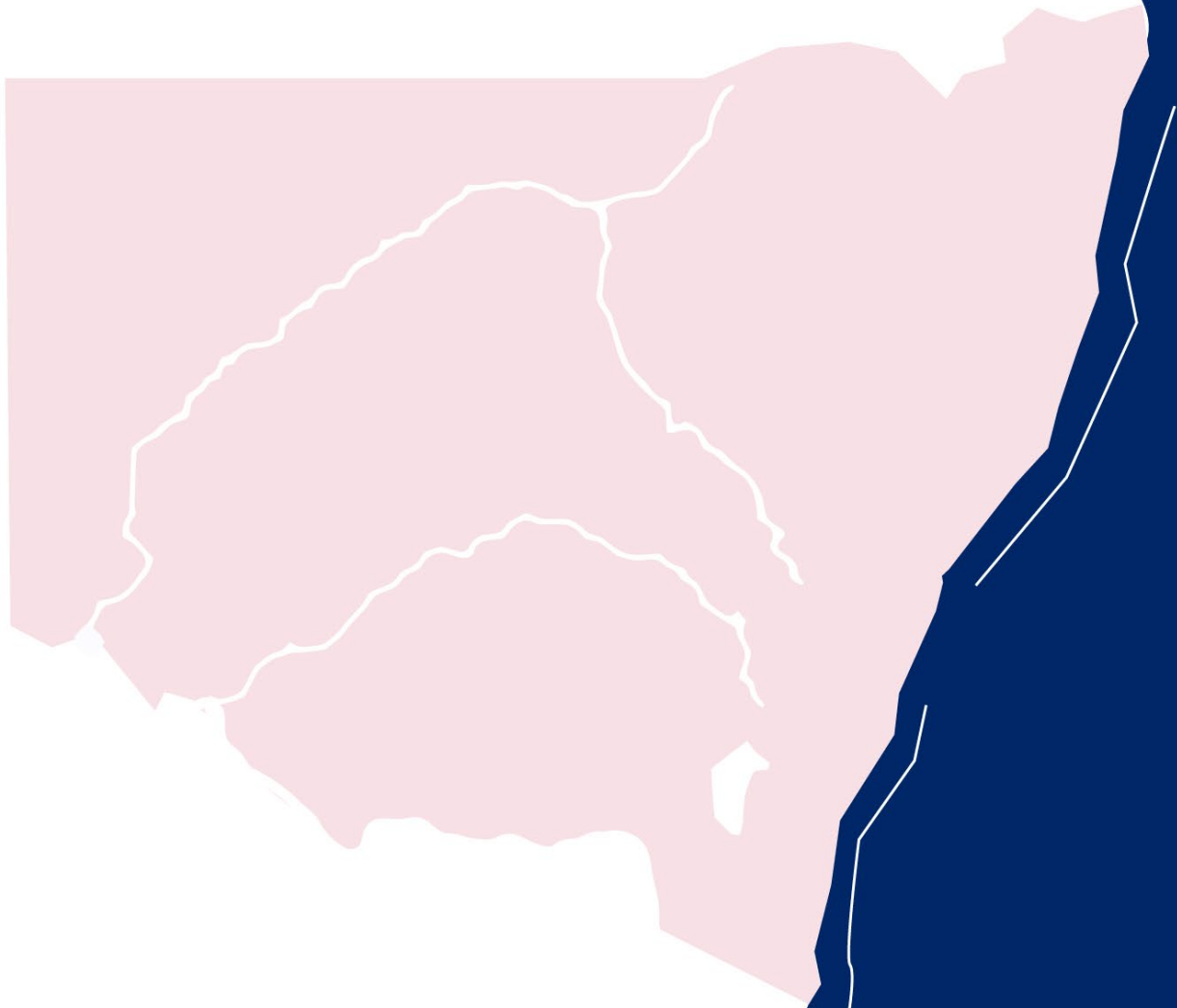


Appendix D: Statewide Employment Guidance

State Plan

August 2026



Contents

Appendix D: Statewide Employment Guidance	i
Introduction	2
Context	2
Purpose of the Guidance	3
Who should use the Guidance	3
Implementation of the Guidance	3
Jobs targets	4
What are jobs targets	4
General methodology for jobs targets	4
Employment, industries and the categories	5
8 Broad industry categories	5
Alignment to other economic strategies and policies	11
NSW Industry Policy	11
NSW Trade and Investment Strategy	11
NSW Innovation Blueprint	12
NSW Critical Minerals Strategy	12
NSW Net Zero Plan	12
Renewable Energy Zones	13

Introduction

New South Wales has a large and diverse economic geography. The Statewide Employment Guidance (the Guidance) provides a consistent framework to support planning for jobs growth in its regions. The Guidance establishes an evidence-based jobs target methodology and the Eight broad industry categories, as a part of the new strategic planning framework of the NSW State Land Use Plan (the State Plan).

Context

The NSW economy contributed a third of Australia's Gross Domestic Product in 2024-2025, totalling a Gross State Product of \$855 billion and it is projected to double by 2060. The economy is supported by Australia's largest workforce of over 4.4 million people. This is projected to grow to over 5.3 million people by 2046. More broadly, NSW has world-leading universities and health districts and the state is a tourist destination for people from all around the world.

While the NSW economy is shaped by different industry specialisations, knowledge-based and health and education industries have grown to make up a combined 55% of the state's economy over the last 20 years and over 50% of jobs in NSW. The Financial and Insurance Services industry is the single largest contributor to the NSW economy, adding just under \$110 billion in Gross Value Added (GVA) to the state. Health Care and Social Assistance and Professional, Scientific and Technical Services are also key industries that drive the state's economy. At the same time, the biggest industry employers in NSW are Construction, Retail Trade, Professional, Scientific and Technical Services, Education and Training, and Health Care and Social Assistance. Together these industries make up more than half of the state's jobs.

In addition, exports accounted for over \$153 billion in goods and services in 2024-25 with primary resources and agriculture, along with service-based exports such as education-related travel, being the most significant export categories.

Into the future, these economic strengths will continue. Emerging sectors and technologies including artificial intelligence, and transition to net zero will create new revenue streams, augment work, and increase productivity. Although opportunities and impacts will vary across industries, occupations and regions.

Purpose of the Guidance

The Guidance will inform the strategic planning of jobs growth and land use provisions for industries across NSW.

The purpose of the Guidance is to support strategic planning across all levels of government to:

- Protect strategically important land uses, such as commercial cores and industrial lands, that complement the growth of the state's economy
- Unlock capacity and access for education, health, and transportation infrastructure
- Expand the permissibility of land uses in appropriate locations to support the visitor economy
- Apply an evidence-based approach to jobs targets and strategic land use planning

Who should use the Guidance

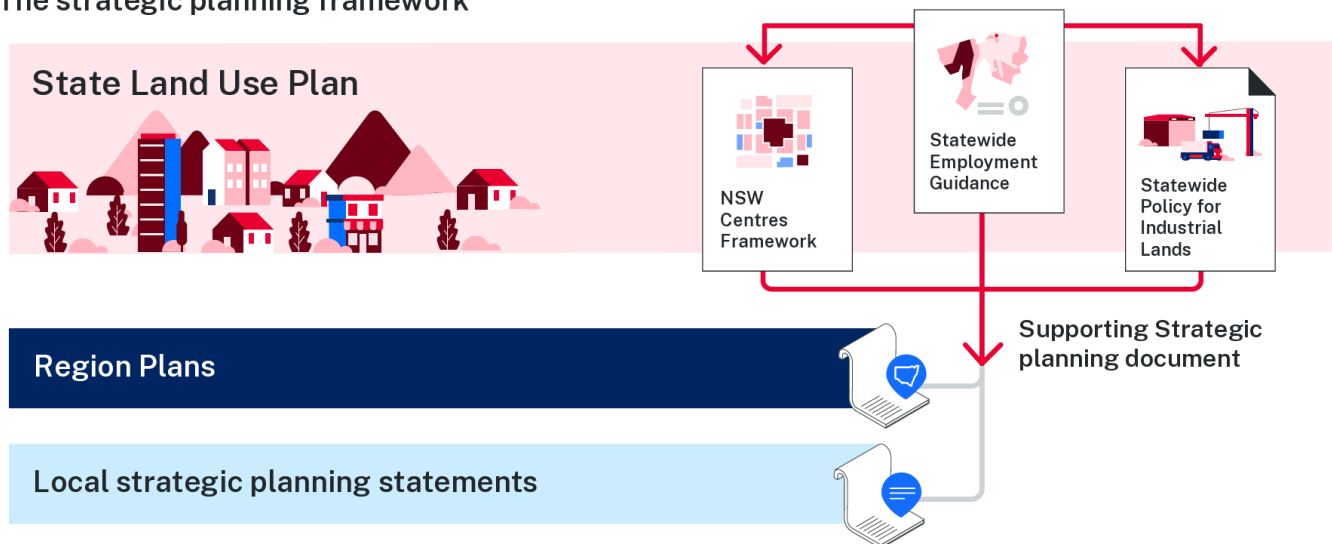
This Guidance will be used by the Department of Planning, Housing and Industry (the Department), other State Government agencies, councils, consultants, and other technical professionals.

Implementation of the Guidance

This Guidance should be read in conjunction with the State Land Use Plan and its associated technical appendices that have a direct interface with the Guidance, Namely the Centres Framework (the Framework) and the Statewide Industrial Lands Policy (the Policy).

Figure 1: How the Guidance fits into the wider strategic planning framework

The strategic planning framework



Jobs targets

What are jobs targets

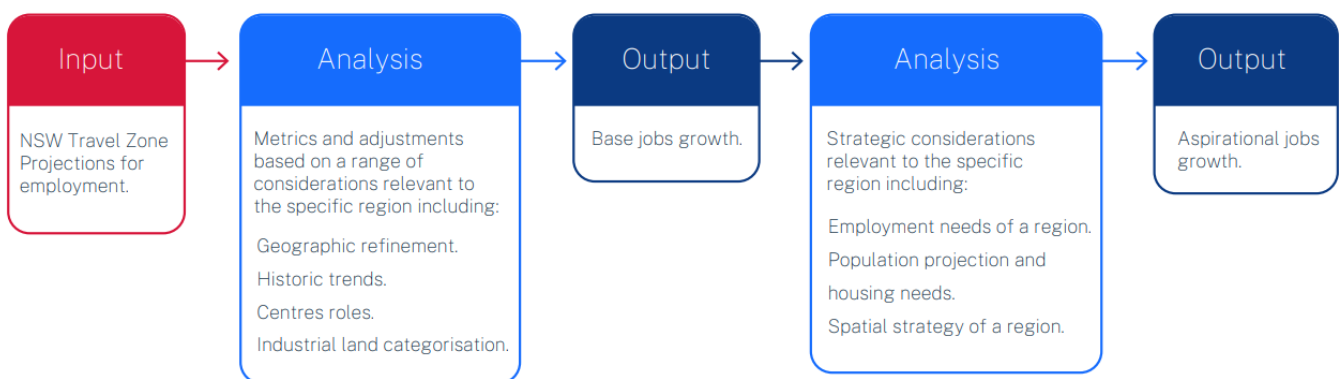
Job targets are aspirational targets that support the coordinated planning and investment by setting clear expectations around what is required or desirable in each region. They are different from projections, which are derived from historical data.

Setting jobs targets helps government balance housing and employment growth, promote self-containment and reduce commuting pressures. Region plans set jobs targets at different scales relevant to the specific region. Robust mechanisms to monitor, evaluate and report on progress towards these targets will need to be established alongside the targets at the regional and local levels of strategic planning.

General methodology for jobs targets

The methodology for jobs targets utilises the TfNSW Travel Zone Projections (TZP) for employment, which provides a basis for establishing the target. These NSW government-endorsed projections are used because they have been developed to support a strategic view of NSW, as part of the Common Planning Assumptions. Considerations for planning-specific matters, in accordance with a region's characteristics, are also a crucial aspect to developing the jobs target, as they provide a contextualised understanding of strategic intent and policy directions for a region. The below figure illustrates the methodology behind the targets.

Figure 2: Jobs target methodology



Employment, industries and the categories

8 Broad industry categories

Jobs targets are supported with an understanding of which industries should be targeted for that growth. To support this, Eight Broad industry categories (BIC 8) have been identified, as part of the new strategic planning framework for the state. These categories are based on the ABS Australian and New Zealand Standard Industrial Classification (ANZSIC 19 divisions) and are designed to group industries into broadly similar locational drivers. They move beyond the traditional economic sectors and previous categorisation methods in strategic planning, that being knowledge intensive (KI), health and education (HE), population-serving (PS), and industrial (TI), allowing for greater distinction and understanding of the aspirational targets. The BIC 8 are as follows:

Table 1: 8 Broad industry categories

ANZSIC 19 divisions	BIC 4	BIC 8
Accommodation and Food Services	PS	Arts and Recreation
Arts and Recreation Services	PS	Arts and Recreation
Administration and Support Services	KI	Business Services
Financial and Insurance Services	KI	Business Services
Public Administration and Safety	KI	Business Services
Rental, Hiring and Real Estate Services	KI	Business Services
Education and Training	HE	Education
Health Care and Social Assistance	HE	Health
Agriculture, Forestry and Fishing	TI	Industrial and Resource Intensive
Electricity, Gas, Water and Waste Services	TI	Industrial and Resource Intensive
Mining	TI	Industrial and Resource Intensive
Transport, Postal and Warehousing	TI	Industrial and Resource Intensive
Construction	PS	Manufacturing and Production
Manufacturing	TI	Manufacturing and Production

Wholesale Trade	TI	Manufacturing and Production
Retail Trade	PS	Retail
Other Services	PS	Retail
Information Media and Telecommunications	KI	Technology and Communications
Professional, Scientific and Technical Services	KI	Technology and Communications

The BIC 8 has a relationship to the kinds of jobs (occupations) which are likely to be found within them. The following section identifies a sample list of occupations which may form part of the industry categories. The occupations can then also be related to certain land use types, particularly within the employment zones identified in the *Standard Instrument (Local Environmental Plans) Order 2006*.

Arts and recreation

Arts and recreation is a broad industry, comprising primarily of population-serving jobs that stem from recreational activities, such as sports, and also jobs that support said activities, for example, short-term accommodation. This industry also engages in the preservation and exhibition of objects and sites of historical, cultural or educational interest. Examples of the kinds of jobs in this BIC include:

- Arts and recreation services: Museum curators, librarians, zookeepers, actors, musicians, dancers, visual artists, writers, professional athletes and fitness instructors
- Accommodation and food services: Hotel managers, concierges, chefs, waiters, bar attendants, baristas and café managers

These jobs are primarily located in the following zones:

- E1 Local Centre
- E2 Commercial Centre
- MU1 Mixed Use
- SP4 Enterprise
- SP3 Tourist
- SP5 Metropolitan Centre

Business services

Business services jobs support well effective functioning of business and public administration and related activities such as financial services, building maintenance and operations, defence and regulatory services. Some jobs which fall in this category include:

- Financial and insurance services: Finance brokers, insurance agents, financial investment advisers, bank branch managers, actuaries and commodities traders
- Administrative and support services: Clerical workers, human resources staff, travel agents, commercial/residential cleaners and gardeners
- Public administration and safety: Police officers, firefighters, policy analysts, program administrators, diplomats, customs officers and ADF personnel
- Rental, hiring and real estate services: Property managers, real estate agents, valuers, heavy machinery/scaffold renters, intellectual property leasing agents and car rental hires

These jobs are primarily located in the following zones:

- E1 Local Centre
- E2 Commercial Centre
- MU1 Mixed Use
- SP4 Enterprise
- SP5 Metropolitan Centre

Education

Education and training jobs span the full spectrum of education all the way from pre-schooling to academic research. The industry is population serving but increasingly takes on an export driven role towards tertiary education.

- Preschool and school education: Preschool teachers, primary and secondary school teachers and principals
- Tertiary education: University lecturers, TAFE teachers, vocational trainers and academic researchers
- Adult, community and other education: sports coaches, diving instructors, art tutors and educational support services providers

These jobs are primarily located in the following zones:

- E1 Local Centre
- E2 Commercial Centre
- E3 Productivity Support
- MU1 Mixed Use
- SP4 Enterprise
- SP2 Infrastructure
- SP5 Metropolitan Centre

Health

Healthcare and social assistance jobs are generally population serving in nature – it covers a diverse range of occupations which spans high knowledge specialists such as surgeons to technical operators such as nurses and paramedics. It is important to note that health does not include medical researchers.

- Hospitals, medical and other health services: Doctors, nurses, and administrative support staff, dentists, physiotherapists, radiologists and paramedics
- Residential care and social assistance: Aged care workers, disability support workers, childcare workers and welfare managers

These jobs are primarily located in the following zones:

- E1 Local Centre
- E2 Commercial Centre
- MU1 Mixed Use
- SP4 Enterprise
- SP2 Infrastructure
- SP5 Metropolitan Centre

Industrial and resource intensive

Industrial and resource intensive jobs are primarily identified with the industrial activity and sectors of the economy. The jobs in this industry can be located both in and out of urban centres, depending on the nature of the economic activity that a business engages in, and can span across both metropolitan and regional areas. Some examples of the kinds of jobs in this collection of industries are:

- Agriculture, forestry and fishing: grain farmers, fruit growers, cattle farmers, commercial fishers, oyster farmers, deckhands, foresters and logging plant operators
- Mining: petroleum engineers, coal miners, geologists, miners, mine surveyors, quarry managers, blasters, excavator operators
- Electricity, gas, water and waste services: Power generation plant operators, electrical engineers, renewable energy technicians, water treatment plant operators, hydrologists, garbage truck drivers, recycling technicians, hazardous waste specialists
- Transport, postal and warehousing: truck drivers, train drivers, pilots, ship captains, bus drivers, posties, courier drivers, delivery drivers, forklift operators, warehouse managers, air traffic controllers and stevedores

These jobs are primarily located in the following zones:

- RU1 Primary Production
- RU3 Forestry
- RU4 Primary Production Small Lots
- E3 Productivity Support
- E4 General Industrial
- E5 Heavy Industrial
- W4 Working Waterfront

Manufacturing and production

Jobs in the Manufacturing and production BIC generally focus on the production and distribution of raw material into goods, and of the physical building of structures. Jobs considered in this BIC include:

- Construction: builders, project managers, site supervisors, civil engineers, earthmoving plant operators, electricians, plumbers, bricklayers and painters
- Manufacturing: Bakers, butchers, wine makers, textile processors, food technologists, chemical plant operators, welders, glass blowers, cabinet makers, electronics technicians, aircraft maintenance engineers and motor vehicle parts makers
- Wholesale trade: Grain traders, petroleum wholesalers, metal and mineral merchants, computer equipment wholesalers, medical equipment importers, fruit and vegetable wholesalers, dairy product distributors and liquor wholesalers

These jobs are primarily located in the following zones:

- E3 Productivity Support
- E4 General Industrial
- E5 Heavy Industrial
- W4 Working Waterfront
- SP4 Enterprise

Retail

The core of Retail is the purchase and selling of goods and services to the general public. These services are population-serving in nature and is one of the industries most impacted by recent global trends and the progression of technology. Jobs include:

- Retail trade: Car salesperson, parts interpreters, tyre fitters, service station attendants, sales assistants, checkout operators, visual merchandisers, furniture sales consultants and hardware assistants
- Other services: automotive electricians, computer technicians, watchmakers, hairdressers, beauty therapists, pet groomers, nannies and domestic housekeepers

These jobs are primarily located in the following zones:

- E1 Local Centre
- E2 Commercial Centre
- E3 Productivity Support
- MU1 Mixed Use
- SP4 Enterprise
- SP3 Tourist
- SP5 Metropolitan Centre

Technology and communications

Technology and communications jobs are generally high value jobs and are centred the creation and adoption of knowledge and technologies. They often have export value with relatively low input overheads and is common supports productivity increases across the whole of the economy. Some jobs which fall in this category include:

- Information media and telecommunications: Film, television and stage directors, artistic directors, media producers, telecommunications engineering professionals, ICT managers and software and application programmers
- Professional, scientific and technical services: Software engineers, Management and Organisation Analysts, Solicitors, Architects and Graphics and Web Designers

These jobs are primarily located in the following zones:

- E1 Local Centre
- E2 Commercial Centre
- MU1 Mixed Use
- SP4 Enterprise
- SP5 Metropolitan Centre

Alignment to other economic strategies and policies

This Guidance interacts with several key strategies and policies that influence and provide direction on jobs growth across the state. The Guidance considers the objectives and principles of these policies by translating the desired economic outcomes into land use planning applications. This Guidance provides brief summaries of the strategies and policies that support the key economic considerations of strategic planning, so that jobs growth and appropriate land uses for industries in NSW can be realised.

NSW Industry Policy

The NSW Industry Policy provides a long-term vision and commitment to give businesses the confidence to invest and grow in NSW. It is built around three interrelated missions that act as strategic priorities for the NSW Government: Housing, Net Zero and Energy Transition, and Local Manufacturing. This Guidance considers these missions to be fundamental considerations for the planning of jobs growth and appropriate land uses for industries and employment, so that economic planning outcomes can be achieved.

NSW Trade and Investment Strategy

Investment NSW's Trade and Investment Strategy build upon the key sectors identified in the Industry Policy and introduces additional sectors that are strategically focused, in consideration of global growth trends, their significant market potential, and of NSW's comparative advantage in innovation, technology, and skilled labour. These focus sectors are:

- Agrifood
- Defence and aerospace
- Digital technologies
 - Artificial intelligence and machine learning
 - Quantum technologies
 - Smart cities and the Internet of Things
 - Fintech
- International education
- Life sciences and healthcare
- Mining equipment, technology and services

The Trade and Investment Strategy provides the basis for investment in the state, identifying NSW as Australia's economic centre, and outlining principles and initiatives to action the strategy. These are matters that regional and local strategic planning should engage with to produce planning outcomes that support jobs growth for the state.

NSW Innovation Blueprint

The NSW Innovation Blueprint sets out a long-term vision and policy priorities for the state's innovation ecosystem, articulating the importance of innovation to the state's economic prosperity. It sets out the basis for how the NSW Government will work with partners in the innovation space, with particular implications for the technologies and services in businesses that operate in larger centres. The document also describes the current innovation ecosystem in the state and establishes key goals and actions that will realise the vision. These matters are a key component of the strategic planning and land use outcomes that the Guidance is designed to support and should be considered when planning for job's growth in NSW.

NSW Critical Minerals Strategy

The NSW Critical Minerals Strategy provides a high-level outlook of critical minerals and their importance for the global energy transition and advanced manufacturing. The document places the state as a key contributor to the nation's own adoption of these trends, and for the country's position in the global landscape. The strategy incentivises the production of critical minerals and high-tech metals, identifying key supply chains up and down the value chain from R&D, manufacturing and recycling/re-processing. These matters align with the purpose of the Guidance, which in turn, will support regional and local strategic planning in engaging with the strategic pillars of the Critical Minerals Strategy, so that the key actions can be realised.

NSW Net Zero Plan

The Federal Government's Net Zero Plan outlines the key priorities for addressing climate change, with the key goal being to achieve an emission reduction target between 62-70% by 2035, and net zero emissions by 2050. As part of this, the Net Zero Plan identifies an economic transition that needs to occur, which include stimulating parts of the nation's economic structure by modernising the electricity network, adopting low-emissions technologies, and harnessing the nation's abundant renewable energy resources. Electrification and the energy sector will be the critical piece for other industries and sectors, governments, the private sector and the community to realise this economic transition and should be considered in strategic planning to achieve the land use outcomes that the Guidance supports.

Renewable Energy Zones

The NSW Government is developing renewable energy zones (REZs) which will combine renewable energy sources (solar, wind, hydro) and associated infrastructure (batteries, transmissions) to power homes and businesses across the state. The concept is a crucial component of the broader transformation of the state's electricity network, as identified in the NSW Electricity Infrastructure Roadmap. There are five REZs identified across the state, replacing coal-fired power stations for secure, affordable and clean energy, and is expected to translate into 4,450 ongoing direct jobs, primarily in regional areas, and with additional demand for workers in local manufacturing, retail, transport and supply chains. This corresponds with the design of the Guidance to support strategic planning for jobs growth and appropriate land uses for industries.

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