

Regional Profiles

Hunter – Central Coast

Overview

The Hunter and Central Coast regions are at the centre of Australia's economic transformation. Coal mining and coal-fired power generation remain a significant share of the local economy, and both industries are changing. This change presents challenges for some workers and communities, but the region is also well placed to benefit. The region has strong natural assets, existing infrastructure, and a skilled workforce that can support new industries.



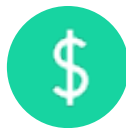
Population (2025)

- 1,179,899 persons
- 1.2% 5-Yr Avg. Annual Growth
- NSW: 1.2% 5-Yr Avg. Annual Growth



Total Area

- 33,851.0 km²
- 4.2% of NSW



Gross Regional Product (2022-23)

- \$119.8 Billion
- 14.0% of NSW



Employment (2022-23)

- 466,418 persons
- 12.7% of NSW

Working Zones: Bulahdelah-Stroud, Central Coast and surrounds, Forster, Tuncurry and surrounds, Gloucester; Muswellbrook, Scone and surrounds; Nelson Bay Peninsula and Anna Bay; Newcastle, Lower Hunter and surrounds; Taree and surrounds (maps at end of profile).

Region Selection Rationale

Exposure to Decarbonisation	Economic Opportunities from Decarbonisation
• Carbon Intensity: There are 3 coal-fired power stations along with 18 safeguard facilities in the region. As of 2024-25, safeguard facilities account for 39.6% of New South Wales (NSW) Safeguard Mechanism direct (scope 1) emissions. Approximately 20,000 employees are in roles exposed to change from decarbonisation. • Urgency: All coal-fired power stations in the region are projected to close by 2033. • Adaptive Capacity: Adaptive capacity varies across metropolitan and rural areas. City centres have diversified economies with related education opportunities and higher skill levels. • Readiness: The Hunter-Central Coast is in a moderate to strong position to capitalise on energy transition opportunities. The NSW Government has announced the Future Jobs and Investment Authority for NSW's four coal mining regions, including the Hunter.	• Natural Assets: Considerable potential for green industry, including green aluminium production and strong offshore wind energy resources. Several renewable energy projects have been proposed for the region, particularly in battery storage and solar photovoltaic (PV) electricity generation. • Workforce Compatibility: A moderate number of workers in the region are employed in jobs highly compatible with clean energy industries. Higher levels of compatibility are experienced in Muswellbrook, Scone, Newcastle and the Lower Hunter. • Enabling Infrastructure: Existing infrastructure, particularly the Newcastle Airport and the Port of Newcastle, supports the movement of workers, connect the region's exports to global markets and support economic diversification.

Source: NZEA (2026).



Carbon-Intensive Industries

Coal-Fired Power Stations

Facility	Owner	Public closure date	Employees	Supplying Coal Mine	S1 emiss. (tCO2-e) (23/24)	% of NSW S1 emiss. (23/24)	% of Aus S1 emiss. (23/24)
Bayswater Power Station	AGL	2033	500	Mangoola, and Wilpinjong	13,678,909	19.0%	4.5%
Eraring Power Station	Origin	2029	200+	Mandalong, Myuna, and three others	13,535,335	18.8%	4.5%
Vales Point Power Station	Delta	2033	280	Chain Valley (primary)	7,043,816	9.8%	2.3%
Total	3	-	980+	-	34,258,060	47.6%	11.3%

Note: S1 emiss. indicates Scope 1 Emissions. Further information on Scope 1 emissions can be found [here](#).
Source: AEMO (2026a), AGL (2026a) DCCEEW (2025a, 2025b), Origin (2024).

Gas-Fired Power Stations

Facility	Owner	Public closure date	Employees	S1 emiss. (tCO2-e) (23/24)	% of NSW S1 emiss. (23/24)	% of Aus S1 emiss. (23/24)
Colongra	Snowy Hydro Limited (Cwth gov)	2070	10	63,830	0.1%	<0.1%

Note: S1 emiss. indicates Scope 1 Emissions. Further information on Scope 1 emissions can be found [here](#).
Source: AEMO (2026a), DCCEEW (2025b).



Safeguard Facilities (Emit 100,000+ tonnes CO₂ annually - power stations connected to grid are exempt)

Facility	No.	S1 emiss. (tCO ₂ -e) (24/25)	% of NSW Safeguard emiss. (24/25)	% of Aus Safeguard emiss. (24/25)
Coal mining	16	7,318,650	32.2%	5.5%
Manufacturing	2	1,669,870	7.4%	1.2%
Total	18	8,988,520	39.6%	6.7%

Note:

- Mannering Colliery, included in the safeguard numbers, operates as part of an integrated mining operation with Chain Valley.
- Integra coal mine is included in the safeguard facilities number. However, this facility is no longer operational.
- Data is based on coal mines that emitted emissions in the 2023/24 FY, which includes mines that have since closed.

Source: CER (2026).

Coal Mines

No. of Coal Mines	Mines Supplying Domestic Market	Mines Supplying Export Market	Thermal Coal Mines	Metallurgical Coal Mines
21	10	19	20	12

Note: Individual coal mines may produce both thermal and metallurgical coal and may therefore be counted in both categories. Similarly, some mines may supply both domestic and export markets and may be counted in both market categories.

Source: Geoscience Australia (2026), Wood MacKenzie (2026).

Major Commonwealth Funded Net Zero Projects (excluding cancelled and completed) (top projects by value)

This table reflects projects that have received Commonwealth funding (as of April 2026), identified through publicly available sources, consistent with the [Net Zero Investment Map](#), including the programs below.

- **Capacity Investment Scheme (CIS)**
- **Australia Renewable Energy Agency (ARENA)**
- **Clean Energy Finance Corporation (CEFC)**
- **Northern Australian Infrastructure Facility (NAIF)**
- **National Reconstruction Fund (NRF)**
- **Regional Hydrogen Hubs Program**

Project	Description	Status	Cwth Govt Funding	Value
Liddell Battery Energy Storage System (BESS)	The Liddell Battery is a 500MW, two-hour duration, grid scale battery located at the former Liddell Power station site. Construction of the battery is complete with full commercial operations expected by June 2026.	Commissioning	\$35.0M ARENA	\$694.7M
Hunter Valley Hydrogen Hub	The Hunter Valley Hydrogen Hub project located in Kooragang Island, delivering green hydrogen to the Newcastle industrial area and port precinct. The project is designed to support decarbonisation of existing industrial operations in the Hunter region.	Development	\$432.0M ARENA \$70.0M (Regional Hydrogen Hub Program)	\$200.0M
ASTRI Australian Solar Thermal Research Institute	Consortium of leading Australian research institutions collaborating on Concentrating Solar Thermal (CST) power research projects. The main objective is to facilitate the commercial uptake of more efficient, higher temperature solar thermal technologies and CST systems.	Concept	\$50.0M ARENA	\$102.2M
Ethtec Cellulosic Ethanol Pilot Plant	The Ethtec Cellulosic Ethanol Pilot Plant is expected to have a production capacity of 270,000 litres per annum.	Planning	\$12.0M ARENA	\$32.0M
Hunter Valley Solar Foundry Project	The Hunter Valley Solar Foundry Project is a solar manufacturing facility, producing modules for local and export markets. The facility aims to utilise local materials and suppliers and provide production capability to other manufacturers.	Planning	\$171.0M ARENA \$34.4M CEFC	Unknown

Source: AGL (2026b) ARENA (2026), NZIM (2026), Orica (2026).

Regional Renewable Energy Projects (aggregated)

The aggregated tables below draw on RenewMap's energy project database which contains information on the location and size of public and privately funded energy generation projects. Results are shown in aggregated form to illustrate the breadth and depth of projects in the region.

Operational

Type	Projects (No.)	Total Project Size (MW)	Total Storage Size (MWh)
Battery	3	475	1,070
Biogas	4	6	N/A
Hydro	1	6	N/A
Solar Photovoltaic (Solar PV)	4	15	N/A
Total	12	502	1,070 (Known Storage)

Note:

- RenewMap is a commercial subscription and is not publicly available.
- MW = Megawatt. A unit that measures capacity of energy systems.
- MWh = Megawatt hour. In battery technology, this unit measures the total amount of energy the system can store.
- Information correct as of April 2026.

Source: RenewMap (2026).

Under Development and Proposed

Type	Projects (No.)	Total Project Size (MW)	Total Storage Size (MWh)
Battery	52	12,989	32,986
Biomass	1	128	N/A
Hydrogen	2	1,650	N/A
Onshore Wind	5	2,451	N/A
Pumped Hydro	5	2,090	20,700
Solar Photovoltaic (Solar PV)	15	2,244	N/A
Solar Thermal	1	5	90
Total	81	21,557	53,776 (Known Storage)

Note:

- RenewMap is a commercial subscription and is not publicly available.
- MW = Megawatt. A unit that measures capacity of energy systems.
- MWh = Megawatt hour. In battery technology, this unit measures the total amount of energy the system can store.
- Information correct as of April 2026.

Source: RenewMap (2026).



Transmission Infrastructure Projects

Australian Energy Market Operator (AEMO) Draft 2026 Integrated System Plan (ISP)

Project	Description	Status	Timing	Cost
Hunter-Central Coast Renewable Energy Zone (REZ) Network Infrastructure Project	Substation upgrades to supply electricity generation from the Hunter and Central Coast to Sydney, Newcastle and Wollongong load	Committed	Jul-2028	\$604.2M
Sydney Ring North (Hunter Transmission Project)	High capacity 500 kV transmission network to reinforce supply to Sydney, Newcastle and Wollongong load centres.	Actionable	Nov-2029	\$1,364M (±50%)
Sydney Ring South	A new double-circuit 500 kV line to supply the Sydney, Newcastle and Wollongong load centres.	Actionable	Jul-2030	\$2,360M (±50%)
New England REZ Network Infrastructure project	Three separate projects to increase the transfer capability between central and northern NSW, enable more transfer capacity out of QLD-NSW Interconnector, and expand the New England REZ.	Anticipated	Jul-2034	\$3,700M

Note: ± indicates the cost uncertainty range.
Source: AEMO (2026b). AER (2025), Infrastructure Pipeline (2026).



Major Industries (Hunter – Central Coast)

Gross Value Add (GVA) (2022-23)

Ranked Industries (Top five by value)	Value (\$M)	% of GVA
Mining	\$31,587.2	28.0%
Rental, Hiring and Real Estate Services	\$13,250.5	11.8%
Health Care and Social Assistance	\$11,241.7	10.0%
Construction	\$8,850.4	7.9%
Public Administration and Safety	\$6,187.6	5.5%

Note: Gross Value Add estimates are sourced from REMPLAN (2026), incorporating Australia Bureau of Statistics (ABS) 2021 Census (PoW), ABS 2024 Estimated Resident Population, ABS 2022–23 National Input–Output Tables, and ABS June 2025 Gross State Product into its modelling. Gross Value Add (GVA) measures the value of goods and services produced, minus the cost inputs used in production. Further information on GVA can be found [here](#).

Source: REMPLAN (2026).

Employment (Hunter – Central Coast)

Place of Work (2022-23)

Ranked Industries (Top Five)	Employees (No.)	% of Employment
Health Care and Social Assistance	88,943	19.1%
Retail Trade	48,638	10.4%
Construction	47,976	10.3%
Education and Training	41,433	8.9%
Accommodation and Food Services	38,122	8.2%

Note: Employment by Place of Work (PoW) estimates are sourced from REMPLAN (2026), incorporating Australia Bureau of Statistics (ABS) 2021 Census by PoW, ABS 2024 Estimated Resident Population, ABS 2022–23 National Input–Output Tables, and ABS June 2025 Gross State Product into its modelling.

Source: REMPLAN (2026).

Place of Usual Residence (2021)

Ranked Industries (Top Five)	Employees (No.)	% of Employment
Health Care and Social Assistance	87,982	18.3%
Construction	50,502	10.5%
Retail Trade	48,192	10.0%
Education and Training	42,408	8.8%
Accommodation and Food Services	36,900	7.7%

Source: ABS (2021).

Key Economic and Social Indicators (Hunter)

Employment

Indicator (2021 Census unless otherwise stated)	Hunter	New South Wales
Median working age	39	40
Median income (annual gross, exc. super)	\$33,800 – \$41,559	\$41,600 – \$51,999
Participation in workforce	59.5%	58.7%
Female participation in workforce	56.8%	55.5%
Workforce Self-Sufficiency (% of Workforce)	96.5%	N/A
Unemployment rate (Dec 2025)	4.3%	4.1%
Regional Labour Market Index (Sep 2025)	Average	N/A

Note: The regional labour market index does not include Newcastle. The neighbouring SA4 of Newcastle and Lake Macquarie has an 'Above Average' score

Source: ABS (2021), DEWR (2026), JSA (2026).

Demographics

Indicator (2021 Census)	Hunter	New South Wales
Median age	40	39
First Nations (% of population)	6.6%	3.6%
Educational attainment (% of population aged 15 and above):		
• Below Year 12	53.0%	39.0%
• Year 12 or equivalent	47.0%	61.0%
• Certificate III and IV	24.0%	16.3%
• Bachelor and above	20.2%	30.4%

Source: ABS (2021).

Housing

Indicator (2021 Census)	Hunter	New South Wales
Estimated Homelessness (% of population)	0.3%	0.4%
Commonwealth Rent Assistance (% of population) (Sep 2025)	6.9%	5.4%
Mortgage stress	12.0%	17.3%
Rental stress	35.8%	35.5%

Source: ABS (2021), DSS (2025).

Key Economic and Social Indicators (Central Coast)

Employment

Indicator (2021 Census unless otherwise stated)	Central Coast	New South Wales
Median working age	42	40
Median income (annual gross, exc. super)	\$33,800 – \$41,559	\$41,600 – \$51,999
Participation in workforce	55.6%	58.7%
Female participation in workforce	52.5%	55.5%
Workforce Self-Sufficiency (% of Workforce)	91.9%	N/A
Unemployment rate (Sep 2025)	3.7%	4.1%
Regional Labour Market Index (Sep 2025)	Average	N/A

Source: ABS (2021), DEWR (2026), JSA (2026).

Demographics

Indicator (2021 Census)	Central Coast	New South Wales
Median age	43	39
First Nations (% of population)	5.1%	3.6%
Educational attainment (% of population aged 15 and above):		
• Below Year 12	51.4%	39.0%
• Year 12 or equivalent	48.6%	61.0%
• Certificate III and IV	22.9%	16.3%
• Bachelor and above	19.5%	30.4%

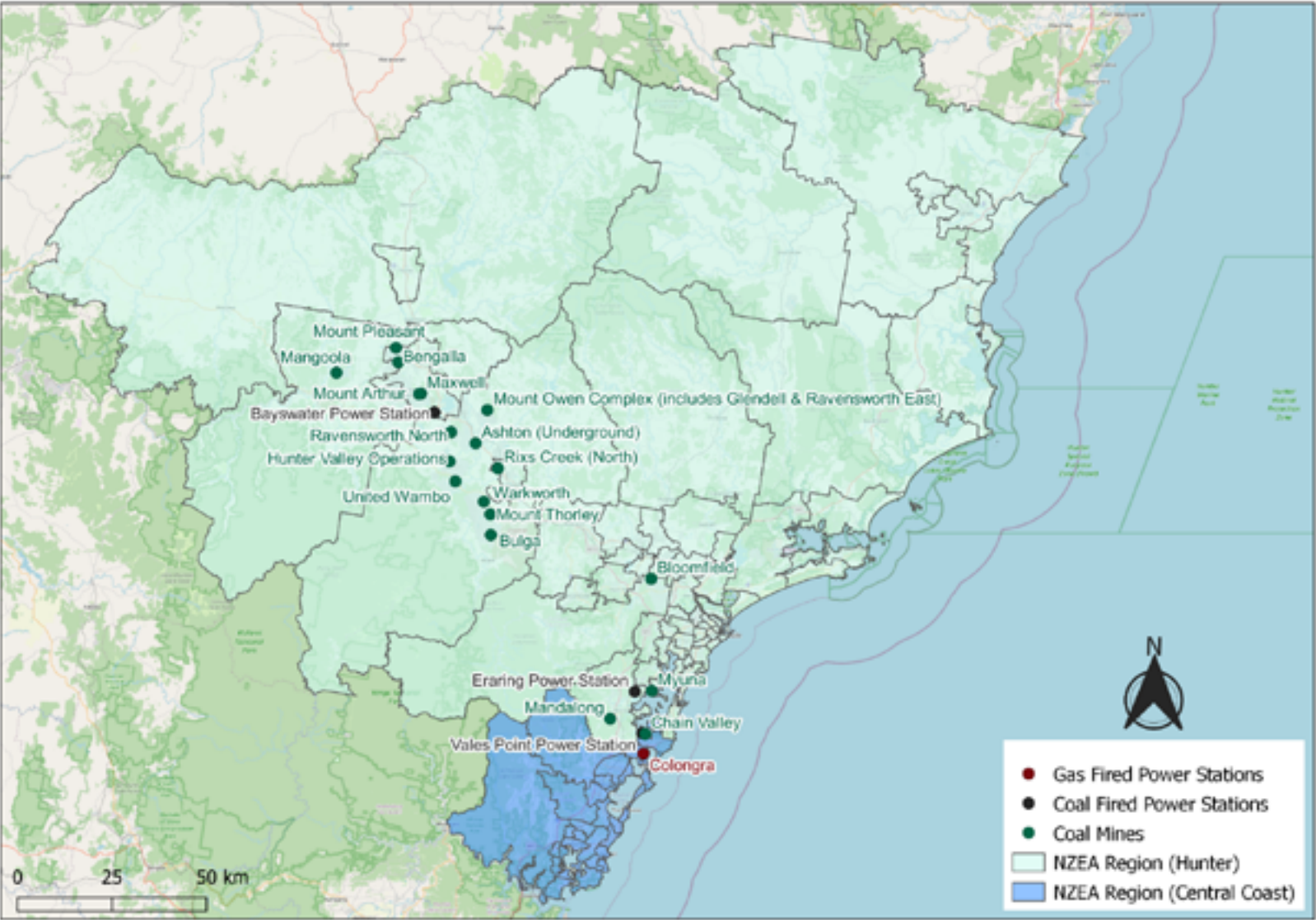
Source: ABS (2021).

Housing

Indicator (2021 Census)	Central Coast	New South Wales
Homelessness (% of population)	0.2%	0.4%
Commonwealth Rent Assistance (% of population) (Sep 2025)	7.7%	5.4%
Mortgage stress	14.7%	17.3%
Rental stress	42.0%	35.5%

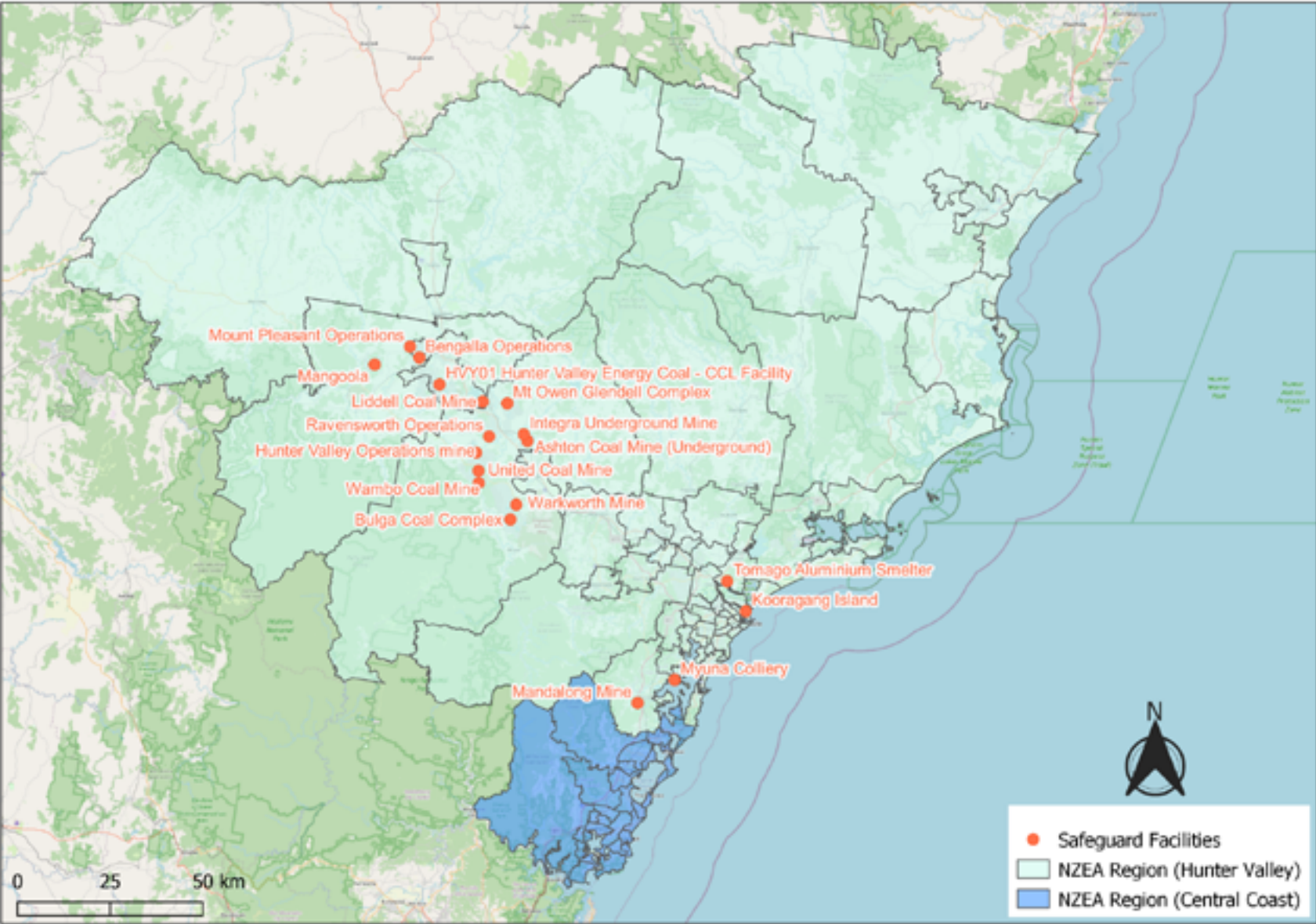
Source: ABS (2021), DSS (2025).

Power Stations and Coal Mines Map



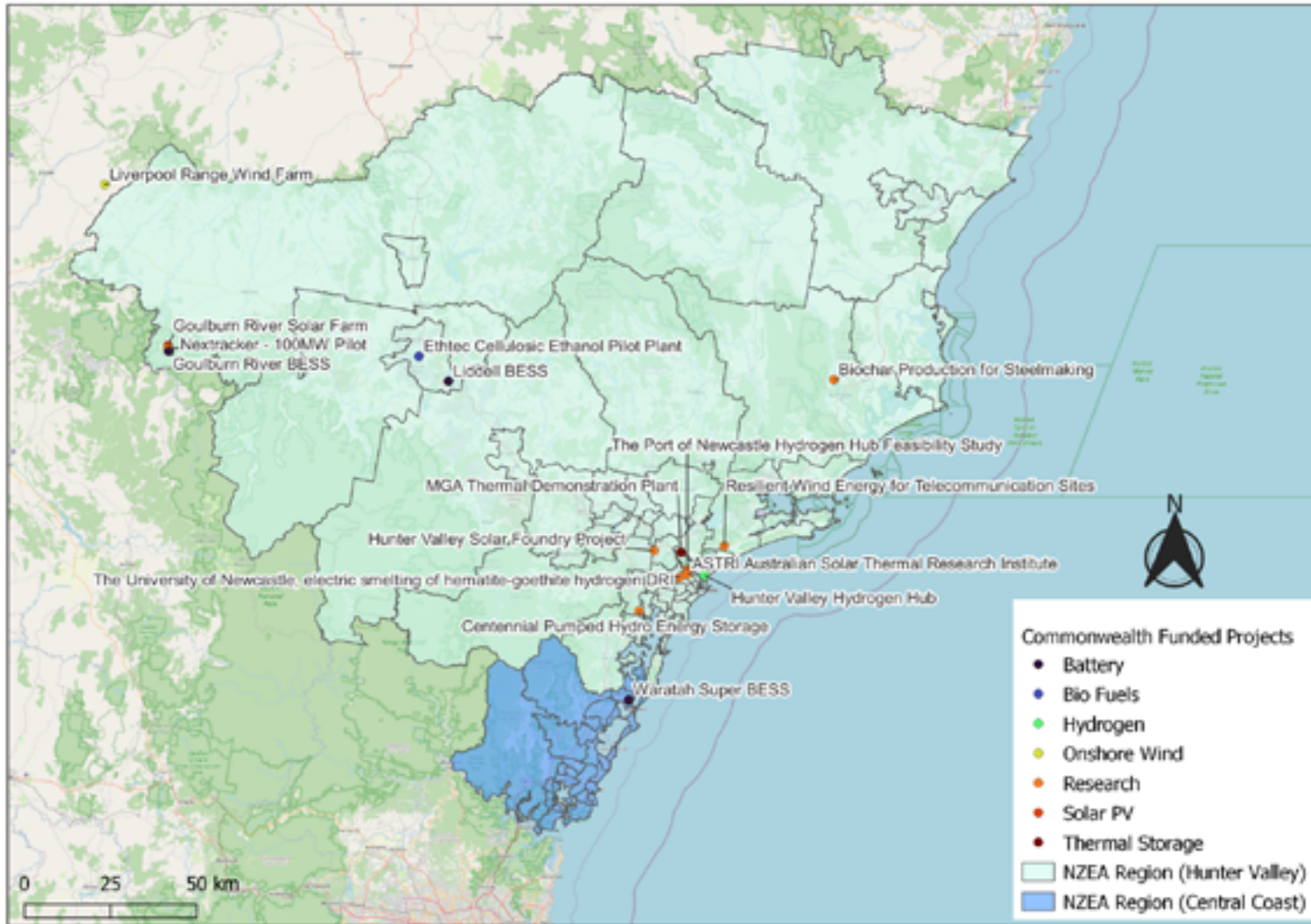
Source: AEMO (2026a).

Safeguard Facilities Map



Source: DCCEEW (2025b).

Commonwealth-Funded Net Zero Projects Map – Current & Proposed



Note:

- Commonwealth funded projects include projects from the following schemes, Capacity Investment Scheme, Australian Renewable Energy Agency, Clean Energy Finance Corporation, Northern Australia Infrastructure Facility, National Reconstruction Fund, Regional Hydrogen Hubs Program.
- Information correct as of April 2026.

Source: NZIM (2026)



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