



Hunter Global: The Flightpath to our Future



Proudly led by the Councils of the Hunter Region

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Acknowledgement of Country

We acknowledge the Traditional Custodians of the land and pay our respects to Indigenous Elders past, present and future.

Proudly funded by the NSW Government.



Project Partners



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Part One

Executive Summary

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Executive Summary

Hunter Global: The Flightpath to our Future aims to encourage and support stakeholders invested in the Hunter region to make the most of the numerous economic and social opportunities that have, and will, emerge from the Newcastle Airport upgrades.

Our vision throughout the Hunter Global initiatives is that the Hunter is a globally connected and economically prosperous city-region, recognised as a key international gateway, providing its communities with a vibrant and unique lifestyle.

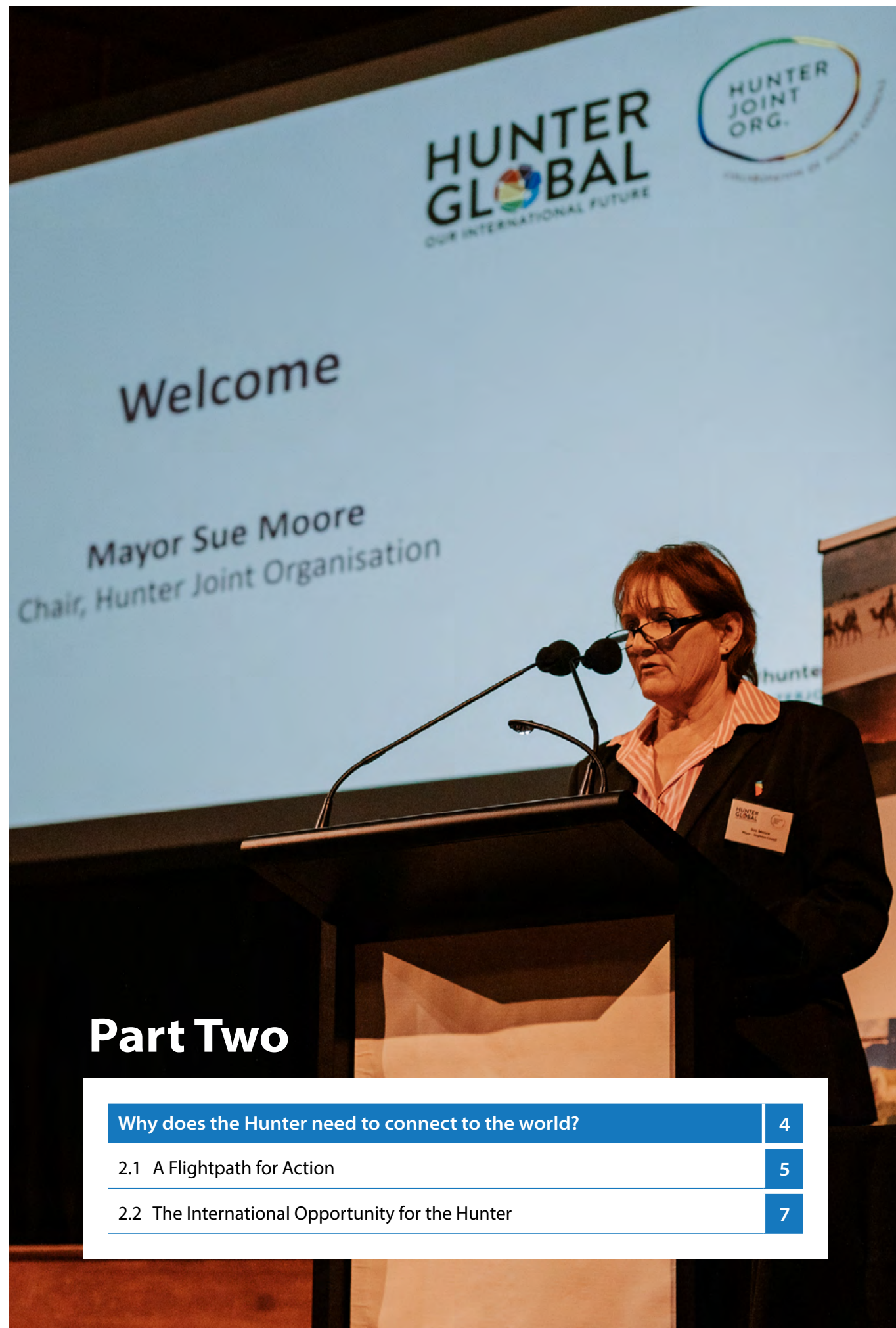
This vision is simultaneously about looking to the future of our region, as well as addressing the change that is upon us with the forecast reduction in the demand for coal. This demand is currently demonstrated by \$24 billion in coal exports annually, representing fifty percent of the Hunter's annual exports.

This report discusses the economic opportunities created by the Airport's upgrade as 'above the wing' – the movement of people between destinations – and 'below the wing' – the movement of goods and freight between destinations. Hunter Global's success relies on the Hunter region capitalising on these new economic opportunities, guided by a shared vision for the region's prosperity.

Hunter Global is not a new initiative. It has been built on the collaborative successes between the Newcastle Airport and numerous regional partners over many years.

This report sets out the priority actions necessary to ensure the region is ready for take-off in line with the Hunter Global vision. These priority actions have been drawn from expert input, participant feedback from the summit, and post-summit engagement with the Airport and other stakeholders.

Each action has a specific focus based on whether its outcome is principally focused on regional advocacy, regional planning and priority setting, or regional collaboration. We hope that this Flightpath provides a useful guide and point of reference for government, industry and community alike in ensuring the success of the Hunter region.



Why does the Hunter need to connect with the world?

2.1 A Flightpath for Action

The Hunter JO intends that this report articulate the next steps in the Hunter Global initiative in order to facilitate the coordination of regional stakeholder actions that will unlock the economic and social opportunities triggered by increased access to global markets.

This report gives an overview of the activities led by the Hunter Joint Organisation (Hunter JO) that have contributed to Hunter Global - strategically positioning the Hunter region for success and growth. [Hunter Global: Our International Future](#) is a region-wide initiative led by local government, through the Hunter JO, to boost collaboration, planning and advocacy to capitalise on the Newcastle Airport runway and terminal upgrade.

The Hunter JO is not alone in championing opportunities for the continued economic prosperity of the Hunter region. In addition to the 10 Member Councils, the Hunter Global initiative is supported by a number of key project partners including Newcastle Airport, the University of Newcastle, Business Hunter, and Committee for the Hunter.

This report should be of interest to all stakeholders, existing and emerging, who are passionate about seeing the Hunter region reach its full potential on the international stage.





2.2 The International Opportunity for the Hunter

The Hunter is a region currently facing the downturn of its traditional industries while also experiencing a fast-growing population. The Hunter's economy needs to evolve to maintain its substantial economic contribution to the State and Federal economies.

The Hunter exports \$24 billion of coal each year, which amounts to a third of our total economic output and roughly half of our exports. As we approach one million people by 2040, radical intervention is required to maintain the liveability and economic prosperity of the Hunter to build a region resilient to changing global energy demands.

Individual economic opportunity, principally in the form of employment and creation of comparable incomes, needs to be maintained and improved as the region diversifies away from coal which will require support and investment from all levels of government.

Direct competitive access to international markets will underpin this transition and safeguard the future of the Hunter. This is because efficient and effective access to global markets will be critical to attracting investment and talent to evolve the region's economy, and to enable the export of new products and services to the world.

Arising from the united and collaborative voice of the region, in May 2021, the Commonwealth Government announced \$66 million in funding to upgrade the Newcastle Airport's runway to Code E international standards. As can be seen from Figure 1, this upgrade will be a gamechanger for the region in terms of its ability to reach international markets.

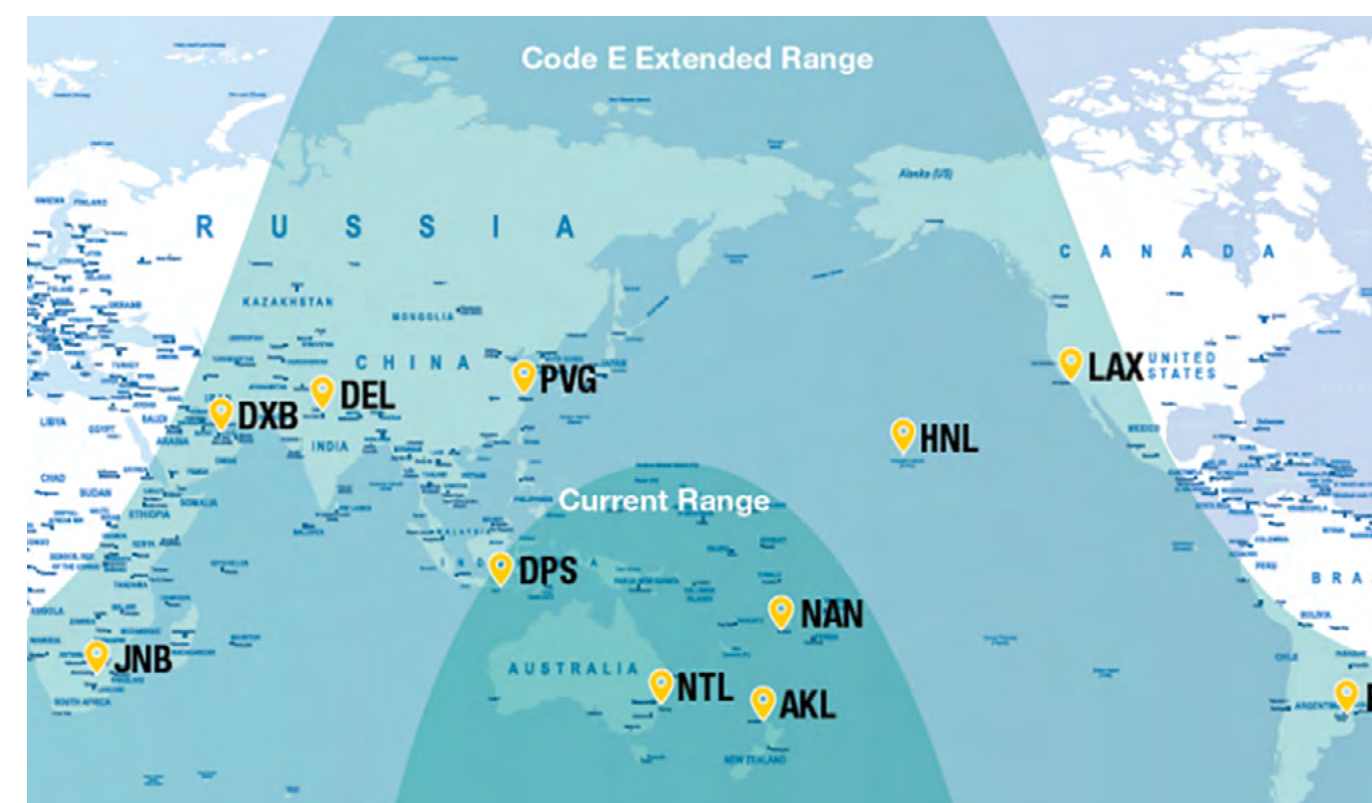


Figure 1: Code E Extended Range (sourced from Newcastle Airport)

¹ <https://hunter.org.au/scott-morrison-confirms-66-million-will-be-set-aside-for-newcastle-airport-runway-upgrade/>



Building on the announcement of the runway upgrade, in April 2022, the Commonwealth Government announced \$55 million in funding for the upgrade of the Airport's international passenger terminal.

According to the Airport upgrade's Economic Impact Assessment, these upgrades will generate 4,400 jobs (FTE)³ over 20 years. Over the same time, it will generate an additional \$6.2 billion in income for the visitor economy and \$6.5 billion in additional business activity through increased freight access.

This is in addition to the already significant contribution that the airport contributes to the Hunter's economy. In 2018, the airport and nearby related operations, including the annual impacts of domestic tourism from the airport, amounted to \$698.7 million in Gross State Product, supporting 5,673 jobs (FTE)³.

These upgrades to the Newcastle Airport have received bi-partisan report, demonstrating recognition across the political spectrum of the substantial importance of the airport in the region's internationally focused economic future.



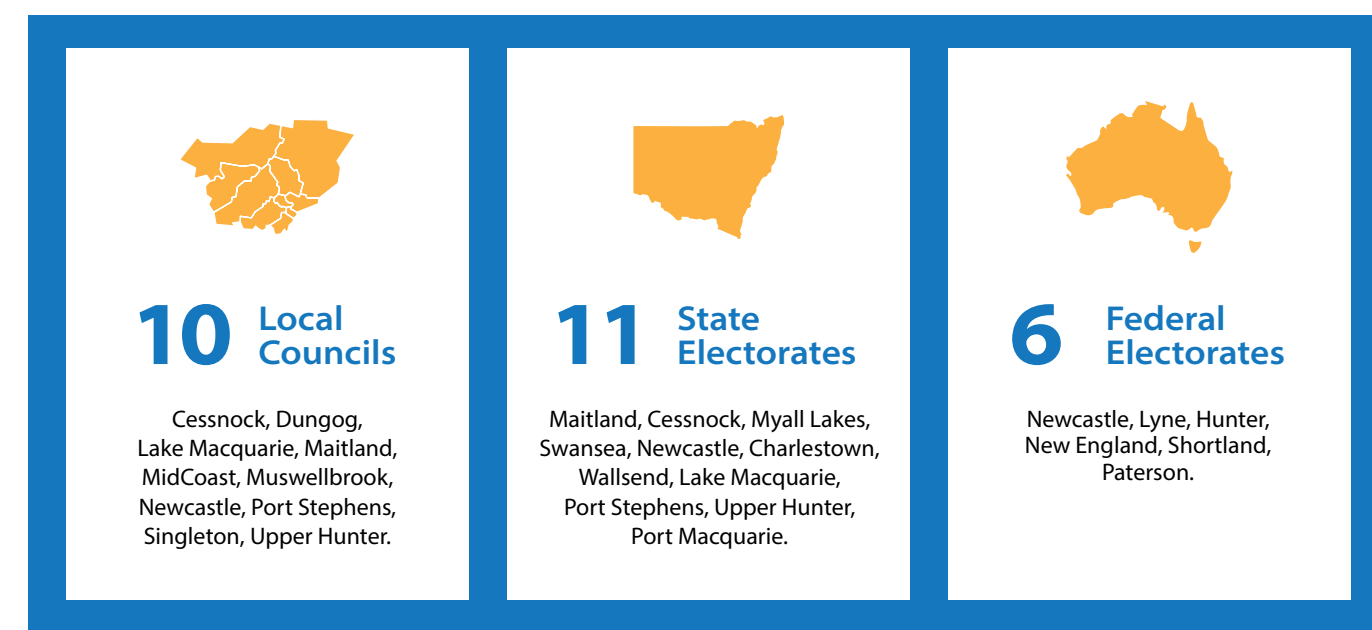
Watch Greater Newcastle and the Hunter:
When we get to the world stage
to find out more about the Hunter's international opportunities.

The Hunter Region

According to the 2021 census, the Hunter region is home to 682,465 people with predictions for the region to be home to more than one million people within the next 30 to 40 years⁴.

The Hunter is the largest regional economy in Australia, ranking above Tasmania, the Northern Territory, and the Australian Capital Territory in terms of economic output. It drives around 28% of regional NSW's total economic output and is the largest regional contributor to the State's gross domestic product.

The Hunter's exports amount to \$45 billion per annum, of which coal is approximately half. The region's economy has a diverse industrial base; however, there is still a high sensitivity to coal and energy transition which requires the growth of industry and production opportunities.



The Newcastle Airport

Newcastle Airport is less than a 20-minute drive to the Newcastle City Centre and 30-minutes to tourist and economic destinations such as Nelson Bay, Lake Macquarie, and the Hunter Valley wine country.

The Airport is co-located with the Williamtown Royal Australian Airforce (RAAF) Base, offering unique access to the airfields and runways of its military neighbour. The Airport site is leased jointly to Port Stephens Council and the City of Newcastle by the Commonwealth Government of Australia.

Newcastle Airport's catchment extends to Taree (140km north), Upper Hunter (100km west), and Hornsby (100km south). The core catchment – people who live within one hour's drive from the Airport – is around 665,000⁵ people and growing.

The Hunter JO

The Hunter JO is a collaborative body that brings together the ten councils in the Hunter region to provide a united and local voice for its communities. As the hub for local intergovernmental collaboration, the Hunter JOs statutory mandate includes identifying key regional strategic priorities, advocating for these priorities, and building collaborations around these priorities with other levels of government, industry, and community.

²<https://nationals.org.au/opening-the-hunter-to-the-world/>

³Synergies Economic Consulting, August 2018; Final Report to Newcastle Airport: Economic Impact Assessment

⁴<https://rdahunter.org.au/hunter-region/#~:text=THE%20HUNTER%20IS%20AUSTRALIA'S%20SEVENTH,CHALLENGES%20FOR%20THE%20REGION'S%20FUTURE.>

⁵Newcastle Airport, March 2018; 2036 Newcastle Airport Vision



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Hunter Global: Charting the Flightpath to our Future

By 2024, the Hunter will host an international airport, offering a once-in-a-generation opportunity for the region's economic growth and diversification. Supported by funding from the Commonwealth Government, significant upgrades to Newcastle Airport infrastructure including a runway built to Code E international standard and construction of a new international passenger terminal, represent an opportunity to underpin significant economic evolution and growth for the region.

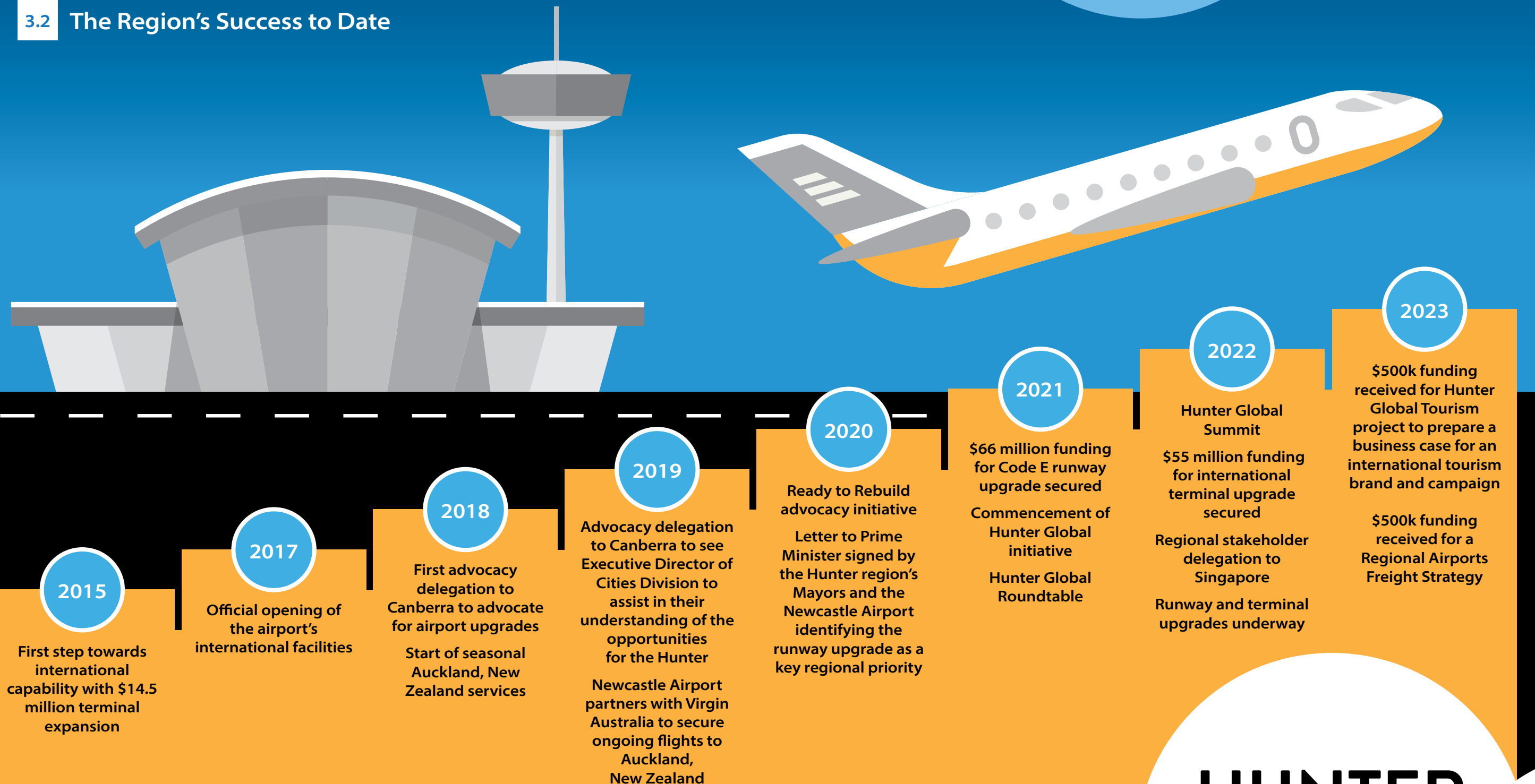
The growth of Newcastle Airport, and of the communities and industries linked to this growth, will be a key future driver of the region's economic evolution beyond coal. This is because a globally connected Hunter, via Newcastle Airport and the Port of Newcastle, will be key to creating an economically prosperous city-region. This can provide our communities with a vibrant and unique lifestyle, linked to growth in products and services, to replace the current economic output of thermal coal. Growing international connectivity through the airport is therefore fundamental to ensuring the Hunter region can continue to grow and evolve as a powerhouse of the state and national economies.

To support the region to capitalise on this opportunity, this Flightpath report has been developed following significant stakeholder participation achieved through a virtual roundtable in November 2021 and a whole-of-region summit in February 2022. This Flightpath report outlines priority objectives and actions for how the Hunter as a whole can capitalise on the international opportunities arising from the upgrades to the airport, particularly for areas of strategic opportunity and regional competitive advantage including tourism, business, education, research, agribusiness, manufacturing, and defence. Alignment around, and collaboration in pursuing these directions will ensure our communities are able to capitalise on the significant opportunities the airport presents for our regional economy and liveability.

3.1 The Hunter Global Vision

The Hunter is a globally connected and economically prosperous city-region, recognised as a key international gateway, providing its communities with a vibrant and unique lifestyle.

3.2 The Region's Success to Date



**HUNTER
GLOBAL**
OUR INTERNATIONAL FUTURE

Historical

Expansions and upgrades of the Newcastle Airport have been a long-term priority for the Hunter region. Terminal upgrades in 2014-15 saw the first significant step in the Airport's international capability, with a \$14.5 million terminal expansion delivering new arrival halls and a dedicated area for permanent customs, immigration, and quarantine services in readiness for future international services.

* For our full collaborative history and success to date, refer to [Appendix A](#)

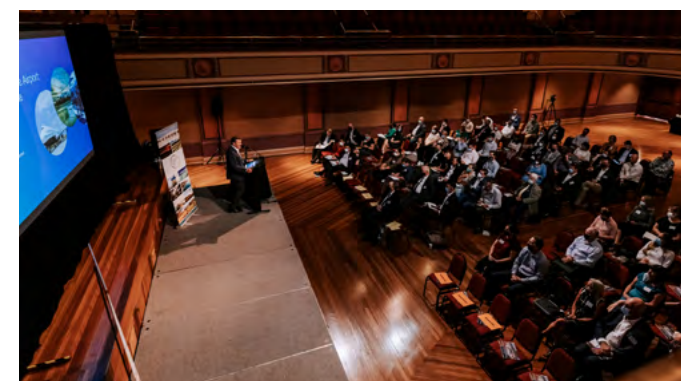
Hunter Global Summit

In February 2022, we hosted a two-day Hunter Global Summit, the direction of which was informed by previous work in this space. This whole-of-region summit provided a platform for stakeholders to come together to collaboratively identify the opportunities for the Hunter arising from the enhanced international connectivity that an upgraded Newcastle Airport will provide.

There were also opportunities to co-design strategies and a way forward to ensure the region is activated to capitalise on these international opportunities. Summit delegates heard from aviation industry specialists and senior leaders in government and business about the global avenues the Airport offers to the region. This Flightpath report is built directly on the outcomes from the Hunter Global Summit.



*Watch Greater Newcastle and the Hunter:
Our Journey to Global Connectivity*





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Ready for Take-off




4.1 Collaborating for Success

This section of the Flightpath report sets out the priority actions to ensure the region is ready for take-off in line with the Hunter Global vision.

The following actions will support achievement of the Hunter Global vision through driving and curating the opportunity to grow certain products and services into new markets. Actions are separated into three key priority areas:


Priority Areas	
Foundational Actions	These are the actions that are necessary to underpin the future establishment of both above and below the wing opportunities.
Above the Wing Actions	These are the actions focused on tourism, education, business, and talent attraction opportunities.
Below the Wing Actions	These are the actions focused on import and export opportunities for freight and cargo.





Actions are grouped around the three focus areas of regional advocacy, regional planning and priority setting, and regional collaboration.

Key Focus Areas	Outcomes
 Regional Advocacy	Alignment through a strong and united regional voice facilitates place-based decision making and targeted investment that delivers on the Hunter Global vision and priorities.
 Regional Planning and Priority Setting	Clear evidence-based plans and priorities for the region are identified for collaborative implementation by key partners and stakeholders to achieve the Hunter Global vision.
 Regional Collaboration	A collaborative framework and systems are established, that encourage and drive action and accountability from key partners and stakeholders, in delivering the Hunter Global vision.

NB: The actions included in this report provide strategic direction for a range of stakeholders across the region. While the Hunter JO has coordinated this piece of work it is not primarily responsible for ongoing delivery of identified actions.

4.2 Hunter Global Action Plan

Foundational Actions		
Key Focus Area	Action	Impact
	Identify key stakeholders to form a Hunter Global partner group to ensure delivery of the Flightpath report recommendations.	Ensuring regional leadership, clarity of objective and accountability around the delivery of the Flightpath to our Future report recommendations.
	Build regional awareness and support of the Hunter Global Flightpath alongside the delegation of key activities.	Ensuring the roadmap is supported by key stakeholders will reinforce the document's legitimacy and regional alignment, which is critical to effective advocacy.
	Map a clear ecosystem of partners, collaborators, and stakeholders and their interests, influence, and impacts on international connectivity in the Hunter.	This mapping will identify and prioritise stakeholders and their needs as they relate to the delivery and progress of the Hunter Global initiative.
	Leverage regional support, to attract priority new international flight partners and connecting destinations, including for example whole-of-region representation in trade missions and delegations.	Demonstrating regional alignment to potential new airlines and underpinning the case for the diverse economic opportunities available to them.
	Collaborate to present a unified position and voice to generate funding and investment to attract international flights that will provide direct connections for businesses.	More regular flights will make it easier for international businesses to establish and operate in the Hunter and to retain talent in the region.
	Invest in development of a transport masterplan that prioritises and improves accessibility for people and freight from across the region to key international transport and export hubs including Newcastle Airport and the Port of Newcastle.	<p>Building a regional prism on enabling infrastructure that might be critical for economic development in other areas of the region.</p> <p>Prioritising key infrastructure and transport services (e.g., distribution hub) to enable efficient passenger transport and freight to and from the airport from across the entire region.</p>

Foundational Actions		
Key Focus Area	Action	Impact
	Establish a permanent Australian Border Agencies presence at Newcastle Airport to be ready upon activation of the runway and terminal upgrades.	To provide the resources necessary to facilitate the import and export of goods, services, and people through the Newcastle Airport.
	<p>Collaboratively develop and deliver action plans for priority sectors identified through the Hunter Global initiative, including:</p> <ul style="list-style-type: none"> • Business, Education & Research • Defence • Tourism & Visitors, Friends, and Relatives (VFR) • Trade supply • Manufacturing & Construction • Mining, Energy & Technology Services • Agribusiness • Medtech & Health 	Identification, alignment, and prioritisation of actions specific to the sectors where clear competitive advantages exist, will drive the readiness of each sector and shape sector-specific investment to capitalise on international market opportunities.
	Advocate for the renewal of the NSW Government Aviation Attraction Fund beyond 30 June 2023 as an important funding mechanism for leveraging increased domestic and international flights through Newcastle Airport.	Greater capability to attract airlines to Newcastle Airport.
	Identify skills needed for the region to be internationally ready and identify gaps and opportunities via a skills audit, to inform the development of an international skills development program.	<p>Understanding the skills gaps (capacity and capability) that may impact the Hunter region's ability to obtain the economic benefits created by the Airport's upgrade.</p> <p>Vocational training and capacity building will be essential to building the region's capability to meet the specific needs of different international market opportunities.</p>






Regional Advocacy




Regional Planning and Priority Setting



Regional Collaboration

Foundational Actions		
Key Focus Area	Action	Impact
	Develop a skills and talent attraction and retention strategy that builds on the existing Hunter and Identity Positioning strategy work.	Identifying and improving the facilities, resources and lifestyle opportunities needed to attract and retain necessary skills and talent to the region to capitalise on both above and below the wing opportunities.
	Explore and consider opportunities to embed and improve sustainability for Newcastle Airport and the activities it enables across the region, as it continues to grow as a primary driver for the Hunter's economic evolution.	Positioning Newcastle Airport and the Hunter to capitalise on decarbonisation and sustainability drivers in international markets.
	Continue to build on the recognition of the Hunter Global initiative, through the design and delivery of a series of regional events to progress the core priorities of the Flightpath report.	Continued engagement of regional stakeholders in the Hunter Global journey.

Above the Wing Actions		
Key Focus Area	Action	Impact
	Work actively with Destination NSW and Destination Sydney Surrounds North to collectively promote the Hunter region as-a-whole to international markets.	This will ensure priorities and resources across Local Government and State Agencies are aligned in their focus and efforts to increase the level of international visitors directly entering the region.
	Collate existing market research to identify core international markets aligned to the region's key tourism assets and experiences.	Priority markets will be identified for targeting international marketing resources and activities.
	Complete an International Visitor Expectations Audit and Benchmark of our region.	Identification of the experiences, assets, and facilities currently present in the region compared to what an international visitor would expect as part of a destination experience.
	Identify key barriers and opportunities for attracting international visitors directly to the region via Newcastle Airport.	Ability to develop more effective strategies and campaigns for attracting international visitation to the region.
	Develop and invest in a regional tourism marketing campaign to create a unified and collaborative approach to the promotion of the region as a key international destination.	Creating strong and unified destination branding and marketing will position the Hunter as an international tourism brand, growing the number of international tourists and enticing them to stay and spend longer in the region.
	Attract investment to develop and enhance both existing and new events, tourism products and infrastructure that create and connect experiences and compelling itineraries for the international tourism market.	Creating connected region wide experiences for visitors will facilitate and entice international visitors to stay longer and visit more of the region.






Regional Advocacy








Regional Planning and Priority Setting



Regional Collaboration

Above the Wing Actions		
Key Focus Area	Action	Impact
	Work with and support the region's First Nations peoples to unlock world class Indigenous tourism experiences.	To support the region's Indigenous communities in developing and marketing tourism experiences to promote their unique and diverse cultures.
	Support and encourage investment in digital connectivity and the elimination of mobile blackspots across the region.	To ensure international tourists can access information that will support them navigate their way throughout the entire region, utilising digital technology and resources.
	Collaborate to ensure all of region representation at international tourism events where tourism buyers are present.	A unified demonstration by the various regional tourism stakeholders of their collective commitment to attract and provide a unique and quality experience to meet international expectations and demand.
	Identify and attract leading five-star international businesses and experiences to establish in the region.	Provide international quality experiences and services as a key drawcard to attracting global visitation.

Below the Wing Actions		
Key Focus Area	Action	Impact
	Develop a holistic export strategy for the Hunter region, including plans to upgrade freight and supply chain infrastructure.	A holistic export strategy will identify the strategic industry needs, priorities, and opportunities (e.g., infrastructure needs, skills development, export ready products, etc.) that will ensure the Hunter region can share the benefits created by a growing export industry.
	Unlock an import/export concierge service to help local and international businesses explore international opportunities.	An import/export concierge service will provide direct support for industries across the region to access and capitalise upon international markets.
	Develop a regional freight strategy to identify and address barriers to the movement of freight both intra and inter regionally.	To improve connectivity and capacity of freight transport across the region to the airport as a key international gateway.
	Work with industry to identify opportunities, strategies and infrastructure needed to enable the further development and attraction of a freight forwarding ecosystem in the Hunter.	Improving the capacity for Hunter industries to import and export key goods and services through Newcastle airport.
	Attracting and securing investment for freight export and import enabling airport infrastructure.	To provide the necessary enabling infrastructure to facilitate the import and export of goods and services via the airport.



Regional Advocacy



Regional Planning and Priority Setting



Regional Collaboration



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Appendix A: The Region’s Success to Date



2014 - 2015

- Expansions and upgrades of the Newcastle Airport have been a long-term priority for the Hunter region. Terminal upgrades in 2014-15 saw the first significant step in the Airport's international capability, with a \$14.5 million terminal expansion delivering new arrival halls and a dedicated area for permanent customs, immigration, and quarantine services in readiness for future international services⁶.



2017

- Official opening of the airport’s international facilities.



2018

- Initial delegation to Canberra to meet with Federal Minister and representatives to advocate for further airport upgrades.
- Start of seasonal Auckland, New Zealand services.
- 2036 Newcastle Airport Vision (Master Plan) Launches.
- \$11.7 million in funding by the NSW Government, and \$8 million in co-funding from Newcastle Airport creates a world-leading aerospace commercial precinct (Astra Aerolab) adjacent to Newcastle Airport.
- The Greater Newcastle Aerotropolis Pty Ltd entity is created.



2019

- Delegation to Canberra to see Executive Director of Cities Division for an “officer to officer” exchange to assist in their understanding of the opportunities for the Hunter.
- Newcastle Airport partners with Virgin Australia to secure ongoing international flights to Auckland, New Zealand.
- Newcastle Airport signed a Heads of Agreement with major defence contractor BAE Systems Australia to lease land on the 76-hectare Astra Aerolab site.
- Stage 1 works commenced on the Astra Aerolab development.

⁶Newcastle Airport, 2015; Building our future: Newcastle Airport Annual Report 2014/15



2020

- The Hunter JO and Committee for the Hunter champion the Federal Government for \$400 million for a range of projects, including Newcastle airport Code E Runway Upgrade as part of the Ready to Rebuild initiative.
- Letter to Prime Minister signed by the Hunter region's Mayors and the Newcastle Airport identifying the runway upgrade as a key regional priority.
- On 27 May Williamstown was announced as a Special Activation Precinct (SAP) by the NSW State Government. Anticipated to generate more than 15,000 jobs state-wide, the precinct signals a new era of investment for the region and unlimited potential for the Airport and Astra Aerolab in the future.



2021

- **Securing the Code E runway upgrade, May 2021** - After targeted advocacy and broad support across the Hunter region, the Newcastle Airport was able to attract \$66 million in funding from the Commonwealth Government to deliver an upgrade of the Airport's runway to a 'Code E' international standard.
- **Code E runway upgrade** - In order to release billions of dollars in economic benefit, the Airport's runway required an upgrade to Code E status, allowing it to accommodate long-range, wide-bodied aircraft.
This upgrade will directly connect the Hunter to the rest of the world. In doing so, it will create an immediate and permanent stimulus to the visitor economy, generate a substantial uplift in freight activity and deliver significant jobs and growth to Australia's largest regional economy. The benefits will be felt across the economy by multiple sectors and over a broad geographic area in regional Australia.
- **Commencement of the Hunter Global Initiative, August 2021** - In August 2021, the Hunter JO commenced the Hunter Global initiative with financial support from the NSW Government. With its expertise in collaboration and an ability to connect with intergovernmental stakeholders, the Hunter JO took a leading role to mobilise stakeholders to guide the development of Hunter Global.
- **Hunter Global Roundtable, November 2021** - The Hunter Global Roundtable took place in November 2021 and brought together leading industry experts to identify the potential opportunities and barriers for the region to capitalise on the opportunities created by the Code E upgrade.
A copy of a report including the insights collected during the roundtable event, is available on the Hunter JO's website.



2022

- **Hunter Global Summit, February 2022** - The Roundtable informed the direction of a two-day Hunter Global Summit, which took place in February 2022. This whole-of-region summit provided a platform for stakeholders to come together to collaboratively identify the opportunities for the Hunter arising from the enhanced international connectivity that an upgraded Newcastle Airport will provide. There were also opportunities to co-design strategies and a way forward to ensure the region is activated to capitalise on these international opportunities. Summit delegates heard from aviation industry specialists and senior leaders in government and business about the global avenues the Airport offers to the region. This Flightpath report is built directly on the outcomes from the Hunter Global Summit.
More information: Watch [Greater Newcastle and the Hunter: our journey to global connectivity here](#).
- **Securing the Newcastle Airport Terminal Upgrade, April 2022** - On 14 April 2022, the Commonwealth Government announced \$55 million in funding for the upgrade of the Airport's international passenger terminal.
In welcoming this announcement, the CEO of Newcastle Airport, Dr Peter Cock, acknowledged the Hunter JO's efforts in delivering the Hunter Global Summit as key to the Airport attracting the funding.
- **Terminal Upgrade** - This upgrade is essential to process the long-haul aircraft, which can carry close to four hundred passengers – a significant increase from the 180 passengers carried by the Airport's domestic fleet.
This is a nationally significant project and, combined with the Code E upgrade of the runway, is a game-changer for the Hunter region. With the final piece of the puzzle now secured, our region is moving towards true global connectivity.
The terminal will not only offer convenience to travellers who want to fly internationally. It will also drive significant, sustainable economic benefits across the region through inbound tourism and new freight-related industries, including import and export.
- **Regional Delegation May 2022** - Key regional stakeholder delegation to Singapore to engage with key international airlines to clearly articulate the size of the opportunity, while demonstrating strong and unified support from the region.
Runway and terminal upgrade works underway with the airport on track to be international-ready by 2024.



2023

- The Hunter JO received \$500k funding from the Regional NSW Business Case and Strategy Development Fund for a Hunter Global Tourism project to provide insights into international markets' motivation, interest and opportunities to develop a business case for an international tourism brand and campaign.
- The Hunter JO received \$500k funding from the Regional NSW Business Case and Strategy Development Fund for a Regional Airports Freight Strategy to develop a Hunter Region Aviation and Air Freight Strategy action plan which will identify priority planning and infrastructure needs.

Appendix B: International Opportunities for the Region

As well as immediate benefits through job creation, the Newcastle Airport's upgrade is the opportunity to leverage opportunities for the region for economic diversification and growth:

- Additional economic activity is associated with increases in international tourist visitation and expenditure in the aviation and related sectors
- Avoided costs (including time savings) for international passengers associated with the need to travel by road or rail to and from Sydney Airport
- Increased productivity of freight, with exporters able to ship through Newcastle Airport rather than having to transport freight to Sydney Airport
- Catalytic benefits associated with the improved productivity and enhanced capacity of the Airport, particularly in the tourism industry

Priority Areas of Economic Opportunities

In addition to delivering signature events, the Hunter Global initiative has included research and analysis to guide the development of this roadmap. Stemming from Astrolabe's work identifying preliminary economic opportunities, the Hunter JO has identified the following priority areas of economic opportunity:

Tourism and Visitors, Friends and Relatives (VFR)

The Hunter region is a key tourist destination, attracting over 208,400 international visitors in 2019. The Hunter Valley is the region's premier tourist destination and the most visited wine region in Australia. The region also offers a variety of visitor experiences, including environmental and adventure tourism across all 10 Local Government Areas.

The opportunities created by international visitors are estimated to contribute \$82.8 million to Gross State Product annually (from FY 2024-25)

Business, Education and Research

A key component of the business, education, and research opportunities created by the Airport's upgrade relate to the creation of a collaborative export culture. The collaboration between the Port of Newcastle and the Newcastle Airport will attract small and medium enterprises to ground their exports in the Hunter region, improving their capacity to reach new international markets affordably.

Collaboration between business, education and research will attract international talent to live, study and work in the Hunter region, creating new entrepreneurial opportunities that capitalise on the region's land, resources, and workforce.

The opportunity to ground exports in the Hunter region is further encouraged by the Australian Trade and Investment Commission's Export Market Development Grants program.

Agribusiness

As freight export is diverted from Sydney's Kingsford Smith Airport and Brisbane International Airport due to the Airport's upgrade, there is a potential for Newcastle Airport to export more than 20,519 tonnes of freight worth at least \$2.1 billion annually.

Several unique and prosperous agribusiness opportunities face the Hunter region, with key international markets including China, Japan, Korea, Vietnam, the United Arab Emirates, and the United Kingdom.

Growing agribusiness export markets suitable for the Hunter include meat (especially beef, lamb, and pork), summer fruits and nuts, aquaculture, and dairy.

Capitalising on these agribusiness opportunities will need complementary investment in freight and logistics to maximise the lifespan of products from farm to (international) plate.

Manufacturing

The Code E upgrade will strengthen existing, and deliver new, manufacturing opportunities, particularly in advanced food manufacturing, freight manufacturing, and defence manufacturing.

- Advanced food manufacturing – as the export market grows, there will be a demand for the region's producers to 'value-add' to their products. This may include producing more convenient and packaged foods and ready-to-drink beverages (alcoholic and non-alcoholic).
- Freight manufacturing - The Hunter region's supply chain infrastructure will need to be fit-for-purpose to support a growing export market. This includes the infrastructure needed to store, package, and move freight before, during and (for imports) after shipment.
- Defence manufacturing - The NSW Government has identified the Hunter region as a key manufacturing region for defence systems and equipment, aircraft maintenance, crew training systems, and mine disposal.

Defence

Opportunities for the defence industry are focused on the Air 6000 New Air Combat Capability Facilities Project at the RAAF Base Williamstown. The F-35A Operational Precinct is proposed to provide a secure precinct which will be the basis of F-35A operations at RAAF Base Williamstown.

The NSW Government has made a significant investment in Astra Aerolab. A technology park, Astra Aerolab is Australia's newest defence and aerospace precinct, with current tenants including leading Defence firms, such as BAE Systems, Lockheed Martin, Boeing, Raytheon, and many other significant SMEs.

Trade Supply

To ensure the entire Hunter region benefits from the Airport's upgrade, it will be crucial to foster a collaborative export culture across all tiers of Government, industry, and local businesses. The establishment of a strong relationship between the Newcastle Airport and the Port of Newcastle will be of paramount importance.

Although each port will have its own specialities, they can provide more than the sum of their parts by facilitating a diverse and growing ecosystem of trade supply. Opportunities to establish infrastructure and services in locations convenient to both the Airport and the Port of Newcastle will improve the efficiency of trade supply.

⁶<https://www.newcastleairport.com.au/news/newcastle-airport-celebrates-win-for-the-region-after-55-million-funding-announced-for-terminal-upgrade>



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