



Food & Grocery Manufacturing in Western Sydney Economic Snapshot

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Economic Snapshot:

Food & Grocery Manufacturing

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August 2018

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RESOURCES

All modelling has been undertaken using REMPLAN™ software that has been authored by Principal Research Fellow (ret.), Ian Pinge, at La Trobe University Bendigo.

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1 Executive Summary

In Western Sydney, the Food & Grocery Manufacturing sector is an integral part of the local economy.

Output

In 2017, Western Sydney's Food & Grocery Manufacturing industry generated \$17.213 billion in output; a decline of 2.5% over the previous year. The sector represents 7.1% of total output in Western Sydney and 29.3% of total manufacturing in Western Sydney. Despite the overall decline in output between 2016 and 2017 in Western Sydney, four of the nine municipalities experienced growth. These were: Blacktown City, Camden City, Campbelltown City and Canterbury-Bankstown City.

Employment

In 2016, total employment in the industry was estimated at 24,391 people or 3.5% of jobs in Western Sydney. Between 2011 and 2016, employment in the sector increased by 5.1% and exceeded overall jobs growth in Western Sydney at 3.5% growth.

Wages & Salaries

The 24,391 Food & Grocery Manufacturing workers in Western Sydney are paid approximately \$1.949 billion in wages & salaries. The sector supports approximately 28.4% of wages & salaries supported by Western Sydney's broader manufacturing sector.

Value Added

The Food & Grocery Manufacturing sector in Western Sydney created approximately \$4.053 billion in value added in 2017; 6.0% less than was created in 2016. The sector supports 3.7% of total value added created in Western Sydney.

Table 1-1 Summary - Western Sydney's Food Grocery Manufacturing, 2017

Local Government Area	Output		Employment (2016)		Wages & Salaries		Value Added	
	(\$M)	Annual Change	Jobs	2011 to 2016 Change	(\$M)	Annual Change	(\$M)	Annual Change
Blacktown (C)	\$2,792.476	↑	4,176	↑	\$337.746	↑	\$668.822	↑
Camden (A)	\$346.792	↑	562	↑	\$38.403	↑	\$114.332	↑
Campbelltown (C)	\$1,819.524	↑	2,113	↑	\$197.509	↑	\$398.477	↑
Canterbury-Bankstown (C)	\$2,285.519	↑	3,914	↑	\$276.538	↑	\$507.161	↓
Cumberland (A)	\$2,388.221	↓	2,984	↑	\$264.609	↑	\$545.269	↓
Fairfield (C)	\$1,484.805	↓	2,081	↑	\$187.614	↓	\$347.283	↓
Liverpool (C)	\$984.460	↓	2,154	↓	\$118.572	↓	\$288.961	↓
Parramatta (C)	\$4,485.421	↓	4,980	↓	\$447.654	↓	\$983.632	↓
Penrith (C)	\$625.665	↑	1,428	↑	\$80.370	↑	\$198.766	↑
Western Sydney	\$17,212.883	↓	24,391	↑	\$1,949.014	↓	\$4,052.702	↓

Taxes

Western Sydney industry generated \$3.834 billion in net taxes in 2017. The Food & Grocery Manufacturing sector contributes \$138.220 million towards the local industry tax bill in Western Sydney. Parramatta which is the largest contributor towards the economic output in Western Sydney's Food & Grocery Manufacturing supports 22.9% of total tax collected from the sector in the broader region.

Regional Exports

Western Sydney exported \$57.791 billion in 2017. \$8.144 billion or 14.1% of exports are supported by the Food & Grocery Manufacturing Sector. Furthermore, \$2.458 billion of the exports are destined for overseas markets. Between 2016 and 2017, there has been 12.9% drop in exports from the broader region, however, there was an 10.1% increase in the volume of overseas exports.

Meat & Meat Product Manufacturing contributes more than a third of overseas exports in Western Sydney.

Table 1-2 Summary - Western Sydney's Food Grocery Manufacturing, 2017

Local Government Area	Regional Exports		International Exports		Net Taxes
	(\$M)	Annual Change	(\$M)	Annual Change	(\$M)
Blacktown (C)	\$1,550.406	↑	\$452.506	↑	\$24.027
Camden (A)	\$155.894	↑	\$43.917	↑	\$5.200
Campbelltown (C)	\$1,279.199	↑	\$205.713	↑	\$10.454
Canterbury-Bankstown (C)	\$1,232.528	↑	\$422.505	↑	\$17.667
Cumberland (A)	\$1,528.828	↓	\$401.602	↑	\$25.293
Fairfield (C)	\$814.450	↓	\$235.058	↑	\$9.175
Liverpool (C)	\$392.401	↓	\$126.164	↓	\$9.258
Parramatta (C)	\$3,322.376	↓	\$486.438	↓	\$31.593
Penrith (C)	\$216.438	↓	\$84.476	↑	\$5.552
Western Sydney	\$8,144.292	↓	\$2,458.378	↑	\$138.220

In Western Sydney, Human Pharmaceutical Product Manufacturing is the most significant Food & Grocery Manufacturing sub-sector in terms of output however, it is Bakery Product Manufacturing that supports the most jobs while Other Food Product Manufacturing produces the highest level of value-add.

Table 1-3 Summary -Western Sydney Food & Grocery Manufacturing Sub-sectors, 2017

	Output		Employment (2016)		Value Added	
	(\$M)	Annual Change	Jobs	2011 to 2016 Change	(\$M)	Annual Change
Fruit & Vegetable Farming	\$424.617	↑	1,244	↑	\$237.130	↑
Poultry Egg Production	\$183.549	↑	474	↑	\$107.958	↑
Meat & Meat Product Manufacturing	\$2,319.604	↑	4,055	↑	\$456.713	↑
Processed Seafood Manufacturing	\$62.584	↑	36	↑	\$6.985	↑
Dairy Product Manufacturing	\$725.343	↑	878	↓	\$126.315	↓
Fruit & Vegetable Product Manufacturing	\$561.254	↓	478	↓	\$106.658	↓
Oils & Fats Manufacturing	\$157.032	↑	97	↑	\$17.880	↑
Grain Mill & Cereal Product Manufacturing	\$895.308	↑	790	↑	\$184.710	↓
Bakery Product Manufacturing	\$788.142	↑	5,295	↑	\$271.262	↑
Sugar & Confectionery Manufacturing	\$520.259	↑	599	↑	\$111.784	↑
Other Food Product Manufacturing	\$3,081.539	↓	2,913	↓	\$685.947	↑
Soft Drinks, Cordials & Syrup Manufacturing	\$1,065.188	↓	1,298	↓	\$318.281	↓
Beer Manufacturing	\$550.685	↓	449	↓	\$210.603	↓
Wine & Other Alcohol Manufacturing	\$115.711	↓	224	↓	\$33.553	↓
Sanitary Paper Product Manufacturing	\$826.208	↑	768	↑	\$209.970	↑
Human Pharmaceutical Product Manufacturing	\$3,108.760	↑	2,786	↑	\$576.276	↓
Cleaning Compounds & Toiletry Preparation Manu.	\$1,360.226	↓	1,347	↓	\$298.120	↓
Polymer Packaging Product Manufacturing	\$466.875	↓	660	↓	\$92.557	↓

2 Introduction

In Australia, the Food & Grocery Manufacturing sector generates \$178 billion in output annually and supports approximately 2.9% of national employment. The sector is an amalgam of agricultural and manufacturing sectors including: food and beverage production, paper, pharmaceuticals, and cleaning compounds. A complete list of sub-sectors included in the Food & Grocery Manufacturing Sector is provided in Figure 2-1.

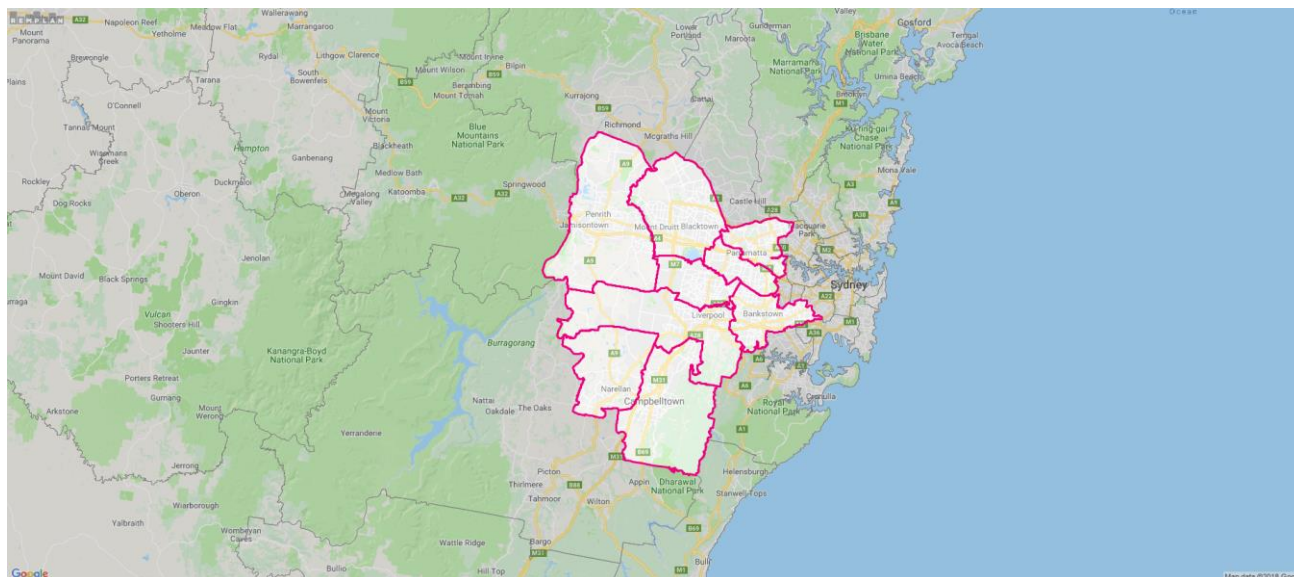
While the broader manufacturing sector in Australia has been declining, the Food & Grocery Manufacturing sector experienced growth between 2016 and 2017.

In Western Sydney, the Food & Grocery Manufacturing sector is an integral part of the local economy. Ongoing strong economic growth in the Food & Grocery Manufacturing sector is expected to continue in the future.

Map 1-1 shows the nine municipalities that define Western Sydney:

- Blacktown City
- Camden Shire
- Campbelltown City
- Canterbury-Bankstown City
- Cumberland Shire
- Fairfield City
- Liverpool City
- Parramatta City
- Penrith City

Map 2-1 Western Sydney Region



Source: REMPLAN Mapbuilder Link: <https://remplan.co/2MF9w8r>

According to the 2016 Census, the Food & Grocery Manufacturing sector supported 24,391 jobs or 3.5% of employment in Western Sydney. Western Sydney's Food & Grocery Manufacturing sector is estimated to generate \$17.213 billion in economic output. Furthermore, the sector generates \$4.053 billion in value-added (3.7% of total Western Sydney's value added); value-add being a key contributor to Gross Regional Product, the net measure of income generated by the region. Within Western Sydney's Food & Grocery Manufacturing sector, 'Bakery Product Manufacturing' supports the highest-level of employment at more than one fifth of total Food & Grocery Manufacturing Sector jobs (21.7%). At a regional level, Parramatta City is the largest contributor in

terms of overall Food & Grocery Manufacturing in Western Sydney representing 26.1% of output, followed by Blacktown City at 16.2% and Cumberland Shire at 13.9%.

Figure 2-1 Food & Grocery Manufacturing Definition

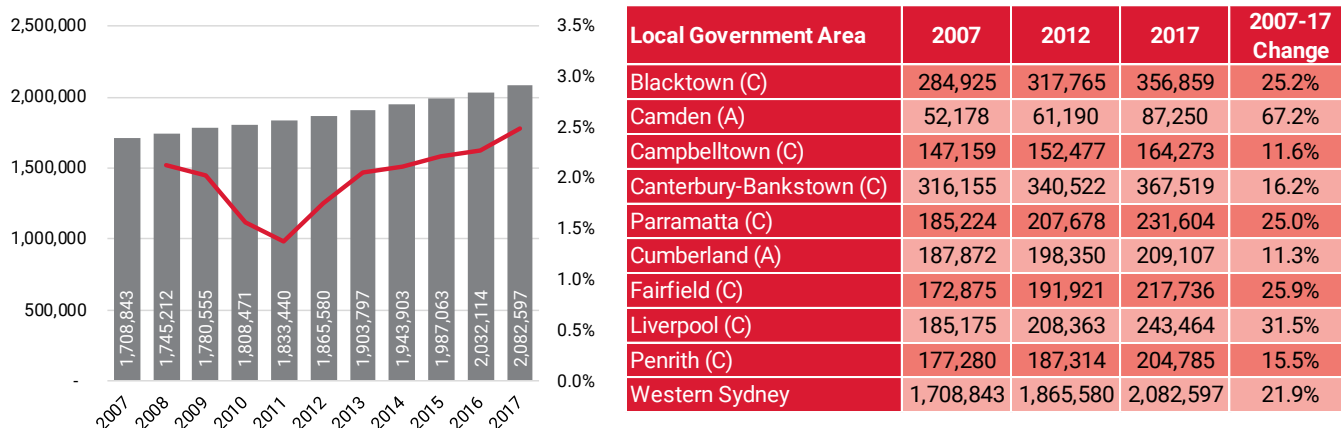
Food and Grocery Manufacturing Sectors	ANZSIC Code	ANZSIC Description
Fruit & Vegetable Farming	121	Mushroom Growing
	122	Vegetable Growing (Under Covers)
	123	Vegetable Growing (Outdoors)
	131	Grape Growing
	132	Kiwifruit Growing
	133	Berry Fruit Growing
	134	Apple and Pear Growing
	135	Stone Fruit Growing
	136	Citrus Fruit Growing
	137	Olive Growing
	139	Other Fruit and Nut Growing
Poultry Egg Production	172	Poultry Farming (Eggs)
Meat & Meat Product Manufacturing	1111	Meat Processing
	1112	Poultry Processing
	1113	Cured Meat and Smallgoods Manufacturing
Processed Seafood Manufacturing	1120	Seafood Processing
Dairy Product Manufacturing	1131	Milk and Cream Processing
	1132	Ice Cream Manufacturing
	1133	Cheese and Other Dairy Product Manufacturing
Fruit & Vegetable Product Manufacturing	1140	Fruit and Vegetable Processing
Oils & Fats Manufacturing	1150	Oil and Fat Manufacturing
Grain Mill & Cereal Product Manufacturing	1161	Grain Mill Product Manufacturing
	1162	Cereal, Pasta and Baking Mix Manufacturing
Bakery Product Manufacturing	1171	Bread Manufacturing (Factory Based)
	1172	Cake and Pastry Manufacturing
	1173	Biscuit Manufacturing (Factory Based)
	1174	Bakery Product Manufacturing (Non-Factory Based)
Sugar & Confectionery Manufacturing	1181	Sugar Manufacturing
	1182	Confectionery Manufacturing
Other Food Product Manufacturing	1191	Potato, Corn and Other Crisp Manufacturing
	1192	Prepared Animal and Bird Feed Manufacturing
	1199	Other Food Product Manufacturing N.e.c
Soft Drinks, Cordials & Syrup Manufacturing	1211	Soft Drink, Cordial and Syrup Manufacturing
Beer Manufacturing	1212	Beer Manufacturing
Wine & Other Alcohol Manufacturing	1213	Spirit Manufacturing
	1214	Wine and Other Alcoholic Beverage Manufacturing
Sanitary Paper Product Manufacturing	1524	Sanitary Paper Product Manufacturing
Human Pharmaceutical Product Manufacturing	1841	Human Pharmaceutical Manufacturing
Cleaning Compounds & Toiletry Preparation Manu.	1851	Cleaning Compound Manufacturing
	1852	Cosmetic and Toiletry Preparation Manufacturing
Polymer Packaging Product Manufacturing	1911	Polymer Film and Sheet Packaging Material Manufacturing

3 Demographics and Economy

3.1 Population

In 2017, the estimated resident population of Western Sydney is 2,082,597 persons. This represents a 2.5% annual increase over the previous year while over the past ten years the population of Western Sydney has grown at an average annualised growth rate of 2.0%. Within Western Sydney, the fastest growing municipality is Camden Shire which grew at an average annualised growth rate of 5.3% between 2007 and 2017.

Figure 3-1 Western Sydney Population and Change



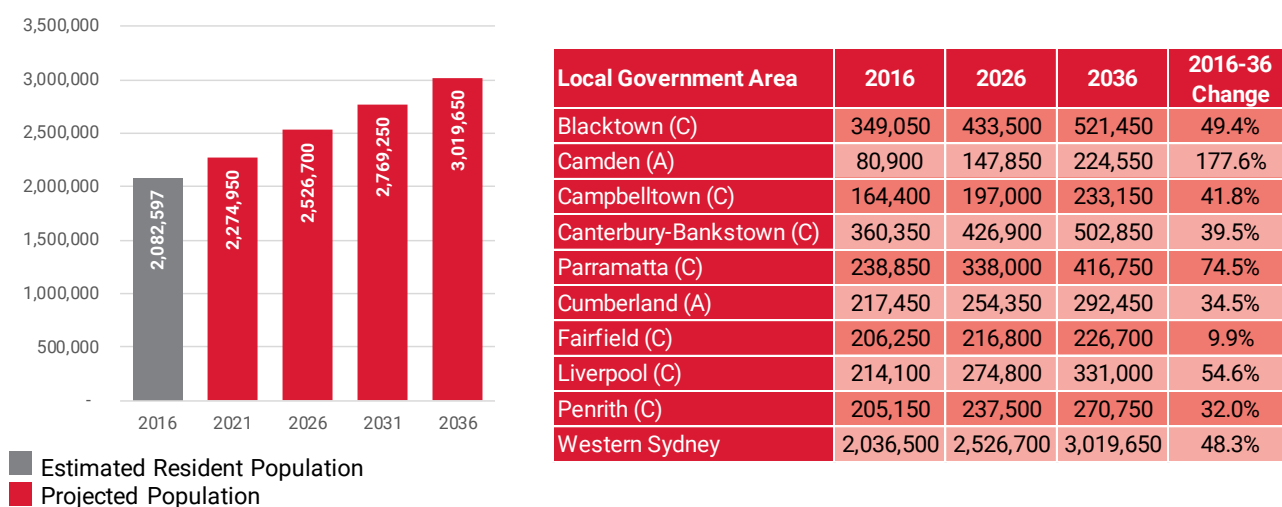
Source: Australian Bureau of Statistics, Regional Population Growth 2007-17, Cat. No. 3218.0.

3.2 Population Projections

Population projections for New South Wales were last published in September 2016 by the NSW Government Department of Planning & Environment and have yet to be adjusted to the findings of the 2016 Census. These population projections provide a basis for future growth in Western Sydney.

The population of Western Sydney is expected to increase to 3,019,650 by 2036. This represents a 49.1% increase from the estimated population in 2016 equivalent to an average annualised growth rate of 2.0%. Camden Shire is projected to be the fastest growing municipality within Western Sydney at a 5.2% average annualised growth rate. Camden is projected to nearly triple its population to 224,550 persons by 2036.

Figure 3-2 Western Sydney Population Projections

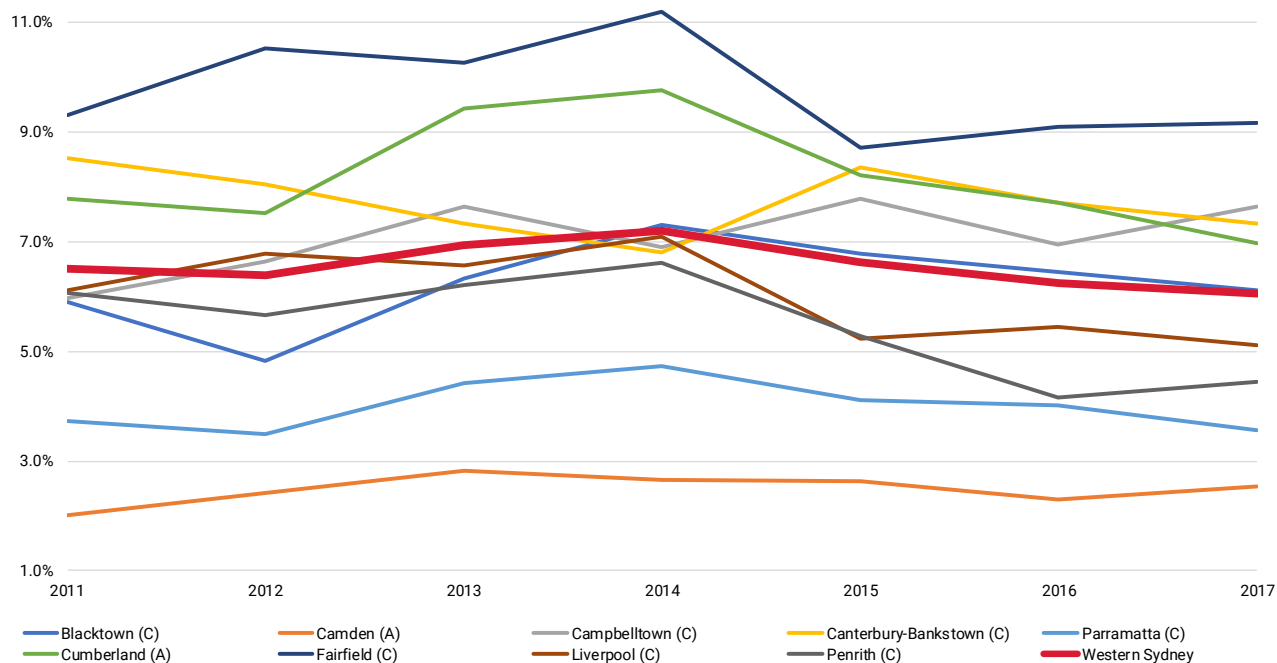


Source: NSW Government: Planning & Environment, New South Wales State and Local Government Area Population Projections, and Implied Dwelling Requirements, 2016

3.3 Labour Force

The unemployment rate for Western Sydney for 2017 was 6.1%; higher than the rate for New South Wales at 4.8%. Within the last five years the unemployment rate peaked at 7.2% in 2014 and has since declined to its current position. The municipality with the highest unemployment rate in Western Sydney is Fairfield City with an unemployment rate of 9.2% followed by Campbelltown City at 7.6%. The local government area with the lowest unemployment rate is Camden Shire at 2.5% followed by Parramatta City at 3.4%.

Figure 3-3 Western Sydney LGA Unemployment Rates



Source: Department of Employment, Small Area Labour Markets March 2018

Figure 3-4 LGA Labour Force Summary

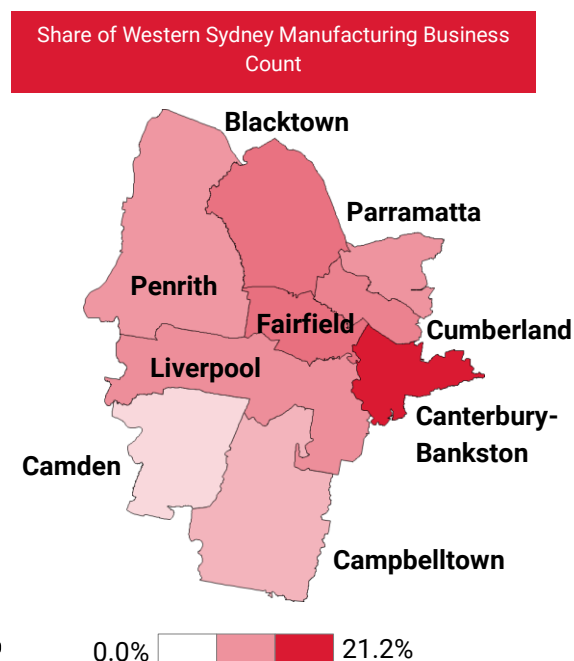
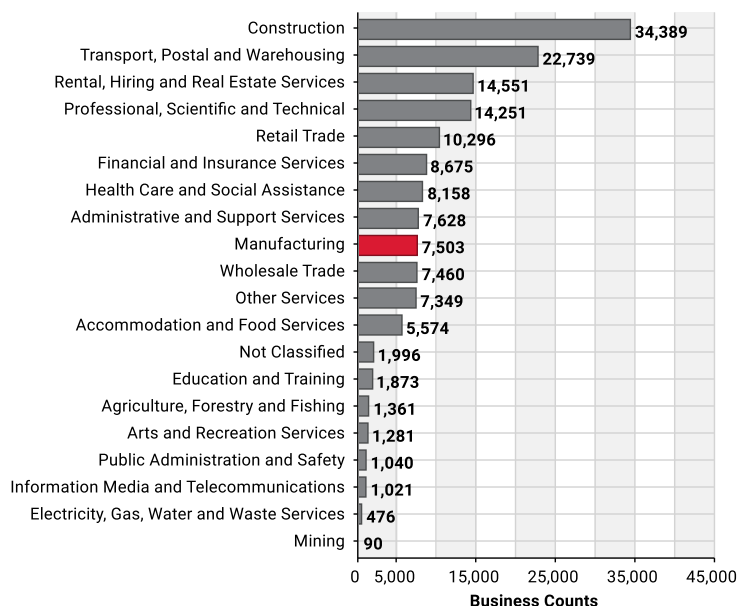
Region	Labour Force		Unemployed		Unemployment Rate
	No.	Annual Change (%)	No.	Annual Change (%)	
Blacktown (C)	180,129	2.8%	11,032	-2.4%	6.1%
Camden (A)	43,040	3.3%	1,092	13.6%	2.5%
Campbelltown (C)	80,279	0.7%	6,128	10.6%	7.6%
Canterbury-Bankstown (C)	167,244	0.0%	12,250	-5.1%	7.3%
Parramatta (C)	129,774	2.5%	4,632	-8.7%	3.6%
Cumberland (A)	111,087	3.4%	7,760	-6.3%	7.0%
Fairfield (C)	91,232	2.8%	8,367	3.8%	9.2%
Liverpool (C)	104,309	3.4%	5,335	-3.0%	5.1%
Penrith (C)	106,243	1.9%	4,730	9.3%	4.5%
Western Sydney	1,013,335	2.2%	61,325	-1.0%	6.1%

Source: Department of Employment, Small Area Labour Markets March 2018

3.4 Business Counts

In 2017, there were 157,702 registered businesses in Western Sydney. The number of businesses increased by 6.3% over the previous year (+9,282 businesses). The largest industry sector by business counts is 'Construction' at 34,389 individual business counts (or 21.8% of Western Sydney businesses). The second highest is 'Transport, Postal and Warehousing' at 22,739 businesses (or 14.4% of Western Sydney businesses). 'Manufacturing' which includes the 'Food & Grocery Manufacturing' Sector contributes 7,503 businesses in Western Sydney (or 4.8% of total businesses). Between 2016 and 2017, 'Manufacturing' businesses grew by 1.1% with an increase of 81 businesses. Canterbury-Bankstown City has the largest share of Western Sydney's Manufacturing businesses (21.2%).

Figure 3-5 Western Sydney Business Counts, 2017



Source: Australian Bureau of Statistics, Counts of Australian Businesses, including Entries and Exits, Jun 2013 to Jun 2017, Cat. No. 8165.0

See Appendix 6.1 for a summary of business counts by industry and municipality in Western Sydney.

3.4.1 Staff Size and Turnover Range

Of the 7,532 businesses operating within Western Sydney's manufacturing sector, nearly two-thirds of businesses are employing¹ (64.7%). In contrast less than a half of all businesses (across all industry sectors) in Western Sydney are employing (42.8%). There was a 33.3% increase in the number of businesses employing 200 or more staff in Western Sydney's manufacturing sector between 2015 and 2017.

Despite increases in all businesses across all levels of turnover, there was a decline in the number of manufacturing businesses turning over less than \$50,000 (-7.9%) and between \$5 to \$10 million in Western Sydney (-1.5%) between 2015 and 2017.

¹ Employing businesses are those enterprises employing persons other than the manager / owner. 'Non-employing' businesses are also called 'Owner-operated'.

Figure 3-6 Western Sydney Manufacturing Sector by Staff and Turnover

	All Industry Sectors				Manufacturing			
Staff Size	2015	2016	2017	Change 2015-17	2015	2016	2017	Change 2015-17
Non-Employing	79,955	84,100	90,167	12.8%	2,605	2,662	2,646	1.6%
1-4 Staff	57,984	61,303	64,430	11.1%	4,141	4,201	4,285	3.5%
20-199 Staff	2,903	2,912	3,013	3.8%	531	562	558	5.1%
200 or more Staff	85	89	89	4.7%	9	6	12	33.3%
	All Industry Sectors				Manufacturing			
Turnover Range	2015	2016	2017	Change 2015-17	2015	2016	2017	Change 2015-17
Zero to less than \$50,000	32,021	34,732	38,201	19.3%	1,242	1,169	1,144	-7.9%
\$50,000 to less than \$200,000	49,555	57,166	59,243	19.5%	1,986	2,096	2,083	4.9%
\$200,000 to less than \$2 million	39,222	46,729	49,757	26.9%	2,802	2,815	2,940	4.9%
\$2 million to less than \$5 million	4,513	5,409	5,804	28.6%	614	643	643	4.7%
\$5 million to less than \$10 million	1,958	2,203	2,337	19.4%	324	319	319	-1.5%
\$10 million or more	1,856	2,164	2,372	27.8%	341	374	374	9.7%

Source: Australian Bureau of Statistics, Counts of Australian Businesses, including Entries and Exits, Jun 2013 to Jun 2017, Cat. No. 8165.0

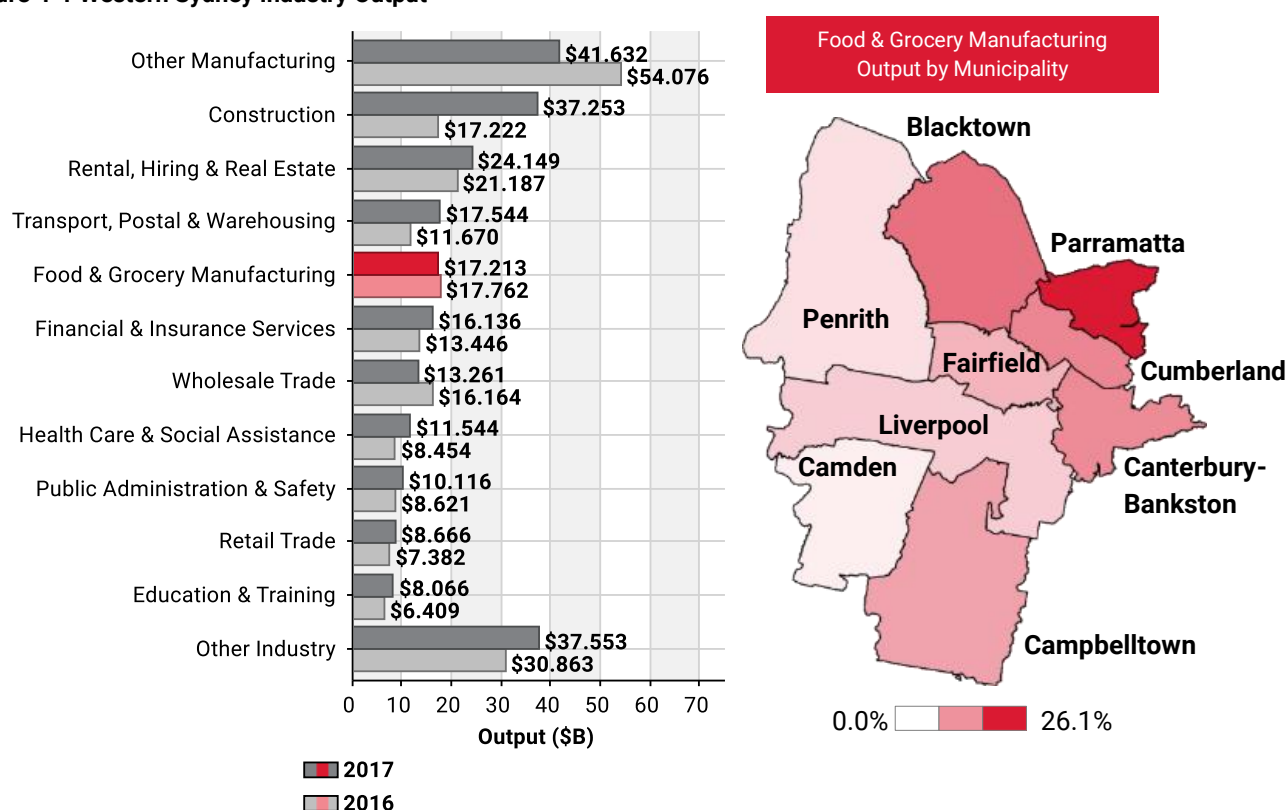
4 Food & Grocery Manufacturing in Western Sydney

The Food & Grocery Manufacturing Sector encompasses an amalgam of activities including the manufacture of food products and several primary agricultural sectors. The following data represents the contribution of the Food & Grocery Manufacturing sector to the broader economy of Western Sydney.

4.1 Output

Total output² in Western Sydney in 2017 is estimated at \$243.133 billion. The Food and Manufacturing Sector contributes \$17.213 billion towards this amount (7.1%). Food & Grocery Manufacturing defines 29.3% of total manufacturing output in Western Sydney. The sector is the fifth largest sector in terms of output in Western Sydney while all other forms of manufacturing contribute the largest share of total region output at \$41.632 billion (17.1% of total output) followed by 'Construction' which contributes \$37.253 billion in output (15.3%). Despite growing nationally, between 2016 and 2017 there has been a slight contraction in Food & Grocery Manufacturing sector in Western Sydney.

Figure 4-1 Western Sydney Industry Output³



The Western Sydney municipality with the largest output contribution to Food & Grocery Manufacturing is Parramatta City at \$4.485 billion, however, it is Campbelltown City which has the highest proportion of its individual municipality's output derived from Food & Grocery Manufacturing (11.0%).

Between 2016 and 2017, output declined by 2.5% and was driven by declines in Liverpool, Parramatta, Cumberland and Fairfield. However, decline in the sector in Western Sydney was softened by growth in the rest of the municipalities between 2016 and 2017.

² Output data represents the gross revenue generated by organisations in each of the industry sectors in a defined region. Gross revenue is also referred to as total sales or total income.

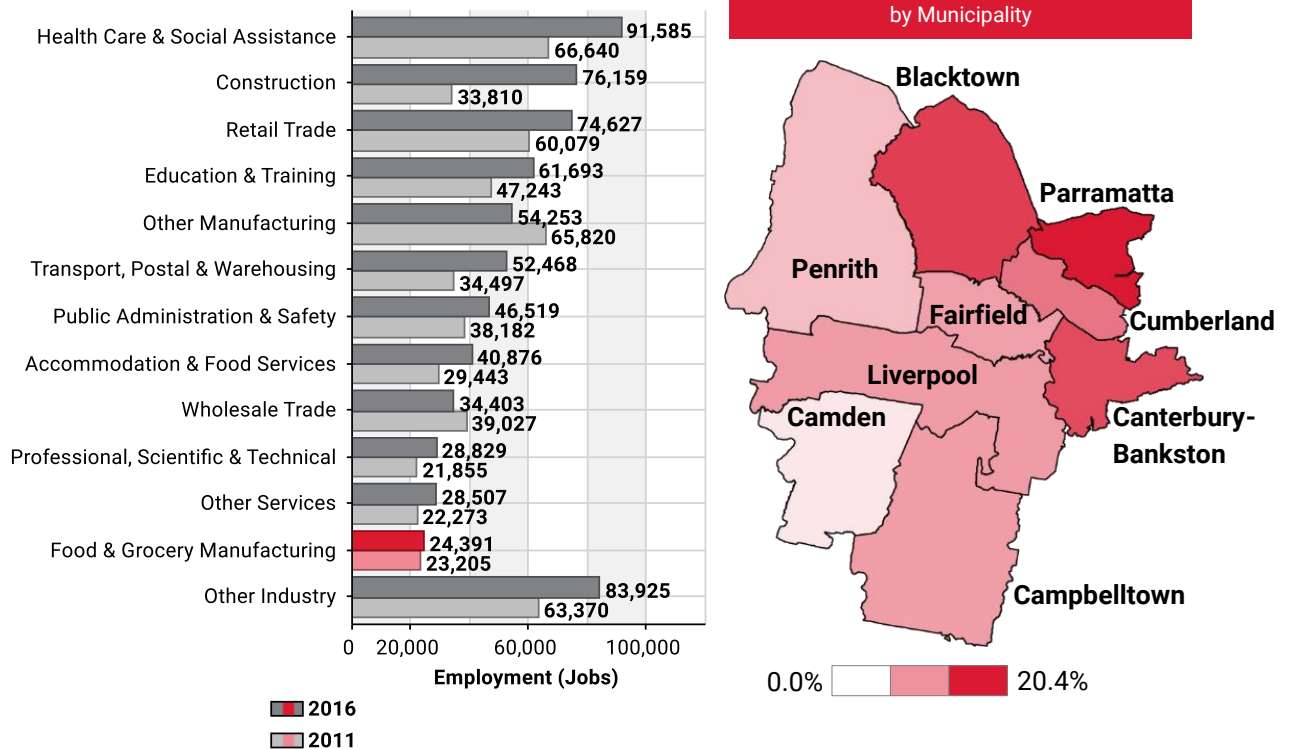
³ Other Manufacturing includes all other forms of manufacturing not included in the Food & Grocery Manufacturing sector.

Table 4-1 Western Sydney Food & Grocery Manufacturing Output by LGA - 2016 & 2017

Local Government Area	Food and Manufacturing Output (\$M)			Total Output (\$M)			% of Total Output (2017)
	2017	2016	% Change	2017	2016	% Change	
Blacktown (C)	\$2,792.476	\$2,548.060	9.6%	\$38,520.504	\$32,721.323	17.7%	7.2%
Camden (A)	\$346.792	\$203.281	70.6%	\$8,585.500	\$5,575.477	54.0%	4.0%
Campbelltown (C)	\$1,819.524	\$1,679.252	8.4%	\$16,498.963	\$14,687.138	12.3%	11.0%
Canterbury-Bankstown (C)	\$2,285.519	\$2,160.124	5.8%	\$33,396.914	\$30,138.600	10.8%	6.8%
Cumberland (A)	\$2,388.221	\$2,514.435	-5.0%	\$27,374.172	\$25,379.137	7.9%	8.7%
Fairfield (C)	\$1,484.805	\$1,524.832	-2.6%	\$20,393.101	\$18,849.811	8.2%	7.3%
Liverpool (C)	\$984.460	\$1,221.886	-19.4%	\$22,854.259	\$19,717.350	15.9%	4.3%
Parramatta (C)	\$4,485.421	\$5,208.703	-13.9%	\$53,146.258	\$47,958.390	10.8%	8.4%
Penrith (C)	\$625.665	\$584.872	7.0%	\$22,363.234	\$18,212.899	22.8%	2.8%
Western Sydney	\$17,212.883	\$17,645.445	-2.5%	\$243,132.905	\$213,240.125	14.0%	7.1%

4.2 Employment

Total employment⁴ in Western Sydney in 2016 was estimated at 698,235. The Food and Manufacturing Sector contributes 24,391 employed persons towards this amount (3.5% of the region's total). Food & Grocery Manufacturing defines 31.0% of total manufacturing employment in Western Sydney. The sector is the eleventh largest employing sector in Western Sydney. Between 2011 and 2016, employment in this sector increased by 5.1% however, overall ranking declined due to significantly larger growth in other sectors in Western Sydney.

Figure 4-2 Western Sydney Industry Employment

The Western Sydney municipality with the largest employment contribution to Food & Grocery Manufacturing in Western Sydney is Parramatta City at 4,980 jobs while Campbelltown City has the highest proportion of their region's employment supported by the Food & Grocery Manufacturing sector (4.3%).

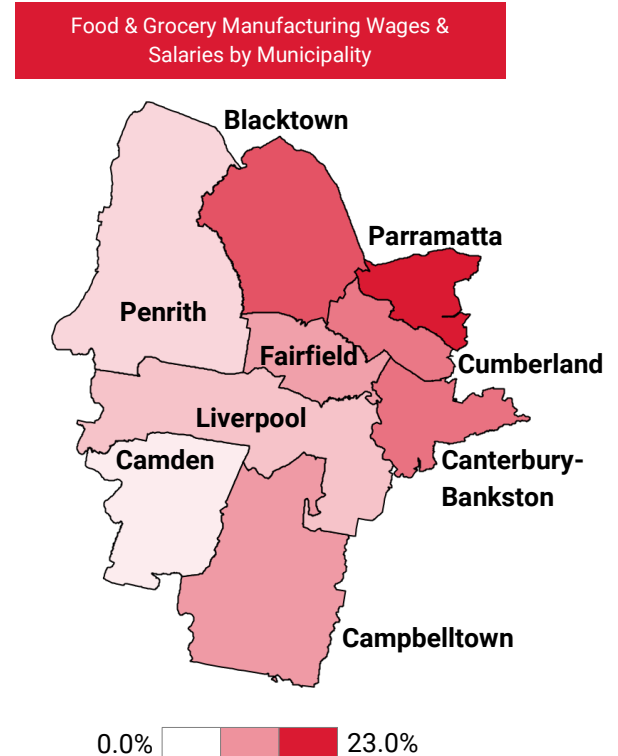
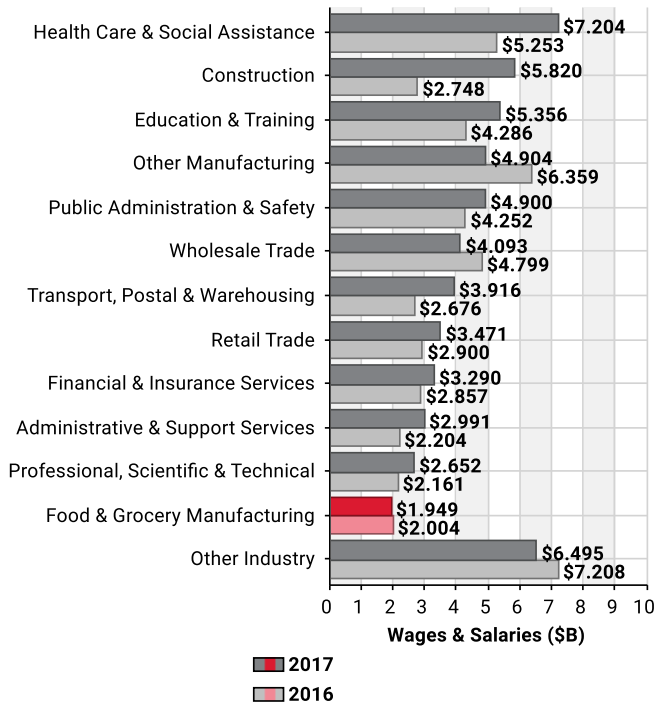
⁴ Employment data represents the number of people employed within each of the industry sectors in a defined region. Employment data presented in this report is destination of work data obtained from the 2016 Census Night.

Table 4-2 Western Sydney Food & Grocery Manufacturing Employment by LGA - 2011 & 2016

Local Government Area	Food and Manufacturing Employment			Total Employment			% of Total Jobs (2016)
	2016	2011	% Change	2016	2011	% Change	
Blacktown (C)	4,176	3,570	17.0%	109,302	81,861	33.5%	3.8%
Camden (A)	562	375	49.9%	25,917	16,312	58.9%	2.2%
Campbelltown (C)	2,113	1,845	14.5%	49,690	40,098	23.9%	4.3%
Canterbury-Bankstown (C)	3,914	3,617	8.2%	97,813	78,227	25.0%	4.0%
Cumberland (A)	2,984	2,897	3.0%	72,702	58,321	24.7%	4.1%
Fairfield (C)	2,081	1,987	4.7%	58,106	46,167	25.9%	3.6%
Liverpool (C)	2,154	2,346	-8.2%	70,037	53,141	31.8%	3.1%
Parramatta (C)	4,980	5,463	-8.8%	143,166	116,906	22.5%	3.5%
Penrith (C)	1,428	1,105	29.3%	71,502	54,412	31.4%	2.0%
Western Sydney	24,391	23,205	5.1%	698,235	545,445	28.0%	3.5%

4.3 Wages and Salaries

Total wages & salaries paid to jobs in Western Sydney is estimated at \$57.040 billion. The Food and Manufacturing Sector contributes \$1.949 billion towards this amount (3.4%). The sector contributes towards 28.4% of total manufacturing in Western Sydney. This is the twelfth largest industry sector by wages & salaries in Western Sydney.

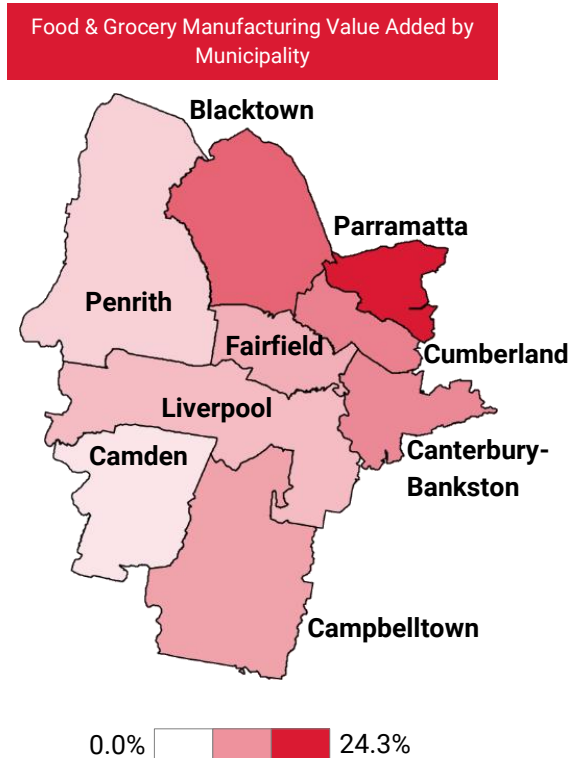
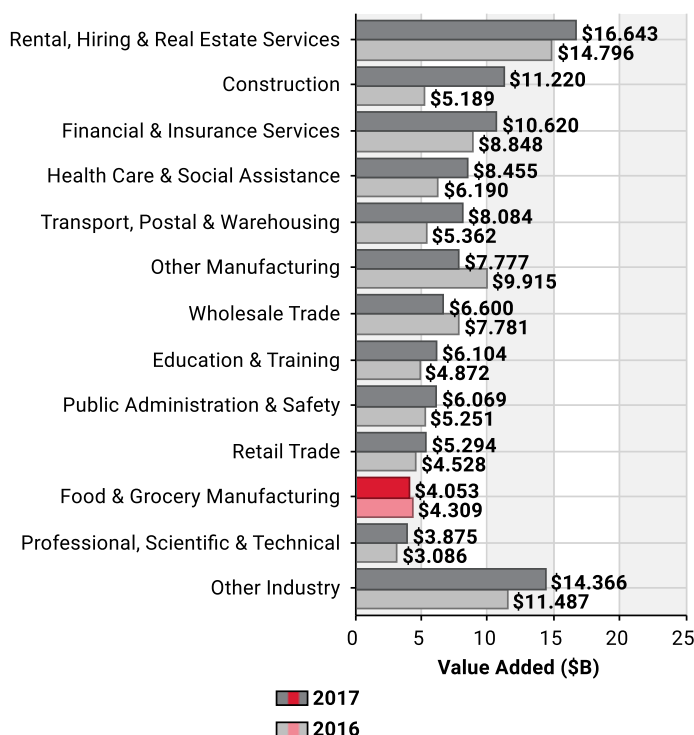
Figure 4-3 Western Sydney Industry Wages & Salaries**Table 4-3 Western Sydney Food & Grocery Manufacturing Wages & Salaries by LGA - 2011 & 2016**

Local Government Area	Food and Manufacturing Wages & Salaries (\$M)			Total Wages & Salaries (\$M)			% of Total Wages & Salaries (\$M) (2017)
	2017	2016	% Change	2017	2016	% Change	
Blacktown (C)	\$337.746	\$313.546	7.7%	\$8,870.119	\$7,080.328	25.3%	3.8%
Camden (A)	\$38.403	\$22.287	72.3%	\$1,947.568	\$1,269.809	53.4%	2.0%
Campbelltown (C)	\$197.509	\$187.771	5.2%	\$3,893.390	\$3,356.786	16.0%	5.1%
Canterbury-Bankstown (C)	\$276.538	\$268.280	3.1%	\$7,565.655	\$6,538.105	15.7%	3.7%
Cumberland (A)	\$264.609	\$263.908	0.3%	\$5,908.781	\$5,087.343	16.1%	4.5%
Fairfield (C)	\$187.614	\$193.974	-3.3%	\$4,520.687	\$3,863.508	17.0%	4.2%
Liverpool (C)	\$118.572	\$148.445	-20.1%	\$5,755.349	\$4,821.810	19.4%	2.1%
Parramatta (C)	\$447.654	\$533.553	-16.1%	\$12,944.930	\$11,196.431	15.6%	3.5%
Penrith (C)	\$80.370	\$72.008	11.6%	\$5,633.093	\$4,490.501	25.4%	1.4%
Western Sydney	\$1,949.014	\$2,003.773	-2.7%	\$57,039.573	\$47,704.621	19.6%	3.4%

4.4 Value Added

Total value-add⁵ in Western Sydney in 2017 is estimated at \$109.159 billion. The Food and Manufacturing Sector contributes \$4.053 billion towards this amount (3.7%). This is the eleventh largest industry sector by value-add in Western Sydney.

Figure 4-4 Western Sydney Industry Value-Add



The Western Sydney municipality with the largest value-add contribution to Food & Grocery Manufacturing in Western Sydney is Parramatta City at \$983.632 million, however, it is Campbelltown City which has the highest proportion of their region's total value-add generated by the Food & Grocery Manufacturing sector (5.5%).

Table 4-4 Western Sydney Food & Grocery Manufacturing Value Added by LGA - 2016 & 2017

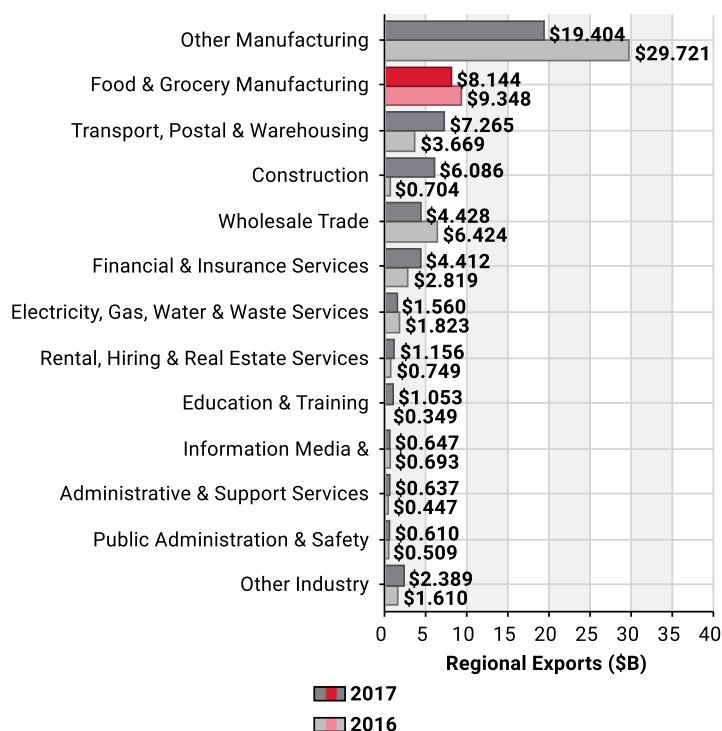
Local Government Area	Food and Manufacturing Value Added (\$M)			Total Value Added (\$M)			% of Total Value Added (2017)
	2017	2016	% Change	2017	2016	% Change	
Blacktown (C)	\$668.822	\$619.167	8.0%	\$17,200.240	\$13,868.860	24.0%	3.9%
Camden (A)	\$114.332	\$70.803	61.5%	\$3,827.181	\$2,492.056	53.6%	3.0%
Campbelltown (C)	\$398.477	\$364.499	9.3%	\$7,191.962	\$6,200.701	16.0%	5.5%
Canterbury-Bankstown (C)	\$507.161	\$529.585	-4.2%	\$14,365.608	\$12,486.038	15.1%	3.5%
Cumberland (A)	\$545.269	\$664.488	-17.9%	\$11,621.681	\$9,936.552	17.0%	4.7%
Fairfield (C)	\$347.283	\$365.297	-4.9%	\$8,577.142	\$7,400.384	15.9%	4.0%
Liverpool (C)	\$288.961	\$334.543	-13.6%	\$10,463.665	\$8,734.691	19.8%	2.8%
Parramatta (C)	\$983.632	\$1,188.298	-17.2%	\$25,636.941	\$22,265.439	15.1%	3.8%
Penrith (C)	\$198.766	\$172.463	15.3%	\$10,274.819	\$8,228.424	24.9%	1.9%
Western Sydney	\$4,052.702	\$4,309.143	-6.0%	\$109,159.239	\$91,613.145	19.2%	3.7%

⁵ Value-Added data represents the marginal economic value that is added by each industry sector in a defined region. Value-Added can be calculated by subtracting local expenditure and expenditure on regional imports from the output generated by an industry sector. Value-Added by industry sector is the major element in the calculation of Gross Regional Product/Gross State Product/Gross Domestic Product.

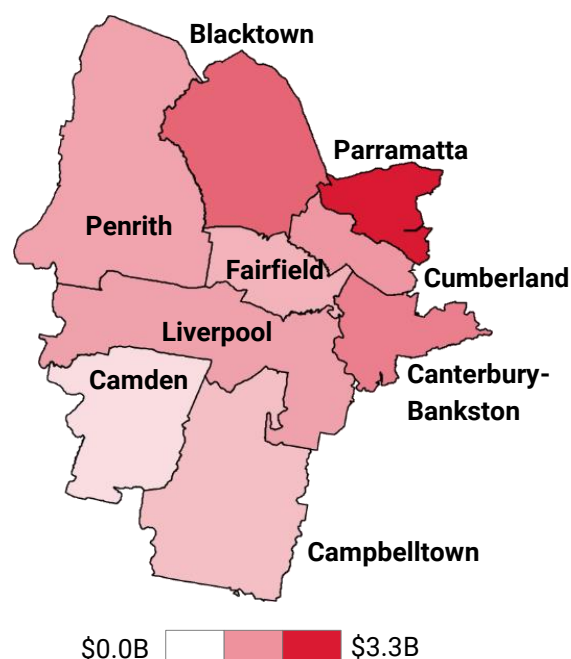
4.5 Regional Exports

Total regional exports from Western Sydney in 2017 is estimated at \$57.791 billion. The Food and Manufacturing Sector contributes \$8.144 billion towards this amount (14.1%). This is the second largest industry sector by regional exports in Western Sydney behind all other forms of manufacturing which exported \$19.404 billion (or 33.6% of total exports).

Figure 4-5 Western Sydney Industry Regional Exports



Food & Grocery Manufacturing Regional Exports by Municipality (\$B)



The Western Sydney municipality with the largest regional export⁶ from the Food & Grocery Manufacturing is Parramatta City at \$3.322 billion, however, it is Campbelltown City which has the highest proportion of their exports generated by the Food & Grocery Manufacturing sector (27.1%).

Table 4-5 Western Sydney Food & Grocery Manufacturing Regional Exports by LGA - 2016 & 2017

Local Government Area	Food and Manufacturing Regional Exports (\$M)			Total Value Regional Exports (\$M)			% of Total Regional Exports (2017)
	2017	2016	% Change	2017	2016	% Change	
Blacktown (C)	\$1,550.406	\$1,352.037	14.7%	\$11,496.552	\$10,369.133	10.9%	13.5%
Camden (A)	\$155.894	\$90.327	72.6%	\$2,186.580	\$1,361.728	60.6%	7.1%
Campbelltown (C)	\$1,279.199	\$1,201.323	6.5%	\$4,722.320	\$4,797.225	-1.6%	27.1%
Canterbury-Bankstown (C)	\$1,232.528	\$1,182.811	4.2%	\$9,179.369	\$9,594.260	-4.3%	13.4%
Cumberland (A)	\$1,528.828	\$1,615.819	-5.4%	\$9,036.141	\$9,896.650	-8.7%	16.9%
Fairfield (C)	\$814.450	\$876.263	-7.1%	\$6,463.199	\$6,941.663	-6.9%	12.6%
Liverpool (C)	\$392.401	\$628.858	-37.6%	\$6,430.915	\$6,492.092	-0.9%	6.1%
Parramatta (C)	\$3,322.376	\$4,125.666	-19.5%	\$21,001.862	\$21,133.553	-0.6%	15.8%
Penrith (C)	\$216.438	\$232.196	-6.8%	\$5,412.044	\$4,663.557	16.0%	4.0%
Western Sydney	\$8,144.292	\$9,347.828	-12.9%	\$57,791.302	\$58,863.815	-1.8%	14.1%

⁶ A fraction of these exports are destined for another region within Western Sydney.

4.5.1 Food & Grocery Manufacturing International Exports⁷

Of the \$8.144 billion in Food & Grocery Manufacturing exported from Western Sydney in 2017, \$2.458 billion was destined for foreign markets (30.2% of total exports produced by Food and Manufacturing in Western Sydney). This leaves \$5.686 billion exported for domestic use elsewhere within Australia. Between 2016 and 2017, international exports grew by 10.1% up from \$2.232 billion in 2016.

The Western Sydney municipality that produces the largest value in international exports from the Food & Grocery Manufacturing is Parramatta City at \$486.438 million, however, it is Penrith City which has the highest proportion of their food and manufacturing exports destined for international markets (39.0%).

Meat & Meat Product Manufacturing supports more than a third of overseas exports from Western Sydney's Food & Grocery Manufacturing sector.

Figure 4-6 Food & Grocery Manufacturing International Exports, 2017

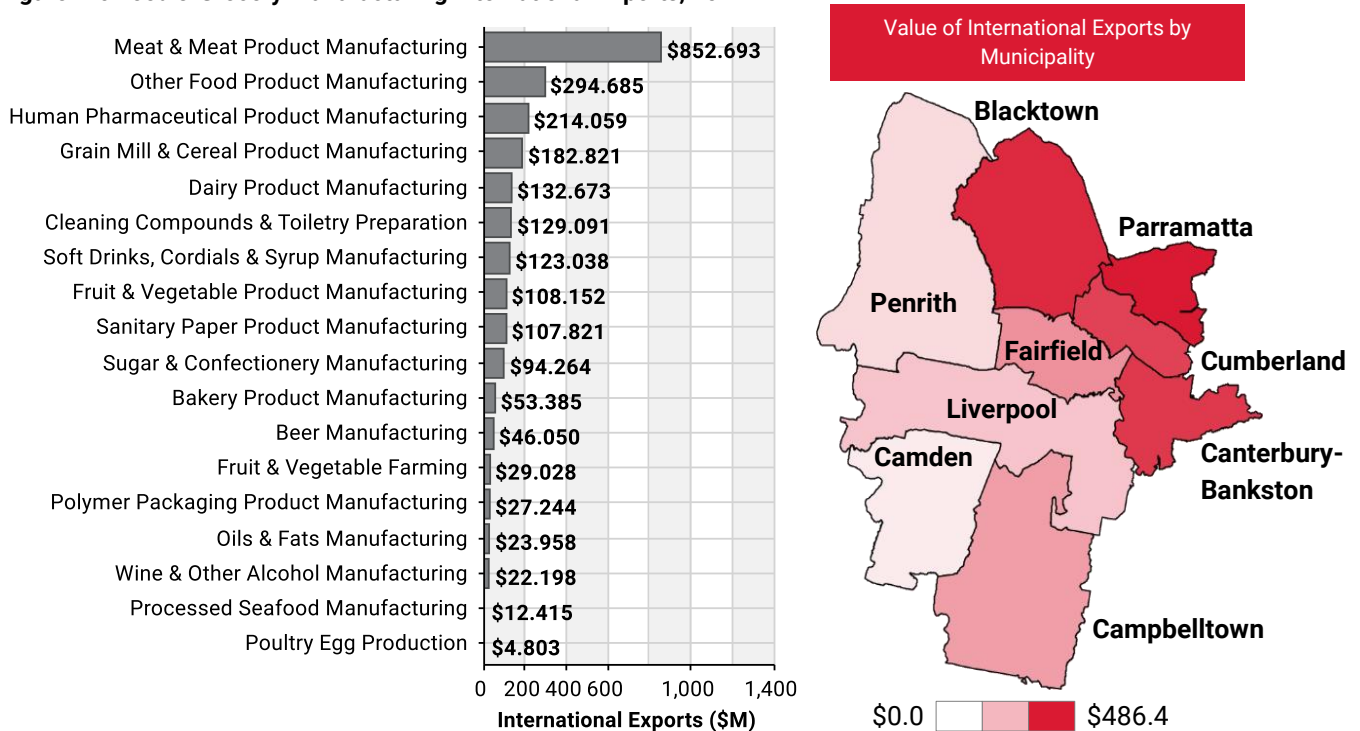


Table 4-6 Western Sydney Food & Grocery Manufacturing International Exports by LGA - 2016 & 2017

Local Government Area	Food and Manufacturing International Exports (\$M)			Food and Manufacturing Regional Exports (\$M)			% of Total Intl Exports (2017)
	2017	2016	% Change	2017	2016	% Change	
Blacktown (C)	\$452.506	\$355.037	27.5%	\$1,550.406	\$1,352.037	14.7%	29.2%
Camden (A)	\$43.917	\$22.654	93.9%	\$155.894	\$90.327	72.6%	28.2%
Campbelltown (C)	\$205.713	\$166.092	23.9%	\$1,279.199	\$1,201.323	6.5%	16.1%
Canterbury-Bankstown (C)	\$422.505	\$349.688	20.8%	\$1,232.528	\$1,182.811	4.2%	34.3%
Cumberland (A)	\$401.602	\$339.432	18.3%	\$1,528.828	\$1,615.819	-5.4%	26.3%
Fairfield (C)	\$235.058	\$209.087	12.4%	\$814.450	\$876.263	-7.1%	28.9%
Liverpool (C)	\$126.164	\$199.695	-36.8%	\$392.401	\$628.858	-37.6%	32.2%
Parramatta (C)	\$486.438	\$506.298	-3.9%	\$3,322.376	\$4,125.666	-19.5%	14.6%
Penrith (C)	\$84.476	\$73.415	15.1%	\$216.438	\$232.196	-6.8%	39.0%
Western Sydney	\$2,458.378	\$2,231.883	10.1%	\$8,144.292	\$9,347.828	-12.9%	30.2%

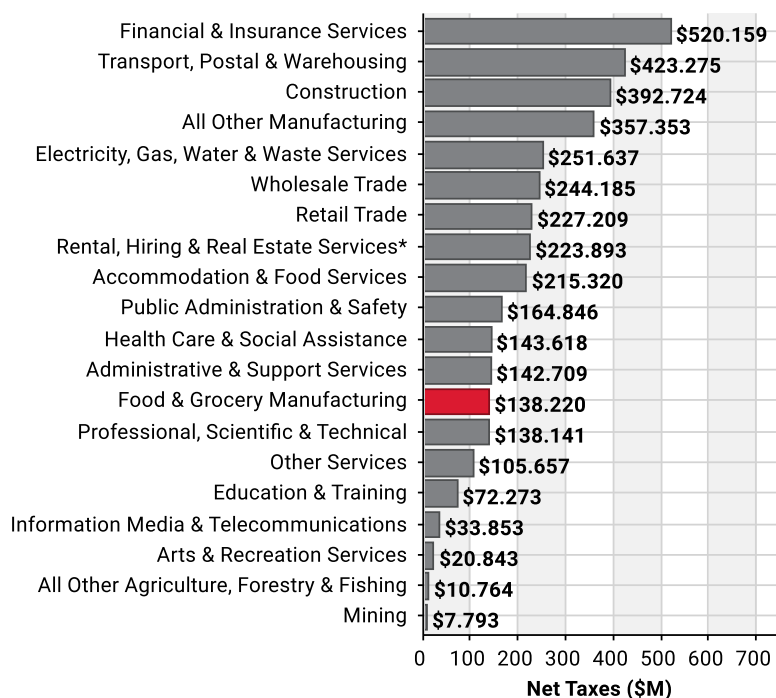
⁷ Please note a portion of regional exports are destined for input into value-added products elsewhere in Australia that are subsequently also exported overseas.

4.6 Net Taxes

Net Taxes here includes all taxes, levies, fees and tariffs on goods and services and other production processes levied by local, state and commonwealth government agencies less subsidies and other financial transfers from government to industry.

Western Sydney collected an estimated \$3.834 billion in net taxes from local industry in 2017. The Food & Grocery Manufacturing sector contributes 27.9% of total tax collected from the broader manufacturing sector in Western Sydney. The sector in Western Sydney contributed \$138.220 million towards total net taxes collected (3.6%).

Figure 4-7 Western Sydney Net Taxes by Industry (\$M)⁸



The Western Sydney municipality with the largest output contribution to Food & Grocery Manufacturing is Parramatta at \$4.485 billion. As a result, their local Food & Grocery Manufacturing industry has largest tax contribution at \$31.593 million from the sectors. Approximately 3.3% of net taxes collected from industry in Parramatta is sourced from the local Food & Grocery Manufacturing industry.

Table 4-7 Western Sydney Food & Grocery Manufacturing Net Taxes by Municipality - 2017

Local Government Area	Food and Manufacturing International Net Taxes (\$M)		
	Food & Grocery Net Taxes (\$M)	Total Net Taxes (\$M)	% of Total Net Taxes (%)
Blacktown (C)	\$24.027	\$647.669	3.7%
Camden (A)	\$5.200	\$139.992	3.7%
Campbelltown (C)	\$10.454	\$232.005	4.5%
Canterbury-Bankstown (C)	\$17.667	\$472.474	3.7%
Cumberland (A)	\$25.293	\$412.575	6.1%
Fairfield (C)	\$9.175	\$293.704	3.1%
Liverpool (C)	\$9.258	\$325.777	2.8%
Parramatta (C)	\$31.593	\$969.123	3.3%
Penrith (C)	\$5.552	\$341.153	1.6%
Western Sydney	\$138.220	\$3,834.472	3.6%

⁸ Estimates of Net Taxes excludes Ownership of Dwellings

5 Western Sydney Councils

5.1 Blacktown City

Blacktown is a vibrant city located in the north of Western Sydney and halfway between Sydney CBD and the Blue Mountains. With a population of 356,859 persons and economy that supports 109,302 jobs, Blacktown is the second largest municipality by population and employment in Western Sydney. The Food & Grocery Manufacturing sector in Blacktown represents 7.2% of the total municipal output at a value of \$2.792 billion and contributes towards 16.2% of Western Sydney's output from the sector.

As a major contributor towards Western Sydney's Food & Grocery Manufacturing sector, Blacktown is the largest contributor in terms of Other Food Product Manufacturing and Grain Mill & Cereal Product Manufacturing. Other prominent sectors in the city include Meat & Meat Product Manufacturing, Poultry Egg Production, Bakery Product Manufacturing and Sugar & Confectionary Manufacturing. In total, Blacktown contributes towards seventeen of the eighteen sub-divisions within Western Sydney's broader Food and Grocery Sector.

The top five Food & Grocery Manufacturing sub-divisions in Blacktown contribute 75.8% of total Food & Grocery Manufacturing output.

Top Five Food & Grocery Manufacturing Sub-Divisions in Blacktown City by Output				
1	2	3	4	5
Other Food Product Manufacturing	Meat & Meat Product Manufacturing	Grain Mill & Cereal Product Manufacturing	Soft Drinks, Cordials & Syrup Manufacturing	Human Pharmaceutical Product Manufacturing
\$782.815 Million	\$478.794 Million	\$373.989 Million	\$315.125 Million	\$166.262 Million

Total Food & Grocery Manufacturing employment in Blacktown City is 4,176 jobs; 3.8% of total jobs in the city and 17.1% of jobs in Western Sydney's Food & Grocery Manufacturing sector.

Top Five Food & Grocery Manufacturing Sub-Divisions in Blacktown City by Employment				
1	2	3	4	5
Bakery Product Manufacturing	Meat & Meat Product Manufacturing	Other Food Product Manufacturing	Soft Drinks, Cordials & Syrup Manufacturing	Grain Mill & Cereal Product Manufacturing
995 Jobs	837 Jobs	740 Jobs	384 Jobs	330 Jobs

Overall, Blacktown City's Food & Grocery Manufacturing sector generates \$668.822 million in value-added or 16.5% of the portion of value-added generated by Western Sydney's Food & Grocery Manufacturing sector. Value-added by industry sector is a key contributor toward Gross Regional Product.

Top Five Food & Grocery Manufacturing Sub-Divisions in Blacktown City by Value Added				
1	2	3	4	5
Other Food Product Manufacturing	Meat & Meat Product Manufacturing	Soft Drinks, Cordials & Syrup Manufacturing	Grain Mill & Cereal Product Manufacturing	Bakery Product Manufacturing
\$174.254 Million	\$94.271 Million	\$94.160 Million	\$77.157 Million	\$50.974 Million

5.2 Camden Shire

Between 2007 and 2017, Camden was the ninth fastest growing municipality in Australia and the least populated region in Western Sydney. The shire is home to 87,250 residents and provides employment to 25,917 persons. The shire is bounded by Liverpool City in the north, Campbelltown City in the east and Wollondilly in the south and west. Major suburbs are Camden and Narellan, with a concentration of agricultural farms at Leppington in the shire's north-east and an industrial quarter at Smeaton Grange. Total Food & Grocery Manufacturing sector output from Camden is \$346.792 or 4.0% of total output.

Camden Shire is the smallest contributor to Food & Grocery Manufacturing in Western Sydney; however, between 2011 and 2016, there has been a 49.9% increase in the sector's employment which was the largest rate of change experienced across the Western Sydney region. In terms of output it is the third largest contributor in terms of Fruit and Vegetable Farming and Beer Manufacturing. Camden contributes towards thirteen of the eighteen sub-divisions within Western Sydney's broader Food and Grocery Sector. Total Food & Grocery Manufacturing employment in Camden Shire is 562 jobs; 2.2% of total shire jobs and 2.3% of jobs in Western Sydney's Food & Grocery Manufacturing sector.

The top five Food & Grocery Manufacturing sub-divisions in Camden contribute 72.7% of total Food & Grocery Manufacturing output.

Top Five Food & Grocery Manufacturing Sub-Divisions in Camden Shire by Output				
1	2	3	4	5
Beer Manufacturing	Fruit & Vegetable Farming	Other Food Product Manufacturing	Meat & Meat Product Manufacturing	Fruit & Vegetable Product Manufacturing
\$71.135 Million	\$35.936 Million	\$51.835 Million	\$36.610 Million	\$25.832 Million

Total Food & Grocery Manufacturing employment in Camden Shire is 562 jobs; equal to 2.2% of total shire jobs and 2.3% of jobs in Western Sydney's Food & Grocery Manufacturing sector.

Top Five Food & Grocery Manufacturing Sub-Divisions in Camden Shire by Employment				
1	2	3	3	5
Fruit & Vegetable Farming	Meat & Meat Product Manufacturing	Beer Manufacturing	Bakery Product Manufacturing	Other Food Product Manufacturing
196 Jobs	64 Jobs	58 Jobs	58 Jobs	49 Jobs

Overall, Camden Shire's Food & Grocery Manufacturing sector generates \$114.332 million in value-added or 2.8% of the portion of value-added generated by Western Sydney's Food & Grocery Manufacturing sector.

Top Five Food & Grocery Manufacturing Sub-Divisions in Camden Shire by Value Added				
1	2	3	4	5
Fruit & Vegetable Farming	Beer Manufacturing	Other Food Product Manufacturing	Poultry Egg Production	Meat & Meat Product Manufacturing
\$37.299 Million	\$27.205 Million	\$11.538 Million	\$8.519 Million	\$7.208 Million

5.3 Campbelltown City

Campbelltown is located 53 kilometres southwest of Sydney CBD and covers an area of 312 square kilometres extending from Glenfield in the north, Menangle Park in the south, the Scenic Hills in the west and the Georges River in the east. The city has a population of 164,273 persons and 49,690 persons working in the region. The Food & Grocery Manufacturing sector in Campbelltown City represents 11.0% of total municipal output at \$1.820 billion; the highest proportion of any municipality in Western Sydney.

In terms of output, Campbelltown City is the largest contributor in Sugar & Confectionary Manufacturing as well as second largest in both Human Pharmaceutical Product Manufacturing and Sanitary Product Manufacturing. The city also has notable prominence in Other Food Product Manufacturing (3rd highest in Western Sydney) and Cleaning Compounds & Toiletry Prep. Manufacturing (3rd highest in Western Sydney). Overall, Campbelltown City contributes towards thirteen of the eighteen sub-divisions within Western Sydney's Food and Grocery Sector.

The top five Food & Grocery Manufacturing sub-divisions in Campbelltown contribute 86.5% of total Food & Grocery Manufacturing output.

Top Five Food & Grocery Manufacturing Sub-Divisions in Campbelltown City by Output				
1	2	3	4	5
Other Food Product Manufacturing	Human Pharmaceutical Product Manufacturing	Cleaning Compounds & Toiletry Preparation Manu.	Sanitary Product Manufacturing	Sugar & Confectionary Manufacturing
\$489.788 Million	\$381.621 Million	\$299.916 Million	\$212.451 Million	\$189.343 Million

Total Food & Grocery Manufacturing employment in Campbelltown City is 2,113 jobs; 4.3% of total jobs in the city and 8.7% of jobs in Western Sydney's Food & Grocery Manufacturing sector.

Top Five Food & Grocery Manufacturing Sub-Divisions in Campbelltown City by Employment				
1	2	3	4	5
Other Food Product Manufacturing	Bakery Product Manufacturing	Human Pharmaceutical Product Manufacturing	Cleaning Compounds & Toiletry Preparation Manu.	Sugar & Confectionary Manufacturing
463 Jobs	352 Jobs	342 Jobs	297 Jobs	218 Jobs

Overall, Campbelltown City's Food & Grocery Manufacturing sector generates \$398.477 million in value-added or 9.8% of the portion of value-added generated by Western Sydney's Food and Grocer Grocery Manufacturing sector.

Top Five Food & Grocery Manufacturing Sub-Divisions in Campbelltown City by Value Added				
1	2	3	4	5
Other Food Product Manufacturing	Human Pharmaceutical Product Manufacturing	Cleaning Compounds & Toiletry Preparation Manu.	Sanitary Product Manufacturing	Sugar & Confectionary Manufacturing
\$109.026 Million	\$70.742 Million	\$65.732 Million	\$53.991 Million	\$40.683 Million

5.4 Canterbury-Bankstown City

Canterbury-Bankstown City is the largest municipality in New South Wales by population. The shire is in the eastern most part of Western Sydney and is bounded by Inner Sydney in the east, Georges River to the south and the rest of Western Sydney to the west. The Shire is home to Bankstown Airport. The shire's population is 367,519 persons and 97,813 persons working in the region. Despite being the largest council area by population in NSW, Canterbury-Bankstown is the sixth largest municipality by employment in NSW. The Food & Grocery Manufacturing sector in Canterbury-Bankstown City represents 6.8% of total municipal output at \$2.286 billion and contributes 13.3% of Western Sydney's output from the sector.

Canterbury-Bankstown City is the largest contributor in Western Sydney's Food and Grocery Sector in terms of Meat & Meat Product Manufacturing, Cleaning Compounds & Toiletry Preparation Manufacturing, Bakery Product Manufacturing, Wine & Other Alcohol Manufacturing, and Polymer Packaging Product Manufacturing. Canterbury-Bankstown is also a significant contributor in many other subdivisions associated with the Food & Grocery Manufacturing sector in Western Sydney contributing to seventeen of the eighteen Food & Grocery Manufacturing sub-divisions within Western Sydney.

The top five Food & Grocery Manufacturing Sub-Divisions in Canterbury-Bankstown contribute 77.7% of total Food & Grocery Manufacturing output.

Top Five Food & Grocery Manufacturing Sub-Divisions in Canterbury-Bankstown City by Output				
				
Meat & Meat Product Manufacturing	Other Food Product Manufacturing	Cleaning Compounds & Toiletry Preparation Manu.	Polymer Packaging Product Manufacturing	Bakery Product Manufacturing
\$679.006 Million	\$407.275 Million	\$324.152 Million	\$191.602 Million	\$173.406 Million

Total Food & Grocery Manufacturing employment in Canterbury-Bankstown is 3,914 jobs; 4.0% of total jobs in the city and 16.0% of jobs in Western Sydney's Food & Grocery Manufacturing sector.

Top Five Food & Grocery Manufacturing Sub-Divisions in Canterbury-Bankstown City by Employment				
				
Meat & Meat Product Manufacturing	Bakery Product Manufacturing	Other Food Product Manufacturing	Cleaning Compounds & Toiletry Preparation Manu.	Polymer Packaging Product Manufacturing
1,187 Jobs	1,165Jobs	385 Jobs	321 Jobs	271 Jobs

Overall, Canterbury-Bankstown City's Food & Grocery Manufacturing sector generates \$507.161 million in value-added or 12.5% of the portion of value-added generated by Western Sydney's Food and Grocer Grocery Manufacturing sector. Value-added by industry sector is a key contributor toward Gross Regional Product.

Top Five Food & Grocery Manufacturing Sub-Divisions in Canterbury-Bankstown City by Value Added				
				
Meat & Meat Product Manufacturing	Other Food Product Manufacturing	Cleaning Compounds & Toiletry Preparation Manu.	Bakery Product Manufacturing	Polymer Packaging Product Manufacturing
\$133.691 Million	\$90.659 Million	\$71.044 Million	\$59.683 Million	\$37.985 Million

5.5 Cumberland Shire

Cumberland Shire is in the north-east of Western Sydney and centred between Parramatta City in the North, Strathfield Shire in the east, Blacktown to the west and Canterbury-Bankstown City and Fairfield City to the south. With a population of 209,107 persons and 72,702 persons working in the region, Cumberland Shire has the second highest proportion of workers in the Food & Grocery Manufacturing sector amongst the municipalities in Western Sydney. The Food & Grocery Manufacturing sector in Cumberland Shire represents 8.7% of total municipal output at \$2.388 billion and contributes 13.9% of Western Sydney's output from the sector.

Cumberland Shire is a major contributor towards Western Sydney's Food & Grocery Manufacturing sector. It is the largest contributor in terms of Beer Manufacturing, Dairy Product Manufacturing, Fruit & Vegetable Product Manufacturing. The shire is also the largest of three local government areas in Western Sydney involved in Processed Seafood Manufacturing. Cumberland Shire is also a significant contributor in many other subdivisions associated with the Food & Grocery Manufacturing sector in Western Sydney as it is the only municipality contributing all eighteen sub-divisions within Western Sydney's Food and Grocery Sector.

The top five Food & Grocery Manufacturing sub-divisions in Cumberland contribute 77.0% of total Food & Grocery Manufacturing output.

Top Five Food & Grocery Manufacturing Sub-Divisions in Cumberland Shire by Output				
1	2	3	4	5
Meat & Meat Product Manufacturing	Other Food Product Manufacturing	Dairy Product Manufacturing	Beer Manufacturing	Human Pharmaceutical Product Manufacturing
\$489.663 Million	\$393.523 Million	\$343.671 Million	\$326.241 Million	\$286.774 Million

Total Food & Grocery Manufacturing employment in Cumberland is 2,984 jobs; 4.1% of total jobs in the city and 12.2% of jobs in Western Sydney's Food & Grocery Manufacturing sector.

Top Five Food & Grocery Manufacturing Sub-Divisions in Cumberland Shire by Employment				
1	2	3	4	5
Meat & Meat Product Manufacturing	Dairy Product Manufacturing	Other Food Product Manufacturing	Bakery Product Manufacturing	Beer Manufacturing
856 Jobs	416 Jobs	372 Jobs	314 Jobs	266 Jobs

Overall, Cumberland's Food & Grocery Manufacturing sector generates \$545.269 million in value-added or 13.5% of the portion of value-added generated by Western Sydney's Food and Grocer Grocery Manufacturing sector. Value-added by industry sector is a key contributor toward Gross Regional Product.

Top Five Food & Grocery Manufacturing Sub-Divisions in Cumberland Shire by Value Added				
1	2	3	4	5
Beer Manufacturing	Meat & Meat Product Manufacturing	Other Food Product Manufacturing	Dairy Product Manufacturing	Human Pharmaceutical Product Manufacturing
\$489.663 Million	\$393.523 Million	\$343.671 Million	\$326.241 Million	\$286.774 Million

5.6 Fairfield City

Fairfield City is 32km south-west of the Sydney Central Business District and covers an area of 104 square km, incorporating 27 suburbs. The shire is bounded by Blacktown City and Cumberland Shire in the north, Canterbury-Bankstown in the east, Liverpool in the south and Penrith in the west. The city has a population of 217,736 persons and 58,106 persons working in the region. The Food & Grocery Manufacturing sector in Fairfield City represents 7.3% of total municipal output at \$1.485 billion. Furthermore, Fairfield contributes towards 8.6% of Western Sydney's output from the sector.

The top five Food & Grocery Manufacturing Sub-Divisions in Fairfield contribute 62.9% of total Food & Grocery Manufacturing output. Fairfield City is the largest contributor to Sanitary Product Manufacturing, Meat & Meat Product Manufacturing and Oils & Fats Manufacturing in Western Sydney. Overall, Fairfield contributes towards all but one sub-division within Western Sydney's Food and Grocery Sector.

Top Five Food & Grocery Manufacturing Sub-Divisions in Fairfield City by Output

1	2	3	4	5
				
Sanitary Product Manufacturing	Meat & Meat Product Manufacturing	Cleaning Compounds & Toiletry Preparation Manu.	Grain Mill & Cereal Product Manufacturing	Other Food Product Manufacturing
\$426.163 Million	\$166.462 Million	\$120.168 Million	\$114.463 Million	\$106.844 Million

Total Food & Grocery Manufacturing employment in Fairfield City is 2,081 jobs; 3.6% of total jobs in the city and 8.5% of jobs in Western Sydney's Food & Grocery Manufacturing sector.

Top Five Food & Grocery Manufacturing Sub-Divisions in Fairfield City by Employment

1	2	3	4	5
				
Bakery Product Manufacturing	Sanitary Product Manufacturing	Meat & Meat Product Manufacturing	Cleaning Compounds & Toiletry Preparation Manu.	Dairy Product Manufacturing
515 Jobs	396 Jobs	291 Jobs	119 Jobs	103 Jobs

Overall, Fairfield City's Food & Grocery Manufacturing sector generates \$347.283 million in value-added or 8.6% of the portion of value-added generated by Western Sydney's Food and Grocer Grocery Manufacturing sector. Value-added by industry sector is a key contributor toward Gross Regional Product.

Top Five Food & Grocery Manufacturing Sub-Divisions in Fairfield City by Value Added

1	2	3	4	5
				
Sanitary Product Manufacturing	Meat & Meat Product Manufacturing	Bakery Product Manufacturing	Cleaning Compounds & Toiletry Preparation Manu.	Other Food Product Manufacturing
\$108.304 Million	\$32.775 Million	\$26.383 Million	\$26.337 Million	\$23.783 Million

5.7 Liverpool City

Liverpool consists of 42 suburbs and the Liverpool central business district has become the major commercial centre of south-west Sydney, as it includes many shopping centres and high-rise office buildings. The city has a population of 243,464 persons and 70,037 persons working in the region. The Food & Grocery Manufacturing sector in Liverpool City represents 2.8% of total municipal output at \$984.460 million and contributes towards 4.3% of Western Sydney's output from the sector.

Liverpool City is the largest contributor in terms of Fruit & Vegetable Farming. Liverpool City is also a significant contributor in many other subdivisions associated with the Food & Grocery Manufacturing sector in Western Sydney contributing to fifteen of the eighteen sub-divisions within Western Sydney's Food and Grocery Sector.

The top five Food & Grocery Manufacturing sub-divisions in Liverpool contribute 77.1% of total Food & Grocery Manufacturing output.

Top Five Food & Grocery Manufacturing Sub-Divisions in Liverpool City by Output				
1 	2 	3 	4 	5 
Human Pharmaceutical Product Manufacturing	Meat & Meat Product Manufacturing	Fruit & Vegetable Farming	Cleaning Compounds & Toiletry Preparation Manu.	Bakery Product Manufacturing
\$190.810 Million	\$161.314 Million	\$155.158 Million	\$129.257 Million	\$122.054 Million

Total Food & Grocery Manufacturing employment in Liverpool City is 2,154 jobs; 3.1% of total jobs in the city and 8.8% of jobs in Western Sydney's Food & Grocery Manufacturing sector.

Top Five Food & Grocery Manufacturing Sub-Divisions in Liverpool City by Employment				
1 	2 	3 	4 	5 
Bakery Product Manufacturing	Fruit & Vegetable Farming	Meat & Meat Product Manufacturing	Human Pharmaceutical Product Manufacturing	Cleaning Compounds & Toiletry Preparation Manu.
820 Jobs	455 Jobs	282 Jobs	171 Jobs	128 Jobs

Overall, Liverpool City's Food & Grocery Manufacturing sector generates \$288.961 million in value-added or 7.1% of the portion of value-added generated by Western Sydney's Food & Grocery Manufacturing sector. Value-added by industry sector is a key contributor toward Gross Regional Product.

Top Five Food & Grocery Manufacturing Sub-Divisions in Liverpool City by Value Added				
1 	2 	3 	4 	5 
Fruit & Vegetable Farming	Bakery Product Manufacturing	Human Pharmaceutical Product Manufacturing	Meat & Meat Product Manufacturing	Cleaning Compounds & Toiletry Preparation Manu.
\$86.649 Million	\$42.009 Million	\$35.371 Million	\$31.762 Million	\$28.329 Million

5.8 Parramatta City

Considered as the second CBD of Sydney, Parramatta is the geographical, commercial and cultural capital of Western Sydney. Parramatta has a population of 231,604 persons and has 143,166 persons working in the region; making the city Western Sydney's largest employing local government area. The Food & Grocery Manufacturing sector in Parramatta represents 8.4% of the city's total \$4.485 billion municipal output and contributes 26.1% of Western Sydney's output from the sector.

The top five Food & Grocery Manufacturing sub-divisions in Parramatta contribute 85.4% of total Food & Grocery Manufacturing output. Parramatta is the largest contributor towards Western Sydney's Food & Grocery Manufacturing sector. It is the largest contributor in terms of Human Pharmaceutical Product Manufacturing and Soft Drinks, Cordials & Syrup Manufacturing in Western Sydney. Parramatta is also a significant contributor in many other subdivisions associated with the Food & Grocery Manufacturing sector in Western Sydney contributing to sixteen of the eighteen sub-divisions within Western Sydney's Food and Grocery Sector.

Top Five Food & Grocery Manufacturing Sub-Divisions in Parramatta City by Output				
1	2	3	4	5
Human Pharmaceutical Product Manufacturing	Other Food Product Manufacturing	Soft Drinks, Cordials & Syrup Manufacturing	Cleaning Compounds & Toiletry Preparation Manu.	Grain Mill & Cereal Product Manufacturing
\$1.918 Billion	\$727.806 Million	\$633.532 Million	\$313.044 Million	\$239.127 Million

Total Food & Grocery Manufacturing employment in Parramatta is 4,980 jobs; 3.5% of total jobs in the city and 20.4% of jobs in Western Sydney's Food & Grocery Manufacturing sector.

Top Five Food & Grocery Manufacturing Sub-Divisions in Parramatta City by Employment				
1	2	3	3	5
Human Pharmaceutical Product Manufacturing	Soft Drinks, Cordials & Syrup Manufacturing	Other Food Product Manufacturing	Bakery Product Manufacturing	Cleaning Compounds & Toiletry Preparation Manu.
1,719 Jobs	772 Jobs	688 Jobs	565 Jobs	310 Jobs

Overall, Parramatta City's Food & Grocery Manufacturing sector generates \$983.632 million in value-added or 24.3% of the portion of value-added generated by Western Sydney's Food and Grocer Grocery Manufacturing sector.

Top Five Food & Grocery Manufacturing Sub-Divisions in Parramatta City by Value Added				
1	2	3	4	5
Human Pharmaceutical Product Manufacturing	Soft Drinks, Cordials & Syrup Manufacturing	Other Food Product Manufacturing	Cleaning Compounds & Toiletry Preparation Manu.	Grain Mill & Cereal Product Manufacturing
\$355.569 Million	\$189.301 Million	\$162.009 Million	\$68.610 Million	\$49.334 Million

5.9 Penrith City

Penrith is a major metropolitan area located in the western most part of Western Sydney. It sits on the edge of the Blue Mountains with Hawkesbury to the north and Wollondilly and Liverpool to the south. Penrith has a population of 202,785 persons and there are an estimated 71,502 persons employed in the region. The Food & Grocery Manufacturing sector in Penrith represents 2.8% of total municipal output at a value of \$625.665 million and contributes 3.6% of Western Sydney's output from the sector. The top five Food & Grocery Manufacturing sub-divisions in Penrith contribute 68.2% of total Food & Grocery Manufacturing output.

Penrith is a relatively minor contributor towards Western Sydney's Food & Grocery Manufacturing sector however is the largest contributor in terms of Poultry Egg Production in Western Sydney and second largest contributor towards Fruit & Vegetable Farming. Dairy Product Manufacturing and Bakery Product Manufacturing are also prominent. In total, Penrith contributes towards fifteen of the eighteen sub-divisions within Western Sydney's Food and Grocery Sector.

Top Five Food & Grocery Manufacturing Sub-Divisions in Penrith City by Output

1	2	3	4	5
				
Fruit & Vegetable Farming	Dairy Product Manufacturing	Meat & Meat Product Manufacturing	Other Food Product Manufacturing	Bakery Product Manufacturing
\$107.015 Million	\$82.613 Million	\$81.229 Million	\$79.339 Million	\$76.507 Million

Total Food & Grocery Manufacturing employment in Penrith City is 1,428 jobs; 2.0% of total jobs in the city and 4.8% of jobs in Western Sydney's Food & Grocery Manufacturing sector.

Top Five Food & Grocery Manufacturing Sub-Divisions in Penrith City by Employment

1	2	3	4	5
				
Bakery Product Manufacturing	Fruit & Vegetable Farming	Poultry Egg Production	Meat & Meat Product Manufacturing	Dairy Product Manufacturing
514 Jobs	314 Jobs	149 Jobs	142 Jobs	100 Jobs

Overall, Penrith City's Food & Grocery Manufacturing sector generates \$198.766 million in value-added or 4.9% of the portion of value-added generated by Western Sydney's Food and Grocer Grocery Manufacturing sector.

Top Five Food & Grocery Manufacturing Sub-Divisions in Penrith City by Value Added

1	2	3	4	5
				
Fruit & Vegetable Farming	Poultry Egg Production	Bakery Product Manufacturing	Other Food Product Manufacturing	Meat & Meat Product Manufacturing
\$59.764 Million	\$33.950 Million	\$26.332 Million	\$17.661 Million	\$15.993 Million

6 Appendix

6.1 Appendix – Business Counts, 2017

Business Counts 2016	Blacktown (C)	Camden (A)	Campbelltown (C) (NSW)	Canterbury-Bankstown (A)	Parramatta (C)	Cumberland (A)	Fairfield (C)	Liverpool (C)	Penrith (C)	Western Sydney
Agriculture, Forestry and Fishing	158	211	54	93	91	69	123	302	260	1,361
Mining	6	5	3	17	7	16	5	8	23	90
Manufacturing	985	276	521	1,590	747	873	996	791	724	7,503
Electricity, Gas, Water and Waste Services	58	16	27	85	55	66	60	50	59	476
Construction	3,994	1,624	1,718	7,055	3,982	5,412	3,518	3,717	3,369	34,389
Wholesale Trade	1,055	214	369	1,563	1,324	1,069	734	673	459	7,460
Retail Trade	1,375	313	566	2,266	1,529	1,362	1,164	972	749	10,296
Accommodation and Food Services	750	168	286	1,111	1,014	807	578	484	376	5,574
Transport, Postal and Warehousing	3,816	533	1,423	5,857	2,292	3,209	1,820	2,277	1,512	22,739
Information Media and Telecommunications	178	26	54	190	222	107	72	97	75	1,021
Financial and Insurance Services	1,117	415	535	1,459	2,028	786	716	800	819	8,675
Rental, Hiring and Real Estate Services	1,557	628	727	2,983	2,886	1,512	1,547	1,292	1,419	14,551
Professional, Scientific and Technical Services	2,040	630	800	2,548	3,492	1,510	952	1,181	1,098	14,251
Administrative and Support Services	1,121	240	406	1,446	1,327	1,058	720	743	567	7,628
Public Administration and Safety	155	40	40	277	113	162	73	118	62	1,040
Education and Training	248	77	133	349	378	209	140	148	191	1,873
Health Care and Social Assistance	975	271	521	1,513	1,678	976	743	833	648	8,158
Arts and Recreation Services	194	91	83	226	205	113	79	128	162	1,281
Other Services	1,109	349	502	1,375	805	758	899	748	804	7,349
Currently Unknown	234	69	107	432	357	313	163	179	142	1,996
Total	21,125	6,196	8,875	32,435	24,532	20,387	15,102	15,541	13,518	157,711

Source: Australian Bureau of Statistics, Counts of Australian Businesses, including Entries and Exits, Jun 2013 to Jun 2017, Cat. No. 8165.0

7 Resources

7.1 Resources

- Australian Food and Grocery Council: www.afgc.org.au
- REMPLAN Economic Development Practitioner Package for Western Sydney and participating Local Government Areas.
- Australian Bureau of Statistics (ABS), Various Publications (see below)

7.2 Definitions and Data Sources

REMPPLAN Modelling and Analysis System, developed by REMPLAN utilises the following sources:

- 2016 ABS Census Journey to Work Employment Data;
- 2014 / 2015 ABS National Input Output Tables;
- June 2017 ABS Gross State Product;
- Area specific data for Western Sydney and relevant Local Government Areas.

Population Data:

- ABS Catalogue number 3218.0 "Population Estimates by Local Government Area (ASGS 2016), 2007 to 2017".

Employment: REMPLAN data refers to 2011 & 2016 Place of Work (POW) Census data for Western Sydney and relevant Local Government Areas.

Business Counts: ABS Catalogue number 8165.0 "Counts of Australian Businesses, including Entries and Exits, Jun 2013 to Jun 2017".

Labour Force Data: Department of Employment, Small Area Labour Markets Australia. Latest data – March Quarter 2018

Output, Value-Added and Regional and International Exports: data is specific to the regional area based on the number of jobs within the region, utilising the latest National Accounts data (2014 / 2015 ABS National Input Output Tables) and the latest Gross State Product data.

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Disclaimer



All figures and data presented in this document are based on data sourced from the Australian Bureau of Statistics (ABS), and other government agencies. Using ABS datasets, the regional economic modelling software 'REMPPLAN economy', has been applied to generate industrial economic data estimates. This document is provided in good faith with every effort made to provide accurate data and apply comprehensive knowledge. However, REMPLAN does not guarantee the accuracy of the data nor the conclusions drawn from this information.