the City of Swan. The Eastern Metropolitan Regional Council (EMRC) actively promotes the Region, advocating for major projects that continue to grow the Region's economic capacity and productivity. The resulting public and private investment in the Region has supported annual growth in Gross Regional Product of 5.7% per annum for the past five years.

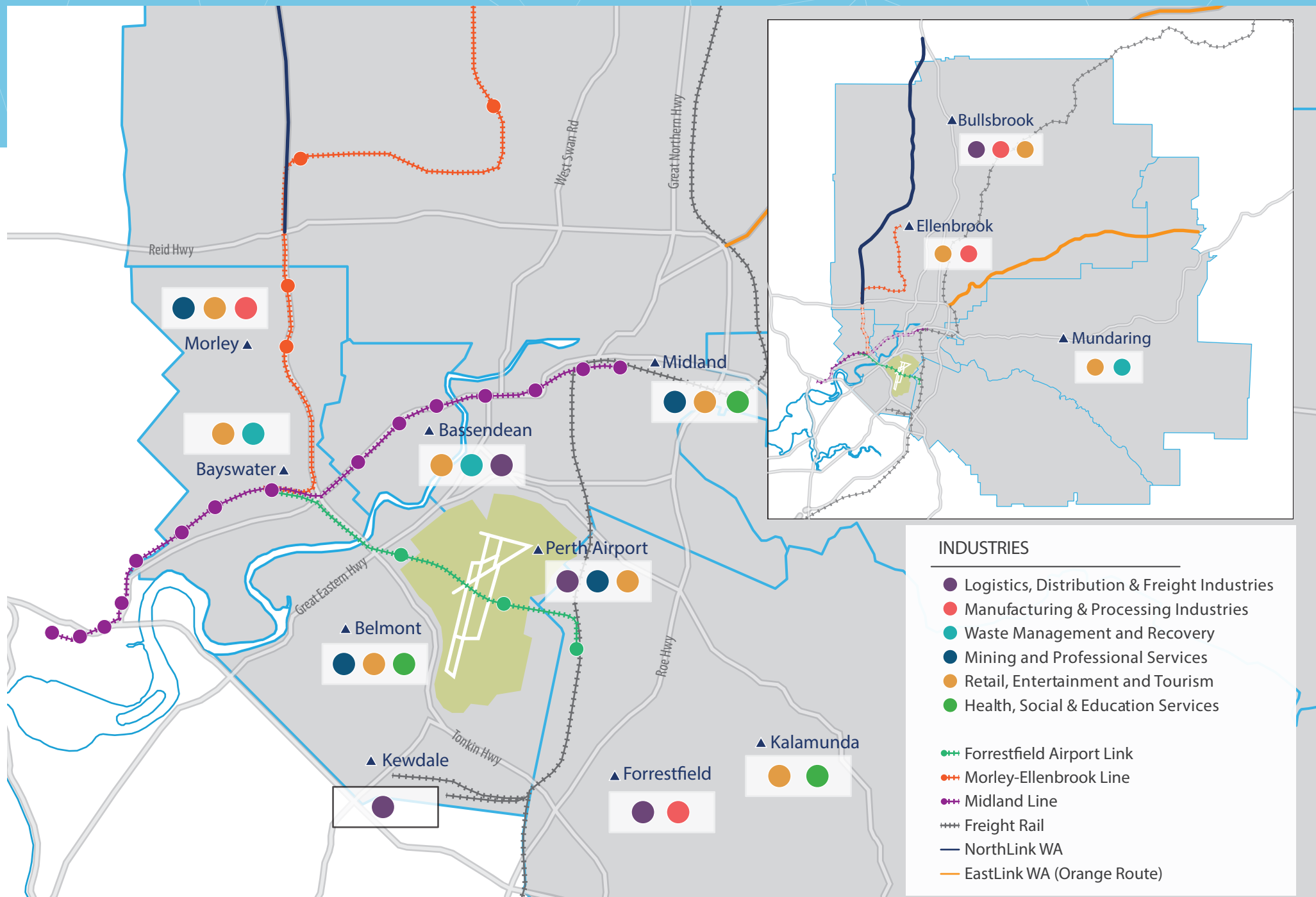
The Region is home to the most significant road, rail and air freight infrastructure in the Metropolitan area and a number of strategic industrial and commercial centres.

The cumulative positive effect of these assets has led to the formation of major industry clusters in logistics and transport, distribution, tourism, manufacturing and professional services.

The Region's attractiveness also extends to everyday living. With a growing public transport network, access to National Parks and public open spaces, and some of Perth's premier shopping destinations, the Region provides a work-life balance second to none. Choosing to do business in the Eastern Region will help improve your bottom line through new opportunities, greater efficiency and happier employees.









# OUR COMPETITIVE ADVANTAGE

*Perth's Eastern Region offers a number of unique advantages that support economic growth such as Perth Airport and the State's primary Intermodal Terminal, Kewdale.*



## \$21.4 billion

Regional exports (24.3% of Greater Perth total)



## \$14 billion

Building development since 2009



## \$5 billion+

Infrastructure development since 2009



## \$4.4 billion

Local retail expenditure



## 5.7%

Annual growth in Gross Regional Product



### Freight by Air, Road and Rail

Perth's Eastern Region is home to major National Highways, State Highways and Freight Railways connecting the Metropolitan area with the state's North and the Eastern States. These freight corridors culminate in the primary Freight and Logistics hub for the Metropolitan area: Kewdale/Forrestfield Intermodal Terminals and the Perth Airport.

- Kewdale and Forrestfield intermodal terminals
- Planned South Bullsbrook intermodal terminal
- Perth-Darwin National Highway
- Perth-Adelaide National Highway
- Perth Airport
- Freight Railway



### Major Industry Anchors

Employment centres such as the Perth Airport, Kewdale and Forrestfield are attracting a fast-growing cluster of Mining and Professional Service industries with new high-quality office space in close proximity to major firms, in addition to Freight and Logistics employment opportunities. Local industries are embracing the rapidly changing economic environment; a number of major firms have invested in cutting edge technology, including remote mining facilities and highly technical distribution centres. These high-tech solutions are ensuring that the local economy will continue to adapt and support growth in years to come.







## Activity Centres

- Midland and Morley strategic metropolitan centres – 150,000+ catchment
- Two secondary centres and six district centres
- One fifth of Perth's total population
- \$4.4 billion in resident expenditure p.a.

Major investment in these centres is planned and will continue to drive opportunity for economic growth.

Providing safe communities and employment centres is a priority in the Region. Each council has its own safety protocols, with CCTV and security patrols throughout. The City of Belmont has an integrated CCTV system with over 400 CCTV cameras and its Belmont Community Watch patrols provide a 24/7 service to all of its residents and businesses.



## Tourism

- Perth Airport – 14 million passenger movements p.a.
- Swan Valley and Perth Hills - over 2.8 million visitor nights p.a.
- \$2 billion+ in visitor spend p.a.
- Swan Valley and Bickley Valley
- Avon Descent event
- Whitman Park
- John Forrest National Park
- Bassendean Oval



## Retail

The Region has a growing retail specialised centre at the Perth Airport and Estate, providing goods and services to residents and workers from the Region and the broader Metropolitan area. Retail hot spots also include Morley and Midland centres.



## Health

- Mt Lawley (private) and Midland (public) St John of God hospitals
- Planned additional St John of God Midland hospital - approximately 2021 (private)
- 60% growth in health industry from 2006 – 2016
- Top age structure groups for the Region are parents and homebuilders (34-49 y/o), young workforce (25-34 y/o) and older workers and pre-retirees (50-59 y/o)
- Growing need for aged care services and facilities



## Industrial Area

Major industrial areas are located along National Highways; Roe, Leach and Great Eastern Highway, providing large land holdings for industry use and buffers that protect nearby residential areas.

- Industrial Areas: Kewdale, Forrestfield, South Bullsbrook, Hazelmere, Belmont Business Park, Tonkin Estate/ Bassendean Industrial Area, Malaga, Midvale, South Guildford
- 3,580 ha of planned industrial land



## PERTH AIRPORT AND ESTATE

The Perth Airport is the gateway between Western Australians and the rest of the world. As a passenger airport it welcomes millions of visitors to our State every year. As a freight and employment estate it is changing the nature of doing business in WA. Recent investment has led to a doubling of employment in the Air Transport industry, a significant increase compared to State employment growth of 27%. The increase in Air Transport employment reflects growth in both passenger and freight movements through the airport. The number of passenger movements has also doubled over the same period and Perth Airport now carries 49% of Australia's airfreight exports by value, through a combination of meat, vegetable and metal products.

Perth Airport has secured its place as a prime location for a number of industries. This can be seen by the major firms that have chosen to locate on the estate, including:

- **Retail:** DFO and Costco
- **Distribution:** Woolworths, Coles and Amazon
- **Freight and Logistics:** Toll, FedEx and Aus Post
- **Mining:** Roy Hill and Rio Tinto

With an extensive portfolio of industrial, office and retail premises, and a significant vacant land holding, Perth Airport is progressively developing land that is not required for current or future aviation purposes and has become the destination of choice for a number of high-quality businesses over recent years.

A further \$2.5 billion in investment is planned for the next decade, creating a new runway and terminal by 2025, developing new airport land uses such as accommodation, and supporting significant development of its capacity as an employment centre. It is estimated that by 2040, passenger numbers will have doubled to 28.5 million and airport land will be home to approximately 37,000 workers, an increase of almost 130%. The airfreight task is expected to nearly triple by 2040, reaching approximately 383,000 tonnes per annum.

The Perth Airport is the Region's most significant asset; with its proximity to the CBD, direct access to major road infrastructure, strategic freight and logistics infrastructure, and the soon to be finished trainline to the CBD, the Perth Airport is set to continue driving industry growth.

### Recent Investment

## \$1 billion



Airport industry **114%** growth since 2006



Passenger traffic **100%** growth since 2006



Perth Airport **49%** of National Airfreight

### Planned Investment

## \$2.5 billion



Employment to reach **37,000** on Airport land by 2040



Passenger traffic to reach **28.5 million** movements p.a.



Airfreight to triple to **383,000 tonnes** p.a.

## SWAN VALLEY



Over **340** food and accommodation businesses



Annually **1 million** visitor nights



Tourists spend **\$340 million** annually

The Region is home to the Swan Valley, the largest agricultural precinct in the Metropolitan area. The rich soils and proximity to market and transport infrastructure make the Region ideal for fresh produce and food processing. The demand from nearby Asian markets for premium or 'clean food' continue to expand rapidly, delivering significant opportunities for agricultural entrepreneurs to capitalise on.

There are opportunities to create new and unique tourist attraction enterprises, provide a greater diversity of overnight visitor accommodation options, and provide conference and reception facilities to attract event-based tourism. Additionally, many opportunities exist to establish enterprises such as tour operators or new food products that compliment, feed off or expand on existing business offerings in the tourism sector.

## FREIGHT INFRASTRUCTURE FOR ROAD AND RAIL



Recent road projects - **\$2.2 billion**

- NorthLink WA
- Gateway WA



Funded road projects - **\$1.1 billion**

The Region has the highest level of road and rail freight connectivity of any area in the Greater Perth Region. All National Highways pass through the Region and the National railway terminates at the Kewdale/Forrestfield intermodal terminals. State and National highways connect the Region to the Northern, Central and Southern metropolitan areas making local transport fast and reliable.

Major road projects continue to provide the additional capacity for freight and passenger vehicles to ensure the Region is the premier location for Logistics, Distribution and Freight Transport. A new intermodal terminal at South Bullsbrook Industrial Precinct will ensure that there is sufficient capacity for the projected growth in rail freight. The Region is continuously adapting to the changing need of industries and will continue to maintain a level of road and rail infrastructure that delivers high levels of efficiency to its businesses.



## **GROWTH OF RESIDENTIAL DEVELOPMENT**

The Region has experienced high population growth and will continue to do so through land availability and supporting infrastructure. Leading to significant demand for residential development. A total of 47,000 additional dwellings will be required by 2031, continuing the significant demand for land and driving employment in Real Estate and Construction industries.

Areas towards the Perth Hills, Swan, Mundaring and Kalamunda, provide great lifestyle living opportunities with a number of planned growth areas, such as Helena Valley and Bellevue Farm, that will provide low density living in proximity to the Region's key employment centres. Urban centres closer to the City such as Midland, Morley and Belmont have areas planned for high density living.

High-density residential development will also be supported at new train stations along the Forrestfield Airport Link (completion in 2021) and the Morley to Ellenbrook trainline (completion in 2023). These developments will provide opportunity for commercial floorspace, allowing developers to diversify developments and capture demand from multiple markets. The Region's Councils have established planning documents for many of these areas and are in a position to work with potential investors.

*The Region supports almost **\$1billion** in residential building development annually*

## **INDUSTRY AND GOVERNMENT WORKING TOGETHER**

Red tape is a common challenge for the business community and Local Governments alike. The Region's Councils are working with industry representatives to build a future where planning promotes and facilitates sustainable economic development. Link WA is an alliance between the Cities of Belmont, Swan, Kalamunda and Canning. It represents the growing freight and logistics precinct within the Region and has a stated task of working with the State Government to standardise and streamline regulation processes and approvals. The desired outcome is a systematic process for development applications in industrial areas that is consistent and clearly communicated. This approach to planning is being considered across the Region.

Private - public collaboration have also been developed with business representative organisations such as EMICOL, that work with Councils to provide local industry support. There are also private firms that work with government to engage their communities such as Town Teams.

The Region's Councils also create opportunities through sister city agreements that promote cultural and commercial ties that support business links, encourage trade and increase tourism.

*Reducing red tape is a common goal for Councils in an effort to support the required levels of development in the Region.*

## SMALL BUSINESS OPPORTUNITY

The Eastern Metropolitan Region Council (EMRC) and individual local Councils have a strong focus on supporting local business development. Small and Medium businesses are the life blood of the economy; the Region is home to an estimated 28,000 businesses with less than 20 employees. The EMRC provides support to these businesses through workshops, networking opportunities and run a business exemplar program. Individual Councils provide incentives and support, including grants for events, funding for shop front upgrades, skill development workshops, and more. They also maintain communication with several organisations that can help guide you through the different stages of operating a business. The EMRC and Member Councils realise the risk that small business owners have taken and aim to ensure they have the best possible chance of succeeding.

Head to page 31 'Connect with Perth's Eastern Region' for more information in regards to small business support or opportunities.



Small Business  
Development Corporation



Chamber of Commerce  
and Industry WA



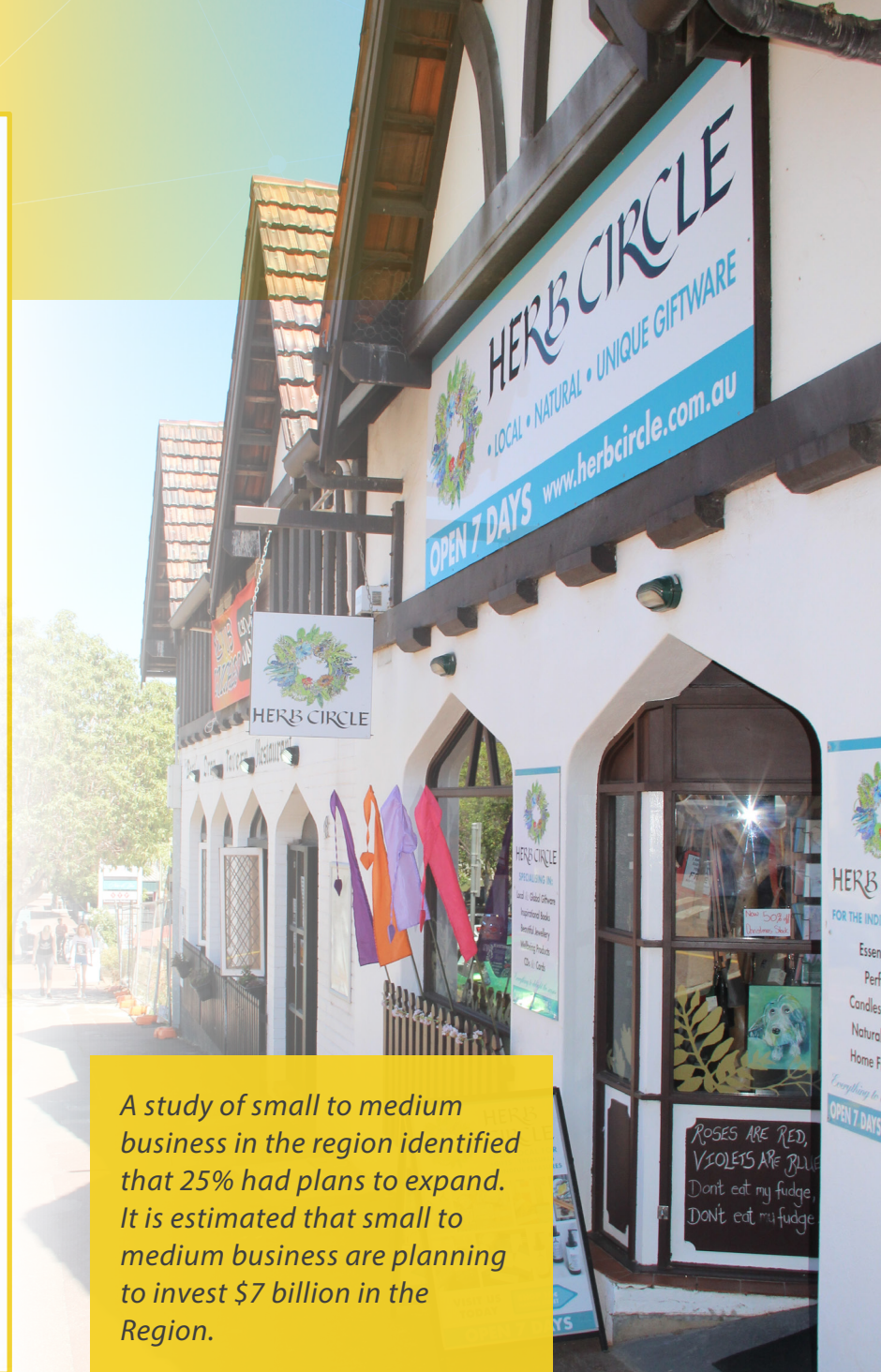
MUNDARING  
CHAMBER OF COMMERCE  
SUPPORTING LOCAL BUSINESS



SWAN  
CHAMBER  
OF COMMERCE



KALAMUNDA CHAMBER  
OF COMMERCE




*A study of small to medium business in the region identified that 25% had plans to expand. It is estimated that small to medium business are planning to invest \$7 billion in the Region.*



# LOGISTICS, DISTRIBUTION & FREIGHT INDUSTRIES

*The Western Australian Regional Freight Network Plan identifies the Kewdale, Forrestfield and Perth Airport areas as key convergence points for metropolitan and regional freight and logistics activities. As Perth heads towards a population of 3.5 million the State Government has committed to continue developing road and rail infrastructure to ensure the continued high levels of performance for freight activities in the Region.*

 **61%** Employment growth since 2006

 **3** Intermodal terminals

 **77%** Growth projected for rail freight

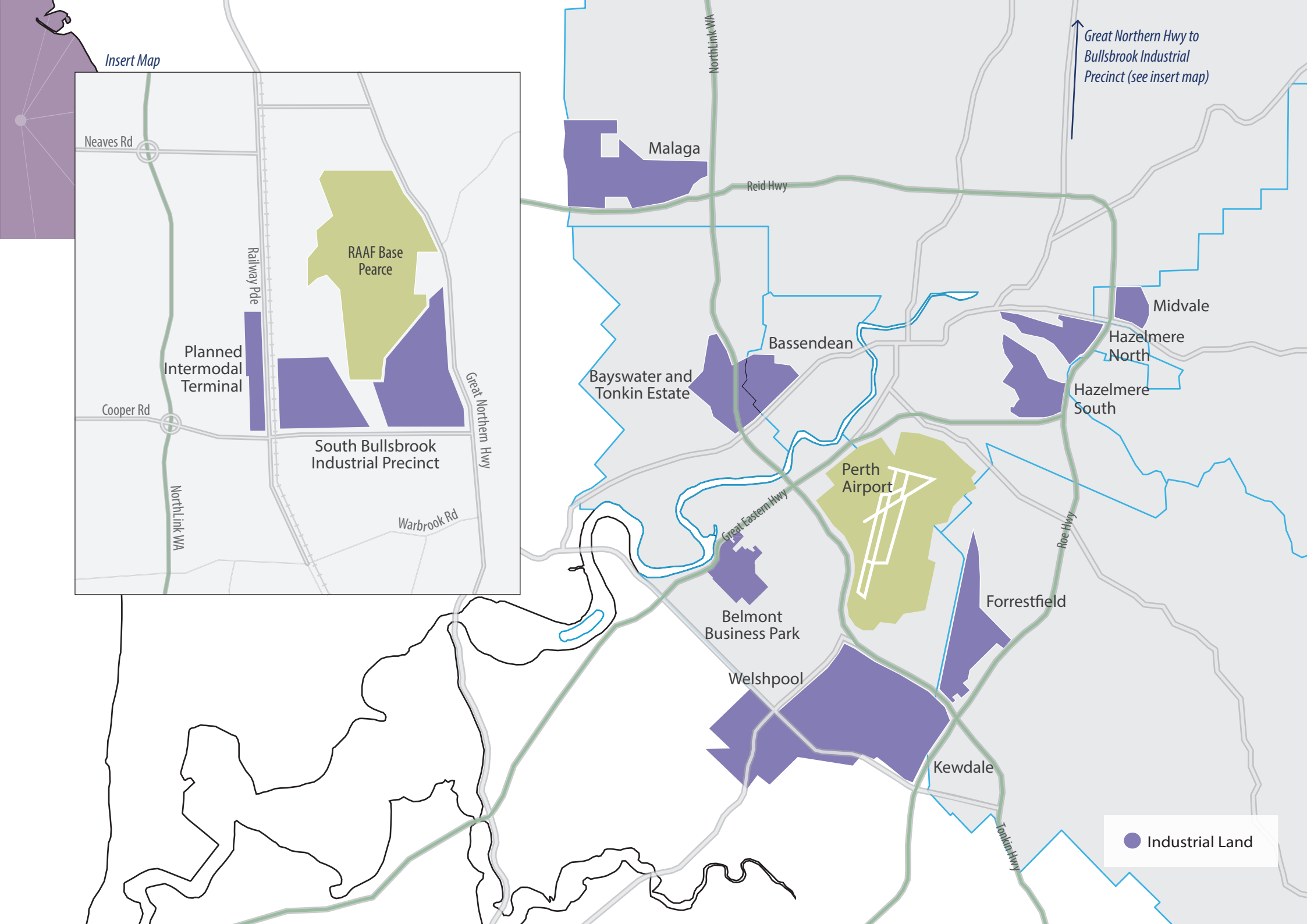
## Connectivity

The Region has direct access to National freight routes, a significant agglomeration of storage and distribution facilities, and the presence of manufacturing and processing facilities create high levels of connectivity and significant efficiencies for Logistics, Distribution and Freight Transport industries in the Region. The Perth Airport is ideally located for freight access and provides access to international markets for local industries. Major highways connect the Region to the Northern, Central and Southern metropolitan areas making local transport fast and reliable. Connectivity ensures local businesses enjoy lower transport costs through high efficiency between each level in the supply chain.

*Link WA refers to both the region and the project name of the alliance between the Cities of Belmont, Canning, Kalamunda and Swan. Link WA aims to take a leadership role in the support and promotion of the freight and logistics industry.*

*The four Councils recognise the opportunities and challenges that exist for the commercial and sustainable growth of the industry; and collectively, are working to ensure the industry continues to prosper in the Region.*









## Infrastructure and Industry Agglomeration

The Region's industrial areas are strategically located along major freight routes, culminating in the Kewdale and Forrestfield Intermodal Terminals, the soon to be developed South Bullsbrook Intermodal Terminal and Perth Airport industrial areas.

These areas of strategic infrastructure create co-location benefits that drive supply chain efficiencies. Co-location benefits mean it will be easier for you to find the right employees, expand your portfolio of clients and reduce the costs associated with delivering your services.

### *Labour Pooling*

With such a concentration of firms in the same industry cluster there is a substantial labourforce from which you can obtain the skills you require. Over 34% of the local labourforce are Technicians, Labourers or Machinery Operator/Drivers, 4% higher than the Greater Perth average.

### *Knowledge Spillovers*

Opportunities for collaboration are readily available and can put your company in a better position to win contracts or expand your portfolio of products or services. This is particularly true given the co-location of multiple levels of supply chain, from the storage of natural resources to downstream production.

### *Shared Infrastructure*

The Region's intermodal terminals are shared by a number of enterprises to reduce the capital requirements for individual businesses. The Region is also home to organisations that will have the equipment and/or infrastructure you need for any job, making it easier to take on different and larger projects.

## ***DISTRIBUTION POWERHOUSE***

The Region is the primary location for distribution facilities in the Greater Perth area. Supermarket giants Coles and Woolworths already have their distribution centres in the Region and international heavyweight Amazon just opened its third Australian facility here in 2019.

These facilities are supported by major logistics and transportation firms such as Toll, FedEx and Linfox, and infrastructure such as the Perth Airport and intermodal terminals. Storage facilities tend to co-locate with this infrastructure, such as CBH Group with its metropolitan grain storage centre adjacent to the Forrestfield Intermodal Terminal.

*Choosing to locate your firm in the Region will lead to similar co-location opportunities and give you access to major multi-national firms.*

## ***ATTRACTING INFRASTRUCTURE CAPITAL***

Infrastructure capital being invested in a Region is a strong indicator of economic growth potential. The EMRC plays an advocacy role in the Region, influencing State and Federal Government to fund major projects to meet the needs of both residents and the business community. Northlink WA and Gateway WA are recently completed major road infrastructure projects supported by the EMRC and delivered by the Federal and State Governments. Total cost for both projects was \$2.2 billion, with the resulting infrastructure creating significant efficiencies for freight operators in the Region. With the assistance of EMRC advocacy, another \$2.6 billion of infrastructure projects have had funding allocated and will continue to improve the level of connectivity experienced by commuters, and local Freight and Logistics businesses.


The significant investment in the Region has also supported opportunities for entrepreneurs. Sirona Capital secured \$45 million in venture capital from Goldman Sachs to develop its land holdings in the Northern Gateway Industrial Precincts (Muchea and South Bullsbrook), creating a Freight and Logistics hub that will link with the State's planned intermodal terminal in Bullsbrook.


*Locating in the Region will create new investment opportunities for your business.*



# MANUFACTURING & PROCESSING INDUSTRIES

*The Region is a manufacturing hub, producing a variety of goods, from food and beverage production to heavy vehicle part manufacturing, meeting local and export needs. With a total output of over \$11 billion per annum, the Region supports 25% of Greater Perth's manufacturing and processing employment. Industrial land, access to inputs and access to markets, make the Region the ideal location for these industries.*

 **23%** Of Greater Perth outputs

 **70%** Businesses report affordability of premises as an advantage

 **3,580ha** Planned industrial land

## Suitable Industrial Land

This manufacturing destination features a variety and scale of industrial land uses. From downstream chemical processing to food production, the Region offers suitable and affordable land for these activities with large land holdings that suit the manufacturing and processing activities. In a recent study, 70% of local businesses identified the affordability of premises as an advantage within the Region.

*With over 3,580ha of planned industrial land ready to meet industry demand, the Region will continue to meet the land requirements of Manufacturing and Processing industries.*

## Access to Skilled Labour

One of the key requirements to support manufacturing and processing activities is access to an appropriately skilled labourforce. Over 25% of the Greater Perth Manufacturing and Processing Industry labourforce works within the Region, a workforce of approximately 13,700. The Region's labourforce is also more likely to have vocational training with 51% of the labourforce having advanced diploma,

diploma or certificate level education compared to 46% for Greater Perth. State and National Highways provide fast road access to the Region from the North, Central and Southern Metropolitan areas, making the Region's industrial areas some of the most convenient employment centres for Metropolitan residents to access by car. The new Forrestfield Airport Link and Morley to Ellenbrook Rail Line will soon work along side the current bus network making public transport an even better option for workers to access the Region. With high levels of amenity throughout the Region, attracting the employees you need has never been easier.

## Access to Inputs

The availability and proximity of inputs is critical to manufacturing and processing industries. The closer the inputs are to the downstream supply chain the lower the costs associated with acquiring those inputs. The Region's status as the primary location for the storage and distribution of goods makes it an ideal location for manufacturing and processing industries. This can be seen by the co-location of the CBH Metro Grain Storage Centre with the Quaker Oats cereal production factory. The Region also has unmatched access to key resource areas outside of the Metropolitan area.





## Access to Customers and Markets

Whether your products are destined for the local market, the eastern states, or overseas, the Region has the capacity to get your product to market. Here you will have access to major firms that create local demand for your products, and access to air, rail, road and sea transport options that can open your business up to new customers. For instance, the Region is home to a significant concentration of heavy equipment manufacturing industries that provide components and machinery for freight and logistics activities while also having direct access to the National Highways that supply the State's mining regions.

*Locating in the Region will put you closer to your suppliers and key inputs, reducing your costs and improving your bottom line.*

*Choosing to locate in the Region will give you better access to your current customers and enable you to enter into new markets through new networks and reduced costs of getting your goods to market.*



## FOOD PROCESSING

The Region has a cluster of food processing activities. Much of the agricultural produce from the Swan and Bickley Valleys, including the Region's famous wines, is processed locally and delivered into local, interstate and international markets. The Region is also home to several large food processing firms such as Golden Eggs and Sanitarium who benefit from the Region's role as a primary storage and passage point for commodities and agricultural produce.

The ability to process food where it is stored and from where it is forwarded creates significant cost savings for food processing businesses. Food production will continue to grow with population demand and the State Government's ambition to enter into foreign markets such as Asia. The Region will play a critical role in achieving this ambition as a distribution centre for the Metropolitan area and through its transport infrastructure, particularly the capacity to reach foreign markets through the Perth Airport.

*Locating your food processing business in the Region will give you an advantage, no matter where in the world your product is going.*

## SOUTH BULLSBROOK INDUSTRIAL PRECINCT



400+ ha of developable land



Planned intermodal terminal



Access to Perth-Darwin National Hwy and Great Northern Hwy



Access to Perth-Geraldton rail line

South Bullsbrook Industrial Precinct (SBIP) is a developing industrial area in the Region that has significant potential for manufacturing and processing activities. The City of Swan was successful in obtaining a \$15 million Federal grant to develop the road that provides access to the precinct. Once this road is complete, SBIP will have direct access to the Perth Darwin National Highway, Great Northern Highway and the State Government planned intermodal terminal.


*The accessibility of the site, the separation from residential developments and the potential for large land holdings makes this an ideal location for Manufacturing and Food Processing industries in the Metropolitan area.*

# WASTE MANAGEMENT AND RECOVERY

*The EMRC is leading the way with the recovery of resources from household and commercial waste, in line with the State Waste Strategy and consistent with the circular economy. Employment in waste management and recovery is 50% more prevalent in the Region than the state average.*

 **61%** Employment growth since 2006

 **600** Employees

 **EMRC** is a leader in waste management

*The EMRC is actively looking to engage with waste recovery and waste to energy related operators who are interested in taking advantage of the EMRC's expertise and significant Regional waste related infrastructure.*

## Fostering New Industry Growth

The EMRC has commenced development of processing Food Organics Garden Organics (FOGO) waste services to meet the needs of member Councils and potentially the wider Metropolitan area. The EMRC is uniquely positioned to provide FOGO processing at its Red Hill Waste Management Facility and to deliver resource recovery and management. The EMRC is proceeding with a FOGO trial processing the Town of Bassendean and City of Bayswater's food organics and garden organics and thereafter it is envisaged that a large processing facility to process the Region's FOGO waste to produce compost and biogas will materialise. This demonstrates the competitive advantage that is being created by the EMRC and underpins the growth potential in the industry.



## Wood, Energy and Agriculture

The EMRC will commission a wood waste to energy plant in 2020 to produce renewable electricity and biochar at its Hazelmere site. The facility will be the only one of its kind in the Region and the energy generated will be used to power local industrial areas. The process will also produce a biochar bi-product of sufficient quality to be used for agricultural uses. The EMRC is currently in talks with local businesses to supply them with the bi-product, with the aim of improving local agricultural productivity.


*With the EMRC looking to expand its waste recovery practices, further energy and reuse opportunities are being explored.*



# MINING AND PROFESSIONAL SERVICES

*Major industry operators and supporting service providers are choosing to locate their office-based activities in the Region, with office-based industry employment growing by 53% between 2006 and 2016. Access to clients, high quality office space, fast and reliable internet connectivity and high-quality amenity make the Region an attractive place to do business.*

 **53%** Growth in office-based industry

 **400** Potential clients with \$10 million+ turnover

 **5** Major office centres planned

## Customer Potential

Proximity to major firms is one of the primary reasons Professional Service industries choose to locate in the Region. A survey of local businesses found that 87% believed proximity to clients was an advantage within the Region. More than 30 major firms with 200+ staff call the Region home, creating high demand for a broad range of professional and technical services. These multi-national firms span a number of industries and include companies such as Coca-cola, Toll and Daimler. Additionally, the Region is located in proximity to the CBD and will soon have greater public transport access through the Forrestfield Airport Link and Morley to Ellenbrook trainlines. Locating in the Region will provide you with access to a wider potential client base and reduce the time and costs associated with face to face client meetings.

## Suitable Infrastructure

Office space has been the fastest growing floorspace in major employment centres in the Region. New A-grade office space is available in several employment centres with a substantial increase in supply planned at new and expanding developments along Forrestfield Airport Link, Morley to Ellenbrook trainline and Great Eastern Highway.

Communications infrastructure in the Region's employment centres has been a key advocacy focus for the EMRC, there are 75% of businesses who identify internet speed as a regional advantage. Parking was also highlighted as an advantage within the Region by more than 74% of businesses. You and your employees can enjoy the convenience of commuting to work in your own vehicle.

## Transport and Amenity

Public transport, road infrastructure and active transport infrastructure ensure that your personnel have multiple options for getting to work. The Region's Councils are continuously improving the public open space and amenities available to employment areas.

*Major developments at centers including Morley, Midland and a number of new Metronet stations, will provide additional high-quality office space with amenities, access via walking and cycling paths, and within walking distance of train and bus stations. Attracting qualified personnel has never been easier.*

### ***MINING OPERATIONS IN THE EAST***

Major organisations choose to base their headquarters and operations centres in the Region. Both Rio Tinto and Roy Hill have chosen the Perth Airport for their remote operations centres, with Roy Hill also choosing the location as their headquarters.

Affordability, availability of land, amenity and location are key drivers behind the attractiveness of office space in the Region. Choose the Region as your next location and you will find a space that is perfect for your business.



**RioTinto**






# RETAIL, ENTERTAINMENT AND TOURISM

*Tourism, Retail and Entertainment industries have been supported by growth in population, workforce and visitors to the Region. The Region's residents generate a significant retail expenditure pool with potential for industry growth to reduce leakage to other Metropolitan areas. The Region is also uniquely positioned to capitalise on tourism growth as it is the origin for most tourists visiting the State.*

 **\$4.4 billion** Retail Expenditure

 **\$2 billion** Visitor spend

 **32%** Population growth by 2031

*Choosing to operate in the Region will support your business viability and provide access to a greater diversity of potential customers.*

## Retail Attractiveness

The Region is also home to two secondary centres, six district centres, with many neighbourhood and local centres providing a location for multiple goods and service providers. These centres are strategically located to meet the needs of local residents and attract expenditure from unique catchments. The Strategic Metropolitan centres are Midland and Morley. These centres include retail, entertainment and other commercial uses and support wide consumer catchments ranging from 150,000 to 300,000 people, attracting spend from residents across the Region, and from the broader Metropolitan area. Both of these centres have plans to expand with a \$350 million expansion approved for Morley and \$650 million in estimated construction costs for the New Junction Town Centre development in Midland. As a district centre, the Town of Bassendean has plans to revitalise the town centre, by reviewing planning frameworks and implementing a Town Centre Masterplan to help pave the way for future investment and to ensure it becomes a vibrant, mixed use hub.

These future developments will increase the attractiveness of the strategic centres to customers and provide substantial additional capacity for new operators to benefit from their significant catchments. The Perth Airport has developed as a specialised retail centre with a regional catchment through the DFO and Costco. The Councils are looking to work with operators that can add to these centres through a more diverse offering, including retail, entertainment and other services that can promote

multi-purpose visits and increase centre dwell times. With continued growth projected for residents, visitors and workers, there will be substantial demand for additional retail, tourism and entertainment businesses.

## Worker Spend

The Region supports approximately 150,000 workers, creating opportunities to capture worker spend during the day and as they commute. It is estimated that the average office worker spends \$11,000 per annum during workdays. Access to worker populations provides retail and food and beverage industries with the opportunity to meet different target markets and increase their potential revenue sources. It also supports business viability by generating daytime expenditure to supplement evening expenditure.

## Population and Growth

Some 370,000 people call the Region home. Demographic analysis shows there is a higher than average concentration of employment age persons, with the most common household being made up of medium to high income families with higher than average disposable income.

*The estimated 47,000 additional households projected by 2031 will generate approximately \$1.6 billion in household expenditure, creating significant new opportunities for Retail and Entertainment industries in the Region.*



## Tourism Destinations

The Region is home to tourism destinations that attract international, interstate and intrastate visitors.

- The Swan River is a state significant recreation asset attracting tourists and Metropolitan residents year round
- The Swan Valley is the fourth most visited wine region in Australia attracting 1.2 million visitor days per annum
- Bickley Valley and the Perth Hills offer a great diversity of attractions including Aboriginal Heritage sites, 14 wineries, several national parks, Mundaring Weir, hiking/cycling trails, zipline parks and other outdoor tourist attractions

The diversity of attractions in the Region creates opportunities for almost any tourism operator, whether you want to share the Aboriginal history of the Region, provide tours, open a restaurant that uses local produce or operate something more adventurous. The Region's councils are actively looking for tourism opportunities both individually and collaboratively. The Perth Hills Tourism Alliance is a multi-council alliance that has the aim of progressing the Region's tourism industry.

*There is no better opportunity to expand or start a new tourism-based business than in Perth's Eastern Region.*

## Council Initiatives

The Region's councils are actively working to support local consumer orientated industries. All the Councils in the Region have or are in the process of revitalising town centres to attract and extend the stay of visitors. Councils also sponsor and/or provide grants for events that activate these town centres, further supporting local retail and entertainment industries in attracting consumers and increasing their sales.





## THE LINK TO GREATER EXPENDITURE



20,000 daily passengers by 2022



29,000 daily passengers by 2032



4 new train stations in the Region

Forrestfield Airport Link along with new stations are going to change the way the Region interacts with tourists, residents and workers. Tourists and visitors will now be able to access multiple Town Centres in the Region via train and have a direct link to other tourist areas, creating opportunities for accommodation, retail, food and beverage operators. New centres being developed at the Bayswater, Redcliffe and Forrestfield North stations will attract significant passenger traffic. These stations will be surrounded by commercial activity, high density residential developments and experience high levels of tourism, workforce and commuter traffic daily.

Bayswater Junction will be the largest train station outside of Perth CBD with the convergence of three lines, presenting significant commercial and residential opportunities. The Forrestfield Airport Link will significantly grow the expenditure pool available to consumer facing businesses in the Region.

## TOURISM – ROOM TO GROW

Tourism related businesses in the Region have a great opportunity to develop and expand. Based on employment figures, the Region has a lower than state-average level of employment in tourism related industries, indicating a gap in the market for operators to fill.

Forrestfield Airport Link is a great opportunity for current and future tourism related industries to address this gap. The visitors that pass through the Region from the airport bring approximately \$4 billion in expenditure to the state every year.

*Even a 1% increase in expenditure captured would equate to more than \$40 million in the local economy. This is sufficient expenditure to sustain 250 new employees, a substantial workforce for small to medium businesses.*

## **ARTS AND CULTURE IS ALIVE**

Arts and Cultural activities are inextricably linked with Tourism and Retail industries, activating space, attracting visitors and creating a more liveable space for residents. Arts and Cultural industries can be found in the Region with establishments such as the WA Ballet, WA Youth Jazz Orchestra and world-renowned artists and sculptors developing their works here.

The Region is also home to key arts and cultural infrastructure and live venues, including the Belvoir Amphitheatre, Mundaring and Swan Arts Centres, and the Kalamunda Performing Arts Centre. Councils are actively working to engage with the arts and cultural community and grow the industry. The Shire of Mundaring supports an artists open studio program, and is currently the home of the Darlington Arts Festival, an annual event that attracts over 15,000 people. The City of Kalamunda is looking to grow the local arts and cultural industry through a significant new grant that will inject up to \$300,000 into the regional industry annually.

*Choosing to locate your arts and cultural organisation in the Region will provide you with the support and networks you need to grow your passion and reach a wider public.*



'Tourists in Mundaring' by Stuart Elliot, Mundaring Community Sculpture Park.



# HEALTH, SOCIAL & EDUCATION SERVICES

*The Region is developing its ability to be self-reliant in terms of catering for the health, aged care and education needs of the local population. New medical precincts are developing through targeted advocacy and tertiary education facilities are emerging to meet population demand, creating opportunities for supporting industries. With employment growth of over 51% since 2006, Health, Social and Education industries will continue to expand to meet local demand as the population grows and new hospitals and education opportunities arise.*



**51%** Employment growth since 2006



**2** Hospitals



**8** Vocational and Tertiary Education Facilities

## Health Service Demand

The Region is quickly developing its medical capabilities to meet the needs of the growing population. St. John of God Mt Lawley and Midland Hospital are the two hospitals catering for residents in the Region. St John of God already has plans to construct a second hospital in Midland by 2021, securing the medical precinct as the health services destination for the Region.

Co-location advantages include:

- The ability to service two hospitals from the same location in future
- Access to medical students through the newly established Curtin Medical Campus
- Potential to co-ordinate with other health providers
- High levels of access to patients due to proximity to hospitals

These advantages can be critical for medical service providers especially those that provide services to patients with limited mobility. There is also the opportunity for health industries to grow around the Mt Lawley hospital and locate in local communities. With a higher than average number of people between the ages of 20 and 40, the demand for health and aged care services will continue to grow, supporting General Practitioners, house care providers and other healthcare specialists.

## Demand for School Education

The Region currently has 15% more children per school education employee when compared to the state average. This is likely causing a leakage of students to inner-metropolitan areas and presents an opportunity for new and current education providers to expand their services within the Region. The Region has a surplus of large, affordable land holdings with room for ovals and other outdoor facilities that can potentially provide schools in the Region with an advantage over their inner-metropolitan counterparts.

*In addition, the demand for primary and secondary schools will increase significantly as the Urban Growth Corridor develops, with an expected increase in the number of young families living in high-growth areas. The Region will need additional education services to support its growing population.*

## Tertiary and Vocational Education Demand

The Region offers a number of college and vocational training facilities. These facilities continue to see high levels of demand associated with the growth in relevant employment opportunities within the Region, providing a skilled workforce that aligns with a large subset of local employment. Curtin recently opened the Midland Medical Campus, the first tertiary education facility in the Region. The campus is situated adjacent to the Midland hospital, with the first students to start at the campus in 2020. The multicultural diversity in the Midland area will play an important role in attracting international students to the campus.

While going a long way towards providing tertiary education in the Region, there is still a significant gap in the provision of these services. Residents in the Region are 6% less likely to have a bachelor level of education or higher. Economic analysis indicates that an additional 2,000 tertiary education jobs could be sustained if the Region achieved the State average concentration of tertiary employment.

*With demand for additional tertiary offerings and the trend of older adults that are reskilling or upskilling in the difficult employment conditions, there is a substantial opportunity for tertiary education providers to meet a gap in the education market.*

## HEALTH INDUSTRY GAINING GROUND

Health industries have grown significantly in recent years, achieving 61% growth in employment since 2006. Even so, there is only one major public hospital for 370,000 people, and a lower representation of health-related employment. Based on economic analysis there is still significant room for growth with an additional 3,600 jobs required to achieve an equivalent concentration of health-related employment to the state average.

*As the new private hospital is built, there will be significant opportunity for allied health services to locate in the Midland Medical Precinct, taking advantage of co-location benefits including access to patients, knowledge sharing opportunities and potential shared infrastructure opportunities.*





# MAJOR PROJECTS

*The Region has attracted significant public and private investment over the past decade. Between road infrastructure, public transport and airport investment alone there has been more than \$5 billion in infrastructure investment within the Region.*

*Building construction approvals over the same period total \$14 billion with more than \$5 billion in non-residential building development. This level of investment is expected to grow with a number of major projects already funded and a strong advocacy program in place.*

## Road and Rail Freight Infrastructure

Major projects have been identified within the Region that will improve supply chain efficiencies and provide capacity for continued growth. Over \$1 billion in highway upgrades have been funded to provide suitable intersections and additional freeway style off and on-ramps, creating efficiencies for Freight and Logistics related industries. Planning for the Eastlink WA project has been partially funded with the project intended to create significant efficiencies for road transport between Perth and the eastern states. Total project cost is estimated to be in the region of \$1.6 billion. The South Bullsbrook intermodal terminal is planned adjacent to Northlink WA along the Perth – Geraldton railway, providing sufficient capacity to support the State's growing freight task. The Midland Freight Rail realignment is also being planned and will contribute to more efficient freight movements through the Region.

Project	Total Value
Northlink WA (Completed)	\$1,200 million
Gateway WA (Completed)	\$1,000 million
Perth Airport Terminal 1 Expansion (Completed)	\$1,000 million
Tonkin Highway / Hale Road, Welshpool Road, and Kelvin Road Grade Separations	\$366 million
Tonkin Highway Gap project	\$290 million
Roe Highway / Great Eastern Highway Bypass Interchange	\$180 million
Reid Highway Widening	\$70 million
Roe Highway / Kalamunda Road	\$86 million
Lloyd St Extension	\$40 million
East Link WA	\$1,600 million (Estimated)



## Employment-Orientated Projects

Public and private stakeholders are investing heavily to strengthen the Region as an employment powerhouse. There is currently an estimated \$3.8 billion in funded projects related to employment centres such as the Perth Airport and the Region's industrial areas. Perth Airport has planned several major projects over the next decade including a new runway, a new terminal and expanded employment areas. The State Government recently announced a major investment into railcar manufacturing within the Region that will generate substantial direct and indirect employment opportunities. Two strategic access projects have recently been awarded Federal and State funding to provide improved access to the South Bullsbrook and Hazelmere strategic industrial areas. The Stock Road project is key to unlocking significant private investment into the South Bullsbrook Industrial Precinct with land holders already acquiring venture capital to start development. Future development is also planned along the Great Eastern Highway Corridor and in a number of major commercial centres.

Project	Total Value
Perth Airport	\$2,500 million
Bellevue Railcar Manufacturing Precinct	\$1,250 million
Lloyd St Extension	\$40 million
Stock Road Upgrade	\$34 million
Belmont Business Park	Unknown
Great Eastern Highway Corridor	Unknown

## Activity Centre Developments

The Region's Strategic Metropolitan Centres are being redeveloped and expanded with an estimated \$600 million of funded projects. Midland Town Centre is being redeveloped with a project construction cost of approx \$650 million, providing, retail, office and residential developments. Morley Galleria is set to expand its offering with a multi million dollar redevelopment to create a new Town Centre, retail floorspace and commercial areas. The Shire of Mundaring is planning a major long term town centre revitalisation that will support local sustainable economic growth. Alike the Town of Bassendean is reviewing local planning frameworks and are instigating a Town Centre Masterplan

A number of activity centres planned for development will be funded through a mix of State, Federal and Private funding. These include the planned centres and expansions for Bayswater, Morley, Noranda, Redcliffe (DA 6) and Forrestfield North Stations along the FAL. The estimated development cost of DA 6 is \$8.7billion, with similar levels of investment expected at Forrestfield North.

Project	Total Value
Morley Town Centre Redevelopment	\$350 million
Midland New Junction (Underway)	\$650 million
Ellenbrook Town Centre (Underway)	\$63 million
Midland Trainline Transport Orientated Developments	\$416 million (Estimated)
Redcliffe – Development Area 6	\$8,700 million (Estimated)
Forrestfield North	Unknown

## Transport Developments

Transport projects in the Region include both public transport and active transport initiatives. Funded projects currently represent \$3 billion in public investment and provide substantial additional capacity for the transport network. Forrestfield Airport Link and the Morley to Ellenbrook trainline will connect both the north and southeast of the Region to the Metropolitan area via rail infrastructure. Forrestfield Airport Link will also provide access for tourists to the CBD via a number of town centres within the Region. Improved active transport opportunities will also be achieved through \$55 million in investment towards shared paths, making it easier and safer to walk and cycle in the Region.

Project	Total Value
Forrestfield Airport Link	\$1,860 million
Morley to Ellenbrook Trainline	\$1,000 million
Midland Station Relocation and Rail extension to Bellevue	\$165 million
Principle Shared Paths	\$55 million
Morley to Ellenbrook Train Stations	\$100 million
Henley Brook Park'n'Ride	\$49 million



## ***RAILCAR MANUFACTURING RETURNS***

The State Government has signed a contract to reestablish the railcar manufacturing industry in the Region, injecting \$1.25 billion into the regional economy. The contract is for ten years and could potentially continue. It will create opportunities for a number of industry clusters such as downstream metal products, and production technology and heavy machinery. A number of developing industrial areas such as Hazelmere, Forrestfield North and Perth Airport North industrial areas are ideally located to accommodate the supporting industry growth. Midland Tafe will soon start offering training for railcar manufacturing to enable local involvement in the recently confirmed railcar manufacturing project and ensure a suitably skilled labourforce is available to meet industry needs.

*This project is just another example of the suitability of the Region for Manufacturing and Processing industries.*

## ***THE RAILWAY TO COMMERCIAL CENTRES***

The Region will soon be serviced by two new trainlines, the Forrestfield Airport Link and the Morley to Ellenbrook line. Several new train stations will be added along the way including: Forrestfield North, Redcliffe, Bayswater, Noranda, Morley, Malaga, Bennett Springs, Whiteman and Ellenbrook.

The new trainlines will be connected to several new centres and centre expansions including Redcliffe (Development Area 6), Bayswater Town Centre, Forrestfield North and Midland Junction. These train stations and transport orientated developments will provide more opportunity for mixed-use developments in the Region. Existing train stations also provide opportunities for TOD's and high density developments, the Town of Bassendean has three existing stations all of which have development potential.

*These centres will be developed to provide high-density residential dwellings, retail centres and high-quality office space that is easily accessible by public transport, putting you closer to your employees and clients.*

# CONNECT WITH PERTH'S EASTERN REGION



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*The EMRC encourage industry investors, citizens and businesses to connect, grow and expand.*



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