



PROGRESS
M I D W E S T
Growing Greater Geraldton

PROSPECTUS

A large seal is resting on a sandy beach, looking up towards the sky. In the background, there is a rocky reef structure extending into the turquoise ocean under a clear blue sky. Several white seagulls are perched on the rocks. The scene is bright and sunny.

17

HOSPITALITY, TOURISM AND RETAIL

As part of Australia's Coral Coast, Greater Geraldton is host to an abundance of unique flora, fauna, landscapes and coast, along with vast swathes of unspoilt, remote land that offer enormous tourism potential.

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Welcome

Geraldton lies at the heart of a region with a diverse economy and many opportunities for agriculture, aquaculture, mining, tourism, manufacturing and infrastructure. Centrally located between Perth and Broome, in Western Australia, the region has the potential to be a home for projects that build on existing strengths, as well as new and innovative enterprises.

With strong infrastructure and linkages to the Asia Pacific region, our clean and green reputation for efficiency and productivity ensures our produce and resources are highly sought after.

The Greater Geraldton community is inherently

entrepreneurial, with the structures, resources and research to support new investors and projects. This includes a comprehensive Growth Plan, and a dedicated implementation agency, Progress Midwest, to facilitate this growth.

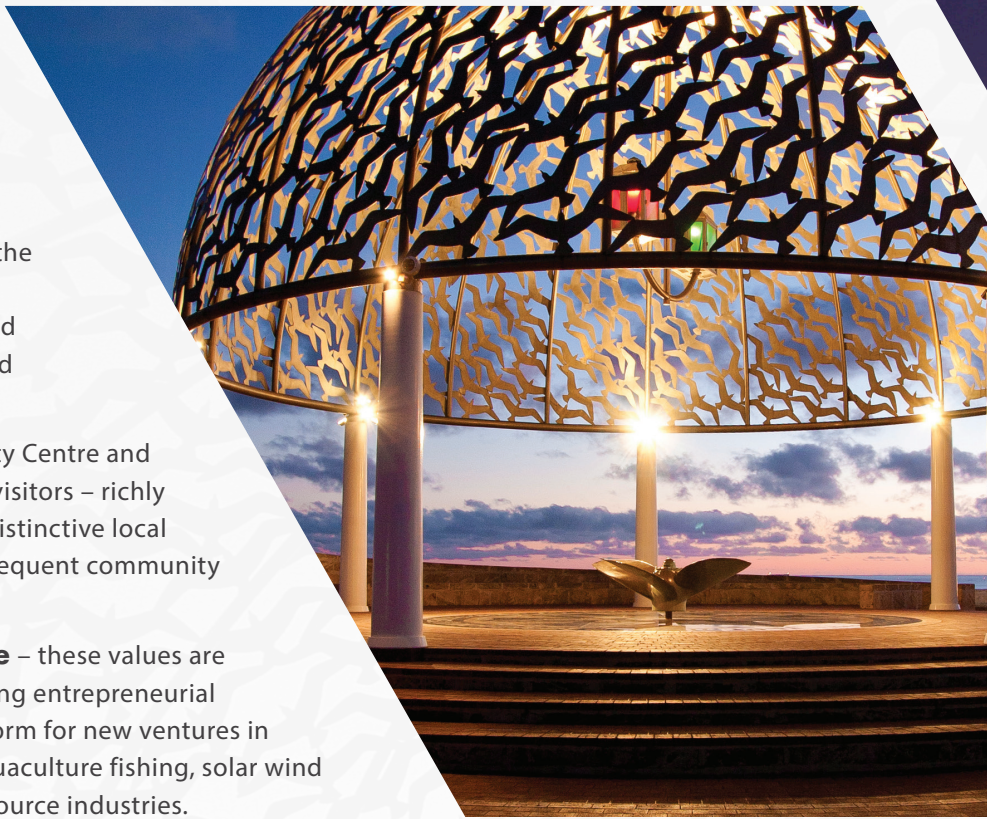


Greater Geraldton is open for business and Progress Midwest is the “front door” for investors and business seeking opportunities in Greater Geraldton and the Mid West Region.



Vision for Change

- > **We're a powerful economy** – the City is globally recognised as a “go to” destination for much sought-after food from land and sea, marine services and experiential tourism.
- > **We're a vibrant centre** – our City Centre and foreshore are magnets for locals and visitors – richly imbued with our maritime heritage, distinctive local businesses, buzzing hospitality and frequent community and business events.
- > **We're creative and innovative** – these values are our foundation for creating outstanding entrepreneurial opportunities. We're an exciting platform for new ventures in technology, horticulture, wild and aquaculture fishing, solar wind farms, sustainable energy and the resource industries.



Why Greater Geraldton?

Greater Geraldton has plenty on offer including:

- > A bountiful and refreshing place to live, work, invest and play.
- > A hotspot for fine seafood, maritime heritage and marine services.
- > A regional hub for goods and services, accommodation, heritage, events, transport and logistics.
- > An established international export hub for mineral and grain commodities.
- > A region with established and untapped resources, with enormous capacity for growth.
- > A single point of contact for investment enquiries and assistance.





Why Invest?

- > Our diverse economy presents a wide range of opportunities for productive private and public investment.
- > The scale of projects ranges from start-ups to high growth enterprises and large-scale infrastructure projects.
- > A strong, local entrepreneurial culture providing opportunities for co-investors, enterprise partners, suppliers and advocates.

The Perfect Investment Location

By 2036, the City's population is forecast to grow more than 35%, with employment increasing by 50%. So, it makes sense to explore current investment opportunities to optimise your potential future. Take a look at what's on offer.

A VIBRANT ECONOMY

ECONOMIC DIVERSITY

Greater Geraldton is WA's most diverse regional economy, supporting numerous industries, including:

- > Mining.
- > Professional Services.
- > Civil engineering and construction.
- > Light manufacturing and engineering.
- > Wild and aquaculture fishing.
- > Intensive and broad acre agriculture.
- > Allied marine services.
- > Retail.
- > Tourism and hospitality.
- > Transport and logistics.
- > Health and education services

STRATEGIC LINKAGES

We have strong strategic linkages with key export markets through embedded activities include:

3 formal relationships in China:

- > Zhanjiang City, Guandong Province, China.
- > Zhoushan City, Zhenjiang Province, China.
- > Linfen City, Shanxi Province, China.

Global research linkages through hosting of the Square Kilometre Array (SKA) radio telescope – the world's largest radio telescope designed to propel technological innovation.

ESTABLISHED INFRASTRUCTURE

Greater Geraldton supports a robust infrastructure network:

- > Well-developed road and industrial railways.
- > The second largest grain export terminal in Australia.
- > The closest general cargo/agriculture port to the emerging South East Asian food bowl marketplace.
- > Airport infrastructure with capacity for A320/B737 aircraft.

INNOVATION AGENDA

Greater Geraldton leads that state in its investment in innovation assets, programs and events:

- > The first regional partner connected to the National Broadband Network's "Fibre to the Premises" platform.
- > A strong, diverse research and educational institutions, including Geraldton Universities Centre, CSIRO (SKA) Murchison Support Facility, Batavia Coast Maritime Institute, WA Centre for Rural Health.
- > The largest, most well-established innovation support programs in regional WA (including co-working spaces, business accelerator programs and entrepreneur support)
- > An Action Agenda to grow the innovation ecosystem, culture and investments (link to innovation action agenda).

UNREALISED POTENTIAL

Greater Geraldton has plenty of upside, with a range of underutilised/untapped resources that represent opportunities for future international standard initiatives and investments in areas including:

- > Dedicated high capacity fibre linkage between Geraldton and the Pawsey Supercomputer.
- > Tourism at the Houtman Abrolhos Islands – designated a Mission Blue Hope Spot.
- > Designated Mid West aquaculture zone.
- > Readily available renewable energy including solar, wind, tidal and geothermal sources.
- > Substantial land-based gas reserves.
- > Diverse inland mineral reserves isolated from the coast.
- > Biomass sources with potential for biofuel production.
- > Rangelands with capacity for holding greater livestock numbers.
- > Opportunities for value addition / value chain completion.

BUSINESS FRIENDLY

Greater Geraldton provides strong institutional support for entrepreneurship through initiatives and enterprises including:

- > Progress Midwest, a not for profit incorporated entity dedicated to growing the export economy of the region, provides a one-stop "front door" for investors and business seeking opportunities within the Mid West.
- > An active local Chamber of Commerce and Industry.
- > A strong support for start-ups, entrepreneurs and accelerating commercialisation including spaces, training programs and venture support.
- > Strong relationships with Federal and State government industry and innovation support bodies.

MAJOR PROJECTS

A range of state and nationally significant projects are underway throughout Greater Geraldton. These are as diverse as economy within which they exist, with projects including:

- > Town revitalisation activities.
- > Workforce training initiatives.
- > Tourism infrastructure development.
- > Logistics and transport infrastructure projects.

THE MID WEST LIFESTYLE

Our City offers a multitude of opportunities to enhance you and your family's lifestyle experience:

- > Diverse, culturally rich, skilled and entrepreneurial community.
- > High quality schools, sporting events and healthcare infrastructure.
- > Attractive climate, stunning beaches and coastal amenities.

Watch:

www.youtube.com/watch?v=O0Unb53dVXI

Investment Opportunities

Export industry clusters

As the key economic and community centre for the Mid West, Geraldton offers major support to each of these activities, through the provision of key logistics infrastructure,

support services, skilled and unskilled labour and public-sector services.

Note: All industry data and statistics quoted refer to the Mid West statistical area unless otherwise noted.

Greater Geraldton is characterised as a highly diverse and competitive economy, with sustained performance in clusters of export activity, including:

KEY SOURCES FOR ALL INDUSTRY PROFILES

REMPLAN Greater Geraldton Employment by Industry. 2018
Department of Minerals and Petroleum, 2017 Spatial and Regional Resources Data.
Greater Geraldton Expenditure Leakage Study 2016
Mid West Regional Blue Print 2015
Growing Greater Geraldton - A Growth Plan 2017
Mid West Port Authority Annual Report 2016-17



MINING



**FOOD PRODUCTION
AND MANUFACTURING**



**MARINE SERVICES,
ENGINEERING,
MANUFACTURING,
AND CONSTRUCTION**



**TRANSPORTATION
AND LOGISTICS**



**HOSPITALITY,
TOURISM AND
RETAIL**



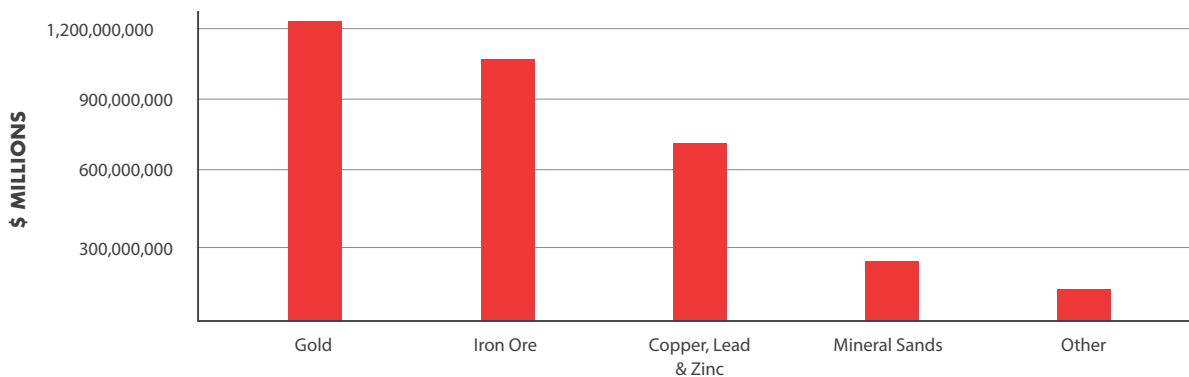
**LAND &
INFRASTRUCTURE
DEVELOPMENT**

Mining

OVERVIEW

Mining is the largest value adding and exporting sector in the Mid West, with \$3.3 billion of production and a workforce of over 3,525 employees. This equates to 2.89% of the total minerals and petroleum production across WA.

Value of Minerals by Commodity 2017



The Mid West's mining sector has been a consistent employer for the past decade, despite recent commodity market instability, particularly in iron ore. This is due to the diversity of resources mined, and a strong exploration and mining support services sector.

A majority of Mid West iron ore is exported via the Geraldton Port to China (95%), with the balance going to South Korea, Taiwan and Japan. This single commodity accounted for 74% of total volumes exported from the Port in 2016-2017.

Opportunities have been identified for Greater Geraldton to capture demand for local services that will further support mining sector growth in areas including:

- > Exploration and Mining Support Services (\$7.1m).
- > Professional Services (\$3.9m).
- > Finance and Insurance (\$1.2m).
- > Civil Engineering and Construction (\$1.7m).
- > Energy Generation (\$3.1m).

KEY COMPETITIVE ADVANTAGES

- > One of Australia's most diverse mining provinces.
- > Geographically close to global markets.
- > Strong existing ties with significant Chinese provinces.
- > Over 2016/17 Mid West ports exported nearly 11 million tonnes of iron ore.

The development of Oakajee will provide infrastructure that will cater for increased export capacity of commodities such as gold and iron ore.

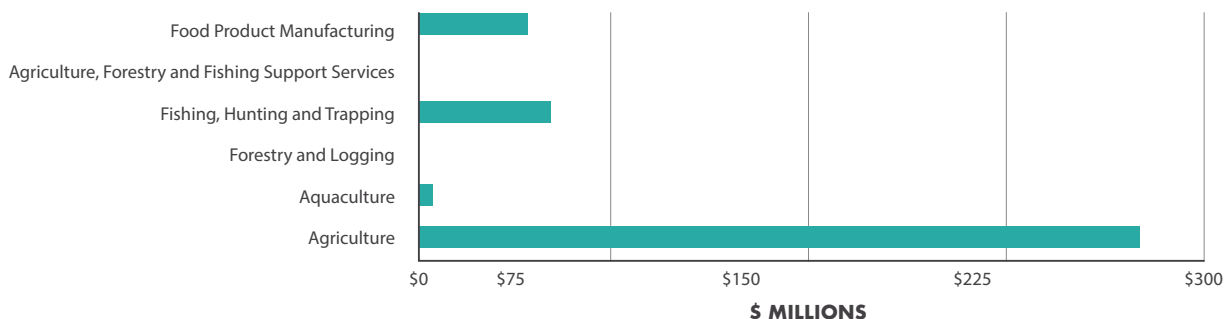
Mining is currently operating well below its five-year average, implying a relatively significant capacity for future opportunities and further value addition.

Food Production & Manufacturing

OVERVIEW

Greater Geraldton is located within the Mid West, one of the largest agricultural regions in Western Australia. This enduring and highly profitable sector includes broad acre agriculture, wild catch fisheries (the largest in WA), intensive horticulture, orchard farming, aquaculture, and large and small livestock farming. These activities support 2,271 local jobs, with a total output of \$818M per annum.

Gross Value Added (per annum) 2018



Fisheries and Aquaculture

Greater Geraldton's coast hosts a dominant rock lobster fishery, high-value wild catch fisheries, and significant finfish and mollusc farming to the production value of \$161 million. The region is ideally placed to expand aquaculture research and development with engagement in the growth of a local industry. A key outcome has been the production of higher value niche products with high environmental standards of production.

Agriculture

The Mid West is a significant agricultural region supplying 22% of the state's wheat production, 10% of the state's canola and 83% of the state's lupins, attributing \$14.1 billion of value add per year (Figure 2). Almost all Mid West crop production is exported, highlighting the importance of global trading relationships to the region. The Mid West is strategically placed for exporting grain as the closest agricultural port zone in Australia to major Asian and other markets. This gives the Mid West a potential geographical advantage that could be further leveraged in the long-term.

Livestock

Cattle and sheep are the region's dominant livestock export. Cattle turnoff (number sold) is typically one

third of the population each year, with approximately half of annual turnoff exported (around three quarters live and one quarter as boxed meat). In 2012-13, beef disposals were valued at approximately \$37 million (8% of WA's total).

Around two thirds of sheep meat are exported - either live or in boxed form. Sheep disposals were valued at approximately \$27 million in 2012-13 (8% of WA's total).

Key Competitive Advantages

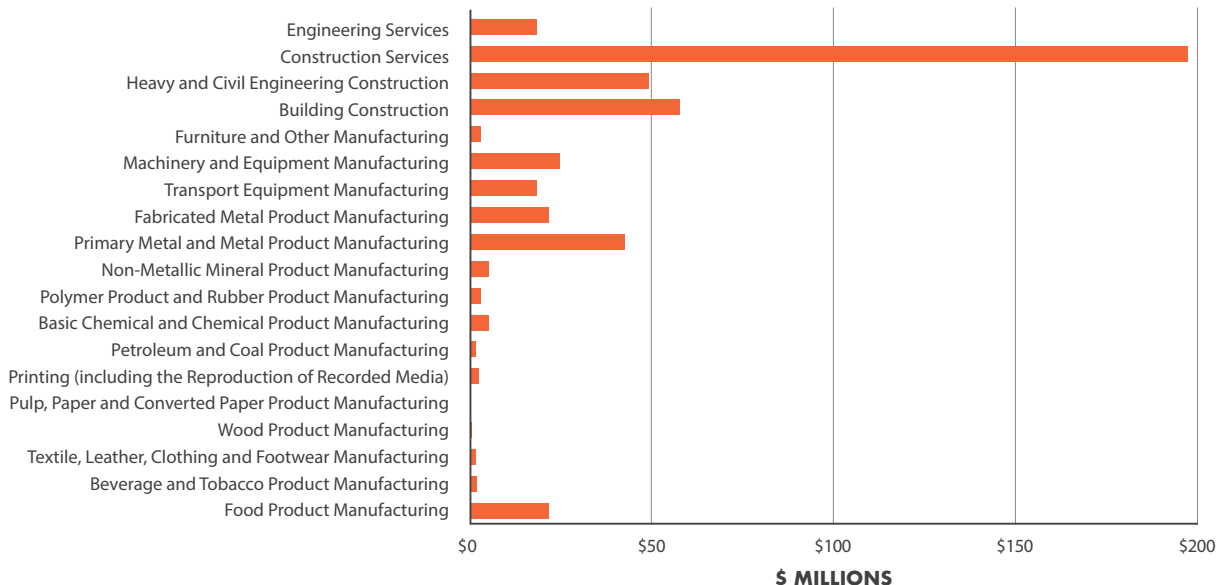
- > Strategically placed for food exports as the closest agricultural port zone in Australia to major Asian and other global markets.
- > Existing formal relationships with various Chinese provinces.
- > Mid West Producers have established a strong reputation for producing high quality produce.
- > With its clean, warm coastal water and strong industry base, the region provides a foundation for the further growth and development of aquaculture and fisheries.
- > The China-Australia Free Trade Agreement (FTA) announced in November 2014 presents significant opportunities to increase the value add of Mid West agriculture and food producers.

Marine Services, Engineering, Manufacturing & Construction

OVERVIEW

Manufacturing is the Mid West's largest contributor to output, employing 4,005 workers with an output of \$2,520 million per annum

Gross Value Add by Industry Sector (per annum) 2018



Significant activity in the region includes; primary metal and metal product manufacturing (\$8.1 billion gross value-add), machinery manufacturing (\$1.5 billion gross value add) and transport manufacturing (\$1.3 billion gross value add). These play key roles in supporting mining, construction and agricultural activities.

Opportunities have been identified to capture demand for local manufacturing supply chains in industries such as:

- > Fabricated metal manufactured products (\$7.2m).
- > Polymer manufactured products (\$2.06m).
- > Professional, scientific and technical services (\$5.8m).
- > Professional, scientific computer equipment manufacturing (\$1.8m).
- > Concrete product manufacturing (less than \$300,000).
- > Structural metal (\$3.9m).
- > Wood product manufacturing (\$5.5m).
- > Sawmill Products (\$3.0m).
- > Glass and glass product manufacturing (\$1.6m).

Competitive Advantages

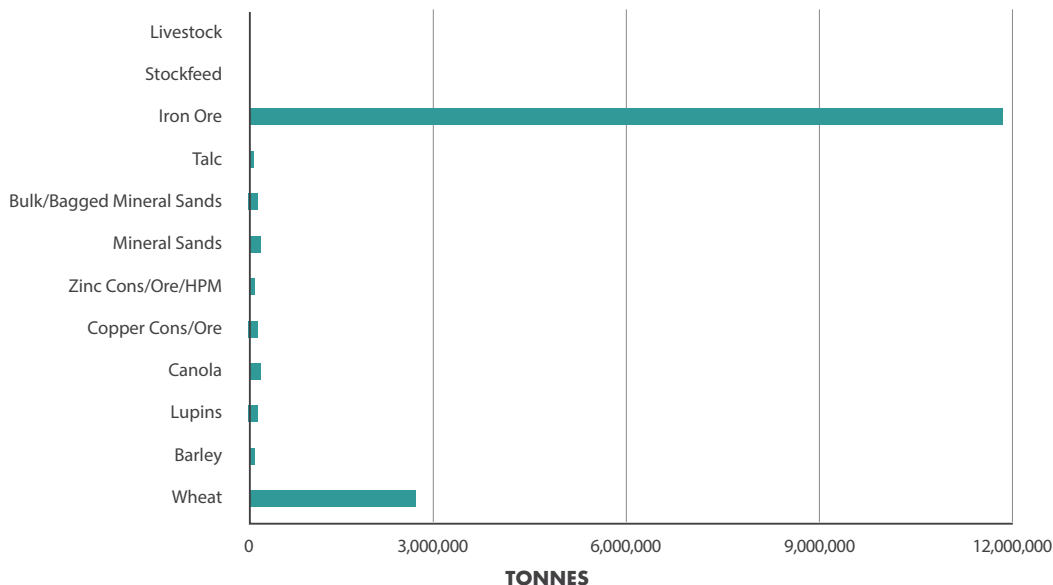
- > Strong marine precinct and allied marine services.
- > Access to high quality infrastructure at the fishing boat harbour, including 50 and 80-tonne boat lifting and hard stand facilities.
- > Anticipated population increases resulting from major resources and infrastructure projects generating additional housing requirements, creating additional demand for construction and developments in the region.
- > Research links to educational facilities and industry research and development programs.
- > Presence of logistics services and infrastructure making transport of materials and products efficient and cost effective.

Transport & Logistics

OVERVIEW

Transport and Logistics contributes \$555 million to the Mid West's economic output and employs 1,429 people

Export Volumes from Mid West Ports (Tonnes) 2017



Strategically located, the Mid West is half-way between the Fremantle Port and the Pilbara, the country's leading direct shipping iron ore province. To capitalise on its position, the region has a busy Panamax port in Geraldton with plans for a deep-water port at Oakajee. These exporting facilities are supported by an integrated network of dual gauge rail infrastructure, several major roads, the Dampier Bunbury Gas Pipeline, grid supplied power with access to groundwater.

The Mid West has a strong commodity base with heavy reliance on access to export markets and trade relations. Access to a market comprises physical access (including efficient transport infrastructure) and business relationships and networks. Transport connections and other infrastructure provision assists in attracting and retaining population and businesses.

Opportunities have been identified to capture demand locally transportation and logistics supply chains in industries such as:

- > Professional services, administrative services, and auxiliary finance and insurance services (\$10.8m).
- > Fuels and oils, mechanical and vehicle components, and railway and rail components (leakage too small to support a viable local industry).

Ports

The Mid West has one major port located at Geraldton and a second port proposed at Oakajee. More than half of the exports leaving Geraldton Port are from the mining sector (minerals and iron ore). Iron ore exports make up over 74% of the total volume throughput of the port, which is growing at an increasing rate. The Geraldton Port can currently accommodate Panamax (70,000 dead-weight tonnage) vessels. The proposed Oakajee deep water port will enable the region to accommodate Capesized vessels and service the region's mining industry by establishing itself as a new gateway to Asia.

Hospitality, Tourism & Retail

OVERVIEW

Australia's Coral Coast, encompassing Greater Geraldton, was host to a total 856,000 visitors (domestic and international) who stayed over 4.7million nights in 2015. Within the Mid West, hospitality, tourism and retail sectors combine to contribute approximately \$682m to output, employing 4,289 workers.

Greater Geraldton contains a network of diverse regional centres and villages that each offer a unique proposition to residents and visitors alike. These communities provide a range of lifestyle opportunities and experiences, as well as being a launching pad to swathes of unspoilt natural experiences including:

- > Houtman Abrolhos Islands.
- > Kalbarri National Park.
- > Murchison Geopark.
- > Remote and outback settlements and conservation estates with critical biodiversity.

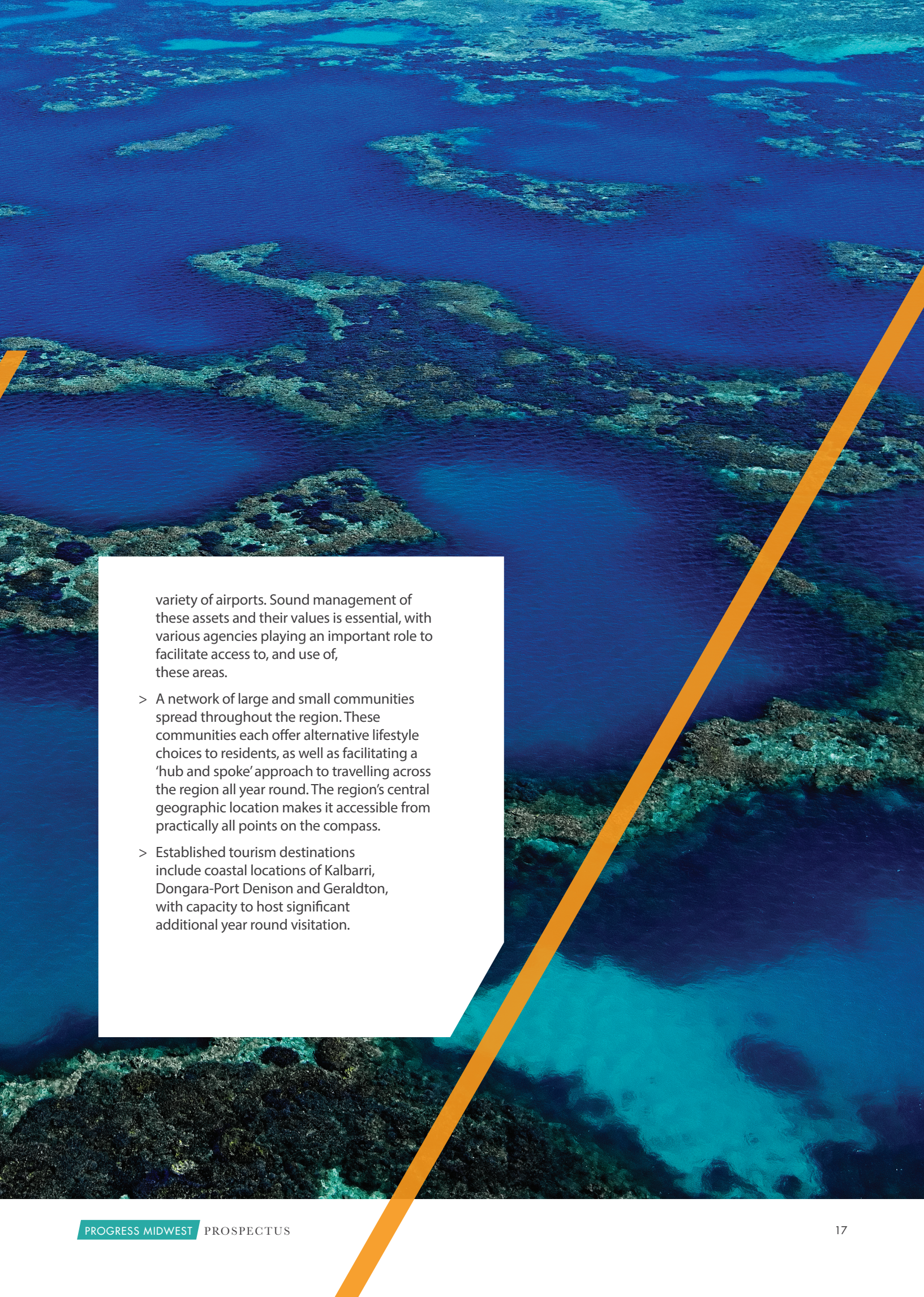
Whether within the towns, or out in nature, the region offers highly accessible and authentic experiences with sophisticated networks of infrastructure and services for both residents and visitors.

Opportunities have been identified to capture demand locally in hospitality, tourism and retail supply chains in industries such as:

- > Entertainment and dining (\$90.71m).
- > Travel services (\$18.28m).
- > Department and discount department stores (\$17.42m).
- > Bulky goods, furniture and other household goods (\$24.13m).
- > Clothing and textiles (\$18.64m).

Competitive Advantages

- > Greater Geraldton as a central community of scale, where all major goods and services can be accessed, a diverse range of housing is available, and major tourism infrastructure is easily accessed.
- > As a visitor destination, many of Australia's assets (world class nature, coastal, marine/ wildlife experiences, food and safety) are entrenched within Greater Geraldton and offer significant growth potential in the medium-long term.
- > The Houtman Abrolhos Islands with world class fishing experiences, protected islands and coral atolls, and significant heritage and interpretation potential.
- > A 340km coastline including protected beaches, dramatic cliffs, a surf coast, reef lined shores, ports, safe anchorages, untouched coastal scrub, dunes and stretches of untouched beaches and shoreline.
- > Geological diversity including world scale mineralisation, unique land forms such as significant gorges and ranges with some of the most ancient rocks on earth.
- > A vast land area including large swathes rich in seasonal wildflowers, native flora and fauna, extensive river and creek systems and extensive areas of conservation reserves. These areas are well linked by road network and a

An aerial photograph of a coral reef system, showing various shades of blue and green. A white rectangular text box is positioned on the left side, and a thick orange diagonal line runs from the bottom left towards the top right, crossing the text box.

variety of airports. Sound management of these assets and their values is essential, with various agencies playing an important role to facilitate access to, and use of, these areas.

- > A network of large and small communities spread throughout the region. These communities each offer alternative lifestyle choices to residents, as well as facilitating a 'hub and spoke' approach to travelling across the region all year round. The region's central geographic location makes it accessible from practically all points on the compass.
- > Established tourism destinations include coastal locations of Kalbarri, Dongara-Port Denison and Geraldton, with capacity to host significant additional year round visitation.

Land & Infrastructure Development

Greater Geraldton has substantial capacity to grow and accommodate a range of prime urban, residential and industrial development opportunities. Local development partners mean that in many cases, projects are de-risked for investment with pre-approved planning and infrastructure servicing.

Opportunities have been identified to capture demand locally in land and infrastructure development supply chains across areas including:

- > Energy generation (\$3.1m).
- > Financial, real estate and insurance services (\$3m).
- > Professional services(\$9m).

Current investment opportunities in this sector include:

NARNGULU INDUSTRIAL ESTATE

Narngulu Industrial Estate is located 12km south east of Geraldton, close to Geraldton airport and connected to the Geraldton Port by major road and rail infrastructure. Situated close to other industrial amenities Narngulu Industrial Estate comprises of 4.5 hectares (available for purchase as whole or part) of unserviced vacant land that is zoned general industry.

Fulfilling a need for large-scale general industrial land in the Mid West region, Narngulu Industrial Estate (NIE) has been specifically designed to accommodate businesses requiring lots greater than 1ha. It is ideal for transport, logistics and manufacturing businesses, particularly those supporting the mining industry.

Businesses within the NIE benefit from easy access to Geraldton Port, Geraldton Airport and potential access to Oakajee Industrial Estate via the proposed Oakajee-Narngulu Infrastructure Corridor (ONIC)

Contact Details:

Phil Sorgiovanni
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Further Info:

www.landcorp.com.au/Industrial-and-Commercial/Narngulu-Industrial/

BLUFF POINT

The future coastal residential development is proposed to include over 80 single homesites and two grouped housing lots, surrounded by heritage listed public open space that retains and preserves the historically significant 'Rail Cutting' as the sites former use accommodated both the Geraldton to Northampton and the Geraldton to Walkaway railway lines as well as the workers cottages.

Bluff Point is situated approximately 5 kilometres north of the Geraldton CBD on the south bank of the Chapman River, between the North West Coastal Highway and the Indian Ocean.

It is 2.5 kilometres from the Batavia Coast Marina, and 300 metres from the popular Champion Bay Beach. The western boundary is Chapman Road and the eastern boundary is the North West Coastal Highway.

Project Stage:

Proposed development

Contact Details:

LandCorp
sales@landcorp.com.au

Further Info:

www.landcorp.com.au/Residential/Bluff-Point1/

BATAVIA COAST MARINA STAGE 2

Batavia Coast Marina Stage 2 (BCM2) has seen the amalgamation for redevelopment of land previously owned by the City of Greater Geraldton, Mid West Development Commission, the Public Transport Authority of WA, and LandCorp into a six hectare precinct that aims to connect the Geraldton Central Business District and the Batavia Coast Marina waterfront.

An additional prime parcel of land, Lot 601, has become part of the overall Batavia Coast Marina Stage 2 project, expanding the development and improving the areas connectivity.

Once complete, BCM2 is anticipated to connect the city centers main areas of activity and offer a new mix of residential, commercial, retail and tourism developments with landscaped surrounds and public open space.

LandCorp, the City of Greater Geraldton, and the Mid West Development Commission form Batavia Coast Marina Stage 2 Steering Committee to deliver the developmen

Investment opportunity:

- > Technical Partnership.
- > Supporting infrastructure and
- > Construction.

Project Stage:

Investor Ready

Contact Details:

LandCorp
sales@landcorp.com.au

Further Info:

www.landcorp.com.au/Industrial-and-Commercial/Batavia-Coast-Marina/Stage-2/

GERALDTON AIRPORT TECHNOLOGY PARK

Stage 1 of the project enables the City to release around 30 lots of land, primarily for long-term leasing, each of around 2,000 square metres, along the newly constructed Avro Drive, ideally for technology and professional service businesses. The Park is not intended for industrial uses. The Geraldton Airport Technology Park consists of a the new Avro Drive from Deepdale Road through to Anson Link, connecting to Gordon Garratt Drive as part of the stage 1 release.

Stage 1 construction included the new roads, and installation of underground utility services, including power, water and telecommunications. New water supply and fire services mains extend to the airport terminal precinct along Gordon Garrett Drive. The Geraldton Airport Technology Park is set to support a strategic aviation hub and provide a range of aviation and non-aviation services. This development is of substantial regional significance and will form the benchmark for new commercial developments for the rest of the Mid West region. The Geraldton Airport Technology Park will be more sustainable than developments from the previous era, designed in an environmentally responsible way. The entire site is facilitated with fully serviced high speed fibre optic connectivity, making it an ideal spot for business operations.

Stage 1 of the Geraldton Airport Technology Park has 30 lots available for long term lease or direct purchase, seeking businesses within the following industries:

- > Aviation support.
- > Logistics, transport and distribution.
- > Commercial and passenger support activities.
- > Office/Warehouse.
- > Mining support and administration.
- > Showroom/Warehouse.
- > Vehicle, truck and equipment sales, servicing and hire.
- > Other light industrial uses.

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