



TAI POUTINI WEST COAST GROWTH STUDY

EVIDENCE REPORT 2 – KEY SECTORS
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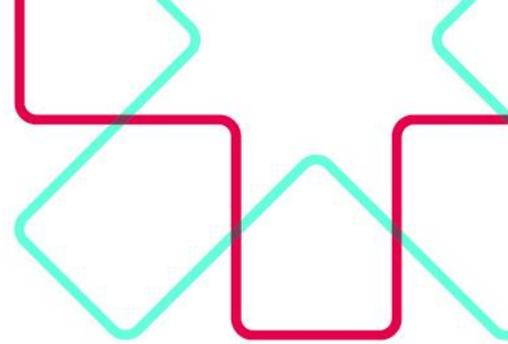
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PREFACE

This report has been prepared for Ministry of Business Innovation and Employment and the Ministry for Primary Industries by Stephen Knuckey, Jason Leung-Wai and Tim Borren from MartinJenkins (Martin, Jenkins & Associates Limited).

Infometrics provided regional and district data for this report. To allow us to undertake the analysis, all data used in this report was finalised on 31 July 2016.



INDUSTRY MIX AND CHANGE ON THE WEST COAST

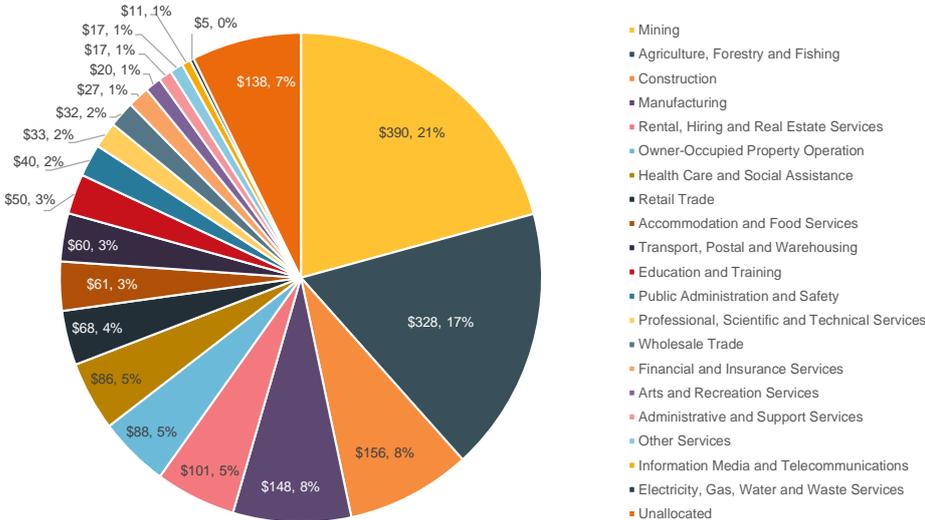
A region’s economic performance is underpinned by major sectors where the region has a comparative advantage. These sectors can usually be identified by the absolute and relative share of economic activity, both within the region but also against other regions. Productivity performance is linked to concentrations of related activities, where like businesses share knowledge and innovation and pools of specialist labour. These specialist areas help to attract further investment and labour.

At the same time, a resilient economy needs to maintain some industrial diversity. The more diverse the region’s economy, the more scope for varied interactions between firms and the more likely innovation will occur. Diversity also provides a broader economic base to protect against economic shocks.

Industry contribution to GDP and employment on the West Coast

Using standard industrial classifications, mining makes the largest proportional contribution to real GDP¹ in the region, contributing \$390 million (around 21 percent of the region’s GDP), with agriculture, forestry and fishing the next largest (\$328 million, 17 percent of the region’s GDP). Construction (\$156 million, 8 percent) and manufacturing (\$148 million, 8 percent) also make up a significant proportion of the economy (Figure 1). Together, these four industries make up over half of the West Coast economy.

Figure 1. GDP on the West Coast by industry, 2015



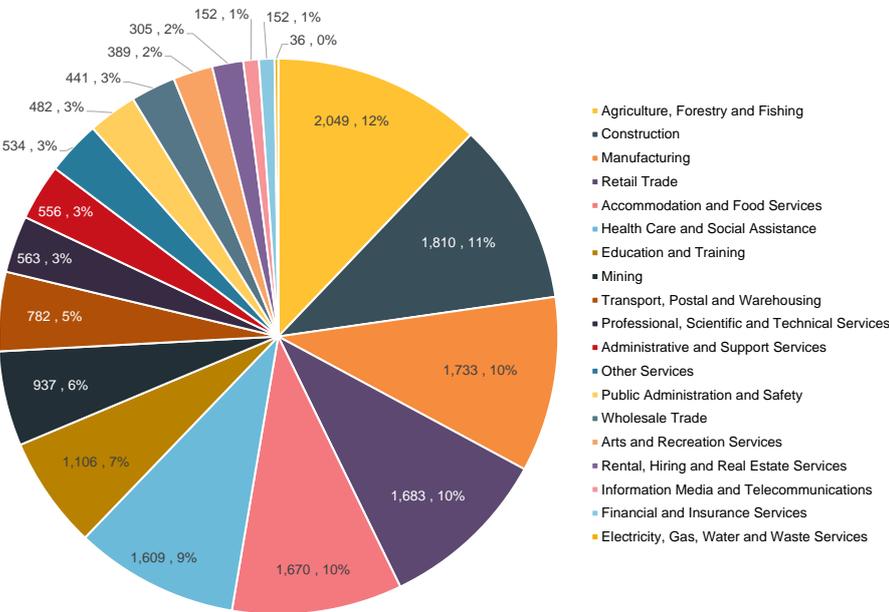
Source: Infometrics regional database.
Note: \$m.

¹ We use Infometrics regional GDP series, which differ from the Statistics New Zealand regional GDP estimates. All GDP values are estimates and are presented in 2010 dollars to account for inflation i.e., real numbers.



As shown in Figure 2, the health care and social assistance, agriculture, forestry and fishing, retail trade, education and training, construction and manufacturing industries are the largest employers on the West Coast, representing 63 percent of employment in the region between them.

Figure 2. Employment on the West Coast by industry, 2015



Source: Infometrics regional database.
 Note: Employment is defined as filled jobs.

The major differences between the employment and GDP breakdowns are:

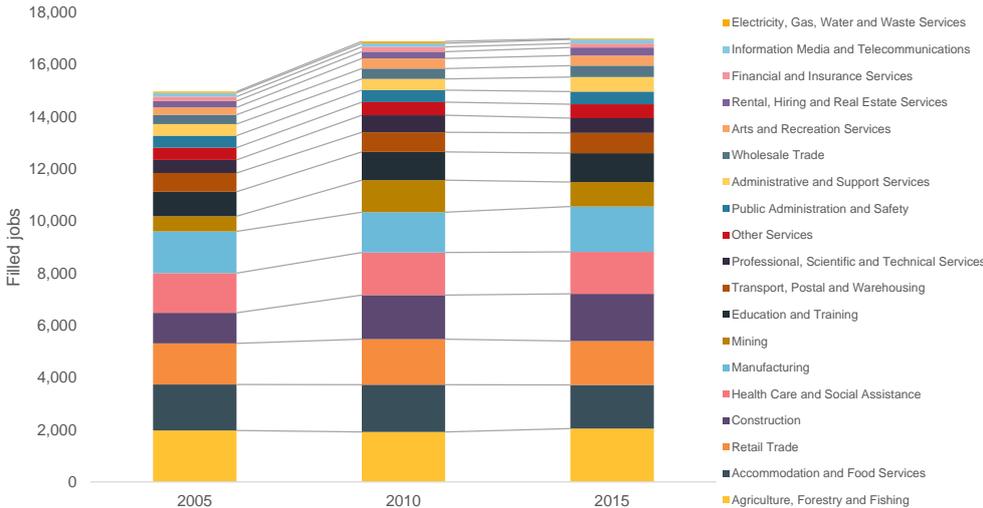
- mining is responsible for 21 percent of GDP, but only 6 percent of employment
- agriculture, forestry and fishing contributes 17 percent of GDP, but only 12 percent of employment
- health is responsible for 5 percent of GDP but 9 percent of employment
- retail trade is responsible for 4 percent of GDP but 10 percent of employment
- accommodation and food services contributes only 3 percent of GDP but 10 percent of employment
- education and training is responsible for 3 percent of GDP but 7 percent of employment.

Industries with a relatively high contribution to GDP compared to employment are likely to be important contributors to higher incomes in the region.



The economy and its composition has changed over time. Figure 3 shows that, although employment on the West Coast increased by over 2,000 employees, from close to 14,960 to around 16,990 between 2005 and 2015, there was very limited growth between 2010 and 2015 (by only 108 jobs). The largest proportional increases over 2005 to 2015 have been in mining (from 582 to 937 jobs or a 61 percent increase), construction (from 1,170 to 1,810 jobs or a 55 percent increase), and arts and recreation (from 283 to 389 jobs or a 38 percent increase). Administrative and support services, rental, hiring and real estate services, and wholesale trade services have also grown relatively strongly.

Figure 3. Employment on the West Coast by industry, 2005, 2010 and 2015



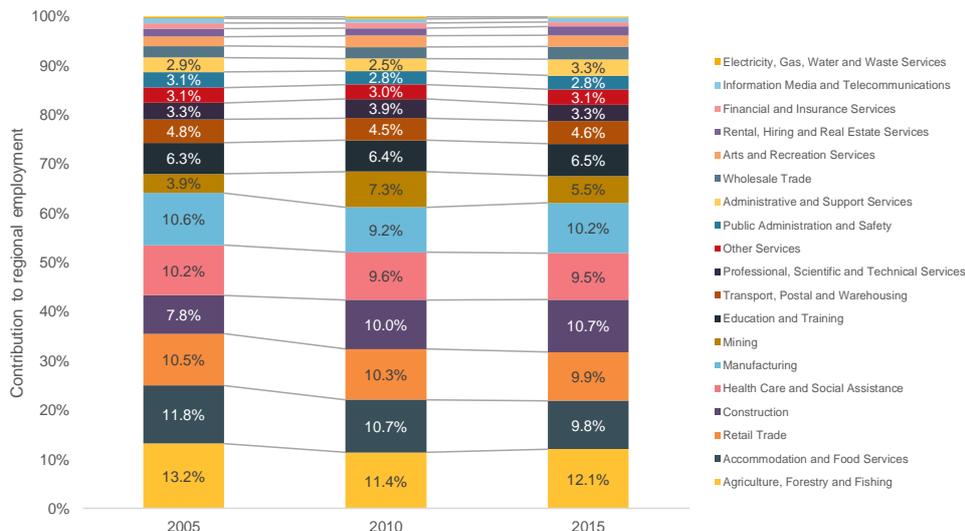
Source: Infometrics regional database.

However, employment fell in several industries between 2010 and 2015, particularly mining (a loss of 290 jobs), accommodation and food services (140 jobs) and professional and technical services (90 jobs).

Figure 4 shows that the employment composition of the economy has altered over 2005 to 2015, particularly over the last 5 years. Many of the largest industries - agriculture, forestry and fishing, accommodation and food services, retail trade and health care - contribute a smaller proportion of jobs in 2015 than they did in 2005. Construction contributes a higher proportion of jobs now than it did in 2005. The contribution of mining grew strongly between 2005 and 2010 and then contracted between 2010 and 2015.



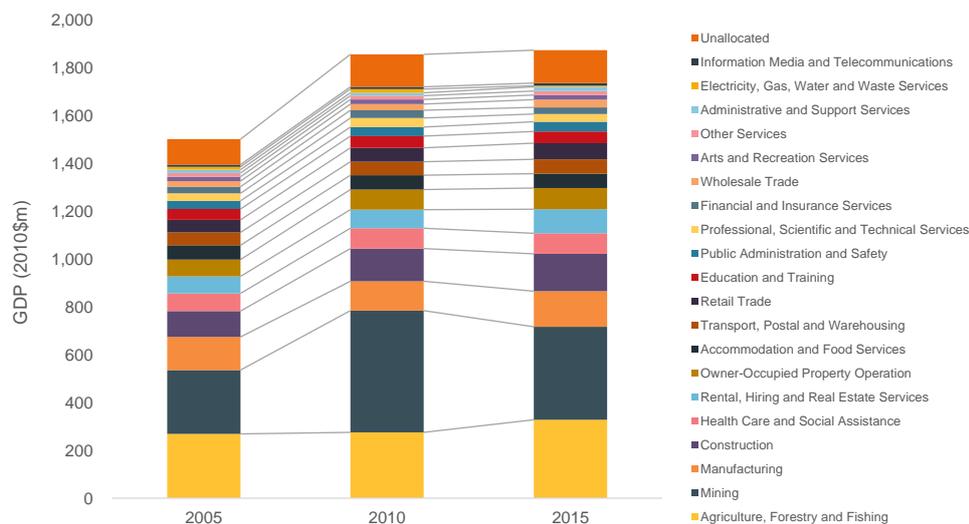
Figure 4. Employment share of industries on the West Coast, 2005, 2010 and 2015



Source: Infometrics regional database.

Figure 5 shows that, although GDP on the West Coast grew from \$1.50 billion to \$1.88 billion from 2005 to 2015, there was only a small increase in GDP from 2010 to 2015. The largest proportional increases in GDP over 2005 to 2015 have been in mining (from \$267 million to \$390 million, a 46 percent increase), construction (from \$107 million to \$156 million, a 45 percent increase over the period), and wholesale trade (from \$23 million to \$32 million, a 40 percent increase). Retail trade and administrative and support services have also grown relatively strongly. Electricity, gas, water and waste’s contribution to GDP fell significantly over the period (by \$8 million or 61 percent).

Figure 5. GDP on the West Coast by industry, 2005, 2010, and 2015



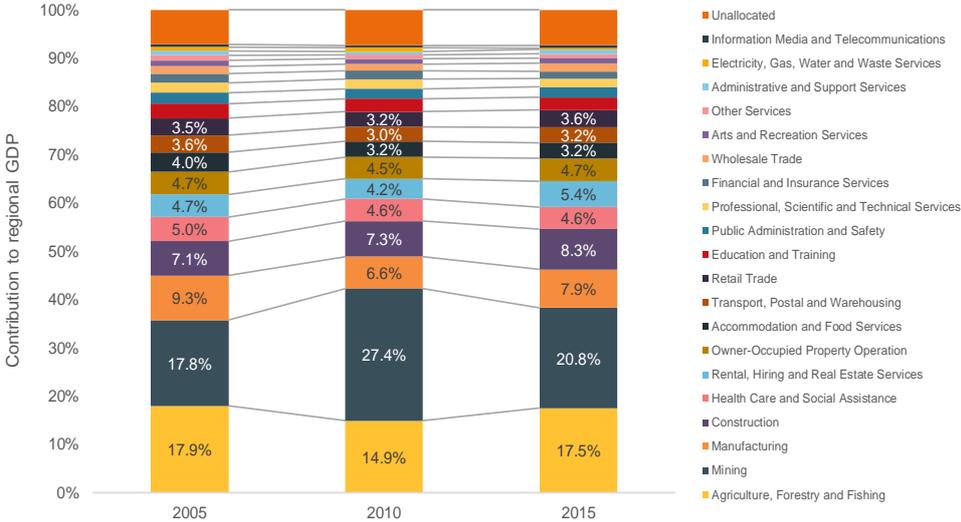
Source: Infometrics regional database.

There was a noticeable decline in the GDP contribution of mining over 2010 to 2015 where it fell from \$509 million to \$390 million, a decline of 45 percent over the period).



Figure 6 indicates how the industry contribution to the region's GDP has altered over 2005 to 2015. Manufacturing represents a slightly smaller proportion of the economy in 2015 than it did in 2005. Mining represents a much smaller proportion of the economy in 2015 than it did in 2010. Construction and rental, hiring and real estate services contribute a slightly higher proportion of GDP in 2015 than they did in 2005.

Figure 6. GDP contribution of industries on the West Coast, 2005, 2010, and 2015



Source: Infometrics regional database.

Industry performance

Table 1 provides more detail on the performance of broad industries on the West Coast.

GDP and employment growth across industries has been mixed, although a few industries have achieved better than national average growth in GDP or employment over the last decade. Some observations include:

- only one industry, wholesale trade, achieved relatively high growth in both GDP and employment over 2005 to 2015
- industries that achieved relatively high growth in GDP over the period were mining, construction, retail trade, information media and telecommunications, rental, hiring and real estate services
- transport, postal and warehousing, professional, scientific and technical services, administrative and support services, education and training, public administration and safety, and other services experienced relatively high growth in employment
- electricity, gas, water and waste and financial services experienced a decline in GDP and mining and health care and social services experienced a decline in employment over the period.



Table 1. Summary indicators for industries on the West Coast

Industry	GDP 2015 (2010\$m)	GDP growth 2005–15	Number of businesses 2015	Business growth 2005–15	Employment (filled jobs) 2015	Employment growth 2005–2015	Productivity 2015 (2010\$)	Productivity growth 2005–2015
Agriculture, forestry & fishing	328	2.0%	996	-1.6%	2,049	0.4%	\$160,127	1.6%
Mining	390	3.9%	91	3.7%	1,670	-0.5%	\$416,362	-1.0%
Manufacturing	148	0.7%	184	-0.1%	1,733	0.8%	\$85,647	-0.2%
Electricity, gas, water & waste Services	5	-8.9%	18	-2.0%	1,683	0.7%	\$136,416	-5.9%
Construction	156	3.8%	394	2.5%	1,609	0.5%	\$86,340	-0.6%
Wholesale trade	32	3.4%	92	0.4%	1,810	4.5%	\$73,323	1.2%
Retail trade	68	2.4%	237	-0.7%	1,106	1.6%	\$40,116	1.7%
Accommodation & food services	61	0.1%	312	-1.0%	782	0.9%	\$36,269	0.6%
Transport, postal & warehousing	60	1.1%	132	-0.4%	937	4.9%	\$76,224	0.2%
Information media & telecommunications	11	2.6%	7	11.2%	563	1.2%	\$72,478	2.3%
Financial & insurance services	27	-0.2%	108	6.1%	534	1.3%	\$179,524	0.8%
Rental, hiring & real estate services	101	3.6%	480	2.6%	482	0.3%	\$330,904	1.2%
Professional, scientific & technical services	33	0.4%	159	2.5%	556	2.3%	\$57,935	-0.7%
Administrative & support services	17	2.2%	101	3.4%	441	2.2%	\$29,935	-0.2%
Public administration & safety	40	1.5%	50	-3.8%	389	3.2%	\$83,359	1.2%
Education & training	50	1.0%	91	0.8%	305	2.3%	\$44,807	-0.6%
Health care & social assistance	86	1.4%	122	0.9%	152	-0.9%	\$53,393	0.9%
Arts & recreation services	20	0.9%	70	-2.3%	152	0.3%	\$51,874	-2.3%
Other services	17	0.4%	214	2.3%	36	3.0%	\$31,189	-1.0%



Industry	GDP 2015 (2010\$m)	GDP growth 2005–15	Number of businesses 2015	Business growth 2005–15	Employment (filled jobs) 2015	Employment growth 2005–2015	Productivity 2015 (2010\$)	Productivity growth 2005–2015
Owner-occupied dwellings	88	2.3%						
Residual/not elsewhere included	138							
TOTAL	1,874	2.2%	3,858	0.3%	16,989	1.3%	\$110,350	0.9%

Source: Infometrics regional database.

Notes: Green cells represent values or growth higher than the regional average; red cells highlight low values or growth rates. Growth figures are compound annual averages.

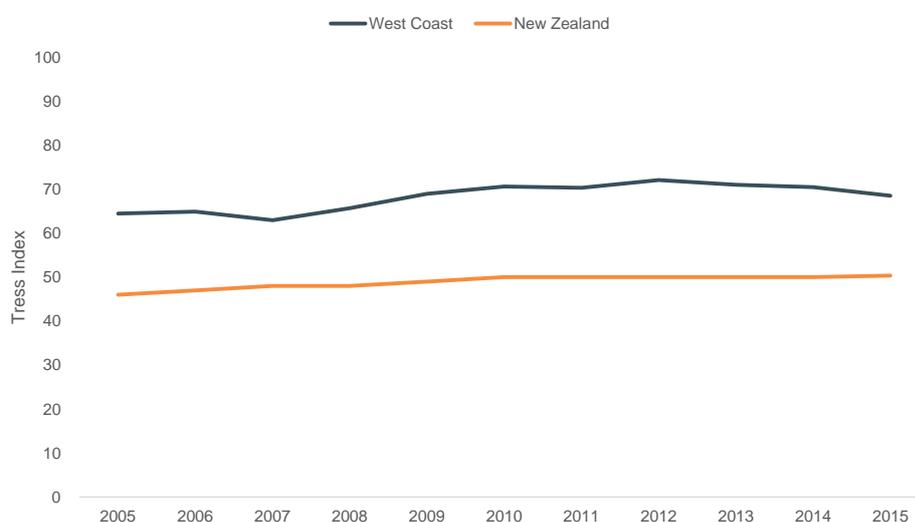


Diversity and concentration

One measure of economic diversity is the tress index, which measures the degree of concentration of an economy on an industry or sector basis². A tress index of zero represents a totally diversified economy, while an index close to 100 means the economy is highly concentrated in a particular sector or sectors.

The West Coast's tress index in 2015 was 69, which indicates that the economy is quite highly concentrated. This is much higher than New Zealand's tress index which, at 50, suggests that the New Zealand economy is neither highly concentrated nor diversified. The West Coast's tress index increased from 2007 to 2012, reaching a peak of 72. However, the regional economy has become less concentrated since 2012, reflecting the decline in the dominant minerals industry.

Figure 7. Tress index for the West Coast and New Zealand, 2005–2015



Source: MartinJenkins calculations using Infometrics data.

Buller has the highest concentration of activity in a few industries, with a tress index of 83 in 2015, compared to Westland at 71 and Grey at 62.

Broad industrial categories and trends in overall diversity hide what is happening within specific industries. To gain a better understanding of industry growth and decline in the region and potential comparative advantages, location quotients (LQs) at the sub-industry level can be examined.

LQs measure the concentration of industries in an area and can provide an indication of a region's comparative advantages. They measure industry employment (or GDP) within a specified location relative to industry employment (or GDP) nationally. An LQ greater than one (more specifically, greater than 1.25) means that the industry or segment is 'over-represented' and concentrated relative to the rest of New Zealand, which suggests it is a net exporter and that some comparative advantages exist.

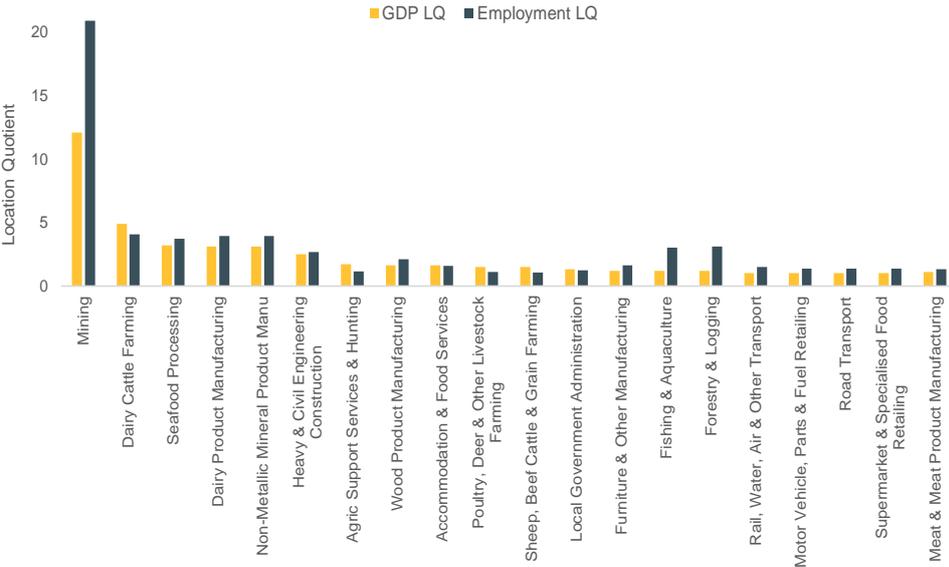
² A tress index is developed by calculating each sector's contribution to the local economy, multiplying each sector's total employment by its share of the economy, calculating the sum totals of the weighted values for each sector and then indexing the totals.



The West Coast has revealed comparative advantages in several industries. The following (non-government sector) industries are particularly over-represented in the region (with employment and GDP LQs over 1.2), relative to New Zealand (Figure 8):

- mining
- dairy cattle farming
- seafood processing
- dairy product manufacturing
- non-metallic mineral product manufacturing
- heavy and civil engineering construction
- wood product manufacturing
- accommodation and food services
- furniture and other manufacturing
- fishing and aquaculture
- forestry and logging.

Figure 8. GDP and employment location quotients for industries on the West Coast, 2015



Source: Infometrics regional database.
 Note: Sectors shown are those with GDP and employment location quotients greater than one.

Looking at changes in LQs over time indicates whether industries are becoming more or less concentrated in the region and can suggest advantages that are becoming more or less significant. Industries where there was a relatively strong increase in concentration between 2005 and 2015 were (Figure 9 and Figure 10):

- seafood processing – an increase in the GDP LQ from 2.3 to 3.2 and the employment LQ from 2.4 to 3.7
- heavy and civil engineering construction – an increase in the employment LQ from 2.4 to 2.7

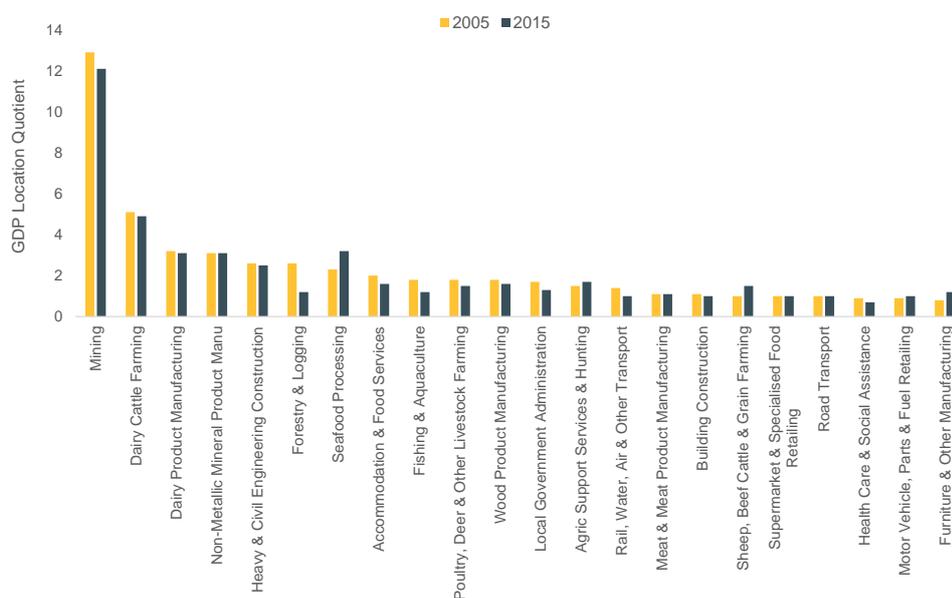


- sheep, beef cattle and grain farming – an increase in the GDP LQ from 1.0 to 1.5 and the employment LQ from 0.7 to 1.1
- furniture and other manufacturing – an increase in the GDP LQ from 0.8 to 1.2 and the employment LQ from 0.9 to 1.6.

Industries for which there was a relatively strong decline in concentration were:

- mining – a decline in the GDP LQ from 12.9 to 12.1, although the industry is still very concentrated in the region
- forestry and logging – a decline in the GDP LQ from 2.6 to 1.2 and the employment LQ from 6.4 to 3.1
- accommodation and food services – a decline in the GDP LQ from 2.0 to 1.6 and the employment LQ from 1.9 to 1.6
- fishing and aquaculture – a decline in the GDP LQ from 1.8 to 1.2 and the employment LQ from 3.7 to 3.0
- poultry, deer and other livestock farming – a decline in the GDP LQ from 1.8 to 1.5 and the employment LQ from 1.4 to 1.1
- rail, water, air and other transport – a decline in the GDP LQ from 1.4 to 1.0 and the employment LQ from 2.0 to 1.5.

Figure 9. GDP location quotient by industry on the West Coast, 2005 and 2015

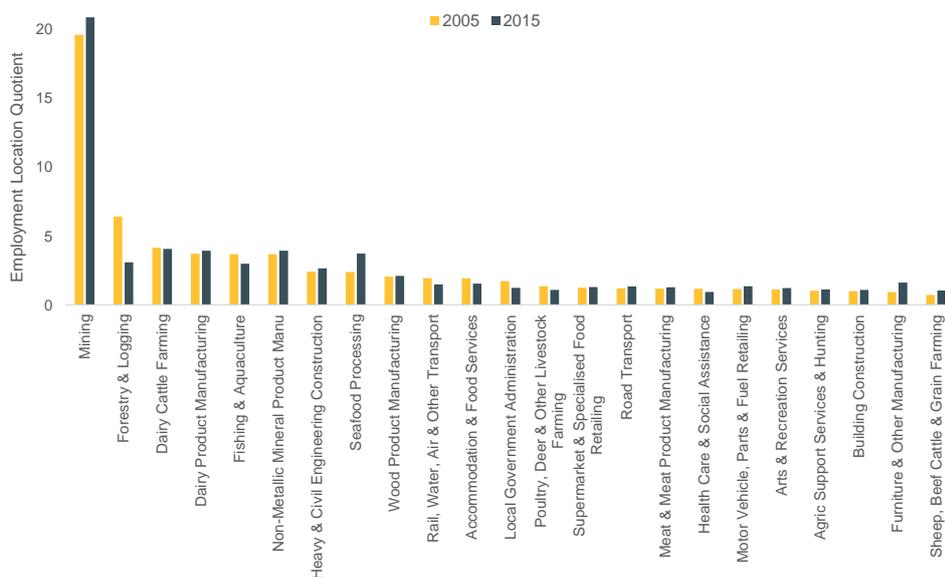


Source: Infometrics regional database.

Note: Sectors shown are those with GDP location quotients greater than one.



Figure 10. Employment location quotient by industry on the West Coast, 2005 and 2015



Source: Infometrics regional database.

Note: Sectors shown are those with employment location quotients greater than one.

The following summarises the main findings of the preceding analysis:

- agriculture, forestry and fishing – is an industry of large scale in GDP and employment terms, is concentrated in the region overall (and the sub-sectors dairy cattle farming, fishing and aquaculture and forestry and logging are all concentrated in the region, with several growing in concentration over time). It has experienced moderate growth in GDP but limited growth in employment over the last decade. The industry has relatively high productivity and productivity growth has been strong.
- mining – is a significant industry in GDP and employment terms and has achieved strong growth in GDP but a decline in employment over the last decade, and a decline in GDP and employment over the last 5 years. It is highly concentrated in the region and has extremely high productivity levels.
- manufacturing – is moderately large in GDP and in employment, and is moderately concentrated in the region overall (dairy product manufacturing, seafood processing, non-metallic mineral product manufacturing, wood product manufacturing and furniture and other manufacturing are strongly concentrated). It achieved only limited growth in GDP and employment over the last decade. It has average productivity levels.
- construction – is an industry of moderately large scale in GDP terms and is large in employment terms, and is somewhat concentrated in the region (although heavy engineering and civil construction is more strongly concentrated). It has achieved strong GDP growth but limited employment growth over the last 10 years. However, productivity has declined (and productivity is relatively low).
- wholesale trade – is very small in GDP terms, but large in employment terms. It has achieved very strong GDP and employment growth over the last decade and moderately strong productivity growth. It is not concentrated in the region.



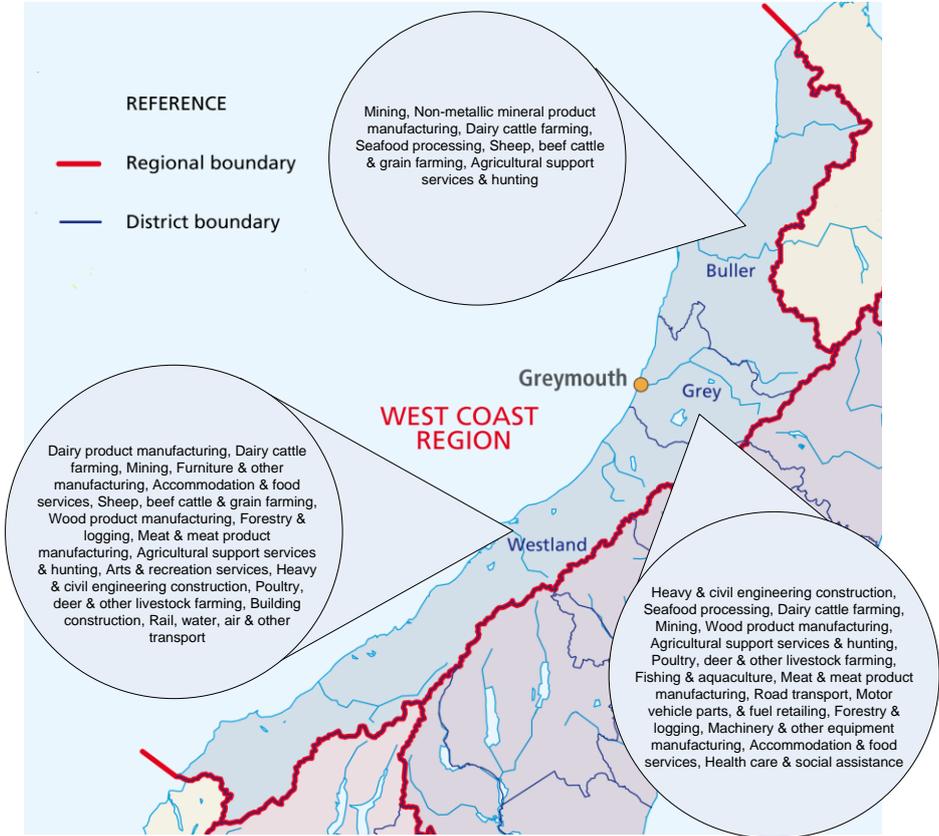
- retail trade – is a moderately sized sector in GDP and employment terms, and is moderately concentrated in the region. It has achieved high GDP growth, moderate employment growth and strong productivity growth (although productivity in the industry is very low).
- accommodation and food services – is of moderate scale in GDP and employment terms. It is strongly concentrated in the region but has achieved very limited employment, GDP and productivity growth (and productivity in the industry is very low).
- transport, postal and warehousing services – is a mid-sized industry in GDP and employment terms, and is not concentrated in the region. It has achieved moderate GDP and productivity growth but very strong employment growth over the last decade.
- information media and telecommunications – is a small industry in GDP terms but of moderate scale in employment terms. It is not concentrated at the broad industry level. It has achieved high GDP and productivity growth, but only moderate employment growth.
- financial and insurance services – is a small-scale industry in GDP terms but medium-sized in terms of employment, and is not concentrated in the region. GDP has declined in the industry over the last decade although it has achieved only moderate employment and productivity growth. Productivity is relatively high.
- rental, hiring and real estate services – is an industry of medium scale in GDP and employment terms. It is not concentrated in the region overall, but has achieved strong GDP, employment and productivity growth (and productivity is very high).
- professional, scientific and technical services – is a relatively small industry in GDP terms but is of moderate scale in employment terms and is not concentrated in the region. It has experienced limited GDP growth but strong employment growth over the last decade, although productivity in the industry has declined (and productivity is relatively low).
- administrative and support services – is a small industry in GDP terms but of moderate scale in employment terms. It is not concentrated in the region. It has achieved moderate GDP growth, high employment growth and a decline in productivity over the last decade (and productivity is very low).
- education and training – is an industry of moderate scale in GDP and employment terms. It is not concentrated in the region. It has achieved moderate growth in GDP, strong growth in employment but a slight decline in productivity (and productivity is relatively low).
- health care and social assistance – is an industry of moderate GDP scale but is relatively small in terms of employment. It is not concentrated in the region, and has experienced moderate GDP and productivity growth, although employment declined over the last decade.
- arts and recreation services – is a small industry in GDP and employment terms, is not concentrated in the region, and has achieved limited employment growth and a decline in GDP over the last decade. Productivity is relatively low.
- other services – is a very small industry in GDP and employment terms. The industry is not concentrated in the region, and has experienced limited GDP growth and strong employment growth resulting in a decline in productivity over the long-term (and productivity is very low).



Not surprisingly, there are some spatial differences in the representation of different sectors across the West Coast districts. Figure 11 shows the top ranked industries by GDP LQs across the districts (LQs over 1.2):

- Buller has comparative advantages in mining; non-metallic mineral product manufacturing; dairy cattle farming; seafood processing; sheep, beef and graining farming; and agricultural support services.
- In addition to key primary industries, Grey has comparative advantages in a larger range of service and manufacturing industries, including heavy and civil engineering construction, seafood processing, agricultural support services, road transport, motor vehicle parts and fuel retailing, forestry and logging, machinery and equipment manufacturing, accommodation and food services and health care and social assistance.
- Westland has comparative advantages in dairy and dairy product manufacturing, mining, wood product and furniture manufacturing, accommodation and food services, meat and meat product manufacturing, arts and recreation services, construction and transport.

Figure 11. Industry concentration by West Coast district



Source: Map adapted from www.lgnz.co.nz. Industry specialisations from MartinJenkins.



KEY SECTOR VALUE-CHAINS

In the discussion that follows, the term sector is used to refer to large groupings of common production activities. Industries relate to specific segments of activity within sectors.

The preceding analysis considered size, growth and concentration of traditional industries on different measures. This analysis was based on the Australia New Zealand Standard Industrial Classification (ANZSIC), which lists 19 industries at the most aggregated level (504 separate industries at their most disaggregated level). However, in several cases, these 19 industries are not consistent with value-chains, especially in agriculture and manufacturing. In addition, some industries can contribute to more than one sector value-chain (e.g., services to agriculture can contribute to dairy, horticulture, beef, forestry).

Our first step in defining sectors for the West Coast was to review the focus of research in previous regional economic strategies and industry research in the region. We used this research to group the 504 ANZSIC level 4 industry classifications into 22 sector value-chains. In selecting industries to include in value-chains we considered both:

- a industry scale and growth in the region
- b common sets of activities (i.e., whether the industries contribute to the delivery of similar sets of products).

We also refined the sector value-chain definitions to reflect those used nationally or in other regions to allow for comparisons.

Sector value-chains were defined by the core production activity and immediate downstream processing or service activities. So, for example, dairy and related processing includes dairy farming, dairy product processing industries and dairy support services.

We didn't consider upstream inputs and more distant downstream services, as a large number of industries could contribute inputs and services to each sector value-chain. For example, for the dairy and related processing value-chain, we could have included industries within minerals (e.g., fertiliser); machinery and equipment; materials; transport equipment; ICT; business and professional services (e.g. farm consulting); freight and logistics; energy, water and waste.

In some cases, we considered new groupings of industries in a sector, reflecting the underlying groups of capabilities in the region associated with those sectors (e.g., metals, machinery and equipment manufacturing and services). In two cases, we grouped the remaining industries into 'other' sectors (e.g., other agriculture and other manufacturing).

A summary of the sector value-chain definitions we arrived at is presented in Table 2 and details of the industries that make up the sectors is included in Appendix 1.



Table 2. Sector value-chain definitions

Sectors	Definition
Dairy & related processing	Dairy cattle farming; milk and cream, ice cream, cheese manufacturing; part of agriculture support services.
Horticulture, food & beverage	Fruit and vegetable growing; eggs; beekeeping; fruit and vegetable processing; oil, preservative, cereal, pasta, bread, biscuit, sugar, confectionary, chips, soft drink, beer, wine, spirit manufacturing; sheep and beef farming, grain, poultry, deer and pig farming; meat processing; part of agriculture support services.
Forestry & wood processing	Forestry, logging, sawmilling, wood chipping, wood product manufacturing, pulp and paper manufacturing.
Aquaculture, fishing & related processing	Aquaculture, line fishing, trawling, seafood processing.
Other agriculture production & services	Nurseries, turf, floriculture, shearing.
Metals, machinery & equipment manufacturing & services	Iron, steel, aluminium, other metals, tank and container, spring and wire, nut, bolt and screw, metal product manufacturing; Photographic, medical and surgical, whiteware appliance, heating, cooling and ventilation, agriculture machinery, mining and construction machinery, machine tools and parts, lifting and handling equipment manufacturing, repair and maintenance; Tyre, motor vehicle, vehicle parts, aircraft, rail, interior manufacturing, repair and maintenance; shipbuilding and repair services.
Other manufacturing	Chemical manufacturing, pharmaceutical and medicine manufacturing, cosmetic and toiletry manufacturing, textile manufacturing, clothing and footwear manufacturing, polymer product manufacturing, paints and coatings.
Minerals & related processing	Oil and gas exploration, coal, iron ore, copper, gold ore, mineral sand, silver, other metal mining; quarrying, fertilizer manufacturing, glass, ceramic, brick, cement, concrete manufacturing.
Construction & related services	House, building, road, bridge, civil engineering construction; land development, bricklaying, plumbing, roofing, installation services, plastering, carpentry, tiling, carpeting, landscaping, hiring of construction machinery, architecture, surveying, engineering design services.
Health services & aged care	Hospitals, general practice services, specialist services, dental services, optometry services, physiotherapy services, chiropractic services, ambulance services, aged care residential services.
Creative & ICT	Publishing, recording, motion picture production, post production services, broadcasting, photographic services, museum operation, performing arts; electronic and communications equipment manufacturing, software, telecommunications, internet services, data processing, computer system design services; specialist design services.
Business, finance & professional services	Printing, research services, testing and analysis services, legal services, accounting services, advertising services, management advisory services, recruitment services, call centre operation, building cleaning services; banks, credit unions, life insurance, health insurance, superannuation, financial and investment services.
Property & real estate services	Property operators and real estate services.
Education	Primary, secondary, technical, vocational, sports and recreational, adult and community education.
Freight & logistics	Road and rail freight, air freight, water transport, postal services, customs services, freight forwarding, warehousing and wholesaling services.
Public transport	Interurban and rural bus transport, taxis, rail and water passenger transport.
Retail	Vehicle, furniture, floor, houseware, manchester, computer, electrical goods, hardware, fuel, supermarket, liquor, food, sport, toy, clothing, book, jewellery, cosmetic, stationery, flower, antique and other good retailing.
Hospitality	Accommodation, cafes and restaurants, takeaway foods, pubs, bars and clubs.
Personal & recreational services	Libraries, museums, gardens, reserves, parks, performing arts, sport clubs and facilities, racing, amusement parks, gambling; Other rental and hiring services, funeral services, laundry services, child care services.



Sectors	Definition
Government	Central and local government administration, defence, police, fire, correction and other public services.
Tourism	Proportions of accommodation, food services, passenger transport, scenic and sightseeing transport, travel agency services, vehicle rental, museum operation, gardens, parks and reserves, sport venues and facilities, amusement parks, casinos, retailing, education.
Energy, water & waste	Electricity generation and distribution, gas supply; water supply, sewerage, waste collection, waste treatment and disposal.

Note that:

- one industry, 'other agriculture production and services' was split across the five primary production sectors that it services: food and beverage cultivation, livestock farming and processing; dairy and dairy related processing; aquaculture, fishing and related processing, and forestry and wood processing. The split was based on each of the primary production sector's share of employment in the region in 2015.
- tourism spans a large range of hospitality, recreational and cultural, retail, transport, personal services and educational industries. Tourism values (GDP, employment, exports etc.) were calculated using a methodology developed by Infometrics, which uses Statistics New Zealand's Tourism Satellite Account (TSA) estimates of tourism-related activity by industry. These were adjusted using regional data on guest nights and visitor expenditure data from MBIE to account for tourism intensity in different regions. The adjustment also takes into consideration each region's relative exposures to tourism-related industries and activities, including guest night shares.



Key sector value-chain identification

For the purpose of this study, key sector value-chains are defined as those that offer the greatest potential for output and employment growth on the West Coast. Consistent with previous regional growth studies, potential was determined based on three criteria:

1. **Competitive strengths** – the current or potential strength of the sector value-chain on the West Coast. This was assessed by considering employment and GDP scale and growth, estimated productivity and growth, and the concentration of the sector (LQs).
2. **Market opportunities** – sector value-chains with large and growing demand for their products or services and hence potential for investment, talent and business attraction and development. This was assessed by considering:
 - national growth (i.e., GDP and employment trends and forecasts of GDP and employment nationally) – this is particularly relevant for service-based sectors that are predominantly selling domestically (and hence growth suggests growing national demand).
 - export demand potential based on trends in regional export estimates and trends in the value of New Zealand’s exports worldwide.
3. **Broader impacts on the economy** – the extent to which the sector value-chain impacts on other industries and incomes. Broader economic impacts were assessed by considering:
 - whether the sector has been identified as an important driver for the region or districts in previous research
 - sector earnings
 - forecast growth in employment.

These factors were only considered for sector value-chains that rated highly on competitive strength or market opportunities.

Tables 3 through 6 provide an assessment of each sector value-chain against the range of competitive strength, market potential, and broader economic impact measures. Table 3 provides the results for the West Coast and Tables 4 to 6 show the results for the three districts.



Table 3. Competitive strength, market potential and broader impacts of sector value-chains, West Coast

West Coast	Competitive strength															Market Potential					Broader economic impacts												
	GDP (2010\$m)		Filled Jobs		Labour productivity		GDP LQ		Empl LQ		2005-2015, %pa change					2010-2015, %pa change			Exports 2010\$m	Rank	2010-2015, %pa change		NZ growth 05-15, %pa change		NZ 2010-15, %pa change	Identified previously as a key sector	Forecast Employment Growth, 2015-2020, %pa	Average annual earnings 2010\$ New Zealand					
	2015	Rank	2015	Rank	2010\$, 2015	Rank	2015	2015	GDP	Empl	Lab prod	GDP LQ	Empl LQ	GDP	Empl	Lab prod	2015	Exports	GDP		Empl	Exports	2004	2014				2004-14, %pa change					
Other agriculture	2.9	22	32	22	89,983	6	0.7	0.5	4.4%	2.7%	1.6%	6.1%	5.3%	2.3%	-1.0%	3.4%	0.0	18	-2.0%	-2.6%													
Food & beverage cultivation and processing	80.0	6	759	12	105,370	5	0.9	0.8	2.5%	1.3%	1.2%	2.0%	1.3%	3.4%	0.3%	3.1%	98.2	3	3.4%	0.1%	-0.2%	4.5%			-0.8%	31,873	45,935	3.7%					
Dairy & related processing	282.2	2	1,641	5	171,913	3	4.6	3.9	2.5%	1.9%	0.6%	-0.2%	0.1%	3.6%	2.6%	1.0%	390.5	1	10.2%	2.4%	1.6%	9.8%	yes		-1.0%	32,605	49,281	4.2%					
Aquaculture, fishing & related processing	15.9	19	229	19	69,686	12	2.4	3.3	-0.5%	0.2%	-0.6%	1.3%	1.6%	2.9%	1.2%	1.7%	35.6	6	5.9%	-2.1%	-1.5%	2.0%			-2.3%	38,337	51,984	3.1%					
Forestry & wood processing	38.4	15	459	15	83,595	8	1.2	1.9	-2.6%	-4.0%	1.5%	-3.6%	-2.1%	3.5%	1.9%	1.6%	38.8	4	8.9%	0.7%	-2.1%	5.3%			0.3%	40,485	55,645	3.2%					
Minerals & related processing	418.0	1	1,179	7	354,503	2	9.3	9.0	3.6%	4.1%	-0.5%	1.1%	2.9%	-4.5%	-3.6%	-1.0%	1.6	15	-4.4%	2.2%	1.1%	-4.1%	yes		-0.9%	50,312	79,895	4.7%					
Other manufacturing	6.8	20	98	20	69,139	13	0.2	0.3	1.8%	3.5%	-1.6%	2.8%	7.1%	6.5%	4.8%	1.6%	10.5	10	6.7%	-1.2%	-3.5%	3.0%											
Business, finance & professional services	67.4	10	1,010	9	66,768	14	0.3	0.4	0.4%	1.6%	-1.1%	-2.2%	0.0%	-0.9%	1.1%	-2.0%	5.6	12	-4.1%	2.4%	1.5%	1.5%											
Creative & ICT	16.9	18	311	16	54,367	15	0.2	0.4	2.3%	1.4%	0.9%	-1.7%	-1.0%	1.9%	0.2%	1.7%	4.3	13	8.2%	3.8%	2.3%	4.9%			-0.3%	51,630	72,719	3.5%					
Metals, machinery & equipment manufacturing & services	30.1	16	555	13	54,127	16	0.5	0.7	0.4%	1.6%	-1.1%	1.3%	1.8%	1.5%	1.3%	0.2%	14.9	9	5.3%	-1.2%	-0.3%	-2.1%											
Energy, water & waste	4.9	21	36	21	136,416	4	0.1	0.3	-8.8%	-3.0%	-5.9%	-10.7%	-7.0%	-19.9%	-12.2%	-8.7%	0.0	18		1.8%	4.2%												
Construction & related services	164.6	3	1,954	2	84,242	7	1.2	1.1	3.6%	4.3%	-0.7%	0.2%	1.6%	2.1%	0.8%	1.3%	0.2	17	0.0%	3.1%	2.5%	4.0%	yes		1.9%	40,302	59,170	3.9%					
Freight & logistics	73.7	8	983	10	74,975	11	0.5	0.7	2.0%	1.3%	0.7%	0.5%	0.9%	2.5%	0.9%	1.6%	32.2	7	1.4%	1.2%	0.2%	3.6%	yes		0.6%	43,327	61,426	3.6%					
Retail	67.5	9	1,683	3	40,116	21	0.8	1.1	2.4%	0.7%	1.7%	-0.6%	0.1%	2.9%	-0.7%	3.6%	6.3	11	3.1%	2.7%	0.4%	4.9%											
Hospitality	60.6	11	1,670	4	36,269	22	1.6	1.6	0.1%	-0.6%	0.6%	-2.5%	-2.1%	0.1%	-1.6%	1.7%	38.7	5	-2.1%	2.3%	1.5%	1.2%											
Public transport	18.2	17	239	17	76,011	10	0.8	1.2	1.1%	1.6%	-0.5%	-1.7%	-0.2%	1.9%	2.1%	-0.2%	0.0	18		2.5%	1.6%												
Personal & recreational services	44.7	13	831	11	53,734	17	0.6	0.9	-0.2%	0.2%	-0.4%	-1.6%	-1.5%	-0.2%	-0.9%	0.7%	20.2	8	2.0%	1.0%	1.6%	2.3%	yes										
Government	40.1	14	481	14	83,295	9	0.5	0.6	1.8%	0.5%	1.3%	-2.5%	-2.7%	2.0%	1.2%	0.8%	0.8	16	9.9%	4.1%	3.2%	6.7%											
Education	49.5	12	1,106	8	44,807	20	0.6	0.8	1.0%	1.6%	-0.6%	0.4%	0.1%	0.0%	0.5%	-0.5%	2.4	14	-6.7%	0.2%	1.4%	-6.2%	yes		1.3%	40,924	54,565	2.9%					
Health & aged care	79.8	7	1,493	6	53,422	18	0.8	1.0	1.5%	0.7%	0.9%	-2.2%	-1.9%	0.2%	-0.2%	0.3%	0.0	18		3.5%	2.5%		yes										
Property & real estate services	86.4	5	236	18	365,787	1	0.8	0.8	4.0%	3.1%	0.9%	1.5%	2.8%	6.1%	4.7%	1.3%	0.0	18		2.2%	0.1%												
Tourism	94.9	4	2,015	1	47,110	19	1.3	1.6	1.7%	0.4%	1.3%	-0.4%	0.4%	2.2%	-0.2%	2.4%	210.9	2	1.8%	1.7%	-0.1%	3.1%											
Total	1,874.4		16,986		110,350				2.2%	1.3%	0.9%			0.2%	0.1%	0.1%	911.7		6.7%	1.9%	1.1%	3.9%	yes	0.9%	37,800	54,230	3.7%						

Source: MartinJenkins, based on Infometrics regional database.

Overall, on the West Coast, the sectors with the greatest number of highly ranked key indicators (light green to dark green in the table) are food and beverage cultivation and processing; dairy and related processing; forestry and wood processing; minerals and related processing; creative and ICT; construction and related services; freight and logistics; retail; property and real estate services; and tourism.



Table 4. Competitive strength, market potential and broader impacts of sector value-chains, Buller

Buller	Competitive strength															Market Potential					Broader economic impacts							
	GDP (2010\$ m)		Filled Jobs		Labour productivity		GDP LQ		Empl LQ		2005-2015, %pa change					Exports 2010\$m		2010-2015, %pa change		NZ growth 05-15, %pa change		NZ 2010-15, %pa change		Identified previously as a key sector	Forecast Employment Growth 2015-2020, %pa	Average annual earnings 2010\$ New Zealand		
	2015	Rank	2015	Rank	2010\$ 2015	Rank	2015	2015	GDP	Empl	Lab prod	GDP LQ	Empl LQ	GDP	Empl	Lab prod	2015	Rank	Exports	GDP	Empl	Exports	2004			2014	2004-14, %pa change	
Other agriculture	1.4	21	15	21	91,550	6	0.9	0.8	1.5%	1.1%	2.3%	5.9%	4.5%	6.1%	3.0%	3.9%	0.0	18		-2.0%	-2.6%							
Food & beverage cultivation and processing	22.6	5	190	12	118,942	5	0.6	0.7	-0.2%	-0.9%	2.0%	1.9%	0.0%	-2.5%	-4.8%	3.5%	5.9	6	7.0%	0.1%	-0.2%	4.5%		-1.6%	31,873	45,935	3.7%	
Dairy & related processing	91.1	2	483	3	188,769	3	3.6	4.0	4.1%	3.1%	0.9%	4.0%	2.2%	3.9%	2.7%	1.4%	2.4	8	36.9%	2.4%	1.6%	9.8%	yes	-3.4%	32,605	49,281	4.2%	
Aquaculture, fishing & related processing	7.2	15	90	15	79,536	9	2.7	4.5	-2.5%	-1.6%	-0.6%	1.8%	0.5%	1.5%	-0.7%	0.6%	16.6	2	5.8%	-2.1%	-1.5%	2.0%		-2.6%	38,337	51,984	3.1%	
Forestry & wood processing	2.4	20	29	19	82,442	8	0.2	0.4	-3.2%	-4.3%	1.6%	-1.7%	-1.6%	2.0%	0.3%	1.3%	1.3	11	0.0%	0.7%	-2.1%	5.3%		-1.4%	40,485	55,645	3.2%	
Minerals & related processing	351.4	1	969	1	362,654	2	19.3	25.7	-12.9%	-11.4%	-0.1%	-12.8%	-11.7%	-28.4%	-21.4%	2.8%	0.2	14	-19.7%	2.2%	1.1%	-4.1%	yes	-0.9%	50,312	79,895	4.7%	
Other manufacturing	0.8	22	9	22	83,655	7	0.0	0.1	15.2%	13.4%	-3.8%	19.3%	18.3%	25.2%	16.7%	0.8%	0.1	15	-24.2%	-1.2%	-3.5%	3.0%						
Business, finance & professional services	16.3	8	224	11	72,540	13	0.2	0.3	1.0%	1.5%	-0.3%	0.9%	0.8%	0.7%	1.7%	-1.0%	1.7	10	-5.0%	2.4%	1.5%	1.5%						
Creative & ICT	2.9	19	55	18	53,265	18	0.1	0.3	2.8%	1.8%	1.2%	1.3%	0.2%	2.1%	0.7%	0.8%	1.0	12	10.8%	3.8%	2.3%	4.9%		0.0%	51,630	72,719	3.5%	
Metals, machinery & equipment manufacturing & services	6.6	16	123	13	53,981	16	0.3	0.5	0.3%	1.3%	-1.8%	3.8%	2.3%	2.4%	1.8%	-0.4%	11.6	3	8.8%	-1.2%	-0.3%	-2.1%						
Energy, water & waste	3.2	18	18	20	179,404	4	0.1	0.6	10.4%	18.9%	-4.5%	10.9%	15.0%	38.0%	10.1%	-7.5%	0.0	18		1.8%	4.2%							
Construction & related services	39.2	3	545	2	71,924	14	0.7	1.1	3.5%	3.9%	-1.2%	2.7%	2.0%	0.7%	-0.5%	1.7%	0.1	15	0.0%	3.1%	2.5%	4.0%	yes	1.7%	40,302	59,170	3.9%	
Freight & logistics	20.5	6	269	8	76,100	10	0.3	0.7	1.4%	0.7%	0.5%	2.5%	1.2%	1.3%	-0.4%	1.1%	11.5	4	2.2%	1.2%	3.6%	3.6%	yes	0.2%	43,327	61,426	3.6%	
Retail	17.2	7	435	4	39,694	21	0.5	1.0	2.7%	1.0%	1.8%	2.3%	1.2%	4.4%	0.8%	3.8%	1.7	9	0.0%	2.7%	0.4%	4.9%						
Hospitality	14.9	10	412	5	36,193	22	1.0	1.3	-0.2%	-0.8%	0.6%	-0.2%	-1.5%	0.5%	-1.1%	1.7%	9.5	5	-4.2%	2.3%	1.5%	1.2%						
Public transport	7.2	14	98	14	74,100	12	0.8	1.7	3.8%	4.5%	0.2%	3.6%	3.5%	13.2%	14.2%	1.9%	0.0	18		2.5%	1.6%							
Personal & recreational services	13.9	11	257	10	54,114	15	0.5	0.9	-3.0%	-3.7%	-1.2%	-1.8%	-4.6%	-3.6%	-5.8%	0.2%	4.9	7	4.1%	1.0%	1.6%	2.3%	yes					
Government	5.6	17	73	16	75,906	11	0.2	0.3	4.3%	3.1%	1.5%	2.5%	0.6%	5.3%	4.7%	-0.3%	0.1	15	0.0%	4.1%	3.2%	6.7%						
Education	11.5	13	259	9	44,566	20	0.4	0.7	0.5%	1.1%	-0.7%	2.6%	0.3%	0.3%	0.7%	-0.6%	0.6	13	-7.8%	0.2%	1.4%	-6.2%	yes	1.1%	40,924	54,565	2.9%	
Health & aged care	15.4	9	288	7	53,431	17	0.4	0.7	1.3%	0.5%	0.9%	0.1%	-1.3%	-0.6%	-1.0%	0.4%	0.0	18		3.5%	2.5%		yes					
Property & real estate services	25.8	4	71	17	366,644	1	0.6	0.8	3.2%	2.2%	1.0%	3.3%	2.8%	7.3%	5.8%	1.4%	0.0	18		2.2%	0.1%							
Tourism	13.5	12	302	6	44,886	19	0.5	0.8	-0.2%	-1.0%	1.6%	0.3%	-0.3%	0.2%	-1.2%	2.0%	18.0	1	-1.5%	1.7%	-0.1%	3.1%						
Total	758.2		4,910		154,430				-0.4%	0.5%							87.2		3.3%	1.9%	1.1%	3.9%	yes	0.3%	37,800	54,230	3.7%	

Source: MartinJenkins, based on Infometrics regional database.

In Buller, the sectors with the greatest number of highly ranked key indicators (yellow to dark green in the table) are dairy and related processing; forestry and related processing; minerals and related processing; creative and ICT; construction and related services; freight and logistics; retail; and property and real estate services.



Table 5. Competitive strength, market potential and broader impacts of sector value-chains, Grey

Grey	Competitive strength														Market Potential					Broader economic impacts									
	GDP (2010\$m)		Filled Jobs		Labour productivity		GDP LQ		Empl LQ		2005-2015, %pa change				2010-2015, %pa change			Exports 2010\$m		2010-2015, %pa change		NZ growth 05-15, %pa change		NZ 2010-15, %pa change	Identified previously as a key sector	Forecast Employment Growth 2015-2020, %pa	Average annual earnings 2010\$ New Zealand		
	2015	Rank	2015	Rank	2010\$, 2015	Rank	2015	2015	GDP	Empl	Lab prod	GDP LQ	Empl LQ	GDP	Empl	Lab prod	2015	Rank	Exports	GDP	Empl	Exports			2004	2014	2004-14, %pa change		
Other agriculture	0.8	22	9	21	87,438	7	0.6	0.3	3.4%	1.1%	0.4%	2.2%	2.4%	-2.6%	-6.2%	3.1%	0.0	18		-2.0%	-2.6%								
Food & beverage cultivation and processing	29.9	9	315	12	95,162	6	0.9	0.7	4.2%	2.1%	0.6%	0.8%	1.0%	7.0%	3.3%	2.4%	56.4	1		-2.7%	0.1%	-0.2%	4.5%		-0.5%	31,873	45,935	3.7%	
Dairy & related processing	62.9	2	331	10	189,790	4	2.8	1.8	1.0%	0.1%	0.9%	-4.4%	-2.8%	1.8%	0.4%	1.2%	13.5	5	71.9%	2.4%	1.6%	9.8%	yes	0.5%	32,605	49,281	4.2%		
Aquaculture, fishing & related processing	7.3	18	109	17	67,181	13	3.1	3.5	2.5%	3.1%	-0.9%	1.4%	3.3%	4.4%	3.8%	2.3%	13.7	4		3.9%	-2.1%	-1.5%	2.0%		-2.3%	38,337	51,984	3.1%	
Forestry & wood processing	21.5	13	266	13	80,752	9	1.9	2.4	-10.1%	-11.5%	1.2%	-13.5%	-10.8%	-3.0%	-4.2%	1.6%	31.2	3		9.1%	0.7%	-2.1%	5.3%		0.5%	40,485	55,645	3.2%	
Minerals & related processing	38.7	6	115	16	336,962	2	2.4	2.0	10.9%	11.1%	-1.7%	5.1%	8.4%	2.9%	0.1%	-8.9%	1.1	15		-4.7%	2.2%	1.1%	-4.1%	yes	-1.1%	50,312	79,895	4.7%	
Other manufacturing	4.4	20	62	20	70,866	11	0.3	0.5	-11.2%	-7.7%	1.6%	-12.9%	-5.6%	-8.9%	-9.7%	7.3%	3.3	10		18.7%	-1.2%	-3.5%	3.0%						
Business, finance & professional services	39.3	5	606	5	64,929	14	0.4	0.6	0.0%	0.2%	-0.5%	-5.4%	-2.5%	-2.0%	-1.0%	-1.0%	2.6	13		-3.5%	2.4%	1.5%	1.5%						
Creative & ICT	9.0	17	164	15	54,602	17	0.3	0.5	4.2%	2.9%	1.0%	-2.8%	-0.8%	4.6%	3.8%	1.4%	3.4	9		8.1%	3.8%	2.3%	4.9%	yes	0.0%	51,630	72,719	3.5%	
Metals, machinery & equipment manufacturing & services	19.0	15	327	11	58,266	16	0.8	0.9	0.7%	2.6%	-1.0%	-1.2%	1.5%	-1.0%	-0.6%	0.6%	2.9	12		-1.9%	-1.2%	-0.3%	-2.1%						
Energy, water & waste	0.9	21	4	22	214,210	3	0.0	0.1	-11.9%	-7.7%	-7.2%	-16.1%	-12.6%	-25.4%	-19.3%	25.3%	0.0	18			1.8%	4.2%							
Construction & related services	91.8	1	964	2	95,277	5	1.8	1.2	3.7%	5.0%	-0.4%	-2.5%	1.0%	4.4%	2.6%	1.2%	0.1	17		0.0%	3.1%	2.5%	4.0%	yes	1.4%	40,302	59,170	3.9%	
Freight & logistics	42.3	4	576	6	73,390	10	0.8	0.9	2.2%	1.6%	0.7%	-2.3%	0.0%	3.7%	2.6%	1.7%	12.1	7		5.2%	1.2%	0.2%	3.6%	yes	0.9%	43,327	61,426	3.6%	
Retail	36.0	7	886	3	40,637	21	1.2	1.3	2.1%	0.3%	1.7%	-3.7%	-1.4%	1.3%	-2.3%	3.6%	3.1	11		4.4%	2.7%	0.4%	4.9%						
Hospitality	19.4	14	536	8	36,131	22	1.4	1.1	-0.3%	-0.9%	0.6%	-5.7%	-3.6%	-2.1%	-3.7%	1.7%	12.4	6		-1.7%	2.3%	1.5%	1.2%						
Public transport	4.9	19	73	19	68,039	12	0.6	0.8	2.4%	2.2%	-0.6%	-3.2%	-0.8%	2.0%	2.4%	2.3%	0.0	18			2.5%	1.6%							
Personal & recreational services	14.1	16	238	14	59,388	15	0.5	0.5	3.7%	5.0%	0.8%	-0.6%	2.0%	2.4%	2.2%	2.3%	9.1	8		0.2%	1.0%	1.6%	2.3%	yes					
Government	29.2	10	341	9	85,805	8	1.1	1.0	-1.9%	-3.3%	1.1%	-8.7%	-7.6%	-5.8%	-5.5%	0.5%	0.6	16		8.4%	4.1%	3.2%	6.7%						
Education	25.6	12	572	7	44,841	20	0.9	0.9	1.3%	2.0%	-0.6%	-2.1%	-0.8%	-2.8%	-2.2%	-0.4%	1.3	14		-5.2%	0.2%	1.4%	-6.2%	yes	1.5%	40,924	54,565	2.9%	
Health & aged care	55.3	3	1,035	1	53,409	18	1.6	1.6	3.1%	2.2%	0.8%	-3.5%	-1.7%	0.8%	0.4%	0.3%	0.0	18			3.5%	2.5%		yes					
Property & real estate services	34.6	8	95	18	365,298	1	0.9	0.7	5.2%	4.2%	1.0%	-0.3%	2.6%	5.2%	3.7%	1.4%	0.0	18			2.2%	0.1%							
Tourism	28.3	11	615	4	45,985	19	1.1	1.1	0.3%	-1.3%	0.8%	-4.5%	-2.5%	-2.4%	-4.3%	1.4%	34.0	2		1.1%	1.7%	-0.1%	3.1%						
Total	676.4		7,623		98,727				5.2%	2.5%				2.0%	-0.2%		200.8		3.3%	1.9%	1.1%	3.9%	yes	1.1%	37,800	54,230	3.7%		

Source: MartinJenkins, based on Infometrics regional database.

In Grey, the sectors with the greatest number of highly ranked key indicators (yellow to dark green in the table) are food and beverage cultivation and processing; dairy and related processing; aquaculture, fishing and related processing; minerals and related processing; creative and ICT; construction and related services; freight and logistics; education; health and aged care; and property and real estate services.



Table 6. Competitive strength, market potential and broader impacts of sector value-chains, Westland

Westland	Competitive strength															Market Potential					Broader economic impacts									
	GDP (2010\$m)		Filled Jobs		Labour productivity		GDP LQ		Empl LQ		2005-2015, %pa change					2010-2015, %pa change			Exports 2010\$m		2010-2015 %pa change		NZ growth 05-15 %pa change		NZ 2010-15 %pa change	Identified previously as a key sector	Forecast Employment Growth 2015-2020, %pa	Average annual earnings 2010\$ New Zealand		
	2015	Rank	2015	Rank	2010\$, 2015	Rank	2015	2015	GDP	Empl	Lab prod	GDP LQ	Empl LQ	GDP	Empl	Lab prod	2015	Rank	Exports	GDP	Empl	Exports	Exports	Exports	Exports	2004	2014	2004-14 %pa change		
Other agriculture	0.7	22	8	22	89,780	5	0.8	0.4	13.2%	10.8%	2.2%	31.5%	18.9%	12.4%	10.1%	2.1%	0.0	16												
Food & beverage cultivation and processing	27.5	5	255	8	107,844	4	1.3	1.0	4.9%	4.0%	0.9%	75.9%	72.6%	9.4%	6.6%	2.6%	35.9	3	20.6%	0.1%	-0.2%		4.5%		-0.8%	31,873	45,935	3.7%		
Dairy & related processing	128.2	1	827	2	154,914	3	8.8	7.5	2.9%	2.6%	0.4%	190.5%	141.9%	4.8%	3.9%	0.9%	374.5	1	9.4%	2.4%	1.6%	9.8%	yes	-0.3%	32,605	49,281	4.2%			
Aquaculture, fishing & related processing	1.4	20	30	19	48,857	17	0.9	1.6	-1.0%	0.2%	-1.2%	256.7%	333.3%	5.4%	2.4%	2.9%	5.2	9	13.2%	-2.1%	-1.5%	2.0%		-1.4%	38,337	51,984	3.1%			
Forestry & wood processing	14.5	9	164	11	88,418	6	1.9	2.6	0.8%	-1.0%	1.8%	219.2%	285.0%	7.7%	6.4%	1.2%	6.4	7	11.0%	0.7%	-2.1%	5.3%		0.4%	40,485	55,645	3.2%			
Minerals & related processing	27.9	4	95	14	292,711	2	2.6	2.8	6.6%	4.1%	2.4%	937.0%	683.5%	10.1%	8.2%	1.7%	0.3	14		2.2%	1.1%	-4.1%		-0.9%	50,312	79,895	4.7%			
Other manufacturing	1.6	19	27	20	60,218	12	0.2	0.3	-2.3%	-1.4%	-0.9%	5.0%	8.7%	-6.7%	-4.4%	-2.4%	6.9	6	3.2%	-1.2%	-3.5%	3.0%								
Business, finance & professional services	11.8	12	180	9	65,767	11	0.2	0.3	-0.7%	3.8%	-4.3%	38.1%	51.1%	-4.1%	1.9%	-5.9%	1.1	11	-7.2%	2.4%	1.3%	1.5%								
Creative & ICT	5.0	17	92	15	54,608	14	0.2	0.5	0.7%	0.0%	0.8%	24.9%	51.1%	0.2%	-2.5%	2.8%	0.0	16	-100.0%	3.8%	2.3%	4.9%		-1.1%	51,630	72,719	3.5%			
Metals, machinery & equipment manufacturing & services	4.4	18	106	13	41,547	20	0.3	0.5	0.6%	1.4%	-0.8%	56.6%	74.8%	1.6%	2.1%	-0.5%	0.5	13	0.0%	-1.2%	-0.3%	-2.1%								
Energy, water & waste	0.9	21	14	21	59,669	13	0.1	0.5	0.3%	4.7%	-4.2%	1.6%	2.2%	-3.8%	-1.0%	-2.8%	0.0	16		1.8%	4.2%									
Construction & related services	33.6	3	445	4	75,424	10	1.0	1.0	3.7%	4.5%	-0.8%	140.6%	101.6%	3.4%	1.7%	1.7%	0.0	16		3.1%	2.5%	4.0%		3.4%	40,302	59,170	3.9%			
Freight & logistics	11.0	13	138	12	79,396	8	0.3	0.4	4.5%	3.5%	0.9%	60.0%	83.4%	5.5%	3.5%	1.9%	8.7	5	-3.3%	1.2%	0.2%	3.6%	yes	0.6%	43,327	61,426	3.6%			
Retail	14.3	10	362	5	39,346	21	0.7	0.9	2.0%	0.5%	1.5%	92.5%	111.3%	1.4%	-2.0%	3.4%	1.5	10	2.9%	2.7%	0.4%	4.9%								
Hospitality	26.3	6	722	3	36,415	22	2.9	2.6	0.5%	-0.2%	0.6%	143.0%	130.1%	1.1%	-0.6%	1.7%	16.8	4	-1.1%	2.3%	1.5%	1.2%	yes							
Public transport	6.0	15	69	17	87,164	7	1.2	1.3	-1.8%	-1.3%	-0.5%	43.3%	57.0%	-4.5%	-3.8%	-0.7%	0.0	16		2.5%	1.6%									
Personal & recreational services	16.6	8	336	6	49,436	16	0.9	1.3	-0.1%	0.7%	-0.8%	63.1%	86.7%	1.1%	1.1%	-0.1%	6.1	8	2.5%	1.0%	1.6%	2.3%	yes							
Government	5.3	16	67	18	78,605	9	0.3	0.3	-3.4%	-4.3%	0.9%	86.6%	95.8%	-3.0%	-4.6%	1.7%	0.1	15	0.0%	4.1%	3.2%	6.7%								
Education	12.3	11	275	7	44,963	19	0.7	0.8	1.8%	2.5%	-0.7%	69.3%	91.4%	2.2%	2.8%	-0.6%	0.6	12	-5.6%	0.2%	1.4%	-6.2%		0.9%	40,924	54,565	2.9%			
Health & aged care	9.1	14	171	10	53,486	15	0.4	0.5	0.6%	-0.3%	0.9%	154.6%	182.9%	4.7%	4.5%	0.2%	0.0	16		3.5%	2.5%									
Property & real estate services	26.0	7	71	16	365,589	1	1.0	0.9	4.1%	3.2%	0.9%	61.8%	53.9%	5.4%	4.3%	1.1%	0.0	16		2.2%	0.1%									
Tourism	53.1	2	1,098	1	48,352	18	3.2	3.4	3.4%	1.9%	1.4%	107.9%	112.9%	4.9%	1.8%	3.0%	158.9	2	2.5%	1.7%	-0.1%	3.1%								
Total	439.8		4,453		98,765				2.5%	1.5%				3.9%	1.7%		623.5		3.3%	1.9%	1.1%	3.9%	yes	1.2%	37,800	54,230	3.7%			

Source: MartinJenkins, based on Infometrics regional database.

In Westland, the sectors with the greatest number of highly ranked key indicators (yellow to dark green in the table) are food and beverage cultivation and related processing; dairy and related processing; forestry and wood processing; minerals and related processing; construction and related services; freight and logistics; and tourism.



As shown in Table 7, there are both common and distinctive sectors across the districts, consistent with the previous analysis of broad industries.

Table 7. Highest ranking sector value-chains across West Coast districts

	Key Sector		
	Buller	Grey	Westland
Horticulture, food & beverage		✓	✓
Dairy & related processing	✓	✓	✓
Forestry & related processing			✓
Aquaculture, fishing & related processing		✓	
Minerals & related processing	✓	✓	✓
Creative & ICT	✓	✓	
Construction & related services	✓	✓	✓
Freight & logistics	✓	✓	✓
Education		✓	
Health & aged care		✓	
Property & real estate services	✓	✓	
Retail	✓		
Tourism			✓

Dairy and related processing, minerals and related processing, construction and related services and freight and logistics stand out as key industries across all three districts.

Sectors that are common to two districts are horticulture, food & beverage; creative and ICT; property and real estate services; and retail/tourism³.

³ Note that much of retail is captured under tourism.



Star performers

These rankings can disadvantage sectors that are relatively small but growing, given that several of the indicators relate to scale (e.g., of GDP, employment, exports). To complete the analysis, we identified sectors that are based on comparative advantages and that are fast growing, irrespective of scale.

Figures 12 through 17 show the 22 sectors ranked according to LQs plus GDP or employment growth. Of particular interest are those sectors that have an LQ greater than one and that have been growing employment or their contribution to GDP at rates faster than the West Coast average (the top right-hand quadrants of the figures).

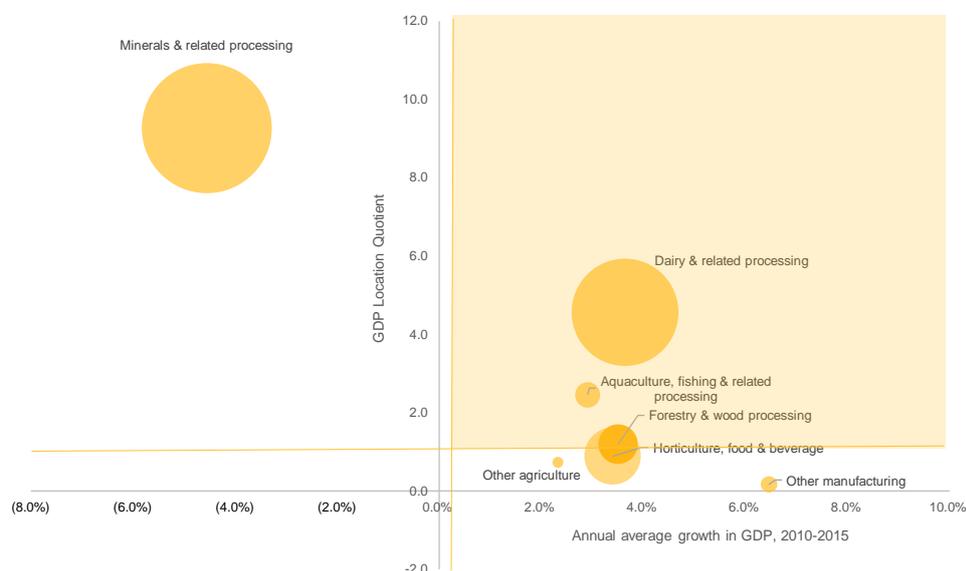
GDP growth and location quotients

Based on GDP growth and LQs, the 'star' performers over 2010 to 2015 have been (Figures 12 to 14):

- dairy and related processing
- aquaculture, fishing and related processing
- forestry and wood processing
- construction and related services
- tourism.

A sector that is close to being a star performer is horticulture, food and beverage.

Figure 12. GDP, GDP growth and GDP location quotients, selected sectors (A)

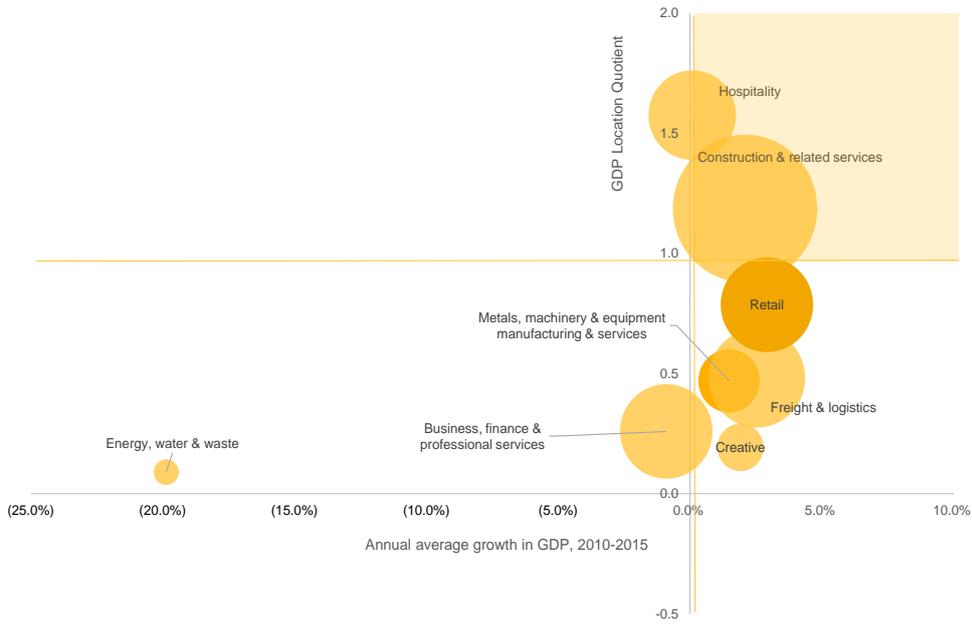


Source: Infometrics regional database and MartinJenkins analysis.

Note: Vertical yellow line: regional average GDP growth rate over 2010–2015; Horizontal yellow line: LQ=1. Size of the bubbles represents sector GDP contribution.



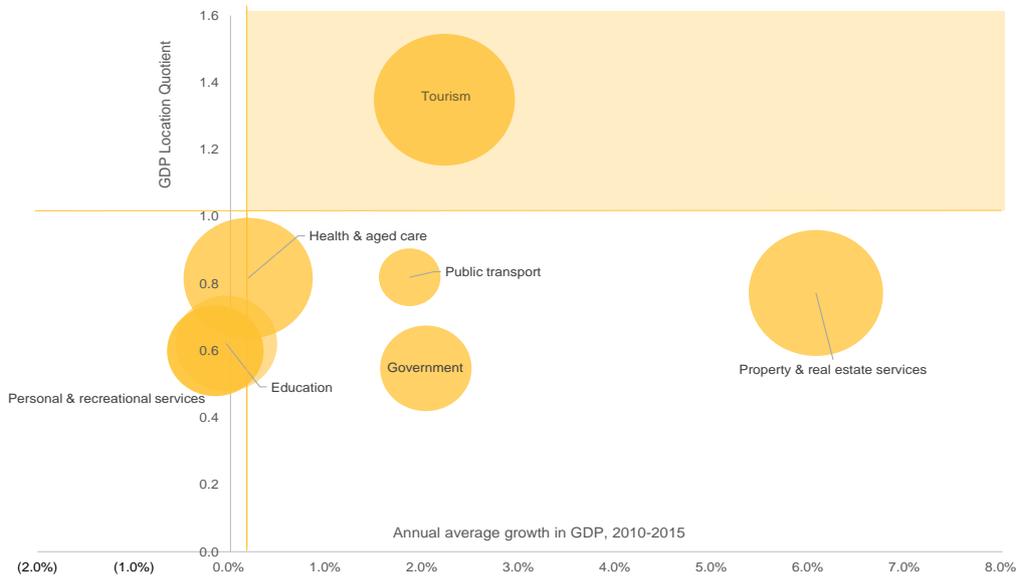
Figure 13. GDP, GDP growth and GDP location quotients, selected sectors (B)



Source: Infometrics regional database and MartinJenkins analysis.

Note: Vertical yellow line: regional average GDP growth rate over 2010–2015; Horizontal yellow line: LQ=1. Size of the bubbles represents sector GDP contribution.

Figure 14. GDP, GDP growth and GDP location quotients, selected sectors (C)



Source: Infometrics regional database and MartinJenkins analysis.

Note: Vertical yellow line: regional average GDP growth rate over 2010–2015; Horizontal yellow line: LQ=1. Size of the bubbles represents sector GDP contribution.



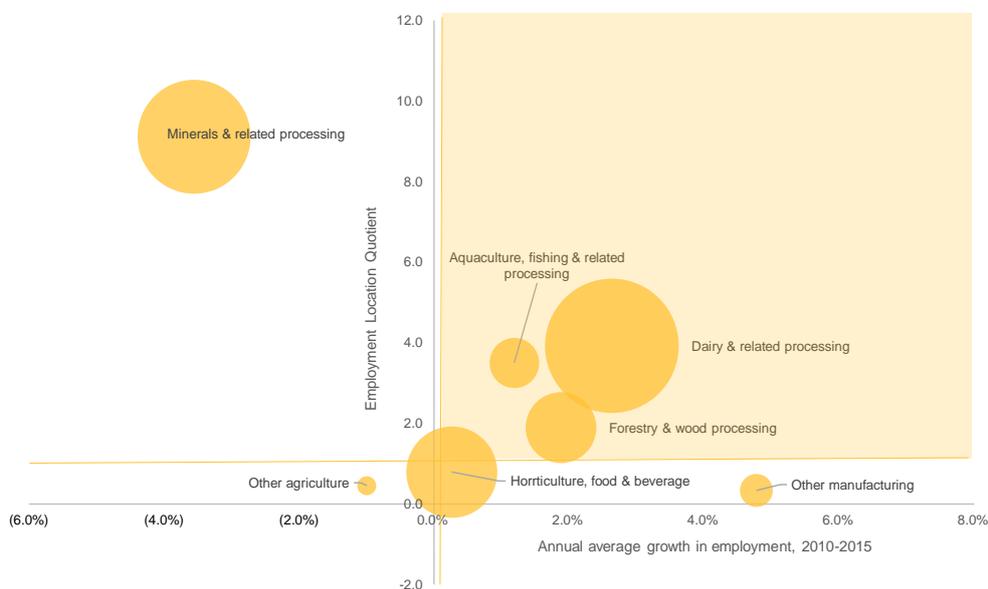
Employment growth and location quotients

Examination of sectors by employment growth and LQs shows a very similar range of star performers (Figures 15 to 17):

- aquaculture, fishing and related processing
- dairy and related processing
- forestry and wood processing
- construction and related services.

Sectors that are close to star performers on this basis are food and beverage cultivation and processing, tourism, health services and aged care, and education.

Figure 15. Employment, employment growth and employment location quotients, selected sectors (A)

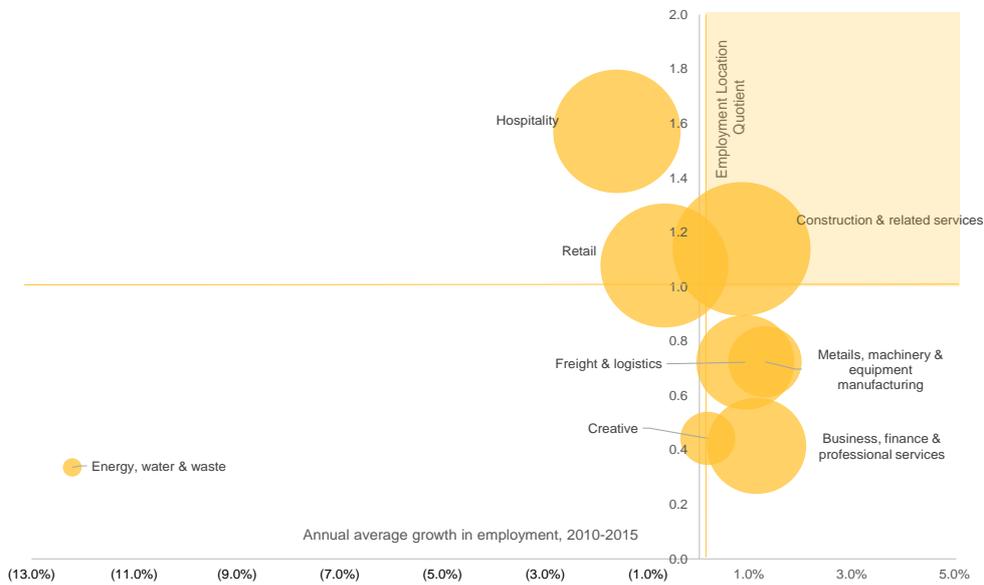


Source: Infometrics regional database and MartinJenkins analysis.

Note: Vertical yellow line: regional average employment growth rate over 2010–2015; Horizontal yellow line: LQ=1. Size of the bubbles represents sector employment contribution.



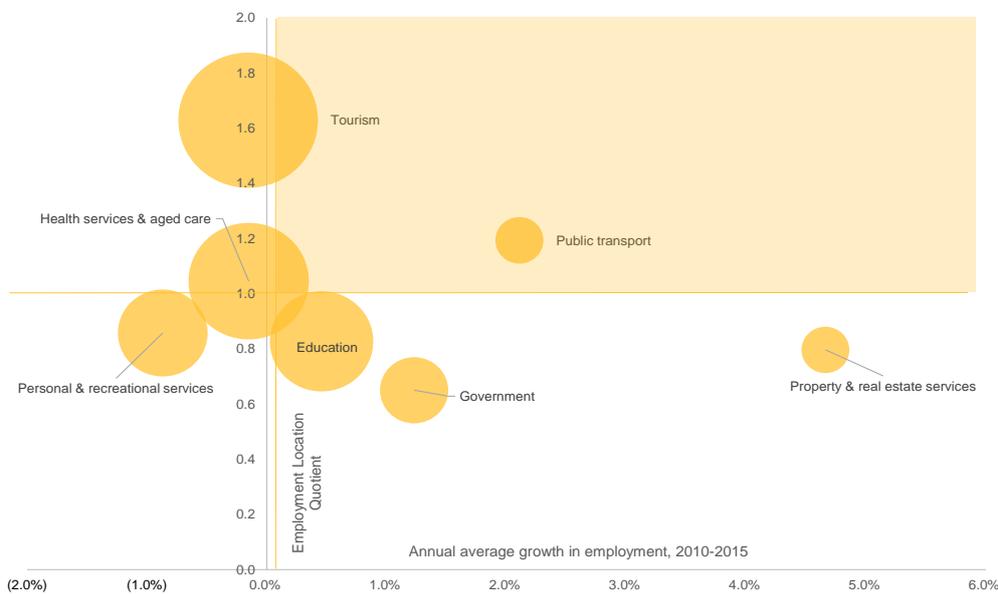
Figure 16. Employment, employment growth and employment location quotients, selected sectors (B)



Source: Infometrics regional database and MartinJenkins analysis.

Note: Vertical yellow line: regional average employment growth rate over 2010–2015; Horizontal yellow line: LQ=1. Size of the bubbles represents sector employment contribution.

Figure 17. Employment, employment growth and employment location quotients, selected sectors (C)



Source: Infometrics regional database and MartinJenkins analysis.

Note: Vertical yellow line: regional average employment growth rate over 2010–2015; Horizontal yellow line: LQ=1. Size of the bubbles represents sector employment contribution.



Key sectors on the West Coast

Based on all the preceding analysis and discussions with stakeholders, we identified ten sectors as having potential to drive income and employment growth on the West Coast. We categorised the sectors into two groups:

- 1 **Key sectors** – these are sectors that ranked highly on several of the criteria, i.e., they are of significant scale, are reasonably concentrated on the West Coast, have demonstrated growth in employment, have large flow-on impacts to other sectors, and have further potential for growth based on what is known about resource availability, national and/or offshore market demand. Key sectors are:
 - minerals and related processing
 - dairy and related processing
 - construction and related services
 - tourism
 - health and aged care.
- 2 **Niche or emerging sectors** - these are sectors that meet some of the criteria, e.g., they may be currently small scale but are concentrated in the region, they may have exhibited limited trend growth but are expected to grow more significantly in future. Niche or emerging sectors are:
 - horticulture, food and beverage
 - aquaculture, fishing and related processing
 - forestry and wood processing
 - creative and ICT
 - education.

The ten sectors were the focus for subsequent detailed research, analysis and consultation with stakeholders.



APPENDIX 1. SECTOR DEFINITIONS

Table 8. Detailed sector value-chain definitions

Sectors	Definition
Agriculture - other	Nursery Production (Under Cover); Nursery Production (Outdoors); Turf Growing; Floriculture Production (Under Cover); Floriculture Production (Outdoors); Rice Growing; Sugar Cane Growing; Cotton Growing; Horse Farming; Cotton Ginning; Shearing Services.
Horticulture, food and beverage	Mushroom Growing; Vegetable Growing (Under Cover); Vegetable Growing (Outdoors); Grape Growing; Kiwifruit Growing; Berry Fruit Growing; Apple and Pear Growing; Stone Fruit Growing; Citrus Fruit Growing; Olive Growing; Other Fruit and Tree Nut Growing; Other Grain Growing; Poultry Farming (Eggs); Beekeeping; Other Agriculture and Fishing Support Services (a share of); Fruit and Vegetable Processing; Oil and Fat Manufacturing; Grain Mill Product Manufacturing; Cereal, Pasta and Baking Mix Manufacturing; Bread Manufacturing (Factory-based); Cake and Pastry Manufacturing (Factory-based); Biscuit Manufacturing (Factory-based); Bakery Product Manufacturing (Non-factory-based); Sugar Manufacturing; Confectionery Manufacturing; Potato Crisps and Corn Chips Manufacturing; Prepared Animal and Bird Feed Manufacturing; Other Food Products Manufacturing n.e.c.; Soft Drink, Cordial and Syrup Manufacturing; Beer Manufacturing; Spirit Manufacturing; Wine and Other Alcoholic Beverage Manufacturing; Cigarette and Tobacco Product Manufacturing; Sheep Farming (Specialised); Beef Cattle Farming (Specialised); Beef Cattle Feedlots (Specialised); Sheep-Beef Cattle Farming; Grain-Sheep and Grain-Beef Cattle Farming; Poultry Farming (Meat); Deer Farming; Pig Farming; Other Livestock Farming n.e.c.; Meat Processing; Poultry Processing; Cured Meat and Smallgoods Manufacturing; Farm Animals and Bloodstock Leasing; Other Crop Growing n.e.c.; Hunting and Trapping.
Dairy & related processing	Dairy Cattle Farming; Other Agriculture and Fishing Support Services (a share of); Milk and Cream Processing; Ice Cream Manufacturing; Cheese and Other Dairy Product Manufacturing.
Aquaculture, fishing & related processing	Longline and Rack (Offshore) Aquaculture; Caged (Offshore) Aquaculture; Onshore Aquaculture; Rock Lobster and Crab Potting; Prawn Fishing; Line Fishing; Fish Trawling, Seining and Netting; Other Fishing; Other Agriculture and Fishing Support Services (a share of); Seafood Processing.
Forestry & wood processing	Forestry; Logging; Forestry Support Services; Other Agriculture and Fishing Support Services (a share of); Log Sawmilling; Wood Chipping; Timber Resawing and Dressing; Prefabricated Wooden Building Manufacturing; Wooden Structural Fittings and Components Manufacturing; Veneer and Plywood Manufacturing; Reconstituted Wood Product Manufacturing; Other Wood Product Manufacturing n.e.c.; Pulp, Paper and Paperboard Manufacturing; Corrugated Paperboard and Paperboard Container Manufacturing; Paper Bag and Sack Manufacturing; Paper Stationery Manufacturing; Sanitary Paper Product Manufacturing; Other Converted Paper Product Manufacturing.
Minerals & related processing	Coal Mining; Oil and Gas Extraction; Iron Ore Mining; Bauxite Mining; Copper Ore Mining; Gold Ore Mining; Mineral Sand Mining; Nickel Ore Mining; Silver-Lead-Zinc Ore Mining; Other Metal Ore Mining; Gravel and Sand Quarrying; Other Construction Material Mining; Other Non-Metallic Mineral Mining and Quarrying; Petroleum Exploration; Mineral Exploration; Other Mining Support Services; Glass and Glass Product Manufacturing; Clay Brick Manufacturing; Other Ceramic Product Manufacturing; Cement and Lime Manufacturing; Plaster and Gypsum Product Manufacturing; Ready-Mixed Concrete Manufacturing; Concrete Product Manufacturing; Other Non-Metallic Mineral Product Manufacturing; Iron Smelting and Steel Manufacturing; Iron and Steel Casting; Steel Pipe and Tube Manufacturing; Alumina Production; Aluminium Smelting; Copper, Silver, Lead, and Zinc Smelting and Refining; Other Basic Non-Ferrous Metal Manufacturing.



Sectors	Definition
Chemical & pharmaceutical processing & other manufacturing	Wool Scouring; Natural Fibre Textile Manufacturing; Synthetic Fibre Textile Manufacturing; Leather Tanning, Fur Dressing and Leather Product Manufacturing; Textile Floor Covering Manufacturing; Rope, Cordage and Twine Manufacturing; Cut and Sewn Textile Product Manufacturing; Textile Finishing and Other Textile Product Manufacturing; Knitted Product Manufacturing; Clothing Manufacturing; Footwear Manufacturing; Natural Rubber Product Manufacturing; Wooden Furniture and Upholstered Seat Manufacturing; Metal Furniture Manufacturing; Mattress Manufacturing; Other Furniture Manufacturing; Toy, Sporting and Recreational Product Manufacturing; Other Manufacturing n.e.c., Petroleum Refining and Petroleum Fuels Manufacturing; Other Petroleum and Coal Product Manufacturing; Industrial Gases Manufacturing; Basic Organic Chemical Manufacturing; Basic Inorganic Chemical Manufacturing; Synthetic Resin and Synthetic Rubber Manufacturing; Other Basic Polymer Manufacturing; Fertiliser Manufacturing; Pesticide Manufacturing; Human Pharmaceutical and Medicinal Product Manufacturing; Veterinary Pharmaceutical and Medicinal Product Manufacturing; Cleaning Compound Manufacturing; Cosmetic and Toiletry Preparation Manufacturing; Photographic Chemical Manufacturing; Explosives Manufacturing; Other Basic Chemical Product Manufacturing n.e.c.; Polymer Film and Sheet Packaging Material Manufacturing; Rigid and Semi Rigid Polymer Product Manufacturing; Polymer Foam Product Manufacturing; Tyre Manufacturing; Adhesive Manufacturing; Paint and Coatings Manufacturing; Other Polymer Product Manufacturing.
Business, finance & professional services	Printing; Printing Support Services; Banking; Building Society Operation; Credit Union Operation; Other Depository Financial Intermediation; Non-depository Financing; Financial Asset Investing; Life Insurance; Health Insurance; General Insurance; Superannuation Funds; Financial Asset Broking Services; Other Auxiliary Finance and Investment Services; Auxiliary Insurance Services; Other Motor Vehicle and Transport Equipment Rental and Hiring; Other Goods and Equipment Rental and Hiring n.e.c.; Non-Financial Intangible Assets (except Copyrights) Leasing; Scientific Research Services; Scientific Testing and Analysis Services; Legal Services; Accounting Services; Advertising Services; Market Research and Statistical Services; Corporate Head Office Management Services; Management Advice and Other Consulting Services; Veterinary Services; Other Professional, Scientific and Technical Services n.e.c.; Employment Placement and Recruitment Services; Labour Supply Services; Office Administrative Services; Document Preparation Services; Credit Reporting and Debt Collection Services; Call Centre Operation; Other Administrative Services n.e.c.; Buildings Cleaning Services; Buildings Pest Control Services; Gardening Services; Packaging Services; Investigation and Security Services; Business and Professional Association Services; Labour Association Services.
Creative	Reproduction of Recorded Media; Jewellery and Silverware Manufacturing; Newspaper Publishing; Magazine and Other Periodical Publishing; Book Publishing; Directory and Mailing List Publishing; Other Publishing (except Software, Music and Internet); Software Publishing; Motion Picture and Video Production; Motion Picture and Video Distribution; Motion Picture Exhibition; Postproduction Services and Other Motion Picture and Video Activities; Music Publishing; Music and Other Sound Recording Activities; Radio Broadcasting; Free-to-Air Television Broadcasting; Cable and Other Subscription Programming; Internet Publishing and Broadcasting; Wired Telecommunications Network Operation; Other Telecommunications Network Operation; Other Telecommunications Services; Internet Access Services; Data Processing and Web Hosting Services; Electronic Information Storage Services; Other Information Services; Other Specialised Design Services; Professional Photographic Services; Computer Systems Design and Related Services; Museum Operation; Performing Arts Operation; Creative Artists, Musicians, Writers and Performers; Performing Arts Venue Operation.



Sectors	Definition
Metals, machinery & equipment manufacturing & services	Non-Ferrous Metal Casting; Aluminium Rolling, Drawing, Extruding; Other Basic Non-Ferrous Metal Product Manufacturing; Iron and Steel Forging; Structural Steel Fabricating; Prefabricated Metal Building Manufacturing; Architectural Aluminium Product Manufacturing; Metal Roof and Guttering Manufacturing (except Aluminium); Other Structural Metal Product Manufacturing; Boiler, Tank and Other Heavy Gauge Metal Container Manufacturing; Other Metal Container Manufacturing; Other Sheet Metal Product Manufacturing; Spring and Wire Product Manufacturing; Nut, Bolt, Screw and Rivet Manufacturing; Metal Coating and Finishing; Other Fabricated Metal Product Manufacturing n.e.c.; Motor Vehicle Manufacturing; Motor Vehicle Body and Trailer Manufacturing; Automotive Electrical Components Manufacturing; Other Motor Vehicle Parts Manufacturing; Shipbuilding and Repair Services; Boatbuilding and Repair Services; Railway Rolling Stock Manufacturing and Repair Services; Aircraft Manufacturing and Repair Services; Other Transport Equipment Manufacturing n.e.c.; Photographic, Optical and Ophthalmic Equipment Manufacturing; Medical and Surgical Equipment Manufacturing; Other Professional and Scientific Equipment Manufacturing; Computer and Electronic Office Equipment Manufacturing; Communications Equipment Manufacturing; Other Electronic Equipment Manufacturing; Electric Cable and Wire Manufacturing; Electric Lighting Equipment Manufacturing; Other Electrical Equipment Manufacturing; Whiteware Appliance Manufacturing; Other Domestic Appliance Manufacturing; Pumps and Compressors Manufacturing; Fixed Space Heating, Cooling and Ventilation Equipment Manufacturing; Agricultural Machinery and Equipment Manufacturing; Mining and Construction Machinery Manufacturing; Machine Tool and Parts Manufacturing; Other Specialised Machinery and Equipment Manufacturing; Lifting and Material Handling Equipment Manufacturing; Other Machinery and Equipment Manufacturing n.e.c.; Automotive Electrical Services; Automotive Body, Paint and Interior Repair; Other Automotive Repair and Maintenance; Domestic Appliance Repair and Maintenance; Electronic (except Domestic Appliance) and Precision Equipment Repair and Maintenance; Other Machinery and Equipment Repair and Maintenance.
Energy, water & waste	Fossil Fuel Electricity Generation; Hydro-electricity Generation; Other Electricity Generation; Electricity Transmission; Electricity Distribution; On Selling Electricity and Electricity Market Operation; Gas Supply; Water Supply; Sewerage and Drainage Services; Solid Waste Collection Services; Other Waste Collection Services; Waste Treatment and Disposal Services; Waste Remediation and Materials Recovery Services.
Construction & related services	House Construction; Other Residential Building Construction; Non-Residential Building Construction; Road and Bridge Construction; Other Heavy and Civil Engineering Construction; Land Development and Subdivision; Site Preparation Services; Concreting Services; Bricklaying Services; Roofing Services; Structural Steel Erection Services; Plumbing Services; Electrical Services; Air Conditioning and Heating Services; Fire and Security Alarm Installation Services; Other Building Installation Services; Plastering and Ceiling Services; Carpentry Services; Tiling and Carpeting Services; Painting and Decorating Services; Glazing Services; Landscape Construction Services; Hire of Construction Machinery with Operator; Other Construction Services n.e.c.; Heavy Machinery and Scaffolding Rental and Hiring; Architectural Services; Surveying and Mapping Services; Engineering Design and Engineering Consulting Services.
Freight & logistics	Wool Wholesaling; Cereal Grain Wholesaling; Other Agricultural Product Wholesaling; Petroleum Product Wholesaling; Metal and Mineral Wholesaling; Industrial and Agricultural Chemical Product Wholesaling. Timber Wholesaling; Plumbing Goods Wholesaling; Other Hardware Goods Wholesaling; Agricultural and Construction Machinery Wholesaling; Other Specialised Industrial Machinery and Equipment Wholesaling; Professional and Scientific Goods Wholesaling; Computer and Computer Peripherals Wholesaling; Telecommunication Goods Wholesaling; Other Electrical and Electronic Goods Wholesaling; Other Machinery and Equipment Wholesaling n.e.c.; Car Wholesaling; Commercial Vehicle Wholesaling; Trailer and Other Motor Vehicle Wholesaling; Motor Vehicle New Part Wholesaling; Motor Vehicle Dismantling and Used Part Wholesaling; General Line Groceries Wholesaling; Meat, Poultry and Smallgoods Wholesaling; Dairy Produce Wholesaling; Fish and Seafood Wholesaling; Fruit and Vegetable Wholesaling; Liquor and Tobacco Product Wholesaling; Other Grocery Wholesaling; Textile Product Wholesaling; Clothing and Footwear Wholesaling; Pharmaceutical and Toiletry Goods Wholesaling; Furniture and Floor Coverings Wholesaling; Jewellery and Watch Wholesaling; Kitchen and Dining Ware Wholesaling; Toy and Sporting Goods Wholesaling; Book and Magazine Wholesaling; Paper Product Wholesaling; Other Goods Wholesaling n.e.c.; Commission Based Wholesaling; Road Freight Transport; Rail Freight Transport; Water Freight Transport; Pipeline Transport; Other Transport n.e.c.; Postal Services; Courier Pick-up and Delivery Services; Stevedoring Services; Port and Water Transport Terminal Operations; Other Water Transport Support Services; Airport Operations and Other Air Transport Support Services; Customs Agency Services; Freight Forwarding Services; Other Transport Support Services n.e.c; Grain Storage Services; Other Warehousing and Storage Services.



Sectors	Definition
Retail	Car Retailing; Motor Cycle Retailing; Trailer and Other Motor Vehicle Retailing; Motor Vehicle Parts Retailing; Tyre Retailing; Fuel Retailing; Supermarket and Grocery Stores; Fresh Meat, Fish and Poultry Retailing; Fruit and Vegetable Retailing; Liquor Retailing; Other Specialised Food Retailing; Furniture Retailing; Floor Coverings Retailing; Houseware Retailing; Manchester and Other Textile Goods Retailing; Electrical, Electronic and Gas Appliance Retailing; Computer and Computer Peripherals Retailing; Other Electrical and Electronic Goods Retailing; Hardware and Building Supplies Retailing; Garden Supplies Retailing; Sport and Camping Equipment Retailing; Entertainment Media Retailing; Toy and Game Retailing; Newspaper and Book Retailing; Marine Equipment Retailing; Clothing Retailing; Footwear Retailing; Watch and Jewellery Retailing; Other Personal Accessories Retailing; Department Stores; Pharmaceutical, Cosmetic and Toiletry Goods Retailing; Stationery Goods Retailing; Antique and Used Goods Retailing; Flower Retailing; Other Store-Based Retailing n.e.c.; Non Store Retailing; Retail Commission Based Buying and/or Selling.
Hospitality	Accommodation; Cafes and Restaurants; Takeaway Food Services; Catering Services; Pubs, Taverns and Bars; Clubs (Hospitality).
Public transport	Interurban and Rural Bus Transport; Urban Bus Transport (Including Tramway); Taxi and Other Road Transport; Rail Passenger Transport; Water Passenger Transport; Air and Space Transport; Scenic and Sightseeing Transport.
Personal & recreational services	Video and Other Electronic Media Rental; Travel Agency and Tour Arrangement Services; Child Care Services; Other Social Assistance Services; Zoological and Botanic Gardens Operation; Nature Reserves and Conservation Parks Operation; Health and Fitness Centres and Gymnasias Operation; Sport and Physical Recreation Clubs and Sports Professionals; Sports and Physical Recreation Venues, Grounds and Facilities Operation; Sport and Physical Recreation Administrative Service; Horse and Dog Racing Administration and Track Operation; Other Horse and Dog Racing Activities; Amusement Parks and Centres Operation; Amusement and Other Recreation Activities n.e.c.; Casino Operation; Lottery Operation; Other Gambling Activities; Clothing and Footwear Repair; Other Repair and Maintenance n.e.c.; Hairdressing and Beauty Services; Diet and Weight Reduction Centre Operation; Funeral, Crematorium and Cemetery Services; Laundry and Dry-Cleaning Services; Brothel Keeping and Prostitution Services; Other Personal Services n.e.c.; Religious Services; Other Interest Group Services n.e.c.
Government	Central Banking; Central Government Administration; State Government Administration; Local Government Administration; Justice; Domestic Government Representation; Foreign Government Representation; Defence; Police Services; Fire Protection and Other Emergency Services (except Ambulance Services); Correctional and Detention Services; Other Public Order and Safety Services; Regulatory Services.
Education	Preschool Education; Primary Education; Secondary Education; Combined Primary and Secondary Education; Special School Education; Technical and Vocational Education and Training; Higher Education; Sports and Physical Recreation Instruction; Arts Education; Adult, Community and Other Education n.e.c.; Educational Support Services.
Health & aged care	Hospitals (except Psychiatric Hospitals); Psychiatric Hospitals; General Practice Medical Services; Specialist Medical Services; Pathology and Diagnostic Imaging Services; Dental Services; Optometry and Optical Dispensing; Physiotherapy Services; Chiropractic and Osteopathic Services; Other Allied Health Services; Ambulance Services; Other Health Care Services n.e.c.; Aged Care Residential Services; Other Residential Care Services.
Property & real estate services	Residential Property Operators; Non-Residential Property Operators; Real Estate Services.
Tourism	Proportions of accommodation, food services, passenger transport, scenic and sightseeing transport, travel agency services, vehicle rental, museum operation, gardens, parks and reserves, sport venues and facilities, amusement parks, casinos, retailing, education.

