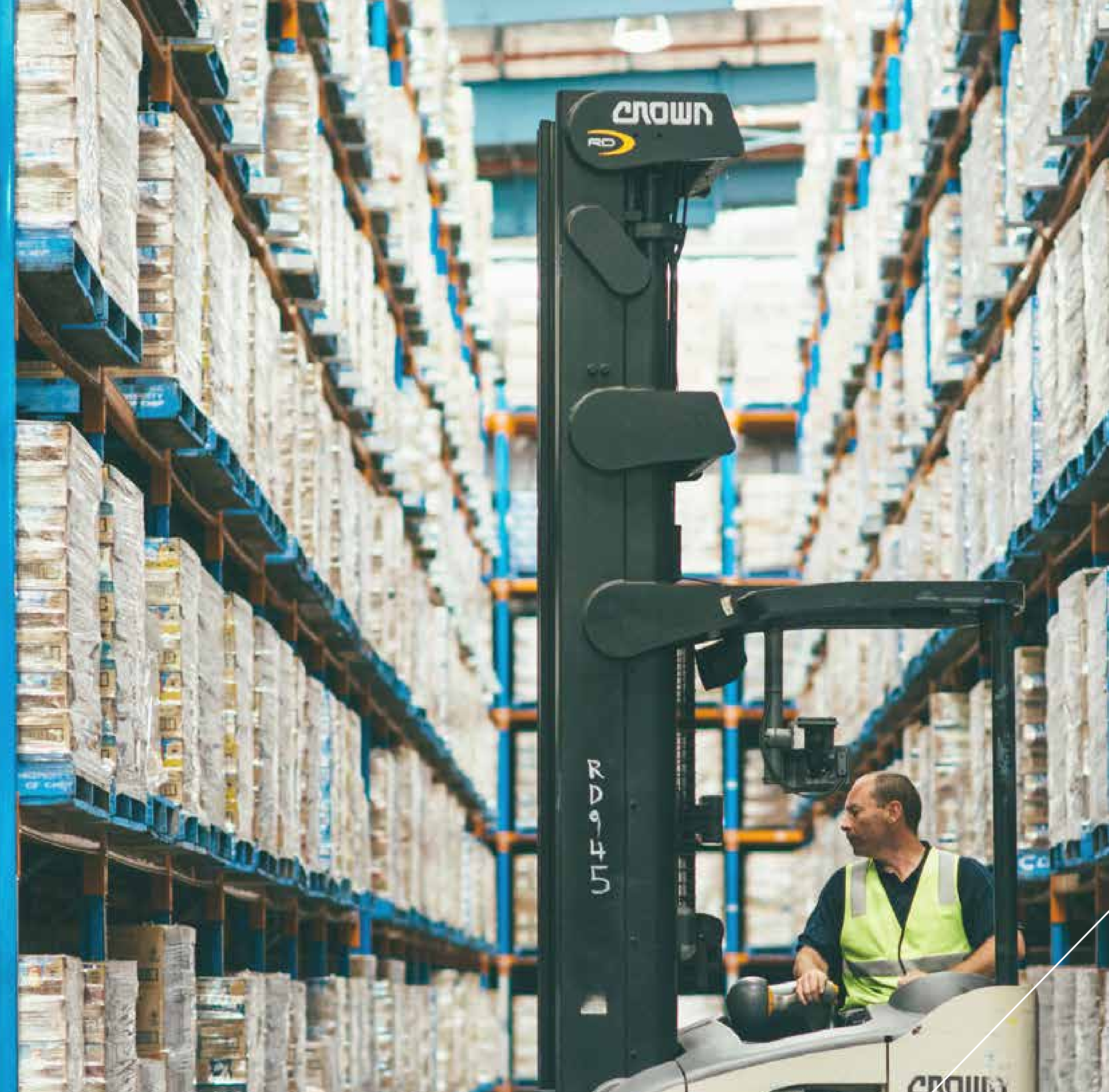

Employment Lands Development Program

2015 REPORT

NSW GOVERNMENT | Planning & Environment

Abstract: ELDP 2015 Report

The Employment Lands Development Program 2015 Report (ELDP 2015 Report) is a comprehensive analysis of the current state of play of industrial land supply and major business parks across Metropolitan Sydney and the Central Coast Region. It provides data on existing and future planned stocks of industrial and business park lands. It offers insights into the current availability of vacant industrial land, where land is already serviced and ready for development, where industrial development is currently taking place and where future land will be provided. It tracks the rate of industrial and business park development over time to assess if there is enough land available, or in the pipeline, to meet likely future demand (supply standards).

This report is a research base for anyone wanting to develop or invest in industrial property and business parks. It is also a source of information for Government agencies, utilities and councils involved in the planning and servicing of these lands to ensure supply matches future demand of industry to support the continued economic growth for the region.

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Introduction

The Employment Lands Development Program 2015 Report (ELDP 2015 Report) provides a comprehensive assessment of the existing and future supply of Employment Lands in the Sydney Metropolitan and Central Coast Regions.

It draws on the substantial consultation recently undertaken with a number of internal and external stakeholders, an audit and refinement of the existing databases and an overview of the methodologies used to collect and analyse the data. This has resulted in further development and enhancement of the data and in some cases minor data corrections. New insights have been drawn out from an in-depth analysis of data and where possible, new databases have been created covering areas identified to be of most value to its end users. This year the Sydney Metropolitan subregional analysis is based on the six subregions identified in *A Plan for Growing Sydney (refer to* **Table 3**). As in previous years the report examines:

- The existing supply of industrial land as at January 2015 and its distribution and size across the six subregions of Metropolitan Sydney and the Central Coast Region
- Whether the existing supply is developed or undeveloped and serviced
- The identified potential future supply of land
- Recent industrial building activity, construction and take-up rates
- The existing supply of Business Parks (over 50 hectares in size) and their distribution, development and servicing status

In response to our consultation and audit process **(as outlined in the Appendix)**, the following enhancements have been included this year:

- Separate reporting for the Sydney Metropolitan and Central Coast Regions
- Further categorisation and analysis of the Sydney Metropolitan data by the East (North, South and Central subregions) and the West (South West, West Central and West subregions)
- Major industrial development approvals and completions
- Gateway determinations and Planning Proposals in relation to industrial lands and business parks
- Existing supply of Business Parks (between 10 – 50 hectares) and their distribution, development and servicing status
- Additional details of undeveloped and serviced land supply
- Updated Jobs in Employment Lands data

The report contains data collected by the Department of Planning and Environment and from a range of external sources including: Sydney Water, Gosford City Council, Australian Bureau of Statistics (ABS), Bureau of Transport Statistics (BTS), BIS Shrapnel. Mapping and GIS analysis draws on Photomaps by nearmap.com.

Further explanation of the data sets and definition of terms are provided within the Glossary.

Key Findings and Trends

Key Facts – Sydney Metropolitan Region

13,548 hectares of **existing** zoned employment lands at January 2015

3,029 hectares of **undeveloped** zoned employment land at January 2015

450 hectares of **undeveloped** and **serviced** zoned employment land at January 2015

6,972 hectares of **proposed** employment lands at January 2015

79 hectares of industrial land was **gained** as a result of rezoning for industrial uses in 2014

$795 million of industrial building **activity** was approved in 2014

120 hectares of employment lands were **taken up** by industrial development in 2014

887 hectares of zoned **Business Park** lands (over 10 hectares in size) at January 2015

Sydney Metropolitan Region

At January 2015 there was 13,548.2 hectares of existing zoned employment lands, including both developed and undeveloped lands, within the Sydney Metropolitan Region. This is an increase of 444.1 hectares (3.4%) from January 2014, resulting mainly from boundary adjustments and additional industrial sites identified through a comprehensive audit undertaken at the end of 2014 of all industrial land in the Sydney Metropolitan Region. Rezonings accounted for the remainder of total stock increase.

Of the total zoned employment lands stock, 22 per cent or 3,029.4 hectares were undeveloped at January 2015, including lands that are both serviced and not serviced. This is an increase of 170.2 hectares from January 2014. The increase can be largely attributed to precinct boundary adjustments as a result of the audit.

Of the total undeveloped zoned land, 449.9 hectares were serviced (water and sewer) at January 2015. This is a decrease of 13.1 hectares from January 2014. The decline is mainly due to the take-up of undeveloped zoned and serviced land.

In addition to existing zoned employment lands, there was 6,972 hectares of proposed employment lands at January 2015 which were identified in planning strategies and which have yet to be rezoned. This is an increase of 4,537 hectares compared to last year, due to the amendment of the *State Environmental Planning Policy (Western Sydney Employment Area) 2009* which confirmed the new boundaries of the Western Sydney Employment Area extension.

In 2014 there was 79.2 hectares of industrial zoned employment lands (IN zones) added through rezonings in the Sydney Metropolitan Region. 1.5 hectares of industrial land was rezoned for other purposes in which industrial uses are not permitted, mainly residential and business zones. A further 39.6 hectares were rezoned to B5 Business Development, B6 Enterprise Corridor or B7 Business Park zones which continue to permit industrial uses.

Industrial building activity increased in 2014 with $795 million worth of approvals, compared to $783 million in 2013. The increase in industrial approvals focused largely on the factories sector.

In 2014 there was 120.6 hectares of employment lands taken up by industrial development in the Sydney Metropolitan Region. This compares with 190.3 hectares in 2013 and 123.1 hectares in 2012. Most of the take-up occurred in the West Central subregion.

In terms of adequacy of stocks at January 2014, there are sufficient stocks of existing undeveloped and proposed future employment lands to meet supply standards under all three take-up rate scenarios. However there exists an undersupply of zoned and serviced land under the average and high take-up scenarios. This is a similar result to the past 4 years and highlights the need to make more zoned and serviced land available in line with demand.

2014 was the third year in which Business Parks (those with over 50 hectares of zoned land) have been monitored. Precincts in this size category did not experience significant changes in 2014. Total zoned stock increased by 11.1 hectares to 737.6 hectares with 308.6 hectares undeveloped and 429 hectares developed. 2014 saw the inclusion of monitoring business parks between 10-50 hectares. Eight new precincts have been added to the monitor with a combined zoned area of 149.1 hectares, comprising 52.5 hectares of undeveloped land and 96.6 hectares of developed land.

Central Coast Region

At January 2015, there was 2,000.3 hectares of existing employment land in the Central Coast Region, down 39.1 hectares from January 2014. A significant amount of the total stock change was the result of boundary adjustments identified through a data audit. In addition, zoning changes resulted in a net loss of 7 hectares of industrial land.

Of the total zoned employment land stock, 55% or 1,096.5 hectares was undeveloped at January 2015.

In addition to existing zoned employment lands, there are 467 hectares of proposed industrial land identified in the North Wyong Structure Plan[1].

The value of building activity increased for the fourth year in a row with $48 million worth of industrial development being approved in 2014 within the Central Coast region. Over half ($24.5 million) was in the warehouse sector. Take-up of industrial land in 2014 was 4.6 hectares which is down from 2013 (5.7 hectares).

Table 1 – Key facts and findings

Subregion	Total Stock (ha)	Developed industrial zoned land (ha)	Undeveloped and serviced industrial zoned land (ha)	Undeveloped and unserviced industrial zoned land (ha)	Industrial land lost to rezoning (ha)	Industrial land gained to rezoning (ha)	Proposed industrial land (ha)
Central	1,444.4	1,383.1	13.6	47.7	1.5		
North	566.8	523.8	25.5	17.6		10.8	
South	897.8	785.3	0.5	111.9			
South West	3,396.6	2,685.6	181.3	529.6		66.0	2,827.3
West	1,786.7	1,065.2	100.7	620.8		2.4	4,145.2
West Central	5,455.9	4,075.8	128.3	1,251.9			
Sydney Metropolitan Region Total	13,548.2	10,518.7	449.9	2,579.5	1.5	79.2	6,972.5

LGA	Total Stock (ha)	Developed industrial zoned land (ha)	Undeveloped and serviced industrial zoned land (ha)	Undeveloped and unserviced industrial zoned land (ha)	Industrial land lost to rezoning (ha)	Industrial land gained to rezoning (ha)	Proposed industrial land (ha)
Gosford	587.4	377.3	34.5	175.5	42.0	35.4	
Wyong	1,413.0	526.5	N/A	N/A			467.0
Central Coast Region Total	2,000.3	903.8	34.5	175.5	42.0	35.4	467.0

1 Deapartment of Planning and Environment, North Wyong Structure Plan, October 2012

Metropolitan Sydney

Metropolitan Sydney

Supply of Employment Lands

Overview

At January 2015, there was 13,548.2 hectares of employment lands in the Sydney Metropolitan Region[2]. This represents an increase of 444.1 hectares (3.4%) of zoned employment lands[3] compared to January 2014.

10,639 hectares (79%) of the total employment lands are located in the West which comprises the South West, West and West Central subregions.

The East, made up of the Central, North and South subregions, accounts for the remaining 2,909 hectares of employment land. While providing only 21% of total stock, employment lands within the East continue to provide key regional and local functions. Regional functions include freight activities at Port Botany and Sydney Airport and medical technology development at Macquarie Park. Local functions include urban services which support population growth such as public transport depots, household maintenance and waste transfer facilities.

Zoned Employment Land Stocks by Subregion

Table 2 compares total employment lands stocks, as well as the split between developed and undeveloped employment land at January 2013, 2014 and 2015 for the six Metropolitan Sydney subregions outlined in *A Plan for Growing Sydney*.

Table 2 – Zoned employment land stocks by subregion at January 2013, 2014 and 2015 (Sydney Metropolitan Region)

Subregion	Jan-13			Jan-14			Jan-15		
	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total
Central	110.9	1,237.9	1,348.8	35.6	1,262.4	1,297.9	61.3	1,383.1	1,444.4
North	36.4	485.4	521.9	24.3	478.2	502.5	43.0	523.8	566.8
South	141.1	761.5	902.6	73.0	823.2	896.2	112.5	785.3	897.8
South West	615.0	2,557.7	3,172.7	653.0	2,625.1	3,278.2	710.9	2,685.6	3,396.6
West	733.5	1,058.1	1,791.6	707.1	1,030.6	1,737.7	721.5	1,065.2	1,786.7
West Central	1,497.0	3,893.3	5,390.2	1,366.2	4,025.3	5,391.5	1,380.1	4,075.8	5,455.9
Sydney Metropolitan Region	**3,133.9**	**9,994.0**	**13,127.8**	**2,859.3**	**10,244.8**	**13,104.1**	**3,029.4**	**10,518.7**	**13,548.2**

Source: ELDP, Sydney Water, Photomaps by nearmap.com.au

As indicated in Figure 1, Figure 2 and Figure 3, the proportion of undeveloped land to total subregion stock is lower in the East than the West. Overall, 22% of employment land remains undeveloped, with a low of 4% in the Central subregion and a high of 40% in the West subregion.

2 Refer to glossary of terms for definition.

3 Refer to glossary of terms for definition.

Figure 1 – Undeveloped and developed employment land by subregion at January 2015 (Sydney Metropolitan Region)

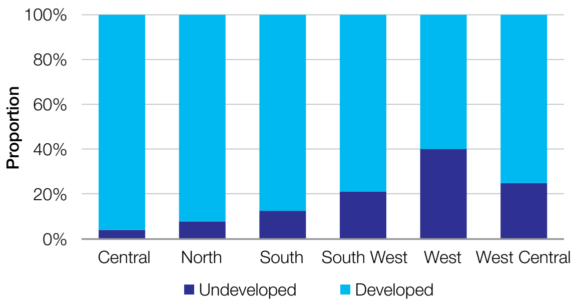


Figure 2 – Undeveloped and developed land stocks in the East and West at January 2015 (Sydney Metropolitan Region)

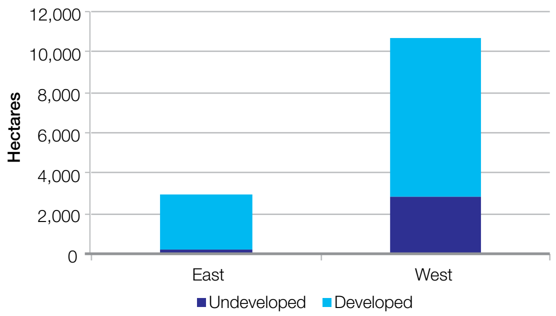
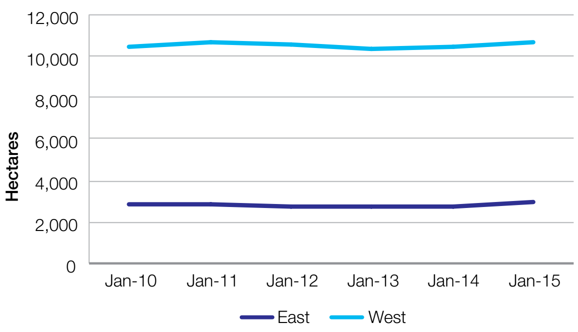


Figure 3 – Historical change in total employment land stocks in the Sydney Metropolitan Region (January 2010 – 2015)

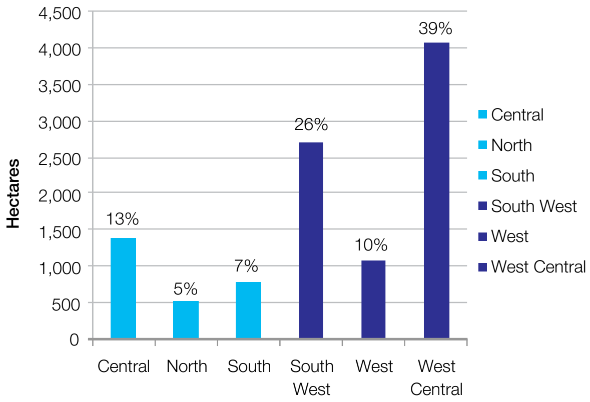


Developed land

The amount of developed land in the Sydney Metropolitan Region increased to 10,518.7 hectares at January 2015, up 273.9 hectares from January 2014. A large portion of the increase in developed land stocks can be attributed to boundary adjustments made as a result of a data audit, including a significant amount of developed land being added at Sydney Airport Environs and South Strathfield/Enfield precincts. The remainder can be attributed to the take-up of industrial land.

Figure 4 shows the amount of employment land that was zoned and developed in each subregion at January 2015. The West comprises three quarters of total developed employment lands with the West Central subregion accounting for 39%, the South West subregion 26% and the West subregion 10%.

Figure 4 – Zoned and developed employment land by subregion at January 2015 (Sydney Metropolitan Region)

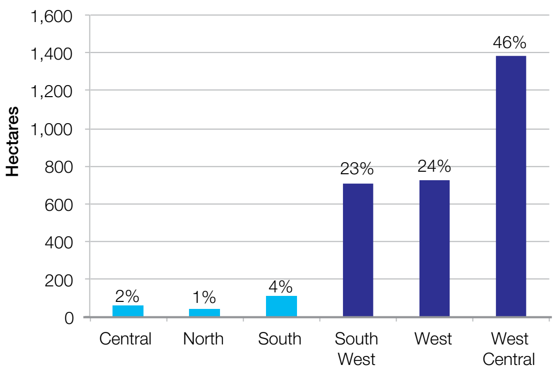


Undeveloped land

In the Sydney Metropolitan Region undeveloped zoned land[4] increased by 170.2 hectares from 2,859.3 hectares at January 2014 to 3,029.4 hectares at January 2015. This net increase can be largely attributed to data refinements as a result of a data audit, including boundary adjustments at Riverstone West and South Strathfield/Enfield and additional industrial sites identified at Macquarie Park on Wicks Road and Warwick Farm Racecourse.

Figure 5 illustrates the amount of zoned and undeveloped land within each subregion at January 2015. The West comprises the majority (93%) of all zoned and undeveloped employment land with 46% located in the West Central subregion, 24% in the West subregion and 23% in the South West subregion. Most of the newly released employment lands are located in the West particularly within the Western Sydney Employment Area and the North West and South West Growth Centres. In the East, strong competition for land uses and a longer development history has led to a high utilisation of land and therefore lower levels of undeveloped land stocks.

Figure 5 – Zoned and undeveloped employment land by subregion at January 2015 (Sydney Metropolitan Region)



Explaining undeveloped employment lands

'Undeveloped' land does not take into account the extent to which land is suitable for future industrial use and therefore does not simply equate to potential 'developable' land.

In areas of new supply, it is often only an estimate of 'gross supply' derived from the size of the area zoned and does not subtract land that would be required for local roads, infrastructure requirements and environmental considerations.

In existing urban areas, undeveloped land may be highly constrained due to subdivision into small and irregular parcels, access issues, a specialised economic function or land use conflicts.

Much of the Sydney Metropolitan Region's undeveloped land is not serviced in terms of road access, water, sewer, gas or electricity connections.

4 Refer to glossary of terms for definition.

Zoned employment lands stock by LGA and precinct

Table 3 compares total stocks, as well as the split between developed and undeveloped employment land at January 2013, 2014 and 2015 by subregion and LGA. Table 27 to Table 32 in the appendix provides a breakdown of employment land stocks by individual precinct. Employment land precincts[5] within an LGA are defined as areas which are zoned industrial (or similar). The employment land precincts form the basis of data collection for the ELDP and range from less than 0.1 hectare to over 500 hectares in size.

Table 3 – Zoned employment land stocks by Subregion and LGA at January 2013, 2014 and 2015 (Sydney Metropolitan Region)

Subregion	LGA	Jan-13 (Ha)			Jan-14 (Ha)			Jan-15 (Ha)			Jan 14 – Jan 15 (Ha)
		Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	
Central	Ashfield	0.0	7.9	8.0	0.0	6.9	7.0	0.1	6.9	7.0	0.0
	Botany Bay	77.9	422.5	500.4	15.6	465.5	481.1	24.0	459.1	483.1	2.0
	Burwood		0.7	0.7		0.7	0.7		0.7	0.7	0.0
	Canada Bay	0.5	30.6	31.1	0.6	29.7	30.3	0.4	29.9	30.4	0.0
	Leichhardt	10.4	104.6	115.0	3.3	99.5	102.7	2.8	98.8	101.7	-1.1
	Marrickville	4.3	135.6	139.9	3.1	136.8	139.9	6.0	163.2	169.2	29.4
	Randwick	0.8	201.8	202.5	0.3	203.9	204.2		204.3	204.3	0.1
	Strathfield	11.1	185.9	197.0	6.9	173.2	180.1	21.9	265.1	287.0	107.0
	Sydney	5.9	148.3	154.3	5.8	146.3	152.1	6.0	155.1	161.1	9.0
	Waverley										
	Woollahra										
	Central Subregion Total	110.9	1,237.9	1,348.8	35.6	1,262.4	1,297.9	61.3	1,383.1	1,444.4	146.5
North	Hornsby	24.8	130.4	155.2	12.7	123.9	136.6	21.0	152.0	173.0	36.4
	Hunters Hill								0.2	0.2	0.2
	Ku-ring-gai										
	Lane Cove	5.8	54.9	60.7	5.8	54.5	60.2	5.7	55.7	61.4	1.1
	Manly	0.2	9.9	10.1	0.2	9.9	10.1	0.2	9.9	10.1	0.0
	Mosman										
	North Sydney							0.1	5.4	5.4	5.4
	Pittwater	0.6	39.3	39.8	1.1	39.7	40.7	0.8	42.4	43.2	2.5
	Ryde	0.1	27.6	27.8	0.1	27.6	27.7	10.9	27.7	38.6	10.9
	Warringah	0.2	135.1	135.2	0.2	135.0	135.2	0.1	142.1	142.2	7.1
	Willoughby	4.8	88.3	93.1	4.3	87.6	92.0	4.3	88.4	92.7	0.7
	North Subregion Total	36.4	485.4	521.9	24.3	478.2	502.5	43.0	523.8	566.8	64.3
South	Canterbury	1.2	149.1	150.4	0.5	149.0	149.5	0.4	149.5	149.9	0.4
	Hurstville	0.3	85.6	85.9	0.3	85.6	85.9	0.6	85.6	86.1	0.3
	Kogarah	0.1	13.6	13.7	0.1	13.0	13.0	0.1	13.1	13.1	0.1
	Rockdale	1.0	47.8	48.9	0.3	48.6	48.9	0.2	49.0	49.1	0.3
	Sutherland	138.5	465.3	603.8	71.9	527.1	599.0	111.3	488.2	599.5	0.5
	South Subregion Total	141.1	761.5	902.6	73.0	823.2	896.2	112.5	785.3	897.8	1.6
South West	Camden	136.3	155.5	291.8	199.3	163.9	363.3	188.6	178.4	367.0	3.7
	Campbelltown	86.8	644.4	731.2	91.4	635.9	727.3	73.1	656.5	729.6	2.3
	Fairfield	142.6	902.7	1,045.4	113.6	924.3	1,037.9	113.9	929.4	1,043.3	5.4
	Liverpool	157.0	741.9	898.8	197.2	747.2	944.4	209.4	749.0	958.4	14.0
	Wollondilly	92.3	113.3	205.6	51.5	153.9	205.4	126.0	172.3	298.3	93.0
	South West Subregion Total	615.0	2,557.7	3,172.7	653.0	2,625.1	3,278.2	710.9	2,685.6	3,396.6	118.4
West	Blue Mountains	34.4	67.1	101.6	31.8	67.3	99.2	34.0	66.9	100.8	1.7
	Hawkesbury	28.2	146.5	174.6	23.7	150.8	174.5	23.9	165.1	189.0	14.6
	Penrith	670.9	844.5	1,515.4	651.6	812.5	1,464.1	663.6	833.3	1,496.9	32.8
	West Subregion Total	733.5	1,058.1	1,791.6	707.1	1,030.6	1,737.7	721.5	1,065.2	1,786.7	49.0
West Central	Auburn	15.5	386.4	401.9	11.6	386.1	397.7	20.0	381.5	401.5	3.8
	Bankstown	32.8	788.6	821.4	17.8	792.0	809.8	25.9	787.1	813.1	3.3
	Blacktown	1,217.0	1,316.0	2,533.0	1,084.2	1,404.9	2,489.1	1,073.1	1,442.0	2,515.1	26.0
	Holroyd	87.0	725.9	812.8	73.3	750.0	823.3	64.7	752.8	817.4	-5.9
	Parramatta	34.2	528.2	562.4	20.8	536.8	557.7	22.4	541.0	563.4	5.7
	The Hills	110.6	148.1	258.7	158.5	155.5	314.0	174.1	171.4	345.4	31.4
	West Central Subregion Total	1,497.0	3,893.3	5,390.2	1,366.2	4,025.3	5,391.5	1,380.1	4,075.8	5,455.9	64.3
Sydney Metropolitan Region Total		**3,133.9**	**9,994.0**	**13,127.8**	**2,859.3**	**10,244.8**	**13,104.1**	**3,029.4**	**10,518.7**	**13,548.2**	444.1

Notes:

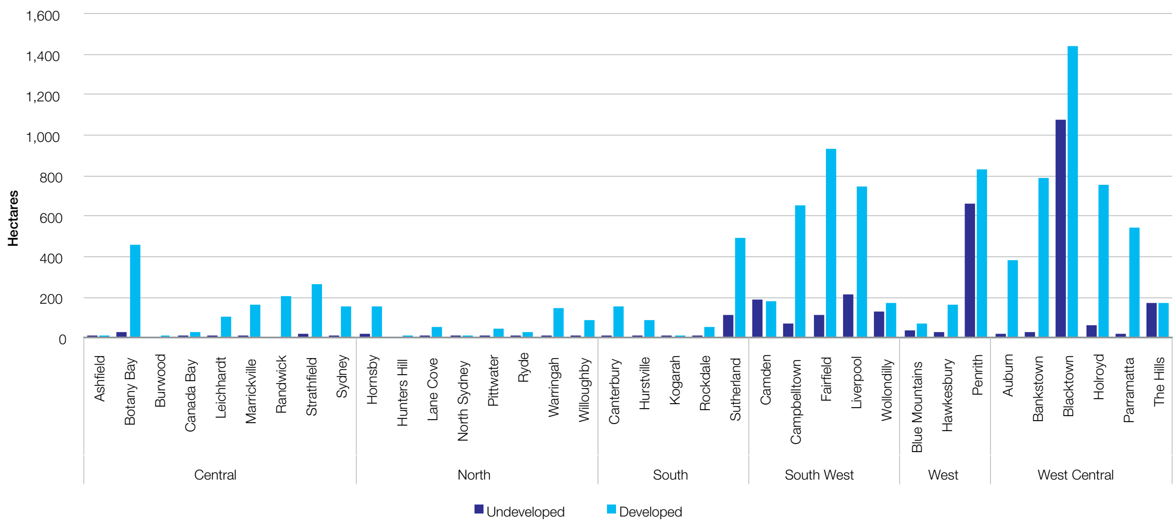
Changes in employment land stocks are due to data refinement from a data audit or zoning changes (see Table 6 for rezoning details and Table 27 to Table 32 for data refinement details).

Figures may not add up exactly due to rounding. Where no value is shown in a cell this indicates that the amount of land recorded is 0 hectares. Where '0.0' is shown in a cell this indicates a value less than 0.05 hectares (i.e. 500sqm) was recorded and then rounded to '0.0'. No employment land precincts within Waverley, Woollahra, Ku-ring-gai and Mosman LGAs

Source: ELDP, Sydney Water, Photomaps by nearmap.com.au

5 Refer to glossary of terms for definition.

Figure 6 – Employment land stocks by Subregion and LGA at January 2015 (Sydney Metropolitan Region)



Undeveloped and serviced land

The total amount of undeveloped and serviced (water and sewer) zoned land[6] in the Sydney Metropolitan Region decreased by 13.1 hectares from 463.0 hectares at January 2014 to 449.9 hectares at January 2015. The decline is mainly due to the take-up of undeveloped zoned and serviced land at Smeaton Grange, Glendenning, Eastern Creek, Erskine Park and Ingleburn.

Table 4 and Figure 7 compare the amount of undeveloped and serviced zoned land for the periods January 2010 to January 2015 in the Sydney Metropolitan Region. Only precincts with over 5 hectares of undeveloped and serviced zoned land have been listed in the table.

Defining Serviced Land

For the purposes of this report the definition of 'serviced' land is land in the Sydney Metropolitan Region where a Sydney Water sewerage and potable water service may be available for connection (lead-in water and wastewater infrastructure).

It is acknowledged that the servicing data does not include servicing in terms of power, roads or other infrastructure.

The servicing data does not include instances where developers provide their own water and sewer services (e.g. water tanks, septic systems) or where services are provided under the *Water Industry Competition Act 2006* independent of Sydney Water networks.

6 Refer to glossary of terms for definition.

Table 4 – Undeveloped and serviced land stocks in the Sydney Metropolitan Region (January 2010-2015)

Subregion	LGA	Precinct	Undeveloped and Serviced Land (Ha)						
			Jan-10	Jan-11	Jan-12	Jan-13	Jan-14	Jan-15	Net change (Jan-14 – Jan-15)
Central	Botany Bay	Banksmeadow	8.5	8.5	8.0	8.0	6.9	7.4	0.5
North	Ryde	Macquarie Park, Wicks Road						10.8	10.8
South West	Bankstown	Chullora	10.5	10.5	12.5	8.2	0.4	0.4	-0.0
	Camden	Narellan	5.7	5.9	5.7	5.7	5.3	5.3	0.0
		Oran Park	0.0	0.0	18.5	18.5	18.5	18.5	-0.0
		Smeaton Grange	54.7	49.7	50.8	51.9	46.5	32.1	-14.4
		Turner Road	0.0	0.0	17.1	8.1	11.4	9.3	-2.1
	Campbelltown	Campbelltown, Blaxland Road	34.2	33.5	31.0	26.1	16.8	15.4	-1.4
		Ingleburn	37.7	36.9	34.3	25.3	19.6	14.1	-5.5
		Minto	32.2	32.2	31.6	20.5	15.1	17.5	2.4
	Fairfield	Wetherill Park	23.0	24.1	27.7	23.9	17.2	21.5	4.3
	Liverpool	Casula, Cross Rds	6.1	6.1	6.1	7.4	16.9	16.9	-0.0
		Hoxton Park Airport	0.0	0.0	5.9	4.7	2.2	2.4	0.2
		Moorebank	13.5	12.8	12.2	9.7	11.6	11.6	-0.0
		Yarunga/Prestons	16.5	18.6	10.5	16.3	16.6	9.6	-7.0
West	Blue Mountains	Katoomba	9.4	7.8	8.3	6.4	5.0	4.0	-1.0
		Lawson	11.1	11.1	11.1	10.2	10.9	10.9	-0.0
	Penrith	Emu Plains	14.3	13.3	12.0	11.7	10.6	11.2	0.6
		Erskine Park	172.2	76.6	165.3	54.2	39.3	34.8	-4.5
		North Penrith	27.8	26.3	32.1	16.0	19.2	26.1	6.9
		St Marys	20.4	16.6	11.7	12.3	6.7	8.1	1.4
West Central	Auburn	Clyburn	6.5	6.5	6.1	6.1	6.1	6.1	0.0
	Blacktown	Arndell Park	13.6	13.6	14.4	13.6	9.3	8.6	-0.7
		Eastern Creek	178.1	164.1	9.5	12.8	20.5	14.4	-6.1
		Former Wonderland	38.7	38.7	27.9	27.9	2.1	2.1	-0.0
		Glendenning	31.2	30.8	31.4	30.4	23.3	5.7	-17.6
		Greystanes						7.4	7.4
		Marsden Park	0.0	10.3	12.1	12.1	12.1	12.1	-0.0
		Minchinbury	15.0	15.0	15.0	6.9	3.2	4.1	0.9
		Mount Druitt	6.6	6.6	6.1	5.3	2.9	5.0	2.1
		The Raceway Precinct	9.7	8.9	7.3	8.6	5.3	3.7	-1.6
	Holroyd	Greystanes	56.0	38.3	24.8	10.2	12.2	3.7	-8.5
		Smithfield, North	20.3	20.1	19.7	20.6	2.5	2.6	0.1
	Parramatta	Rydalmere	7.5	7.5	7.7	7.7	0.2	0.1	-0.1
	The Hills	Annangrove	0.0	11.3	11.3	11.3	11.3	11.3	-0.0
		North Rocks	7.5	7.5	6.9	7.9	0.0	1.2	1.2
		Sydney Metropolitan Region Total	**1012.0**	**892.0**	**816.8**	**655.5**	**463.0**	**449.9**	**-13.1**

Notes:
The table lists only those precincts with over 5 hectares of undeveloped and serviced zoned land within the reporting period.
Greystanes (Blacktown LGA) and Macquarie Park, Wicks Road: commenced monitoring from January 2015 due to data refinement / boundary adjustment.
Source: ELDP, Sydney Water, Photomaps by nearmap.com.au

Figure 7 – Undeveloped and serviced land stocks in the Sydney Metropolitan Region (January 2010 – 2015)

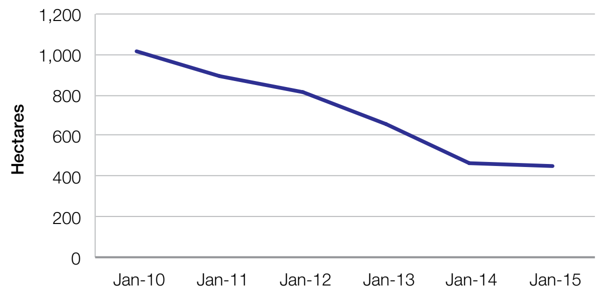
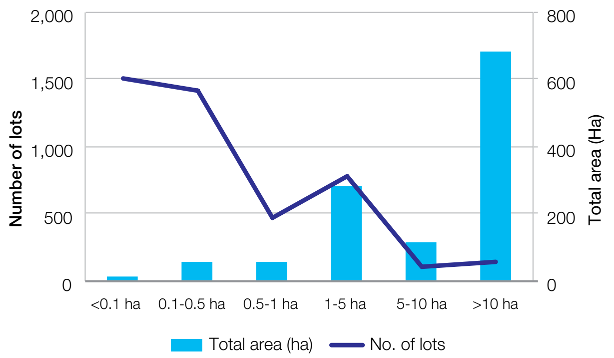


Figure 8 – Area of undeveloped zoned employment lands by lot size at January 2015 (Sydney Metropolitan Region)



Undeveloped land – lot size

In order to cater for a mix of industrial building types, the undeveloped zoned land in the Sydney Metropolitan Region should have a range of lot sizes. This is the case especially in the West where there is increasing demand for larger lots to accommodate new warehousing and storage / logistics buildings.

Table 5 and Figure 8 provide a breakdown of undeveloped zoned employment lands by lot size at January 2015. Lot sizes are grouped into six cohorts ranging from less than 0.1 hectare to more than 10 hectares. This data is presented by the number of lots and total area in hectares for each cohort.

The undeveloped land supply is primarily held in parcels greater than 10 hectares where 57 lots comprised 56% of all undeveloped zoned land. This was followed by the 1-5 hectare category where 310 lots comprised 24% of all undeveloped zoned land. Interestingly, 92% of the > 10 hectare and 1-5 hectare lots are located in the West.

Table 5 – Number of undeveloped employment land lots by size and subregion at January 2015 (Sydney Metropolitan Region)

Subregion	<0.1 ha		0.1-0.5 ha		0.5-1 ha		1-5 ha		5-10 ha		>10 ha	
	No. of Lots	Total area (ha)	No. of Lots	Total area (ha)	No. of Lots	Total area (ha)	No. of Lots	Total area (ha)	No. of Lots	Total area (ha)	No. of Lots	Total area (ha)
Central	51	2.1	36	9.5	13	10.0	7	11.9	2	15.7	1	12.2
North	15	0.6	22	5.5	15	10.3	13	26.6				
South	18	1.2	33	6.3	4	2.5	2	4.4			3	98.1
South West	38	1.9	147	40.1	57	40.4	159	367.1	6	39.9	11	221.5
West	85	5.0	203	43.9	38	28.0	43	104.8	6	44.0	9	495.9
West Central	400	22.1	129	31.4	61	45.8	86	201.9	29	197.8	33	881.3
Sydney Metropolitan Region Total	**607**	**32.9**	**570**	**136.6**	**188**	**136.9**	**310**	**716.7**	**43**	**297.3**	**57**	**1,709.0**

Source: NSW Land and Property Information

Figure 9 – Number of lots by area at January 2015 (Sydney Metropolitan Region)

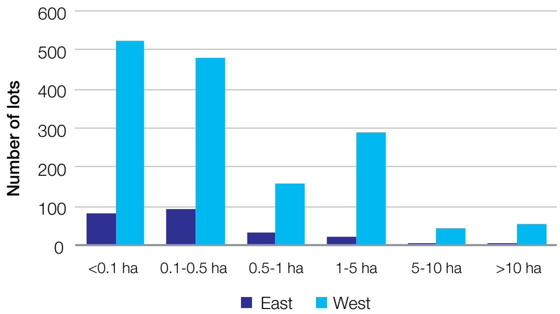
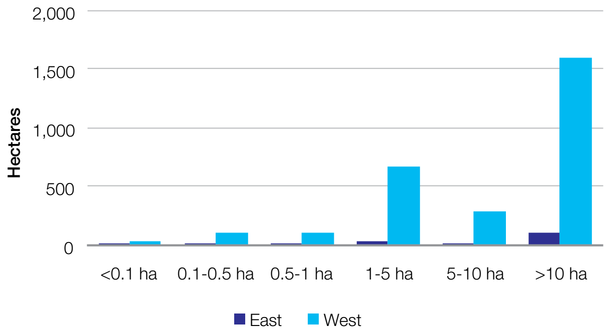


Figure 10 – Total aggregate area of lots by size at January 2015 (Sydney Metropolitan Region)



Changes to employment lands stock

Figure 11 and Figure 12 illustrate the changes to total employment land stocks during the 2014 calendar year.

Figure 11 – Change in the total employment land stock January 2014 and January 2015 by subregion (Sydney Metropolitan Region)

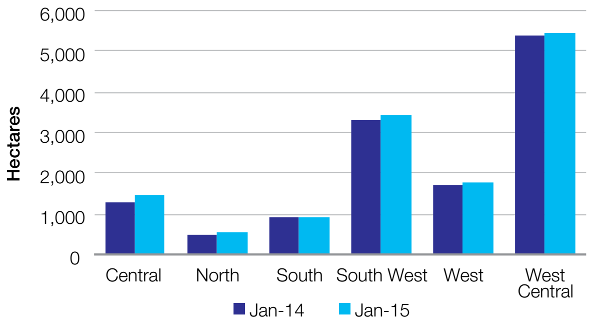
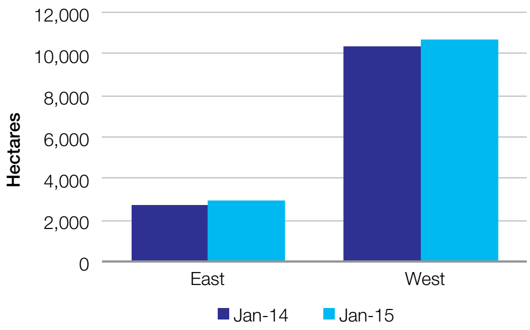


Figure 12 – Change in the total employment land stock January 2014 and January 2015 in the East and West (Sydney Metropolitan Region)



Gains

In 2014 there was 79.2 hectares of employment land gained through rezonings. The largest additions were 65.3 hectares in Maldon (Wollondilly LGA) and 10.8 hectares at Wicks Road, Macquarie Park (Ryde LGA).

There were also significant employment land additions identified through the audit. This included boundary adjustments to existing precincts such as South Strathfield/Enfield (62.4 hectares), Annangrove (29.7 hectares), Dural Service Centre (27.5 hectares), Sydney Airport Environs (25.1 hectares), Riverstone West (15.5 hectares) and Mulgrave/Vineyard (11.2 hectares). There were additional industrial sites identified, the largest being Condell Park Road, Wilton (13.1 hectares), Warwick Farm Racecourse (12.8 hectares) and Werrington Road, Werrington (10.3 hectares).

Losses

There was a loss of 1.5 hectares of industrial land in 2014 through rezoning. This occurred in Leichhardt, with the Parramatta Road/ Tebutt Street precinct rezoning 0.8 hectares to R3 (residential zone) and 0.7 hectares to B4 (business zone).

Rezoning to B5, B6 and B7 zones

For the second year running, the ELDP includes analysis of land that is rezoned from industrial to the B5, B6 and B7 zones. These more flexible business zones permit a mix of land uses including various types of industrial uses. Although industrial land may be rezoned to one of these business zones, it is important that these areas continue to be monitored as industrial sites as the land will continue to support industrial uses and accommodate the changing nature of industry.

In 2014 there was 39.6 hectares of land rezoned from industrial to a B5, B6 or B7 zone in the Sydney Metropolitan Region. This compares to 223 hectares in 2013. Almost all of the rezonings (98%) were to B6 Enterprise Corridor with 39.1 hectares in The Hills LGA and 0.5 hectares rezoned to B7 Business Park in Leichhardt LGA. This illustrates a continuing trend in rezoning industrial land to make it more adaptable for future employment uses.

Record of zoning changes

Table 6 provides details on all known zoning changes to employment lands precincts in 2014, including new industrial additions and also losses due to rezoning. The table also provides a detailed breakdown of the various zones (under the Standard Instrument Local Environmental Plan[7]) that were used when rezoning these precincts.

Table 6 – Record of employment land zoning changes in 2014 (Sydney Metropolitan Region)

Precinct	LGA	2014	2015	Rezonings (Ha)																	Total Rezoned Land (Ha)	Employment Land Zone Additions (Ha)	Employment Land Zone Losses (Ha)
				Employment Land Zones				Residential				Business			Open Space and Environment								
		Total Zoned (Ha)		IN	B5	B6	B7	R1	R2	R3	R4	B1	B2	B4	RE1	RE2	SP2	W1	E1	E2			
Windsor/South Windsor	Hawkesbury	95.4	98.4	2.4																	2.4	2.4	
Parramatta Rd/ Tebutt St	Leichhardt	5.2	3.5							0.8				0.7							1.5		1.5
Warragamba/ Silverdale	Wollondilly	61.3	62.2	0.7																	0.7	0.7	
Maldon	Wollondilly	103.7	169.3	65.3																	65.3	65.3	
Macquarie Park, Wicks Road	Ryde		10.8	10.8																	10.8	10.8	
Lilyfield Road	Leichhardt	1.0	1.0				0.5														0.5		
Annangrove	The Hills	115.2	144.9			39.1															39.1		
	Totals	**381.9**	**490.1**	**79.2**		**39.1**	**0.5**			**0.8**				**0.7**							**120.3**	**79.2**	**1.5**
% of Total Rezoned Land				**66%**	**0%**	**32%**	**0%**	**0%**	**0%**	**1%**	**0%**	**0%**	**0%**	**1%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**			

Note: Only rezoned amounts of land greater than 0.1 hectares are included in the above table. Numbers may not add up exactly due to rounding.
Source: ELDP, DP&E Local Plan Making Tracking System (January 2015)

7 Refer to glossary of terms for definition.

Current employment land planning proposals

In 2014 there were six Planning Proposals approved at the Gateway and two proposals lodged (but yet to be determined at January 2015[8]) relating to employment lands and Business Parks (see Table 7).

Of the approved Planning Proposals, the finalisation of three would result in a gain of business park land (49.2 hectares), two would result in a net loss of industrial land (2.06 hectares) and another involves rezoning from light industrial to general industrial (nil gain/loss).

Both of the proposals yet to be determined would result in a net loss of industrial land if finalised (approximately 9.9 hectares).

Table 7 – Record of planning proposals lodged or approved in 2014 (Sydney Metropolitan Region)

LGA	Address	Proposed Zoning Change	Proposal Description	PP Number	Date Proposal Lodged	Date of Gateway Determination	Stage (at January 2015)
Botany Bay	9-15 Erith St, 5-9, 13-15, 21-23 Byrnes St, Botany and 1 Bay Street & 2-10 Mc Fall St, Botany	2.5 ha from IN1 to B7	Rezone 2.5 ha of land from IN1 General Industrial to B7 Business Park.	PP_2013_ BOTAN_001_00	10/29/2013	3/18/2014	Approved at Gateway and with RPA for implementation
Burwood	27 Mitchell Street, Croydon Park	0.63 ha from IN2 to R1	Rezone the site from part R2 Low Density Residential and part IN2 Light Industrial (0.63 ha) to R1 General Residential.	PP_2013_ BURWO_003_00	1/17/2014	2/7/2014	Approved at Gateway and with RPA for implementation
Campbelltown	168-192 Narellan Rd, Campbelltown	12.7ha from 5a (Special Uses) to B7	Rezone the 5a (Special Uses -Monastry) site to allow for a mix of land uses including a business park (12.7 ha), residential development (16.5 ha), seniors living precinct (8.5 ha) and private open space areas.	PP_2014_ CAMPB_001_00	25/06/2014	12/8/2014	Approved at Gateway and with RPA for implementation
Fairfield	65-67 Mandarin St, Fairfield East	0.7ha IN2 to IN1	Adjustment to IN zone boundary to facilitate development / site access	PP_2014_ FAIRF_003_00	5/7/2014	20/06/2014	Approved at Gateway and with RPA for implementation
Penrith	565-609 Luddenham Road, Luddenham	34ha from RU2 to B7	Rezone 287 ha of land from RU2 Rural Landscape to part B7 Business Park, part B4 Mixed use and RE1 Public Recreation.	PP_2014_ PENRI_001_00	3/11/2014	6/18/2014	Approved at Gateway and with RPA for implementation
Auburn	Land bounded by Railway Street, East Street, James Street and Mark Street, Lidcombe	1.43ha from IN2 to B4 & RE1	Rezone 1.43 ha of IN2 Light Industrial land to part B4 Mixed Use and part RE1 Public Recreation, and rezone R4 High Density Residential land to B4 Mixed Use.	PP_2014_ AUBUR_002_00	05/09/2014	9/30/2014	Approved at Gateway and with RPA for implementation
Auburn	2-10 Jenkins Street and 344-362 Park Road, Regents Park	1.9ha from IN2 to R4	Rezone 1.9 ha of land from IN2 Light Industrial to R4 High Density Residential.	PP_2014_ AUBUR_005_00	11/18/2014		With P&E for Gateway determination
Holroyd	190-220 Dunmore Street, Pendle Hill	8ha from IN2 to R4, B2 &RE1	Rezone 8 ha site from IN2 Light Industrial to R4 High Density Residential, B2 Local Centre and RE1 Public Recreation.	PP_2014_ HOLRO_003_00	26/11/2014		With P&E for Gateway determination

Source: DP&E Local Plan Making Tracking System (January 2015)

8 PP_2014_AUBUR_005_00 was subsequently refused at Gateway on 3 February 2015. PP_2014_HOLRO_003_00 was approved at Gateway on 23 February 2015.

Proposed employment lands

Table 8 identifies employment land precincts which are proposed to be rezoned for industrial purposes throughout the Sydney Metropolitan Region. The majority of these future areas are identified within the South West Growth Centre Structure Plan[9] and *A Plan for Growing Sydney*.

In the Sydney Metropolitan Region stocks of proposed future employment land increased considerably from 2,435 hectares at January 2014 to 6,972 hectares at January 2015. The increase was due to the amendment of the *State Environmental Planning Policy (Western Sydney Employment Area) 2009* which confirmed the new boundaries of the Western Sydney Employment Area (WSEA) extension. This new boundary encompasses approximately 4,537 hectares of additional proposed employment land. Although subject to further investigations, this potential land will contribute significantly to stocks of undeveloped employment lands in the future.

Table 8 – Proposed Employment Land at January 2015 (Sydney Metropolitan Region)

Precinct	LGA	Area (Ha)
Catherine Fields	Camden	73.2
Future Industrial	Camden	87.6
Future Industrial	Liverpool	1,124.9
Kemps Creek	Liverpool	446.8
Lowes Creek	Camden	87.7
Lowes Creek/Marylands	Camden	63.7
Marylands	Camden	25.5
Rossmore	Liverpool	40.2
Moorebank Defence Lands	Liverpool	336.0
Glen Lee	Campbelltown	112.3
Glen Lee	Camden	37.6
Western Sydney Employment Area Extension	Penrith	4,145.2
Western Sydney Employment Area Extension	Liverpool	391.9
	Sydney Metropolitan Region Total	**6,972**

Note: The Badgerys Creek Airport Precinct is not listed in the above table as it is not currently included within the Draft Western Sydney Employment Area Structure Plan.

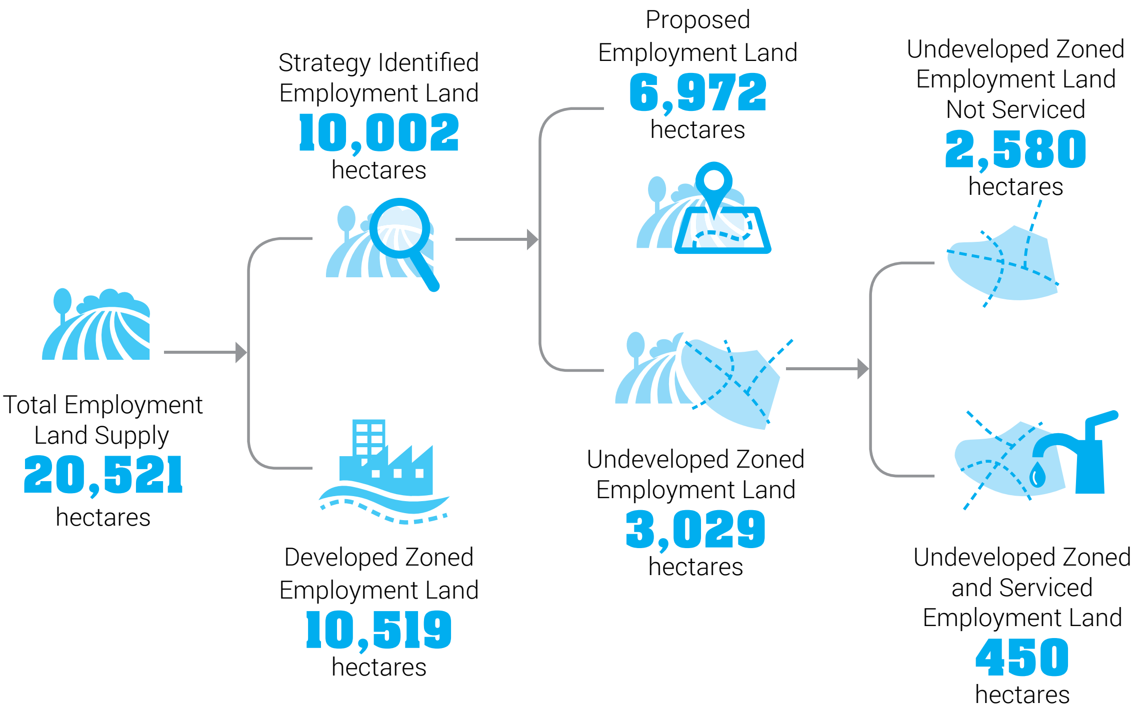
Source: ELDP, South West Growth Centre Structure Plan, A Plan for Growing Sydney, Draft Western Sydney Employment Area Structure Plan

9 Department of Planning and Environment, South West Growth Structure Plan

Status of employment lands at January 2015

Table 9 and Figure 14 compare employment land stocks at different stages of the development pipeline at January 2014 and January 2015. This shows all currently identified land (i.e. undeveloped zoned land and proposed employment land) referred to as 'Strategy Identified Land'[10], as well as how much of this total stock is undeveloped and zoned and of that, how much undeveloped zoned land is currently serviced (in terms of lead-in water and sewer services). This is illustrated in the flow chart in Figure 13.

Figure 13 – Employment lands status categorisation at January 2015



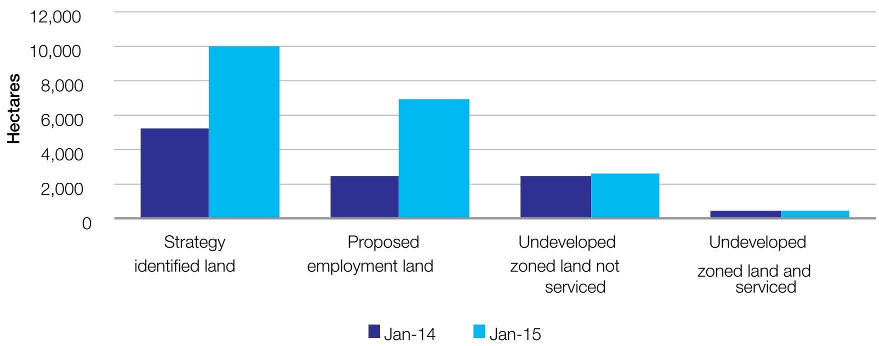
10 Refer to glossary of terms for definition.

Table 9 – Status of employment lands at January 2014 and January 2015 (Sydney Metropolitan Region)

Status of Employment Lands	Jan 2014 (Ha)	Jan 2015 (Ha)	Net Change (Ha) Jan 2014 – Jan 2015
Strategy identified land	5,295	10,002	4,707
Proposed employment land	2,435	6,972	4,537
Undeveloped zoned land:	2,859	3,029	170
Undeveloped zoned land not serviced	2,396	2,580	183
Undeveloped zoned and serviced land	463	450	-13
Developed zoned land	10,245	10,519	274

Note: 'Proposed employment land' (as shown in Table 8) and 'undeveloped zoned land' (as shown in Table 2) are subsets of 'Strategy identified land'. 'Undeveloped zoned land not serviced' and 'Undeveloped zoned land and serviced' (as shown in Table 4) are subsets of 'Undeveloped zoned land'. Numbers may not add up exactly due to rounding.

Figure 14 – Status of employment lands at January 2014 and January 2015 (Sydney Metropolitan Region)



Demand for Employment Lands

This section provides commentary on the demand for industrial property based on 2014 property analyst reports. It contains analysis on the value ($) of industrial approvals sourced from custom ABS data. It also shows the take up[11] of industrial land which was calculated using the ELDP take-up methodology.

Overview

Property analyst reports[12] indicate that the Sydney industrial market has moderated after three years of increased demand. Demand for industrial space in certain sectors however is still strong, including the transport, logistics and the e-commerce/online business sectors. The weakening of the Australian dollar is yet to show an improvement in demand for manufacturing space.

Demand for industrial property

According to property analyst reports, Sydney has remained one of the most in-demand property markets nationally. In 2014, investment sentiment in particular strengthened across the outer west industrial sector of Sydney. For the past 12 months demand in Sydney has been focused on the warehouse subsector with a trend towards larger distribution centres and warehouses, particularly by transport and logistics companies. Outer Western Sydney has experienced strong growth relating to construction of new warehouse and distribution centres, particularly within the Western Sydney Employment Area (WSEA) around the junction of the M4 and M7 motorways. Figure 15 illustrates the value of industrial development approvals by subregion during the 2014 calendar year, and Figure 16 illustrates the value of approvals in the East and West.

11 Refer to glossary of terms for definition

12 BIS Shrapnel, Sydney Industrial Property – Market Forecasts and Strategies 2014 – 2024, December 2014; CBRE, Australia Industrial MarketView, Q1 2014; CBRE, Australia Industrial MarketView, Q3 2014; CBRE, Market Outlook Australia, 2015; and Knight Frank, Sydney Industrial Market Overview, November 2014

Figure 15 – Value ($) of industrial approvals by subregion in 2014 (Sydney Metropolitan Region)

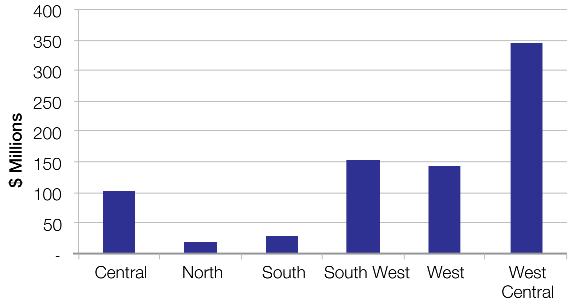
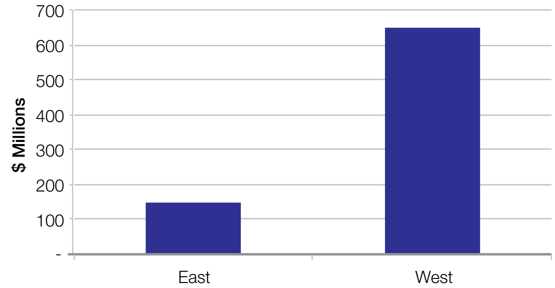


Figure 16 – Value ($) of approvals in the East and West in 2014 (Sydney Metropolitan Region)



In the manufacturing sector, there has been a continued decline in demand for industrial space, especially in trade exposed (export/import) business sectors. This sector is expected to continue to decline over the long term[13]. In contrast the increase in imported manufactured articles has had a positive impact on the transport and logistics sector, which has continued to see growth driving occupier demand[14]. Constant growth in freight volumes and efficiency advancements are directing the need for new facilities in the transport and distribution subsector. Companies taking advantage of strategic locations have seen a noticeable rise in efficiency of distribution costs and time. A key efficiency driver in Sydney is that it contains vacant land particularly in the Outer West, which is in close proximity to motorways.

13 CBRE, Australia Industrial MarketView, Q1 2014

14 CBRE, Australia Industrial MarketView, Q3 2014.

Looking ahead, property analysts predict continued demand for prime industrial property over the next 10 years[15]. This demand will be driven by population growth, increased investment and rising trade volumes. Innovation will continue to change the way that industrial space is demanded, with changing shapes and sizes of warehouses and factories to better suit the needs of technologically advanced industrial facilities[16]. The outlook for the manufacturing sector and secondary property is less positive, with the decline of the industry expected to continue in the long term. Much of Sydney's manufacturing industry has subsided over the last 20 years, with the manufacturers still in operation carrying excess capacity.

Construction and value of approvals

The analysis of the ABS data indicates the level of activity in the industrial property market has increased over the past three years (shown in Figure 17) as international investors, as well as a number of local market participants, have been investing in new builds. There has been demand for prime or modern assets, including large format, high quality and well-located distribution facilities particularly in Western Sydney[17]. 2014 saw industrial construction rise to pre-GFC levels. This rise is directly related to the demand for new prime industry facilities by upgraders relocating from older, secondary industrial facilities[18], rather than expansion of existing industrial operations[19].

The value ($) of industrial development approvals[20] has increased from $783 million in 2013 to $795 million in 2014, with $148 million in the East and $647 million in the West. The factories and warehouse industrial sectors experienced an increase in development approval activity in 2014, while other industrial buildings experienced a decrease in approvals from 2013.

Figure 17 – Value ($) of industrial approvals in the Sydney Metropolitan Region (2009-2014)

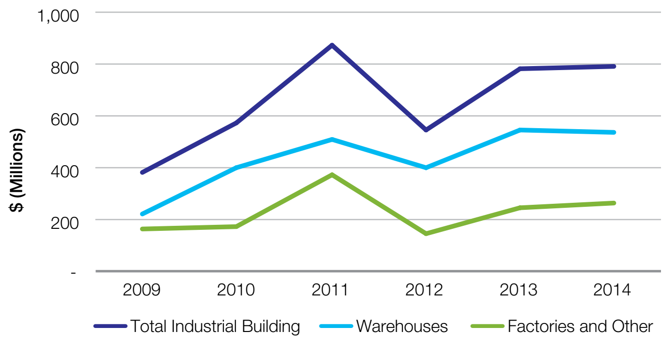


Figure 18 – Value ($) of industrial approvals in the Sydney Metropolitan Region by subregion and type (2014)

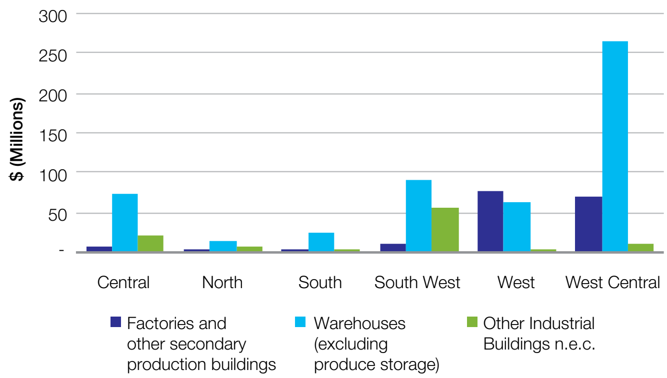
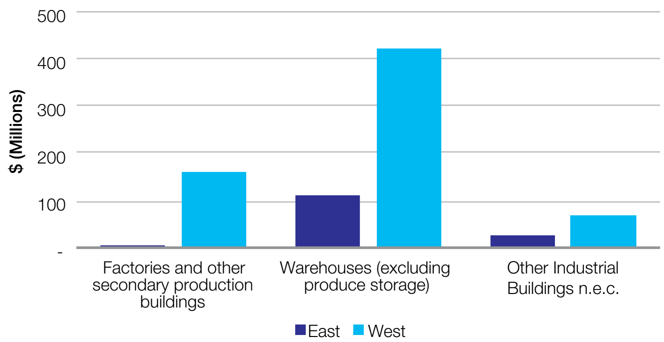


Figure 19 – Value ($) of industrial approvals in the Sydney Metropolitan Region by type (2014)



15 BIS Shrapnel, Sydney Industrial Property – Market Forecasts and Strategies 2014 – 2024, December 2014

16 CBRE, Market Outlook Australia Balancing risks as growth divergence continues, 2014

17 CBRE, Australia Industrial MarketView, Q1 2014

18 BIS Shrapnel, Sydney Industrial Property – Market Forecasts and Strategies 2014 – 2024, December 2014

19 Knight Frank, Sydney Industrial Market Overview, November 2014

20 Refer to glossary of terms for definition.

As illustrated in Figure 18 and Figure 19, warehouse building activity remained the most dominant type of building approvals. This sector accounted for $532 million (67% of total industrial DAs) and was predominantly located in the West Central subregion, while 'factories' accounted for $166 million (21%) of approvals and 'other' industrial accounts for a further $97 million (12% of total industrial DAs)[21]. Examples of approvals contributing to these results are included in Table 10.

Table 10 – Examples of industrial approvals in 2014 (Sydney Metropolitan Region)

LGA	Suburb	Project	DA Value ($m)	Approval Date
Penrith	Erskine Park	TNT Warehouse	57.7	04/02/2014
Blacktown	Marsden Park	Lindt Factory & Warehouse	32.0	26/11/2014
The Hills	North Rocks	Unilever Factory	6.0	23/12/2014
Parramatta	Rosehill	Clyde Refinery Conversion	3.4	22/12/2014
The Hills	Winston Hills	Superior Foods Refrigerated Storage	3.0	22/12/2014
Willoughby	Chatswood	Comcell Warehouse & Office	1.9	22/08/2014
Wyong	Berkeley Vale	Storage King	1.8	25/09/2014
Wyong	Wyong	Storage King	1.4	29/09/2014
Marrickville	Tempe	Tempe Tyre & Wheel Centre	0.9	09/12/2014

Table 11 shows the monetary value ($) of all industrial development approvals in the 2014 calendar year, by LGA and subregion for the Sydney Metropolitan Region. The data is derived from ABS non-residential building approvals data and covers 'warehouse', 'factories' and 'other industry'. This data includes new development, alterations and additions and is limited to DAs valued at over $50,000. The level of approvals is used as a proxy for understanding the level of demand in different areas of Sydney.

In previous years, the ELDP has tracked industrial approvals by financial year. From this year, industrial approvals will be tracked by calendar year, in line with the rest of the ELDP report.

21 ABS, Building Approvals 2014, Customised Report, 2015

Table 11 – Value ($) of industrial approvals by LGA and subregion in 2014 (Sydney Metropolitan Region)

Subregion	LGA	Factories and other secondary production buildings	Warehouses (excluding produce storage)	Other Industrial Buildings n.e.c.	Total industrial building
Central	Ashfield				
	Botany Bay	2,337,400	36,555,300	17,287,300	56,180,000
	Burwood				
	Canada Bay				
	Leichhardt		12,000,000		12,000,000
	Marrickville	550,000	5,075,000	575,000	6,200,000
	Randwick		1,932,700		1,932,700
	Strathfield	3,624,000			3,624,000
	Sydney	687,000	18,128,800	1,909,000	20,724,800
	Waverley				
	Woollahra		657,000		657,000
Central Total		7,198,400	74,348,800	19,771,300	101,318,500
North	Hornsby		4,535,000	2,257,500	6,792,500
	Hunters Hill		400,000		400,000
	Ku-ring-gai		1,500,000		1,500,000
	Lane Cove		1,235,100	116,000	1,351,100
	Manly				
	Mosman	200,000			200,000
	North Sydney		407,000		407,000
	Pittwater		974,100		974,100
	Ryde			84,300	84,300
	Warringah		4,259,700	2,840,800	7,100,500
	Willoughby			405,600	405,600
North Total		200,000	13,310,900	5,704,200	19,215,100
South	Canterbury	130,000	1,461,100		1,591,100
	Hurstville				
	Kogarah				
	Rockdale		794,300	244,000	1,038,300
	Sutherland Shire	225,000	22,927,500	2,086,000	25,238,500
South Total		355,000	25,182,900	2,330,000	27,867,900
South West	Camden	4,429,900	19,289,000	38,328,000	62,046,900
	Campbelltown	206,900	28,078,400	11,603,800	39,889,100
	Fairfield	3,222,000	13,984,900	3,571,100	20,778,000
	Liverpool	2,113,000	28,396,400	1,500,000	32,009,400
	Wollondilly		80,000		80,000
South West Total		9,971,800	89,828,700	55,002,900	154,803,400
West	Blue Mountains	260,000			260,000
	Hawkesbury	4,426,400	3,645,000	4,128,000	12,199,400
	Penrith	72,100,000	60,295,600	60,000	132,455,600
West Total		76,786,400	63,940,600	4,188,000	144,915,000
West Central	Auburn	3,236,000	11,898,300	165,100	15,299,400
	Bankstown	2,757,900	16,926,600	4,703,800	24,388,300
	Blacktown	62,173,100	179,603,900		241,777,000
	Holroyd	2,049,900	34,073,900	869,800	36,993,600
	Parramatta	250,000	7,265,000	3,349,400	10,864,400
	The Hills Shire	1,265,100	15,909,900	600,000	17,775,000
West Central Total		71,732,000	265,677,600	9,688,100	347,097,700
Sydney Metropolitan Region Total		**166,243,600**	**532,289,500**	**96,684,500**	**795,217,600**

Note: Figures in $

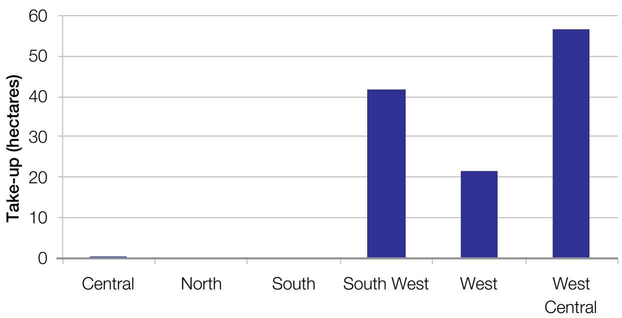
Source: ABS Building Approvals (customised data)

Land take-up

Using the ELDP take-up methodology 120.6 hectares of employment land was taken up by industrial development in 2014 in the Sydney Metropolitan Region. This compares to 190.3 hectares in 2013 and 123.1 hectares in 2012. In 2014, BIS Shrapnel calculated a likely take-up of around 114 hectares[22] for the Sydney Metropolitan Region. This is consistent with the ELDP analysis.

Almost the entire take-up (99%) occurred in the West. The West Central subregion provided the majority share (56.4 hectares) with a further 41.9 hectares in the South West subregion and 21.7 hectares in the West subregion. In contrast, there was no industrial land taken up in the South and North subregions in 2014. This is illustrated in Figure 20. This result is expected due to the limited supply of undeveloped serviced land available in the East in 2013 (33.4 hectares).

Figure 20 – Take-up of industrial land in the Sydney Metropolitan Region (2014)



Take-up activity was concentrated in the precincts of Eastern Creek (22.8 hectares), Smeaton Grange (20.5 hectares), Erskine Park (18.7 hectares), Glendenning (16.8 hectares), Campbelltown Blaxland Road (9.4 hectares) and Huntingwood West (7.9 hectares). These results demonstrate that development is largely focused within the Western Sydney Employment Area (WSEA) where undeveloped and serviced land is available.

22 BIS Shrapnel, Sydney Industrial Property – Market Forecasts and Strategies 2014 – 2024, December 2014

ELDP Take-up methodology

Take-up refers to land that has been consumed by industrial development (i.e. vacant employment lands which have been developed). It is defined as the point at which development has commenced on a site and the site is therefore no longer available for development.

Take-up analysis only includes lots greater than 100m² and does not include existing lots which were already partially developed. The figures will therefore contain a small under estimation of total take-up.

For the Sydney Metropolitan Region, the methodology uses Sydney Water servicing data on the development status of land checked against other sources.

A GIS mapping system compiles industrial zoning records, Sydney Water data and the NSW Land and Property Information (LPI) cadastral data.

The system enables ease of cross-referencing data layers, helping to determine the supply distribution and take-up of employment lands.

To verify changes to the development status of land, analysis of aerial imagery is also used to identify and assess development and changes that have been completed or commenced.

Limitations to this methodology lies in the accuracy of data and interpretation of aerial imagery.

Table 12 summarises take-up of employment lands over the 7 consecutive calendar years from 2008 to 2014. Only those precincts which experienced take-up of 5 or more hectares in one or more of the years are listed in the table. However, the totals shown in the table include all cases of take-up across the Sydney Metropolitan Region.

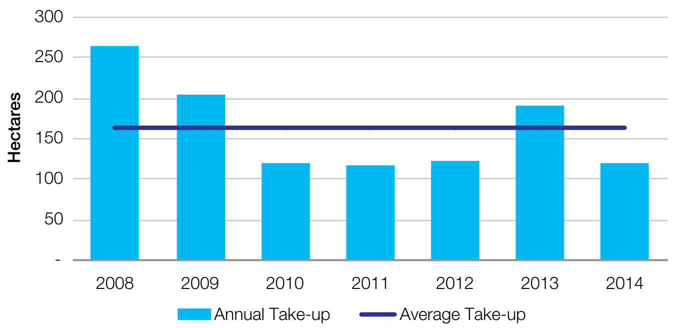
Table 12 – Take-up of employment land by key precincts in the Sydney Metropolitan Region (2008-2014)

Subregion	LGA	Precinct	Take-up (Ha)							
			2008	2009	2010	2011	2012	2013	2014	Total
Central	Randwick	Port Botany	1.3	5.3	0.1	0.5				11.1
South	Sutherland	Kurnell	1.8	22.4	0.2			0.9		25.3
South West	Camden	Smeaton Grange	19.6	3.3	9.0	0.7			20.5	53.1
	Campbelltown	Campbelltown, Blaxland Road					15.1	3.7	9.4	28.2
	Campbelltown	Ingleburn	14.9	4.8	0.3	0.4		4.2	5.0	29.5
	Campbelltown	Minto	3.4	0.5	6.1	0.5				10.5
	Fairfield	South of Sydney Water Pipeline				10.0				10.0
	Fairfield	Wetherill Park	12.2	6.2				2.7		21.2
	Liverpool	Hoxton Park			38.1					38.1
	Liverpool	Yarunga/Prestons	15.6	22.5	5.3	1.4		10.1	4.9	59.8
West	Penrith	Erskine Park	28.3	50.6		19.9	30.7	8.9	18.7	157.2
	Penrith	North Penrith	0.9	7.2	4.3	0.4		7.0	0.3	20.1
West Central	Auburn	Chullora	2.0	0.3	0.1	5.1		4.0		11.4
	Auburn	Regents Park	8.8	1.4	1.2	0.8		0.2		12.4
	Blacktown	Blacktown Rd, St Martins						5.4		5.4
	Blacktown	Eastern Creek	25.5	4.3	11.4	32.3		18.5	22.8	114.9
	Blacktown	Former Wonderland	0.0	9.5		10.7		25.8		46.0
	Blacktown	Glendenning	10.4	5.7	0.2	0.8		2.2	16.8	36.0
	Blacktown	Huntingwood West				18.8		26.7	7.9	53.4
	Blacktown	Marsden Park					16.7			16.7
	Blacktown	Minchinbury	6.5							6.5
	Blacktown	Ropes Crossing		10.5						10.5
	Blacktown	Seven Hills (Blacktown LGA)	7.9	3.0	0.4	0.1		0.4		11.8
	Holroyd	Greystanes			16.8		7.1	22.3	1.4	47.6
	Parramatta	Rydalmere						8.3		8.3
	The Hills	Annangrove			6.0					6.0
		Sydney Metropolitan Region Total (all precincts)	**264.0**	**205.0**	**118.6**	**117.1**	**123.1**	**190.3**	**120.6**	**1,138.8**

Note: The table above only lists precincts where in one or more of the years there was take-up of 5 hectares or more.
Source: ELDP, Sydney Water, Photomaps by nearmap.com

Figure 21 shows that between 2008 and 2014, the average annual take-up was 162.7 hectares. This varied from between a high of 264.0 hectares in 2008 and a low of 118.6 hectares in 2010. The take-up occurring in 2014 (120.6 hectares) was below average, down from 190.3 hectares in 2013.

Figure 21 – Annual employment land take-up in the Sydney Metropolitan Region (2008-2014)



Adequacy of Employment Lands Supply

Maintaining an adequate stock of employment lands is essential in providing for economic growth and competiveness as well as the affordability of employment lands. For adequate land stocks to be maintained, it is necessary to have stocks of land at progressive stages in the planning and development process:

- Strategy identified land
- Undeveloped zoned land not serviced
- Undeveloped zoned and serviced land

Establishing and replenishing stocks at each stage will ensure that adequate stocks of well-located land are ready for development as developer demand requires.

Table 13 outlines estimated supply of employment lands in the Sydney Metropolitan Region and benchmarks the supply at different take-up rates against supply standards.

Supply Standards

These calculate adequacy of Employment Lands supply in the Sydney Metropolitan Region, based on number of years for different stages of the development pipeline, using high, low and average take-up rates. They are based on industrial land planning practices used interstate and comparison standards for residential land provision.

In terms of adequacy of stocks, the broad pattern is similar to that of the last 5 years. There are sufficient stocks of existing undeveloped and proposed future employment lands under all three take-up rate scenarios to meet supply standards, however there exists an undersupply of zoned and serviced land under the average and high take-up scenarios.

Under a high take-up rate of 300 hectares per annum there would be enough *strategy identified land* (i.e. proposed employment land and zoned undeveloped land) to last 33 years (10,002 hectares). Of this total potential stock, there is 2,580 hectares of undeveloped zoned land which is not serviced (water and sewer lead-in services), providing up to 9 years of supply using the high take-up rate. Both these amounts meet the supply standards for *strategy identified land* (20 years supply) and undeveloped zoned which is not serviced (8-10 years supply).

However based on the high take-up rate of 300 hectares per annum there is only 1.5 years supply (450 hectares) of undeveloped zoned land which is serviced (water and sewer lead-in services) and can be considered ready for development.

Under the average take-up rate of 163 hectares per annum there is only 2.8 years supply. This level does not meet the supply standard for undeveloped and serviced land (5-7 years supply).

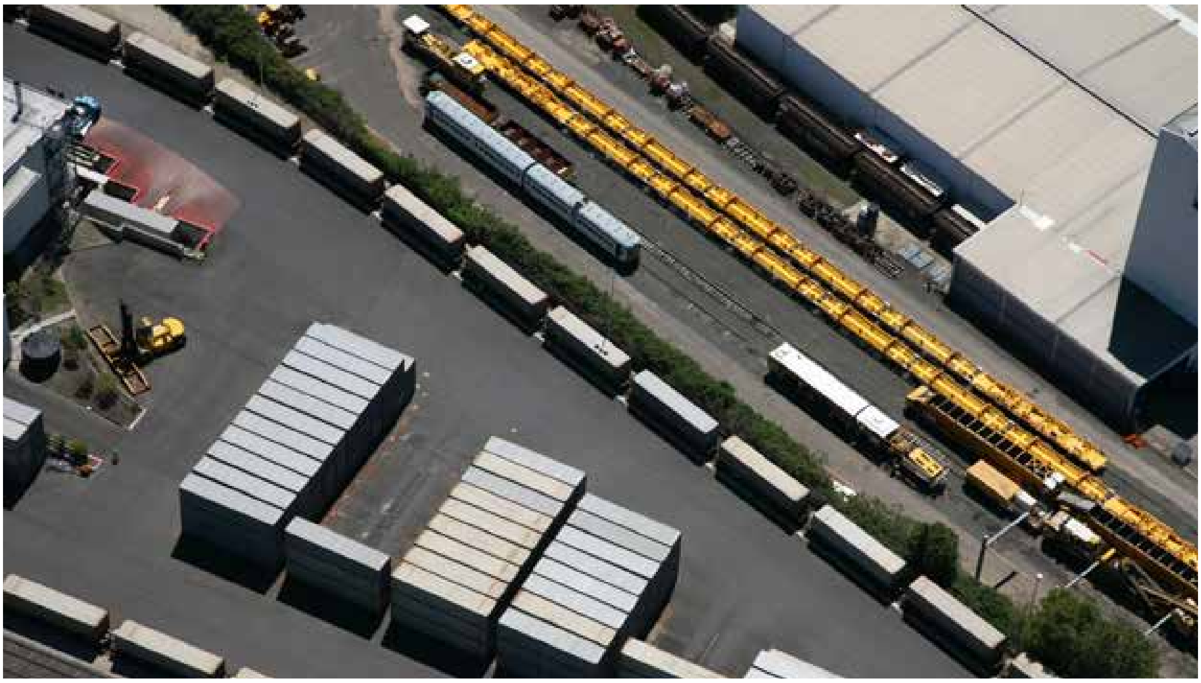
Table 13 – Assessment of the adequacy of employment lands supply at January 2015 (Sydney Metropolitan Region)

Status of Employment Lands	Number of years estimated supply				Supply Standards
	Jan-15 (Ha)	High take-up (300 ha pa)	Average take-up (163 ha pa)	Low take-up (80 ha pa)	
Strategy identified land	10,002	33.3	55.6	125.0	20 yrs
Undeveloped zoned land not serviced	2,580	8.6	14.3	32.2	8-10yrs
Undeveloped zoned and serviced land	450	1.5	2.8	5.6	5-7 yrs

Future servicing

Sydney Water is currently constructing two new trunk sewers (gravity sewer carriers) which will provide services to approximately 817 hectares of existing zoned employment land within the Western Sydney Employment Area (WSEA). This will include the eastern part of Erskine Park (67 hectares), the western part of Eastern Creek (172 hectares), northern part of Ropes Creek (58 hectares) and South of Sydney Water Pipeline (406 hectares). This trunk infrastructure is currently being delivered as part Sydney Water's St Marys Waste Water System Augmentation works. Delivery of the trunk servicing is likely by mid-2015, after which developers will be required to deliver lead-in services and site reticulation works at the development stage in order to connect to the gravity sewers.

The process for delivery of lead-in services usually takes between 12 and 18 months from the lodgement of the Section 73 (of the Sydney Water Act 1994) application by the developer to the issuing of the Compliance Certificate by Sydney Water. Once land is connected to Sydney Water services it will be categorised as 'serviced' land for the purposes of ELDP reporting.



Role of Employment Lands in Job Creation

A Plan for Growing Sydney identifies that Sydney will need to generate and accommodate 689,000 additional jobs over the next 20 years to support the population growth of 1.6 million people in Sydney by 2031. It is expected that 900,000 people or over 56% of the population growth will occur in Western Sydney[23]. Employment Lands will be a major contributor to meeting this need.

In 2011, there were almost 430,000 jobs[24] in employment lands across the Sydney Metropolitan Region. This represents 22% of all jobs across Sydney.

Figure 22 represents the proportion of jobs in Sydney Metropolitan Region which are located within the employment land precincts, against the remainder of jobs across the rest of Sydney, including jobs concentrated in designated centres and jobs that are dispersed across the region.

Distribution of jobs in employment land

In 2011, 61% of all jobs in employment lands were located in the West. The West Central subregion had the highest number of jobs with almost 145,000 jobs[25] in employment lands (see Figure 23). This represents 34% of all jobs in employment lands across the Sydney Metropolitan Region

In 2011 almost half (49%) of all jobs within the South West subregion were in employment lands, followed by 36% in both the West Central and South subregions and 24% in the West subregion (refer to Figure 24).

Figure 22 – Proportion of jobs in employment lands against all other jobs across Sydney Metropolitan Region (2011)

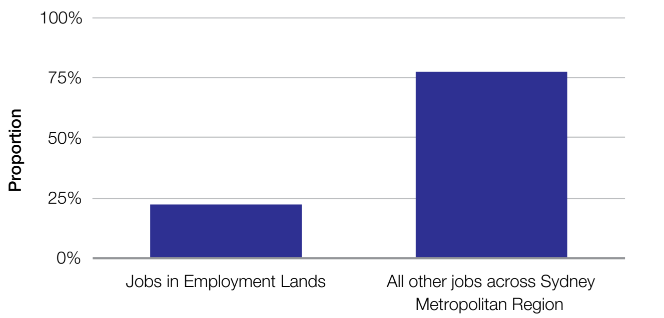


Figure 23 – Number of jobs in employment lands by subregion in the Sydney Metropolitan Region (2011)

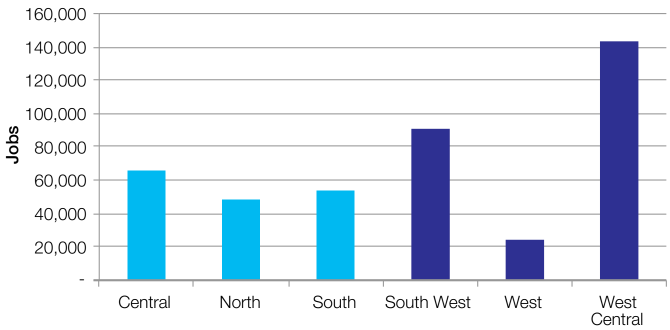
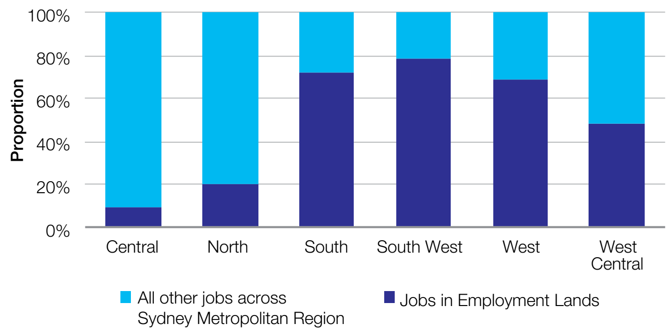


Figure 24 – Proportion of jobs in employment lands by Subregion in the Sydney Metropolitan Region (2011)



23 Department of Planning and Environment, State and Local Government Area Population Projections: 2014 Final, NSW Government, Sydney, 2014

24 Bureau of Transport Statistics, Journey to Work 2011

25 Bureau of Transport Statistics, Journey to Work 2011

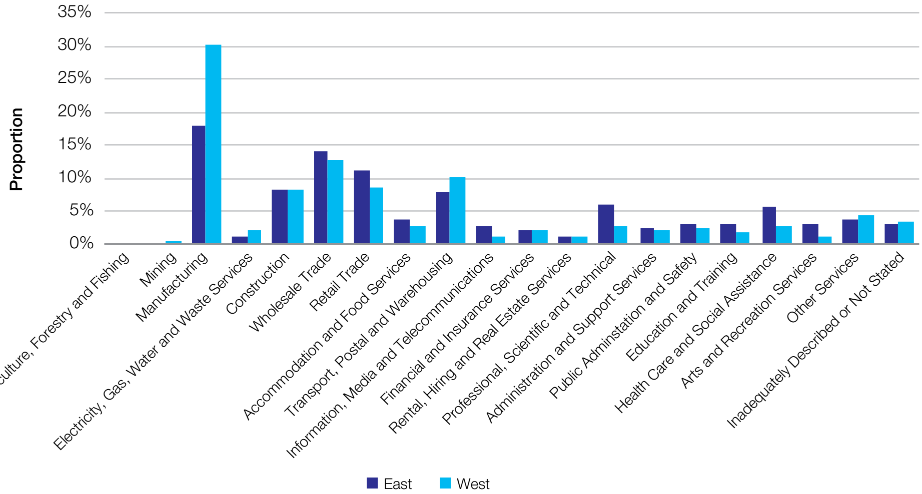
Industry types in employment lands

Almost two-thirds of jobs in employment lands relate to the key industry sectors collectively referred to as 'Production and Manufacturing':

- Manufacturing 25%
- Wholesale Trade 13%
- Transport, Postal and Warehousing 9%
- Construction 8%
- Electricity, Gas, Water and Waste Services 2%

As shown in Figure 25, there is an array of industry sectors present in employment lands reflecting their diverse economic roles. In the East for example, there are a significant proportion of jobs related to the Professional, Scientific and Technical Services (6%) and Health Care and Social Assistance (6%) located in employment lands.

Figure 25- Proportion of jobs by industry in employment lands in the Sydney Metropolitan Region (2011)



Job Densities

The average job density across Sydney's employment lands in 2011 was 50 jobs per developed hectare, as shown in Figure 26. Average job densities were significantly lower in the West (31 jobs per hectare) compared to the East (70 jobs per hectare).

The East continues to contribute significantly to the region's share of jobs in employment lands, especially in high-value and high-technology industries. As shown in Figure 27, employment lands in the East tend to have a disproportionately greater share of jobs compared to land stock. The East accounts for 39% of all jobs in the Sydney Metropolitan Region yet comprises only 26% of all developed land. The West has 61% of total jobs and 74% of total developed land. This difference is due to the more intensive nature of the dominant industrial activities occurring in the East where new land supply is scarce, compared to the West.

Figure 26 – Number of jobs per developed hectare by Subregion against Sydney Metropolitan Region average (2011)

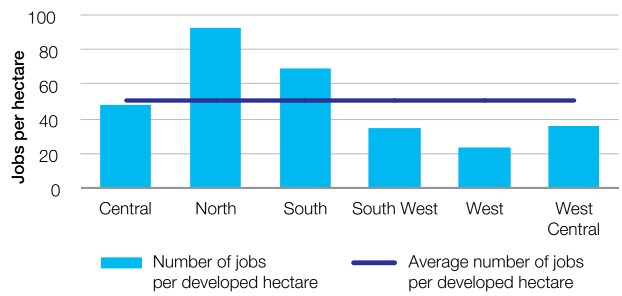
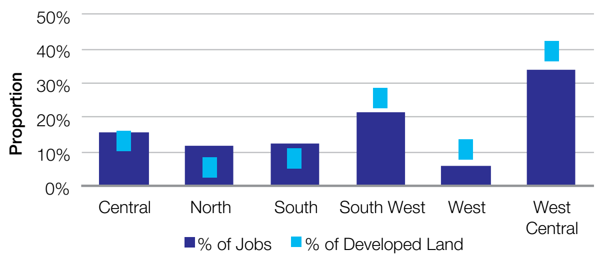


Figure 27 – Proportion of developed land to jobs by Subregion in the Sydney Metropolitan Region (2011)



Business Parks

Overview

Since January 2013 the ELDP has been monitoring major business parks[26] (over 50 hectares in size) within Sydney. These precincts generally have a B7 Business Park zone but may also include components of similar employment zones reflecting their broader functions.

The monitoring of business parks is in recognition of the growing importance of these locations for job growth and the evolution of some industrial areas towards higher density employment areas combining a mix of manufacturing, logistics, warehousing, research and development and office uses.

This year, the ELDP has expanded the monitoring of business parks to include those that are between 10 and 50 hectares in size.

The business parks monitored are either existing or emerging in nature. There are seven business parks included in the monitor which are over 50 hectares in size including Box Hill (The Hills LGA), Frenchs Forest (Warringah LGA), Leppington North (Camden LGA), Macquarie Park (Ryde LGA), Marsden Park (Blacktown LGA), Norwest (The Hills LGA) and Sydney Olympic Park/Rhodes (Auburn and Canada Bay LGAs).

The addition of business parks between 10 and 50 hectares in size includes eight precincts, namely Auslink (Warringah LGA), Burrows Road, Alexandria (Sydney LGA), Coonara Avenue, West Pennant Hills (Hornsby LGA), Greystanes (Holroyd LGA), Potts Hill (Bankstown LGA), Riverstone West (Blacktown LGA), Ryde Road, Pymble (Ku-ring-gai LGA) and Warriewood (Pittwater LGA).

As the reporting of business parks over 50 hectares was first introduced in January 2013, data for these major business parks has been presented for three years, 2012, 2013 and 2014. Monitoring of business parks between 10 hectares and 50 hectares show one year's zoned stock.

26 Refer to glossary of terms for definition

Table 14 provides a summary of business park land stocks which are developed and undeveloped at January 2015, as well as take-up during 2014.

Figure 28 shows the total aggregate area of business parks located in the East and West.

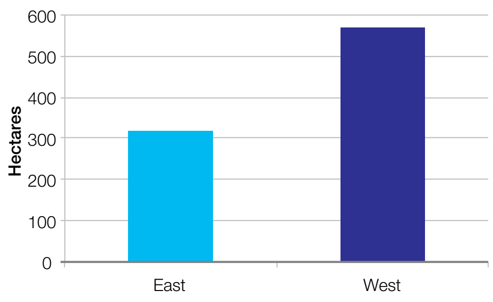
Table 14 – Business parks (> 10 hectares) summary

Business Park Precinct	Undeveloped Land (ha)	Undeveloped and Serviced Zoned Land (ha)	Developed Land (ha)	Total Business Park Size (ha)	Take-up During 2014 (ha)
Box Hill	67.3	0.0	2.1	69.4	0.0
Frenchs Forest	1.4	0.3	55.1	56.5	0.0
Leppington North	92.3	0.0	0.0	92.3	0.0
Macquarie Park	16.2	16.0	144.4	160.6	0.0
Marsden Park	93.7	0.0	29.4	123.1	3.5
Norwest	36.1	9.1	120.6	156.7	3.2
Sydney Olympic Park/Rhodes	1.5	0.0	77.3	78.8	0.0
Auslink	2.8	2.8	28.1	30.9	0.0
Burrows Road, Alexandria	4.1	1.6	9.8	13.9	0.0
Coonara Avenue, West Pennant Hills	10.6	10.6	15.3	25.9	0.0
Greystanes	13.4	13.4	0.0	13.4	0.0
Potts Hill	1.9	1.9	13.7	15.6	2.6
Riverstone West	19.2	0.4	0.0	19.2	0.0
Ryde Road, Pymble	0.5	0.4	12.0	12.5	0.0
Warriewood	0.0	0.0	17.7	17.7	0.0
Total	**361.1**	**56.5**	**525.6**	**886.7**	**9.3**

Note: Figures may not add up exactly due to rounding. Where no value is shown in a cell this indicates that the amount of land recorded is 0 hectares. Where '0.0' is shown in a cell this indicates a value less than 0.05 hectares (i.e. 500sqm) was recorded and then rounded to '0.0'.

Source: ELDP, Sydney Water, Photomaps by nearmap.com

Figure 28 – Total area of business parks (> 10 hectares) in the East and the West (January 2015)



Business parks over 50 hectares in size (Major Business Parks)

Development status of major business parks

Table 15 shows the proportion of land in major business parks in the Sydney Metropolitan Region that are developed and undeveloped at January 2013, 2014 and 2015. In 2014 major business park land stocks increased by 11.1 hectares from 726.5 hectares at January 2014 to 737.6 hectares at January 2015.

As shown in Figure 29, for most of the major business parks the zoned land is either almost fully developed or at the very early stages of development. The newer additions including Box Hill, Leppington North and Marsden Park each have over 60 hectares of undeveloped land at January 2015. Of the more established major business parks there is only 55.2 hectares or 18% of available undeveloped land.

Figure 29 – Proportion of undeveloped land in major business parks (January 2015)

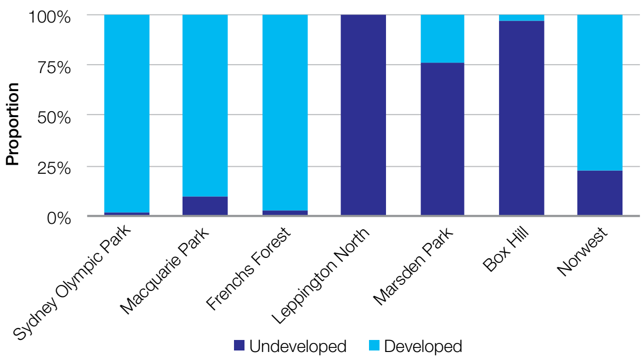


Table 15 – Development status of major business parks (January 2013, 2014 and 2015)

Subregion	LGA	Business Park Precinct	Jan-13 (Ha)			Jan-14 (Ha)			Jan-15 (Ha)			Jan 14-15 (Ha)		
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total
Central	Auburn/ Canada Bay	Sydney Olympic Park/ Rhodes	2.9	75.7	78.5	1.8	76.7	78.5	1.5	77.3	78.8	-0.3	0.6	0.3
North	Ryde	Macquarie Park	17.1	142.0	159.1	15.8	143.8	159.6	16.2	144.4	160.6	0.4	0.6	1.0
North	Warringah	Frenchs Forest	3.2	54.5	57.6	2.7	55.1	57.8	1.4	55.1	56.5	-1.3	0.0	-1.3
South West	Camden	Leppington North				79.2		79.2	92.3		92.3	13.1		13.1
West Central	Blacktown	Marsden Park	98.5	24.7	123.2	98.5	24.7	123.2	93.7	29.4	123.1	-4.8	4.7	-0.1
West Central	The Hills	Box Hill				67.3	2.1	69.4	67.3	2.1	69.4			
West Central	The Hills	Norwest	39.1	119.9	159.0	39.7	119.0	158.8	36.1	120.6	156.7	-3.6	1.6	-2.0
		Total	**160.8**	**416.7**	**577.5**	**305.1**	**421.4**	**726.5**	**308.6**	**429.0**	**737.6**	**3.5**	**7.6**	**11.1**

Note: Figures may not add up exactly due to rounding. Where no value is shown in a cell this indicates that the amount of land recorded is 0 hectares. Where '0.0' is shown in a cell this indicates a value less than 0.05 hectares (i.e. 500sqm) was recorded and then rounded to '0.0'.
Source: ELDP, Sydney Water, Photomaps by nearmap.com

Undeveloped and serviced major business parks

Table 16 indicates the major business parks and how much land was undeveloped and serviced (in terms of water and sewer lead-in servicing) at January 2013, 2014 and 2015.

Only 8% of the total undeveloped land (25.4 ha of 308.6 ha) was zoned and serviced at January 2015, all of which is located in the established business parks. The emerging business parks at Leppington North, Marsden Park and Box Hill (which have a combined 253 hectares of undeveloped land) are yet to be serviced.

Table 16 – Undeveloped and serviced major business park lands (January 2013, 2014 and 2015)

Subregion	LGA	Business Park Precinct	Jan – 13 Undeveloped and Serviced Zoned Land (Ha)	Jan – 14 Undeveloped and Serviced Zoned Land (Ha)	Jan – 15 Undeveloped and Serviced Zoned Land (Ha)
Central	Auburn/Canada Bay	Sydney Olympic Park/Rhodes	1.0	0.0	0.0
North	Ryde	Macquarie Park	11.5	10.3	16.0
North	Warringah	Frenchs Forest	0.5	1.1	0.3
South West	Camden	Leppington North	0.0	0.0	0.0
West Central	Blacktown	Marsden Park	0.0	0.0	0.0
West Central	The Hills	Box Hill	0.0	0.0	0.0
West Central	The Hills	Norwest	0.6	0.6	9.1
		Total	**13.6**	**12.0**	**25.4**

Source: ELDP, Sydney Water, Photomaps by nearmap.com

Take-up of land in major business parks

Table 17 shows how much land was taken up for development during the calendar years of 2012, 2013 and 2014 in the major business parks.

There has been little take-up over the past three years in these business parks. In 2014 there was 6.7 hectares of land taken up by development. This compared with no take-up in 2013 and 11.6 hectares in 2012. Take-up activity in 2014 occurred in Marsden Park (3.5 hectares) and Norwest (3.2 hectares).

The low take-up figures suggest that until servicing occurs within the emerging business parks of Box Hill, Leppington North and Marsden Park, most of the take-up will likely occur within the more established business parks through intensification of existing development or refurbishment and redevelopment of spaces.

Table 17 – Take-up of land in major business parks between 2012 and 2014 (hectares)

Subregion	LGA	Business Park Precinct	Take-up (Ha)		
			2012	2013	2014
Central	Auburn/Canada Bay	Sydney Olympic Park/Rhodes	1.5	0.0	0.0
North	Ryde	Macquarie Park	0.0	0.0	0.0
North	Warringah	Frenchs Forest	0.0	0.0	0.0
South West	Camden	Leppington North	0.0	0.0	0.0
West Central	Blacktown	Marsden Park	10.1	0.0	3.5
West Central	The Hills	Box Hill	0.0	0.0	0.0
West Central	The Hills	Norwest	0.0	0.0	3.2
		Total	**11.6**	**0.0**	**6.7**

Source: ELDP, Sydney Water, Photomaps by nearmap.com

Business parks between 10 – 50 hectares in size (Other Business Parks)

Development status of other business parks

This year, for the first time, the ELDP will monitor other business parks that are between 10 and 50 hectares in size. Table 18 and Figure 30 show the stocks of undeveloped and developed land in other business parks at January 2015.

The business parks in the East have a lower proportion of undeveloped land (18%) compared to those in the West (72%). This is largely due to the newer business parks of Greystanes and Riverstone West where development has yet to occur.

Figure 30 – Proportion of undeveloped land in other business parks (January 2015)

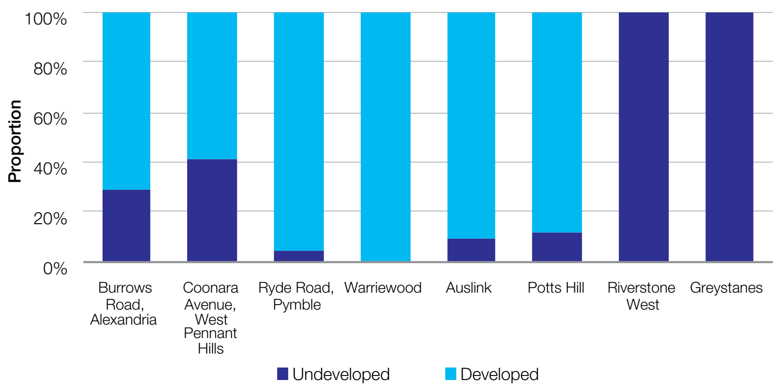


Table 18 – Development status of other business parks (January 2015)

Subregion	LGA	Business Park Precinct	Jan-15 (Ha)		
			Undeveloped	Developed	Total
Central	Sydney	Burrows Road, Alexandria	4.1	9.8	13.9
North	Hornsby	Coonara Avenue, West Pennant Hills	10.6	15.3	25.9
North	Ku-ring-gai	Ryde Road, Pymble	0.5	12.0	12.5
North	Pittwater	Warriewood	0.0	17.7	17.7
North	Warringah	Auslink	2.8	28.1	30.9
West Central	Bankstown	Potts Hill	1.9	13.7	15.6
West Central	Blacktown	Riverstone West	19.2	0.0	19.2
West Central	Holroyd	Greystanes	13.4	0.0	13.4
		Total	**52.5**	**96.6**	**149.1**

Source: ELDP, Sydney Water, Photomaps by nearmap.com

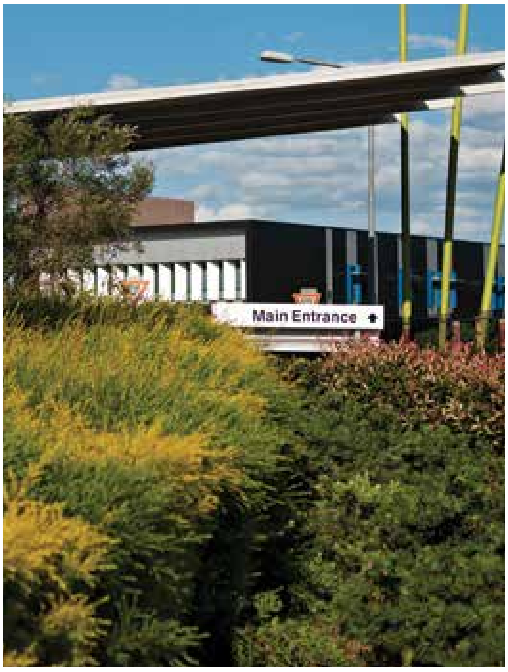
Undeveloped and serviced other business parks

Table 19 shows how much land was undeveloped and serviced (water and sewer lead-in servicing) at January 2015 within the other business parks. Of the 52.5 hectares of undeveloped land, 59% (or 31.1 hectares) is serviced. Most of the undeveloped and serviced land is within Greystanes (13.4 hectares) and Coonara Avenue, West Pennant Hills (10.6 hectares). Most of the remaining undeveloped land is within Riverstone West (19.2 hectares) which is yet to be serviced.

Table 19 – Undeveloped and serviced other business park lands (January 2015)

Subregion	LGA	Business Park Precinct	Jan – 15 Undeveloped and Serviced Zoned Land (Ha)
Central	Sydney	Burrows Road, Alexandria	1.6
North	Hornsby	Coonara Avenue, West Pennant Hills	10.6
North	Ku-ring-gai	Ryde Road, Pymble	0.4
North	Pittwater	Warriewood	
North	Warringah	Auslink	2.8
West Central	Bankstown	Potts Hill	1.9
West Central	Blacktown	Riverstone West	0.4
West Central	Holroyd	Greystanes	13.4
		Total	**31.1**

Source: ELDP, Sydney Water, Photomaps by nearmap.com



Central Coast

Central Coast

Supply of Employment Lands

Overview

At January 2015 there was 2,000.3 hectares of zoned employment lands in the Central Coast Region, including both developed and undeveloped lands (refer to Table 20). This is a decrease of 39.1 hectares (2%) from January 2014. A significant amount of the total stock change was a result of boundary adjustments identified through a comprehensive audit that was undertaken at the end of 2014 of all industrial zoned land in the Central Coast Region. Zoning changes accounted for the remainder of the total stock change with a net loss of 7 hectares.

Table 20 – Zoned Employment Land Stocks by LGA at January 2013, 2014 and 2015 (Central Coast Region)

Region	Jan-13 (Ha)			Jan-14 (Ha)			Jan-15 (Ha)		
	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total
Gosford	197.5	384.5	582.0	197.1	385.7	582.7	210.0	377.3	587.4
Wyong	958.7	500.8	1,459.5	926.0	530.6	1,456.7	886.5	526.5	1,413.0
Central Coast Region	**1,156.2**	**885.3**	**2,041.5**	**1,123.1**	**916.3**	**2,039.4**	**1,096.5**	**903.8**	**2,000.3**

Source: ELDP, Gosford City Council, Photomaps by nearmap.com

Developed land

There was 903.8 hectares of developed land in the Central Coast Region at January 2015, down 12.5 hectares from the previous year. The fall in developed stock can be attributed to the rezoning of employment land at Woy Woy and a boundary adjustment at Tuggerah identified in the audit.

Figure 31 shows the amount of employment land that was zoned and developed in each LGA at January 2013, 2014 and 2015.

Undeveloped land

In the Central Coast Region there was a decrease of 26.6 hectares of undeveloped land from 1,123.1 hectares (January 2014) to 1,096.5 hectares (January 2015). This was largely attributed to the loss of employment lands at Bushells Ridge and Tuggerah through boundary adjustments and data refinement, as identified in the audit. Take up of land accounts for the remainder of the stock change.

Figure 32 illustrates the amount of zoned and undeveloped land that is in each LGA at January 2013, 2014 and 2015.

Figure 31 – Zoned and developed employment land by LGA at January 2013, 2014 and 2015 (Central Coast Region)

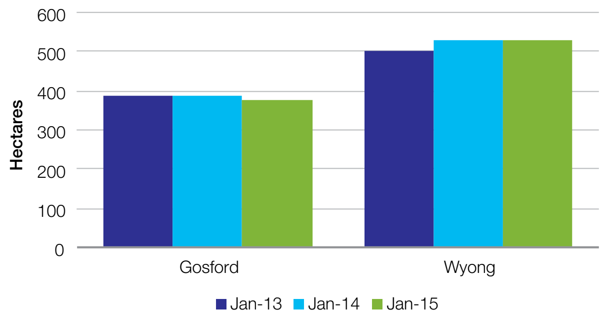
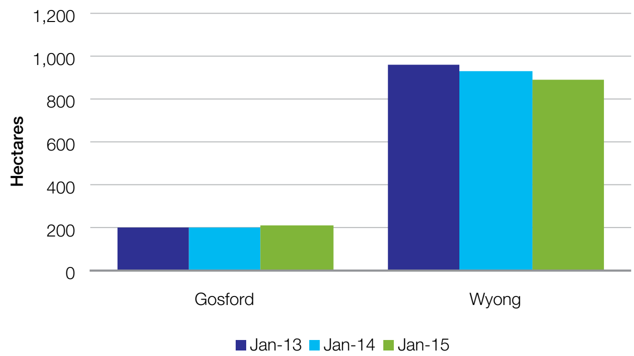


Figure 32 – Zoned and undeveloped employment land by LGA at January 2013, 2014 and 2015 (Central Coast Region)



Zoned employment lands stock by precinct

Table 21 compares total stocks, as well as the split between developed and undeveloped employment land at January 2013, 2014 and 2015 by subregion, LGA and individual precinct. Figure 33 shows the amount of developed and undeveloped employment land by LGA at January 2015.

Table 21 – Zoned employment lands stock by precincts at January 2013, 2014 and 2015 (Central Coast Region)

LGA	Precinct	Jan-13 (Ha)			Jan-14 (Ha)			Jan-15 (Ha)			Jan 14 – Jan 15
		Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	
Gosford	Blackwall	1.5	1.6	3.1	1.4	1.6	2.9		1.7	1.7	-1.3
	Mooney Mooney								1.2	1.2	1.2
	Erina		10.5	10.5		10.5	10.5		9.5	9.5	-1.0
	Gosford Industrial Area	3.1	8.0	11.1	3.1	8.0	11.1	3.1	8.0	11.1	0.0
	Kariong	11.4		11.4	11.4		11.4				-11.4
	Kincumber	0.2	8.5	8.7	0.2	8.5	8.7	0.2	8.7	8.9	0.2
	Lisarow	6.5	55.9	62.3	6.5	55.9	62.3	8.0	58.8	66.9	4.5
	North Gosford and Wyoming	2.3	21.8	24.1	1.7	22.2	23.9	0.4	26.2	26.6	2.8
	Somersby	161.0	131.2	292.2	161.8	131.9	293.7	185.3	130.2	315.5	21.7
	West Gosford	11.5	105.8	117.3	11.0	106.3	117.3	13.0	110.9	123.9	6.7
	Woy Woy		34.4	34.4		34.4	34.4		15.4	15.4	-19.0
	Woy Woy, Alma Ave		0.9	0.9		0.9	0.9		0.9	0.9	
	Woy Woy, Nagari Rd		1.8	1.8		1.5	1.5		1.6	1.6	0.1
	Woy Woy, Rawson Rd		4.1	4.1		4.1	4.1		4.1	4.1	0.0
Gosford Total		197.5	384.5	582.0	197.1	385.7	582.7	210.0	377.3	587.4	4.6
Wyong	Pacific Highway, Doyalson								1.3	1.3	1.3
	Bateau Bay	0.4		0.4							
	Berkeley Vale		8.5	8.5		8.5	8.5		8.5	8.5	0.0
	Bushells Ridge	552.4	79.9	632.3	552.4	79.9	632.3	530.9	74.4	605.3	-27.0
	Charmhaven	6.1	30.1	36.2	6.1	30.1	36.2	6.1	30.1	36.2	0.0
	Doyalson	4.3	7.2	11.6	4.4	7.2	11.6	4.4	7.3	11.7	0.1
	Gwandalan	4.3	1.3	5.7	4.4	1.3	5.7	4.7	0.9	5.6	-0.1
	Long Jetty		3.4	3.4		3.4	3.4		2.9	2.9	-0.5
	Long Jetty/ The Entrance		1.1	1.1		1.1	1.1		1.1	1.1	0.0
	North Wyong	46.9	81.8	128.7	46.9	81.8	128.7	42.9	85.7	128.7	0.0
	Ourimbah, Pacific Hwy	3.7	6.7	10.4	3.2	7.2	10.4	1.2	7.4	8.6	-1.8
	Tuggerah	54.2	232.0	286.2	41.7	243.8	285.5	28.0	235.4	263.4	-22.1
	Wyong	286.4	48.8	335.2	267.0	66.4	333.4	268.3	71.5	339.7	6.3
Wyong Total		958.7	500.8	1,459.5	926.0	530.6	1,456.7	886.5	526.5	1,413.0	-43.7
Central Coast Region Total		**1,156.2**	**885.3**	**2,041.5**	**1,123.1**	**916.3**	**2,039.4**	**1,096.5**	**903.8**	**2,000.3**	**-39.1**

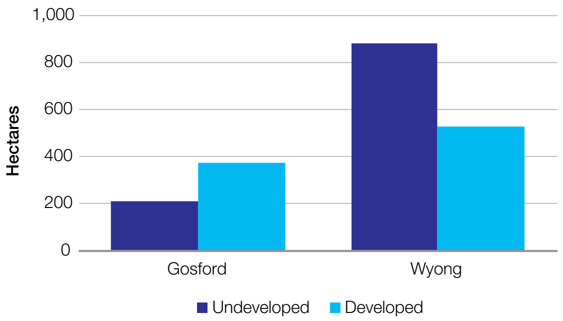
Notes:

Changes to precinct sizes in the Central Coast Region are due to data refinement from a data audit (boundary adjustment) or zoning changes (see Table 23 for rezoning details). Notable changes include Kariong (rezoning), Lisarow (rezoning), Somersby (rezoning), West Gosford (rezoning), Woy Woy (rezoning), Bushells Ridge (boundary adjustment), Tuggerah (boundary adjustment) and Wyong (boundary adjustment).

Figures may not add up exactly due to rounding. Where no value is shown in a cell this indicates that the amount of land recorded is 0 hectares. Where '0.0' is shown in a cell this indicates a value less than 0.05 hectares (i.e. 500sqm) was recorded and then rounded to '0.0'.

Source: ELDP, Gosford City Council, Photomaps by nearmap.com

Figure 33 – Developed and undeveloped stocks by LGA at January 2015 (Central Coast Region)



Undeveloped and serviced land

For the Central Coast Region, servicing data is only available for Gosford LGA. At January 2015, there was 34.5 hectares of undeveloped and serviced zoned land, up from 20.8 hectares at January 2014. The increase is mainly attributed to additional undeveloped serviced land being identified at Somersby and West Gosford.

Undeveloped land – lot size

The greatest amount of undeveloped zoned land in the Central Coast Region is in the > 10 hectares category where 37 lots account for 43 per cent of all undeveloped zoned land (see Table 22 and Figure 34). The next highest was the 1-5 hectare category where 185 lots comprised 21 per cent of total undeveloped land.

Figure 34 – Area of undeveloped zoned employment land by lot size at January 2015 (Central Coast Region)

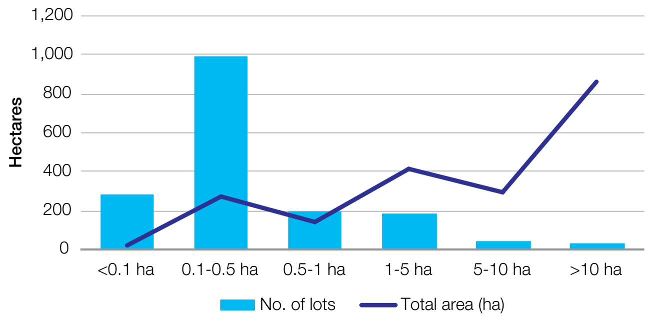


Table 22 – Number of employment land lots by size at January 2015 (Central Coast Region)

LGA	<0.1 ha		0.1-0.5 ha		0.5-1 ha		1-5 ha		5-10 ha		>10 ha	
	No. of lots	Total area (ha)	No. of lots	Total area (ha)	No. of lots	Total area (ha)	No. of lots	Total area (ha)	No. of lots	Total area (ha)	No. of lots	Total area (ha)
Gosford	220	12.5	488	137.2	100	69.3	85	197.9	17	123.0	4	47.4
Wyong	59	3.3	500	135.1	101	71.7	100	216.5	24	168.8	33	817.5
Central Coast Total	**279**	**16**	**988**	**272**	**201**	**141**	**185**	**414**	**41**	**292**	**37**	**864.9**

Source: NSW Land and Property Information

Changes to employment lands stock

There was a net decrease of 39.1 hectares of employment land stock in 2014.

Gains

In 2014 there was 35 hectares of employment land addition to stock through rezonings. The greatest addition was 21.6 hectares in Somersby. The remaining additions were the result of zoning changes within the Gosford Comprehensive Local Environmental Plan which was gazetted in 2014. This included 6.7 hectares at West Gosford and 4.5 hectares at Lisarow.

Losses

There was a loss of 42 hectares of industrial land in 2014 through various IN rezonings to a range of open space and environmental zones. This occurred through zoning changes in the Gosford Comprehensive Local Environmental Plan including Woy Woy (19 hectares) and Kariong (11.4 hectares).

There was also employment lands lost through boundary adjustments and data refinement as identified in the audit. The most notable losses were at Bushells Ridge (27 hectares) and Tuggerah (22.1 hectares).

Rezoning to B5, B6 and B7 zones

In 2014 there was 89.5 hectares of land rezoned from industrial to a B5, B6 or B7 zone. This included 88.7 hectares of land being rezoned from industrial to B6 at North Wyong. It is important that these areas continue to be monitored as industrial sites as the land will continue to support industrial uses and accommodate the changing nature of industry.

Record of zoning changes

Table 23 provides details on all known zoning changes to employment lands precincts in 2014, including new industrial additions and also losses due to rezoning. The table also provides a detailed breakdown of the various zones (under the Standard Instrument Local Environmental Plan) that were used when rezoning these precincts.

Table 23 – Record of employment land zoning changes (Central Coast Region)

Precinct	LGA	2014	2015	Rezonings (Ha)																	Total Rezoned Land (Ha)	Employment Land Zone Additions (Ha)	Employment Land Zone Losses (Ha)
				Employment Land Zones				Residential				Business			Open Space and Environment								
		Total Zoned (Ha)	Total Zoned (Ha)	IN	B5	B6	B7	R1	R2	R3	R4	B1	B2	B4	RE1	RE2	SP2	W1	E1	E2			
Somersby	Gosford	293.7	315.5	21.6											8.1						29.7	21.6	8.1
Erina	Gosford	10.5	9.5		0.4															1.0	1.4		1.0
Blackwall	Gosford	2.9	1.7												1.3						1.3		1.3
Kariong	Gosford	11.4																	11.4		11.4		11.4
Lisarow	Gosford	62.3	66.9	4.5																	4.5	4.5	
North Gosford and Wyoming	Gosford	23.9	26.6	1.0	0.4										1.3						2.7	1.0	1.3
West Gosford	Gosford	117.3	123.9	6.7																	6.7	6.7	
Woy Woy	Gosford	34.4	15.4																	19.0	19.0		19.0
Mooney Mooney	Gosford		1.2	1.2																	1.2	1.2	
North Wyong	Wyong	128.7	128.7			88.7															88.7		
	Totals	**685.1**	**689.4**	**35.0**	**0.8**	**88.7**									**10.6**				**11.4**	**20.0**	**166.5**	**35.0**	**42.0**
% of Total Rezoned Land				**21%**	**0%**	**53%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**6%**	**0%**	**0%**	**0%**	**7%**	**12%**			

Note: Only rezoned amounts of land greater than 0.1 hectares are included in the above table. Numbers may not add up exactly due to rounding.
Source: ELDP, DP&E Local Plan Making Tracking System (January 2015)

Current employment land planning proposals

In 2014 there was only one Planning Proposal approved at the Gateway relating to employment lands within the Central Coast Region. This was the proposed rezoning of 1.92 hectares of IN1 General Industrial land to RE1 Public Recreation at South Tacoma Road, Tuggerah, as part of a sporting facility proposal.

Proposed employment lands

Table 24 identifies employment land precincts which are proposed to be rezoned for industrial purposes in the Central Coast Region.

At January 2015, stocks of proposed employment land in the Central Coast Region remained unchanged at 467 hectares. These proposed lands are identified within the North Wyong Structure Plan.[27]

Table 24 – Proposed Employment Land at January 2015 (Central Coast Region)

Precinct	LGA	Area (Ha)
Doyalson West	Wyong	34.1
Doyalson South West	Wyong	52.4
Doyalson East	Wyong	33.9
Doyalson North East	Wyong	37.8
Hue Hue Road	Wyong	35.6
Lake Munmorah	Wyong	134.7
Warnervale North East	Wyong	52.6
Warnervale North West	Wyong	85.9
	Central Coast Region Total	**467.0**

Source: ELDP, North Wyong Structure Plan

27 Department of Planning and Environment, North Wyong Structure Plan, October 2012

Demand for Employment Lands

Value of industrial approvals for 2014

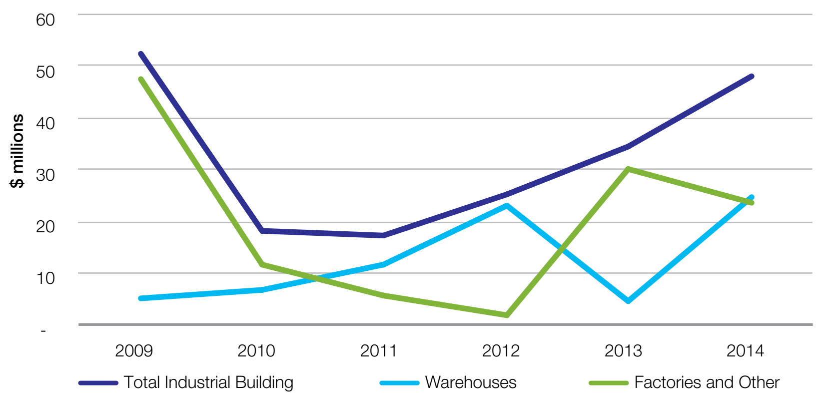
The total value of approvals in the Central Coast Region increased for the fourth year running, as shown in Figure 35. Approvals in 2014 totalled $48.1 million with around half of all approvals occurring in the warehouses sector (see Table 25).

Table 25 – Value ($) of industrial approvals by LGA in 2014 (Central Coast Region)

Subregion	LGA	Factories and other secondary production buildings	Warehouses (excluding produce storage)	Other Industrial Buildings n.e.c.	Total industrial building
Central Coast	Gosford	3,175,900	15,941,600	7,320,000	26,437,500
	Wyong	6,273,000	8,592,100	6,788,900	21,654,000
Central Coast Total		**9,448,900**	**24,533,700**	**14,108,900**	**48,091,500**

Note: Figures in $
Source: ABS Building Approvals (customised data)

Figure 35 – Value ($) of industrial approvals in the Central Coast Region (2009-2014)



Land take-up

In the Central Coast Region, 4.6 hectares of employment lands were taken up in 2014 (refer to Table 26). This included 2.4 hectares at North Wyong, 1.5 hectares at Tuggerah and 0.7 hectares at Somersby.

Table 26 – Take-up of employment land by key precincts in the Central Coast Region (2010-2014)

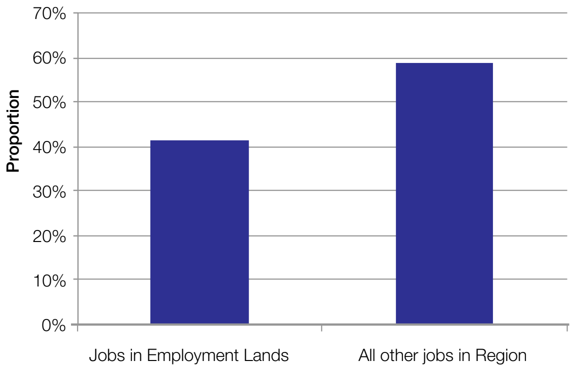
Region	LGA	Precinct	Take-up (Ha)					
			2010	2011	2012	2013	2014	Total
Central Coast	Gosford	Somersby	15.5		7.8	1.6	0.7	25.6
	Wyong	Tuggerah		1.9		4.1	1.5	7.4
	Wyong	Wyong	18.9	0.5	5.1			24.5
Central Coast Region Total (all precincts)			**34.4**	**3.0**	**19.9**	**5.7**	**4.6**	**67.5**

Note: The table above lists only the precincts where in one or more of the years there was take-up of 5 hectares or more.
Source: ELDP, Gosford City Council, Photomaps by nearmap.com

Role of Employment Lands in Job Creation

In 2011 there were over 40,000 jobs[28] in employment lands across the Central Coast Region. This represents 41% of all jobs across the Central Coast, as shown in Figure 36.

Figure 36 – Proportion of jobs in employment lands in the Central Coast Region (2011)



The 'all other jobs in region' category includes jobs that are concentrated in designated centres, as well as all other jobs dispersed throughout the Gosford and Wyong LGAs.

In 2011, 25,000 jobs or 62% of all jobs in employment lands were in the Gosford LGA, whilst 38% or 15,000 jobs were in employment lands in the Wyong LGA, as shown in Figure 37 and Figure 38.

Figure 37 – Number of jobs in employment lands by LGA in the Central Coast Region (2011)

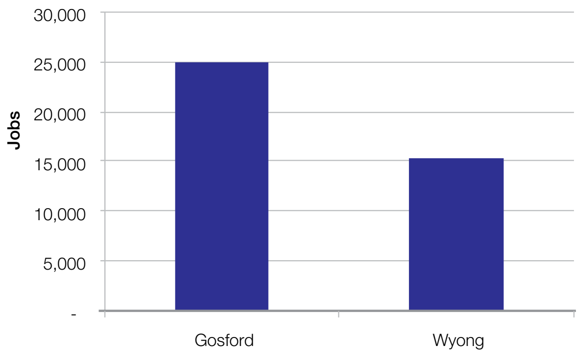
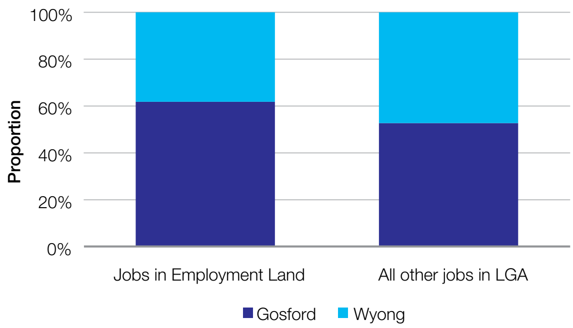


Figure 38 – Proportion of jobs in employment lands by LGA in the Central Coast Region (2011)



28 Bureau of Transport Statistics, Journey to Work 2011

Industry types in employment lands

About one third of jobs in employment lands in the Central Coast Region are from the following key industry sectors collectively referred to as 'Production and Manufacturing':

- Manufacturing 18%
- Construction 7%
- Wholesale Trade 5%
- Transport, Postal and Warehousing 4%
- Electricity, Gas, Water and Waste Services 1%.

A range of industry sectors are also present in employment lands across the Central Coast Region reflecting their diverse economic roles for the region, as show in Figure 39.

After Manufacturing, the Health Care and Social Assistance sector was the most common employer in employment lands with 16% of all jobs, followed by Retail Trade (15% of all jobs).

Job densities

The job densities vary significantly between Gosford and Wyong LGAs as a result of the difference in the types of industries operating in the two LGAs. The average job density in the Central Coast Region employment lands was 48 jobs per developed hectare, with Gosford LGA having an average job density of 66 jobs per developed hectare and Wyong LGA having a job density of 29 jobs per developed hectare. This is illustrated in Figure 40.

Figure 40 – Jobs per hectare by LGA in the Central Coast Region (2011)

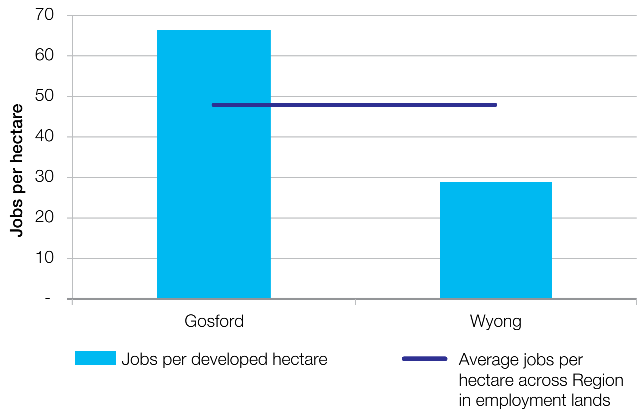
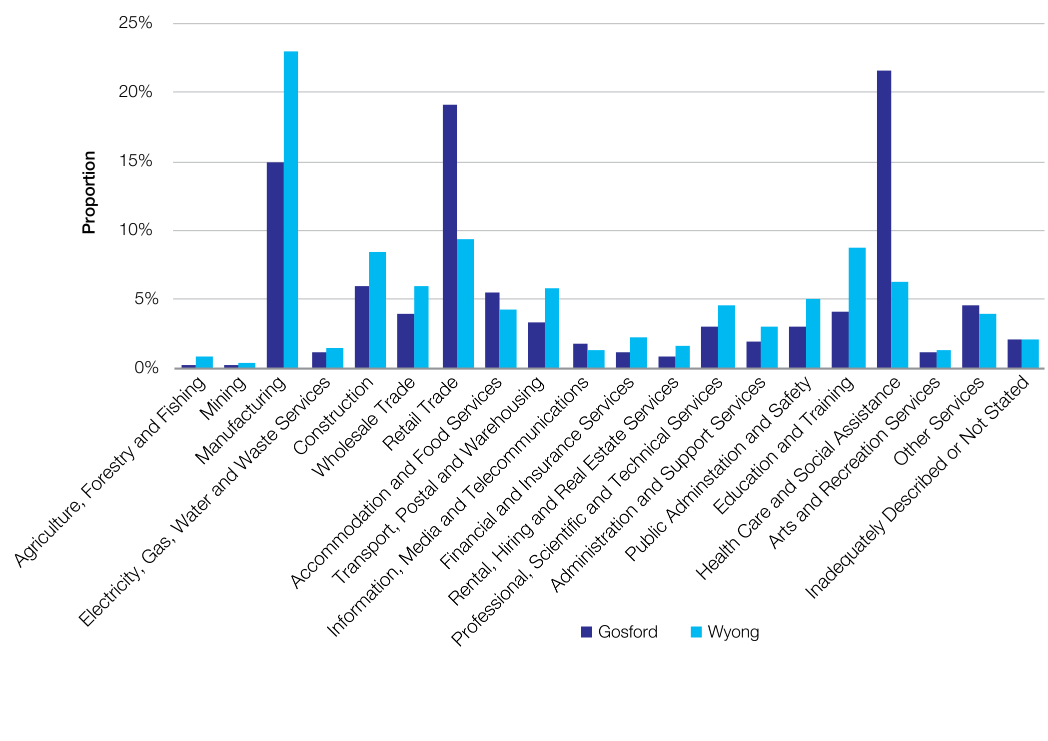


Figure 39 – Proportion of jobs in each industry by LGA in the Central Coast Region (2011)



Appendix

Appendix

Employment Lands Stock by Precinct

Table 27 – Zoned employment land stocks by precinct in Central Subregion (January 2013, 2014 and 2015)

LGA	Precinct	Jan-13 (Ha)			Jan-14 (Ha)			Jan-15 (Ha)			Jan 14 – Jan 15 (Ha)
		Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	
Ashfield	Canterbury Road, Hurlstone Park		0.3	0.3	0.0	0.3	0.3	0.1	0.1	0.3	0.0
	Carlton Cres		0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	
	Flour Mill Site	0.0	3.5	3.5	0.0	2.9	2.9	0.0	2.9	2.9	0.0
	Hordern Pde		0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	
	Milton St North	0.0	0.3	0.3	0.0	0.3	0.3	0.0	0.3	0.3	0.0
	Parramatta Rd, btw Liverpool and Slone Sts		1.1	1.1	0.0	1.1	1.1	0.0	1.1	1.1	0.0
	Parramatta Rd, Frederick St		2.1	2.1	0.0	2.1	2.1	0.0	2.1	2.1	0.0
	Parramatta Rd, Haig Ave		0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0
	West St		0.2	0.2	0.0	0.2	0.2	0.0	0.2	0.2	0.0
Ashfield Total		0.0	7.9	8.0	0.0	6.9	7.0	0.1	6.9	7.0	0.0
Botany Bay	Banksmeadow	15.0	215.6	230.7	12.0	212.7	224.7	21.4	204.8	226.2	1.5
	Botany	1.2	66.1	67.3	0.7	66.0	66.7	0.6	66.0	66.6	0.0
	British American Tobacco Site		16.5	16.5	0.0	5.9	5.9	0.0	6.1	6.1	0.2
	Mascot	3.2	73.9	77.1	1.9	73.4	75.2	2.0	73.6	75.6	0.3
	Port Botany	58.5	50.4	108.9	1.0	107.5	108.5	0.0	108.6	108.6	0.1
Botany Bay Total		77.9	422.5	500.4	15.6	465.5	481.1	24.0	459.1	483.1	2.0
Burwood	Tangarra St East		0.7	0.7		0.7	0.7	0.0	0.7	0.7	0.0
Burwood Total			0.7	0.7	0.0	0.7	0.7	0.0	0.7	0.7	0.0
Canada Bay	Bibby St, Chiswick		0.6	0.6	0.0	0.0	0.0	0.0	0.0	0.0	
	Bushells Site, Burwood Rd		3.9	3.9	0.0	3.9	3.9	0.0	3.9	3.9	0.0
	Concord West		7.6	7.6	0.0	7.6	7.6	0.0	7.6	7.6	0.0
	Harris Road, Five Dock		0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	
	Oulton Avenue	0.1		0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.0
	Parramatta Road/Queens Road	0.1	12.2	12.3	0.2	12.0	12.3	0.1	12.2	12.3	0.0
	Rhodes, Leeds Street	0.3	6.2	6.5	0.3	6.2	6.4	0.3	6.2	6.4	0.0
Canada Bay Total		0.5	30.6	31.1	0.6	29.7	30.3	0.4	29.9	30.4	0.0
Leichhardt	Allen and Flood St		1.0	1.0	0.0	1.0	1.0	0.0	1.0	1.0	0.0
	Balmain Road	0.0	1.3	1.4	0.0	1.4	1.4	0.0	1.4	1.4	0.0
	Bays Precinct (Glebe Island/White Bay)	10.1	71.2	81.3	3.1	67.4	70.5	2.7	68.4	71.0	0.5
	Lilyfield Rd		1.0	1.0	0.0	1.0	1.0	0.0	1.0	1.0	0.0
	Lords Rd		1.1	1.1	0.0	1.1	1.1	0.0	1.1	1.1	0.0
	Marion/Walter St		1.3	1.3	0.0	1.3	1.3	0.0	1.3	1.3	0.0
	Moore St, Catherine St	0.2	5.7	5.9	0.1	5.8	5.9	0.1	5.8	5.9	0.0
	Moore St, McKenzie St		1.0	1.0	0.0	1.0	1.0	0.0	1.1	1.1	0.0
	Mort Bay		0.3	0.3	0.0	0.3	0.3	0.0	0.2	0.2	0.0
	Parramatta Rd, Mallet St, Pyrmont Bridge Rd		7.0	7.0	0.0	7.0	7.0	0.0	7.0	7.0	0.0
	Parramatta Rd/Tebutt St		5.2	5.2	0.0	5.2	5.2	0.0	3.5	3.5	-1.7
	Victoria Rd, Robert St (East of Mullens St)	0.1	3.0	3.1	0.1	3.0	3.1	0.1	3.0	3.1	0.0
	Victoria Rd, Robert St (Former Martin Bright Steelworks)		2.2	2.2	0.0	2.1	2.2	0.0	2.2	2.2	0.0
	Victoria Rd, Terry St/ Wellington St (Carrier Site)		3.2	3.2	0.0	1.8	1.8	0.0	1.8	1.8	0.0
Leichhardt Total		10.4	104.6	115.0	3.3	99.5	102.7	2.8	98.8	101.7	-1.1

Table 27 – Zoned employment land stocks by precinct in Central Subregion (January 2013, 2014 and 2015) *continued*

LGA	Precinct	Jan-13 (Ha)			Jan-14 (Ha)			Jan-15 (Ha)			Jan 14 – Jan 15 (Ha)
		Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	
Marrickville	Camperdown	0.1	2.8	2.8	0.1	2.8	2.8	0.1	2.8	2.8	0.0
	Dulwich Hill, New Canterbury Rd		0.5	0.5		0.5	0.5	0.0	0.5	0.5	0.0
	Lewisham, New Canterbury Rd	0.0	1.4	1.4	0.0	1.4	1.4	0.0	1.4	1.4	0.0
	Lewisham, Old Canterbury Rd	0.3	0.4	0.6	0.3	0.4	0.6	0.3	0.4	0.6	0.0
	Marrickville	2.2	64.0	66.2	1.4	64.8	66.2	1.0	65.5	66.5	0.3
	Marrickville, Meeks Rd		1.5	1.5	0.0	1.5	1.5	0.0	1.5	1.5	0.0
	Princes Hwy Frontages	0.3	7.6	7.9	0.3	7.6	7.9	0.3	7.8	8.1	0.2
	St Peters, Grove Street		2.0	2.0		2.0	2.0	0.0	2.0	2.0	0.0
	St Peters, Princes Hwy	1.3	15.3	16.6	0.9	15.7	16.6	1.1	15.5	16.6	0.0
	St Peters, Unwins Bridge Rd		4.4	4.4	0.0	4.4	4.4	0.0	8.1	8.1	3.7
	Stanmore, Bridge Rd East		1.6	1.6	0.0	1.6	1.6	0.0	1.7	1.7	0.0
	Sydney Airport Environs		15.6	15.6	0.0	15.6	15.6	3.2	37.5	40.7	25.1
	Tempe Rd, Bus Depot		2.4	2.4	0.0	2.4	2.4	0.0	2.4	2.4	0.0
	Tempe, Carrington Rd	0.1	12.4	12.5	0.1	12.3	12.5	0.0	12.5	12.5	0.0
	Tempe, Princes Hwy		3.7	3.7	0.0	3.7	3.7	0.0	3.7	3.7	0.0
Marrickville Total		4.3	135.6	139.9	3.1	136.8	139.9	6.0	163.2	169.2	29.4
Randwick	Port Botany	0.8	201.8	202.5	0.3	203.9	204.2	0.0	204.3	204.3	0.1
Randwick Total		0.8	201.8	202.5	0.3	203.9	204.2	0.0	204.3	204.3	0.1
Strathfield	Hume Highway, Greenacre				0.0	0.0	0.0	0.0	44.4	44.4	44.4
	Chullora		0.3	0.3	0.0	0.3	0.3	0.0	0.3	0.3	0.0
	Flemington (Arthur St, Homebush Business Park and Mason Park)	2.3	59.3	61.6	0.5	53.1	53.5	0.2	53.5	53.7	0.2
	South Strathfield/Enfield	8.5	107.8	116.3	6.2	106.5	112.7	21.4	153.6	175.0	62.4
	Strathfield Mail		13.6	13.6	0.0	8.3	8.3	0.0	8.4	8.4	0.0
	Water Street	0.2	5.0	5.2	0.2	5.0	5.2	0.2	5.0	5.2	0.0
Strathfield Total		11.1	185.9	197.0	6.9	173.2	180.1	21.9	265.1	287.0	107.0
Sydney	Alexandria	5.8	130.8	136.6	5.8	128.9	134.7	5.7	137.9	143.6	8.9
	Bays Precinct (Glebe Island/White Bay)		0.2	0.2	0.0	0.2	0.2	0.0	0.2	0.2	0.0
	Blackwattle Bay		1.3	1.3	0.0	1.3	1.3	0.0	1.3	1.3	0.1
	Glebe (Parramatta Rd/ Arundell St)		1.8	1.8	0.0	1.8	1.8	0.0	1.8	1.8	0.0
	Mascot		0.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	
	Rosebery	0.1	14.0	14.1	0.0	14.1	14.1	0.3	13.8	14.2	0.1
Sydney Total		5.9	148.3	154.3	5.8	146.3	152.1	6.0	155.1	161.1	9.0
	Central Subregion Total	**110.9**	**1,237.9**	**1,348.8**	**35.6**	**1,262.4**	**1,297.9**	**61.3**	**1,383.1**	**1,444.4**	**146.5**

Notes:

Changes to precinct sizes in the Central subregion are due to data refinement from a data audit (boundary adjustment or new site identified) or zoning changes (see Table 6 for rezoning details). Notable changes include Hume Highway, Greenacre (new site identified), South Strathfield/Enfield (boundary adjustment to include freight facilities) and Sydney Airport Environs (boundary adjustment). Historical data is not recorded for any new sites identified through the audit.

Figures may not add up exactly due to rounding. Where no value is shown in a cell this indicates that the amount of land recorded is 0 hectares. Where '0.0' is shown in a cell this indicates a value less than 0.05 hectares (i.e. 500sqm) was recorded and then rounded to '0.0'.

No employment land precincts within Waverley and Woollahra LGAs.

Source: ELDP, Sydney Water, Photomaps by nearmap.com.au

Table 28 – Zoned employment land stocks by precinct in North Subregion (January 2013, 2014 and 2015)

LGA	Precinct	Jan-13 (Ha)			Jan-14 (Ha)			Jan-15 (Ha)			Jan 14 – Jan 15 (Ha)
		Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	
Hornsby	Dural Service Centre							3.1	24.4	27.5	27.5
	Bay Rd, Berowra Waters							0.0	0.1	0.1	0.1
	Berowra Waters Rd & Kirkpatrick Way, Berowra Waters							0.0	0.1	0.1	0.1
	Brooklyn							0.0	0.6	0.6	0.6
	Asquith	4.9	37.9	42.8	4.9	37.9	42.8	4.9	39.3	44.2	1.4
	Hornsby East	0.0	1.0	1.0	0.0	1.0	1.0	0.0	1.0	1.0	0.0
	Hornsby Heights		1.3	1.3	0.0	1.3	1.3	0.0	1.3	1.3	0.0
	Hornsby West	0.0	1.9	1.9	0.0	1.9	1.9	0.0	1.9	2.0	0.0
	Mount Ku-ring-gai	19.5	50.8	70.3	7.4	49.9	57.3	12.7	51.2	63.9	6.6
	Pennant Hills		1.3	1.3	0.0	1.3	1.3	0.0	1.4	1.4	0.0
	Thornleigh	0.3	28.1	28.4	0.3	23.2	23.6	0.3	23.3	23.7	0.1
	Waitara	0.0	8.1	8.1	0.0	7.3	7.3	0.0	7.3	7.3	0.0
Hornsby Total		24.8	130.4	155.2	12.7	123.9	136.6	21.0	152.0	173.0	36.4
Hunters Hill	Margaret St, Woolwich							0.0	0.2	0.2	0.2
Hunters Hill Total					0.0	0.0	0.0	0.0	0.2	0.2	0.2
Lane Cove	Gore Cove Terminal	0.0	8.1	8.1		7.7	7.7		7.7	7.7	0.0
	Lane Cove West	5.8	44.5	50.2	5.8	44.5	50.2	5.7	44.8	50.5	0.3
	Lane Cove West (150 Epping Rd)		2.3	2.3		2.3	2.3		3.2	3.2	0.8
Lane Cove Total		5.8	54.9	60.7	5.8	54.5	60.2	5.7	55.7	61.4	1.1
Manly	Manly Vale	0.2	9.9	10.1	0.2	9.9	10.1	0.2	9.9	10.1	0.0
Manly Total		0.2	9.9	10.1	0.2	9.9	10.1	0.2	9.9	10.1	0.0
North Sydney	Victoria St, McMahons Point							0.1	2.6	2.7	2.7
	John St, McMahons Point							0.0	0.6	0.6	0.6
	McDougall St and Bradley St, Kirribilli							0.0	0.4	0.4	0.4
	Balls Head Rd, Waverton							0.0	1.7	1.7	1.7
North Sydney Total								0.1	5.4	5.4	5.4
Pittwater	Queens Pde, Newport							0.0	0.2	0.2	0.2
	Princes Lane, Newport							0.0	0.2	0.2	0.2
	McCarrs Creek Rd, Church Point							0.0	0.7	0.7	0.7
	Pittwater Rd, Church Point							0.0	0.4	0.4	0.4
	Pittwater Rd, Bayview							0.0	0.4	0.4	0.4
	Mona Vale	0.1	22.4	22.5	0.1	22.4	22.5	0.1	22.4	22.5	0.0
	North Narrabeen		2.5	2.5		2.5	2.5	0.2	2.3	2.5	0.0
	Warriewood Valley	0.5	14.4	14.8	0.9	14.8	15.7	0.5	15.8	16.3	0.6
Pittwater Total		0.6	39.3	39.8	1.1	39.7	40.7	0.8	42.4	43.2	2.5
Ryde	Former ADI Site		1.6	1.6		1.6	1.6	0.0	1.6	1.6	0.0
	Gladesville	0.1	20.1	20.2	0.1	20.0	20.1	0.1	20.1	20.2	0.0
	Macquarie Park, Wicks Road							10.8	0.0	10.8	10.8
	West Ryde		6.0	6.0		6.0	6.0	0.0	6.0	6.0	0.0
Ryde Total		0.1	27.6	27.8	0.1	27.6	27.7	10.9	27.7	38.6	10.9

Table 28 – Zoned employment land stocks by precinct in North Subregion (January 2013, 2014 and 2015) *continued*

LGA	Precinct	Jan-13 (Ha)			Jan-14 (Ha)			Jan-15 (Ha)			Jan 14 – Jan 15 (Ha)
		Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	
Warringah	Campbell Parade, Manly Vale							0.0	1.8	1.8	1.8
	Tepko Rd, Terrey Hills							0.0	5.2	5.2	5.2
	Brookvale	0.0	86.1	86.1	0.0	86.1	86.1	0.0	86.1	86.1	0.0
	Cromer	0.1	44.1	44.2	0.2	44.0	44.2	0.1	44.1	44.2	0.0
	Forestville		2.2	2.2	0.0	2.2	2.2	0.0	2.2	2.2	0.0
	Harbord	0.0	2.7	2.7	0.0	2.7	2.7	0.0	2.7	2.7	0.0
Warringah Total		0.2	135.1	135.2	0.2	135.0	135.2	0.1	142.1	142.2	7.1
Willoughby	Artarmon	4.8	59.0	63.8	4.3	58.7	63.0	4.3	59.4	63.7	0.7
	East Chatswood		26.3	26.3	0.0	26.0	26.0	0.0	26.0	26.0	0.0
	Lane Cove West		3.0	3.0	0.0	3.0	3.0	0.0	3.0	3.0	0.0
Willoughby Total		4.8	88.3	93.1	4.3	87.6	92.0	4.3	88.4	92.7	0.7
	North Subregion Total	**36.4**	**485.4**	**521.9**	**24.3**	**478.2**	**502.5**	**43.0**	**523.8**	**566.8**	**64.3**

Notes:

Changes to precinct sizes in the North subregion are due to data refinement from a data audit (boundary adjustment or new site identified) or zoning changes (see Table 6 for rezoning details). Notable changes include Dural Service Centre (boundary adjustment), Macquarie Park, Wicks Road (rezoning), Mount Ku-Ring-Gai (boundary adjustment) and Tepko Rd, Terrey Hills (new site identified). Historical data is not recorded for any new sites identified through the audit.

Figures may not add up exactly due to rounding. Where no value is shown in a cell this indicates that the amount of land recorded is 0 hectares. Where '0.0' is shown in a cell this indicates a value less than 0.05 hectares (i.e. 500sqm) was recorded and then rounded to '0.0'.

No employment land precincts within Ku-ring-gai and Mosman LGAs.

Data anomalies (January 2014 figures) corrected for Asquith precinct.

Source: ELDP, Sydney Water, Photomaps by nearmap.com.au

Table 29 – Zoned employment land stocks by precinct in South Subregion (January 2013, 2014 and 2015)

LGA	Precinct	Jan-13 (Ha)			Jan-14 (Ha)			Jan-15 (Ha)			Jan 14 – Jan 15 (Ha)
		Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	
Canterbury	Ashbury		3.1	3.1		3.1	3.1		3.1	3.1	0.0
	Belmore	0.2	3.5	3.7	0.1	3.6	3.7		3.7	3.7	0.0
	Canterbury Road, Campsie		3.2	3.2		3.2	3.2		3.2	3.2	0.0
	Chapel Street		7.3	7.3		7.3	7.3		7.3	7.3	0.0
	Clemton Park		17.1	17.1	0.0	17.0	17.0		17.0	17.0	0.0
	Croydon Park		1.5	1.5		1.5	1.5		1.5	1.5	0.0
	Kingsgrove North		35.6	35.6	0.0	35.3	35.3		35.3	35.3	0.0
	Lakemba	0.8	11.2	12.1	0.4	11.5	11.8	0.4	11.5	11.8	0.0
	Punchbowl, Wattle Street		11.7	11.7		11.7	11.7		11.7	11.7	0.0
	Riverwood	0.2	49.1	49.3		49.0	49.0		49.3	49.3	0.3
	West Riverwood, Wiggs Road		5.9	5.9		5.9	5.9		5.9	5.9	0.0
Canterbury Total		1.2	149.1	150.4	0.5	149.0	149.5	0.4	149.5	149.9	0.4
Hurstville	Beverley Hills		1.5	1.5		1.5	1.5		1.5	1.5	0.0
	Hurstville	0.0	1.3	1.3	0.0	1.3	1.3	0.0	1.3	1.3	0.0
	Kingsgrove South	0.1	25.3	25.4	0.2	25.3	25.4	0.2	25.5	25.7	0.2
	Peakhurst, Boundary Rd	0.1	56.0	56.1	0.1	56.0	56.1	0.3	55.8	56.1	0.0
	Penshurst		1.5	1.5		1.5	1.5		1.6	1.6	0.0
Hurstville Total		0.3	85.6	85.9	0.3	85.6	85.9	0.6	85.6	86.1	0.3
Kogarah	Blakehurst		1.6	1.6		1.6	1.6		1.6	1.6	0.0
	Carlton	0.1	9.7	9.8	0.1	9.7	9.8	0.1	9.8	9.8	0.0
	Hurstville South		1.6	1.6		1.6	1.6		1.7	1.7	0.1
	Kogarah, Gray Ave		0.7	0.7							
Kogarah Total		0.1	13.6	13.7	0.1	13.0	13.0	0.1	13.1	13.1	0.1
Rockdale	Bexley		2.1	2.1		2.1	2.1		2.1	2.1	0.0
	Bexley, Queen Victoria St		0.3	0.3		0.3	0.3		0.3	0.3	0.0
	Kogarah, Production Ave	0.1	8.8	8.9	0.1	8.8	8.9		8.9	8.9	0.0
	Rockdale, Garnet St		0.6	0.6		0.6	0.6		0.6	0.6	0.0
	Rockdale, West Botany St	0.1	22.0	22.1	0.2	21.9	22.1	0.2	21.9	22.1	0.0
	Turrella	0.8	12.6	13.4		13.4	13.4		13.7	13.7	0.2
	Wolli Creek		1.5	1.5		1.5	1.5		1.5	1.5	0.0
Rockdale Total		1.0	47.8	48.9	0.3	48.6	48.9	0.2	49.0	49.1	0.3
Sutherland	Caringbah/Taren Point	1.3	142.7	144.0	1.1	142.9	144.0	0.5	142.4	142.8	-1.1
	Engadine (Princes Hwy)		0.6	0.6		0.6	0.6		0.6	0.6	0.0
	Heathcote		0.5	0.5		0.5	0.5		0.5	0.5	0.0
	Heathcote (Burns Rd)	0.1	3.6	3.7	0.1	3.6	3.7		3.7	3.7	0.0
	Kirrawee	3.5	56.7	60.2	8.4	51.8	60.2	4.7	55.5	60.2	0.0
	Kurnell	133.5	236.5	370.0	62.3	302.8	365.1	106.1	260.6	366.7	1.5
	Menai		4.3	4.3		4.3	4.3		4.3	4.3	0.0
	Miranda	0.1	8.2	8.3		8.3	8.3		8.3	8.3	0.1
	Taren Point Bulky Goods		12.2	12.2		12.2	12.2		12.3	12.3	0.0
Sutherland Total		138.5	465.3	603.8	71.9	527.1	599.0	111.3	488.2	599.5	0.5
	South Subregion Total	**141.1**	**761.5**	**902.6**	**73.0**	**823.2**	**896.2**	**112.5**	**785.3**	**897.8**	**1.6**

Notes:

Changes to precinct sizes in the South subregion are due to data refinement from a data audit (boundary adjustment).

Figures may not add up exactly due to rounding. Where no value is shown in a cell this indicates that the amount of land recorded is 0 hectares. Where '0.0' is shown in a cell this indicates a value less than 0.05 hectares (i.e. 500sqm) was recorded and then rounded to '0.0'.

Source: ELDP, Sydney Water, Photomaps by nearmap.com.au

Table 30 – Zoned employment land stocks by precinct in South West Subregion (January 2013, 2014 and 2015)

LGA	Precinct	Jan-13 (Ha)			Jan-14 (Ha)			Jan-15 (Ha)			Jan 14 – Jan 15 (Ha)
		Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	
Camden	Ironbark Avenue, Camden								1.8	1.8	1.8
	Leppington North				66.7	4.1	70.8	70.8		70.8	0.0
	Little Street, Camden	0.0	2.3	2.3	0.0	2.3	2.3	0.0	2.3	2.3	0.0
	Narellan	6.0	28.4	34.4	5.6	28.7	34.4	5.7	29.0	34.7	0.3
	Oran Park	18.5		18.5	18.5		18.5	18.5		18.5	0.0
	Smeaton Grange	75.2	122.7	197.9	72.6	126.1	198.7	58.3	141.1	199.4	0.8
	Turner Road	36.6	2.1	38.7	35.9	2.7	38.7	35.3	4.2	39.5	0.8
Camden Total		136.3	155.5	291.8	199.3	163.9	363.3	188.6	178.4	367.0	3.7
Campbelltown	Campbelltown, Blaxland Road	33.7	104.7	138.5	45.4	90.4	135.8	36.8	100.2	137.0	1.2
	Ingleburn	27.0	290.4	317.4	24.9	291.3	316.2	14.8	300.5	315.3	-0.9
	Leumeah	2.1	16.7	18.7	2.1	16.6	18.7	2.5	16.6	19.2	0.4
	Macquarie Fields		1.3	1.3		1.3	1.3		1.4	1.4	0.0
	Minto	24.0	231.2	255.3	18.9	236.3	255.2	18.9	237.8	256.7	1.6
Campbelltown Total		86.8	644.4	731.2	91.4	635.9	727.3	73.1	656.5	729.6	2.3
Fairfield	Bonnyrigg Plaza	1.0	9.0	10.1	0.5	9.4	9.9	0.5	9.4	9.9	0.0
	Cabramatta CBD	0.3	1.0	1.3	0.3	1.0	1.3	0.3	1.0	1.3	0.0
	Council Depot		2.4	2.4		2.4	2.4		2.5	2.5	0.1
	Fairfield		4.7	4.7		4.7	4.7		4.7	4.7	0.0
	Fairfield East	0.4	99.1	99.4	0.0	99.4	99.4		99.5	99.5	0.1
	Greystanes	10.7	1.6	12.3	2.3	10.0	12.3	2.3	10.0	12.3	0.0
	Lansvale	0.4	56.6	57.0	0.2	56.7	56.9	0.2	57.2	57.4	0.5
	Railway Parade, Cabramatta		4.1	4.1		1.8	1.8		1.9	1.9	0.1
	Smithfield, South	0.4	42.2	42.6	0.2	42.3	42.6	0.2	42.4	42.6	0.0
	South of Sydney Water Pipeline	87.7	169.3	257.0	76.6	175.6	252.1	76.6	175.6	252.1	0.0
	Wetherill Park	41.8	512.7	554.5	33.4	521.0	554.4	33.8	525.3	559.1	4.7
Fairfield Total		142.6	902.7	1,045.4	113.6	924.3	1,037.9	113.9	929.4	1,043.3	5.4

Table 30 – Zoned employment land stocks by precinct in South West Subregion (January 2013, 2014 and 2015) *continued*

LGA	Precinct	Jan-13 (Ha)			Jan-14 (Ha)			Jan-15 (Ha)			Jan 14 – Jan 15 (Ha)
		Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	
Liverpool	Warwick Farm Racecourse							12.8		12.8	12.8
	Austral				44.8		44.8	44.8		44.8	0.0
	Cecil Park		1.6	1.6		1.6	1.6		1.6	1.6	0.0
	Chipping Norton	1.7	99.4	101.1	0.8	100.1	100.9	0.6	100.3	100.9	0.0
	Cross Roads, Casula	7.4	10.8	18.2	16.9		16.9	16.9		16.9	0.0
	Hoxton Park Airport	6.2	32.6	38.8	3.7	36.1	39.8	3.9	36.1	40.0	0.2
	Moorebank	15.2	319.9	335.1	11.9	323.9	335.9	11.7	324.4	336.1	0.2
	Orange Grove		21.5	21.5	0.2	21.4	21.5		21.6	21.6	0.0
	Priddle/Scrivener St	0.0	23.2	23.2	0.0	23.2	23.2		23.2	23.2	0.0
	Sappho Road	0.7	16.8	17.5	0.7	16.7	17.5	0.7	16.8	17.5	0.1
	Yarunga/Prestons	125.8	216.1	341.9	118.2	224.2	342.4	118.0	225.0	342.9	0.6
Liverpool Total		157.0	741.9	898.8	197.2	747.2	944.4	209.4	749.0	958.4	14.0
Wollondilly	Condell Park Road, Wilton							12.4	0.7	13.1	13.1
	Wonga Road, Picton							4.8	4.2	9.0	9.0
	Appin	2.7	7.6	10.3	2.9	7.3	10.3	2.1	9.2	11.3	1.0
	Bargo		0.7	0.7		0.7	0.7		0.7	0.7	0.0
	Maldon	57.6	46.2	103.8	30.8	72.9	103.7	64.3	105.0	169.3	65.6
	Picton	1.1	26.3	27.4	1.1	26.2	27.3	0.7	30.0	30.7	3.4
	Picton (Coull St)	2.1		2.1	2.1		2.1	2.1		2.1	0.0
	Warragamba/ Silverdale	28.8	32.6	61.3	14.6	46.7	61.3	39.4	22.7	62.2	0.8
Wollondilly Total		92.3	113.3	205.6	51.5	153.9	205.4	126.0	172.3	298.3	93.0
South West Subregion Total		**615.0**	**2,557.7**	**3,172.7**	**653.0**	**2,625.1**	**3,278.2**	**710.9**	**2,685.6**	**3,396.6**	**118.4**

Notes:

Changes to precinct sizes in the South West subregion are due to data refinement from a data audit (boundary adjustment or new site identified) or zoning changes (see Table 6 for rezoning details). Notable changes include Maldon (rezoning), Warwick Farm Racecourse (new site identified), Condell Park Road, Wilton (new site identified) and Wonga Road, Picton (new site identified). Historical data is not recorded for any new sites identified through the audit.

Figures may not add up exactly due to rounding. Where no value is shown in a cell this indicates that the amount of land recorded is 0 hectares. Where '0.0' is shown in a cell this indicates a value less than 0.05 hectares (i.e. 500sqm) was recorded and then rounded to '0.0'.

Data anomalies (January 2014 figures) corrected for Ingleburn, Minto and South of Sydney Water Pipeline precincts.

Source: ELDP, Sydney Water, Photomaps by nearmap.com.au

Table 31 – Zoned employment land stocks by precinct in West Subregion (January 2013, 2014 and 2015)

LGA	Precinct	Jan-13 (Ha)			Jan-14 (Ha)			Jan-15 (Ha)			Jan 14 – Jan 15 (Ha)
		Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	
Blue Mountains	Blackheath	0.2	1.7	2.0	0.2	1.7	2.0	0.2	1.8	2.0	0.0
	Blaxland		5.0	5.0		5.0	5.0	1.0	5.5	6.5	1.6
	Blaxland (Great Western Hwy)		0.2	0.2		0.2	0.2		0.2	0.2	0.0
	Glenbrook		0.2	0.2		0.2	0.2		0.2	0.2	0.0
	Katoomba	13.7	33.4	47.1	12.6	33.7	46.4	13.9	32.5	46.4	0.0
	Lawson	17.6	14.4	32.0	17.4	13.9	31.4	17.3	14.1	31.4	0.0
	Valley Heights/ Springwood	2.9	12.2	15.1	1.6	12.6	14.2	1.6	12.6	14.2	0.0
	Wentworth Falls		0.1	0.1					0.1	0.1	0.1
Blue Mountains Total		34.4	67.1	101.6	31.8	67.3	99.2	34.0	66.9	100.8	1.7
Hawkesbury	Mulgrave/Vineyard	9.5	41.6	51.2	5.9	45.0	51.0	3.8	58.4	62.2	11.2
	North Richmond		10.2	10.2		10.2	10.2		10.2	10.2	0.0
	Richmond	0.2	4.5	4.7	0.2	4.5	4.7	0.2	4.7	4.9	0.2
	Richmond, Racecourse Rd		4.0	4.0		4.0	4.0		4.0	4.0	0.1
	Wilberforce	0.7	8.5	9.2	0.7	8.5	9.2	0.9	8.3	9.3	0.1
	Windsor/South Windsor	17.8	77.6	95.4	16.9	78.5	95.4	19.1	79.3	98.4	3.0
Hawkesbury Total		28.2	146.5	174.6	23.7	150.8	174.5	23.9	165.1	189.0	14.6
Penrith	Werrington Road, Werrington							5.8	2.2	8.0	8.0
	South Werrington							3.3	7.0	10.3	10.3
	Emu Plains	14.5	116.5	131.0	45.7	83.7	129.4	45.7	83.8	129.4	0.0
	Erskine Park	147.7	228.4	376.1	135.7	223.9	359.6	123.2	242.3	365.5	5.8
	Great Western Hwy, St Marys		1.9	1.9		1.9	1.9		1.9	1.9	0.0
	Jamisontown	5.2	72.6	77.8	4.9	72.5	77.4	4.3	77.4	81.7	4.3
	Kingswood	1.5	19.8	21.3	1.4	19.9	21.3	1.5	19.8	21.3	0.0
	Llandilo	34.5		34.5							
	North Penrith	76.9	162.0	238.9	78.0	173.2	251.3	90.7	166.3	257.1	5.8
	South of Sydney Water Pipeline	337.2		337.2	337.2		337.2	337.2		337.2	
	St Marys	48.4	185.1	233.5	46.8	179.3	226.1	50.2	174.4	224.7	-1.5
	St Marys Leagues	3.1	3.1	6.3		3.0	3.0		3.0	3.0	0.0
	St Marys North	1.8	55.0	56.8	1.8	55.0	56.8	1.7	55.2	56.9	0.1
Penrith Total		670.9	844.5	1,515.4	651.6	812.5	1,464.1	663.6	833.3	1,496.9	32.8
	West Subregion Total	**733.5**	**1,058.1**	**1,791.6**	**707.1**	**1,030.6**	**1,737.7**	**721.5**	**1,065.2**	**1,786.7**	**49.0**

Notes:

Changes to precinct sizes are due to data refinement from a data audit (boundary adjustment or new site identified) or zoning changes (see Table 6 for rezoning details). Notable changes include Mulgrave/Vineyard (boundary adjustment), South Werrington (new site identified), Werrington Road, Werrington (new site identified), Erskine Park (data refinement), North Penrith (boundary adjustment) and Jamisontown (boundary adjustment). Historical data is not recorded for any new sites identified through the audit.

Figures may not add up exactly due to rounding. Where no value is shown in a cell this indicates that the amount of land recorded is 0 hectares. Where '0.0' is shown in a cell this indicates a value less than 0.05 hectares (i.e. 500sqm) was recorded and then rounded to '0.0'.

Data anomalies (January 2014 figures) corrected for Erskine Park precinct.

Source: ELDP, Sydney Water, Photomaps by nearmap.com.au

Table 32 – Zoned employment land stocks by precinct in West Central Subregion (January 2013, 2014 and 2015)

LGA	Precinct	Jan-13 (Ha)			Jan-14 (Ha)			Jan-15 (Ha)			Jan 14 – Jan 15 (Ha)
		Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	
Auburn	Auburn (Cumberland Industries)		0.7	0.7		0.7	0.7		0.7	0.7	0.0
	Auburn (Queen St)		5.6	5.6		5.6	5.6		5.6	5.6	0.0
	Auburn West	0.0	6.7	6.8	0.0	6.7	6.8	0.0	6.8	6.8	0.0
	Church Street, Rookwood		1.8	1.8		1.8	1.8		1.8	1.8	0.0
	Clyburn	6.1	50.6	56.7	6.1	47.5	53.6	6.1	47.7	53.8	0.2
	Homebush Bay	0.1	21.1	21.2		20.8	20.8		21.2	21.2	0.5
	Lidcome East	2.1	27.9	30.0		29.7	29.7		29.7	29.7	0.1
	Lidcome South	0.1	6.9	7.0	0.0	7.1	7.1		7.1	7.1	0.0
	Lidcome West		41.7	41.7		41.7	41.7	1.9	39.8	41.8	0.1
	New Street West	0.0	0.4	0.4	0.0	0.4	0.4	0.0	0.4	0.4	0.0
	Railway Street, Rookwood		0.6	0.6		0.9	0.9		0.9	0.9	0.0
	Regents Park	3.3	75.0	78.3	1.8	76.2	78.0	2.9	77.9	80.9	2.9
	Silverwater	3.6	147.3	150.9	3.6	147.1	150.8	9.0	141.8	150.8	0.0
Auburn Total		15.5	386.4	401.9	11.6	386.1	397.7	20.0	381.5	401.5	3.8
Bankstown	Chullora	22.3	190.3	212.5	11.9	197.3	209.1	21.1	190.6	211.7	2.6
	Condell Park	0.2	28.9	29.1	0.2	28.9	29.1	0.2	28.9	29.1	0.0
	Edward Dunlop Paper	0.1	2.8	2.9	0.1	2.8	2.9	0.1	2.8	2.9	0.0
	Greenacre Bowls		4.2	4.2		4.2	4.2		4.2	4.2	-
	Leightonfield Station	3.5	158.4	161.9	0.0	159.7	159.7		159.8	159.8	0.0
	Milperra	1.3	102.4	103.7	1.4	100.9	102.3	1.3	101.1	102.4	0.0
	Padstow North	1.9	92.5	94.4	1.1	93.0	94.0	0.8	93.9	94.7	0.7
	Padstow South	1.8	43.5	45.3	2.0	43.3	45.3	1.6	43.7	45.4	0.1
	Punchbowl	0.3	2.5	2.9		0.3	0.3		0.3	0.3	-
	Revesby	1.1	132.3	133.3	0.8	132.1	132.9	0.6	132.1	132.7	-0.2
	Sefton	0.3	31.0	31.3	0.2	29.7	29.9	0.3	29.7	29.9	0.0
Bankstown Total		32.8	788.6	821.4	17.8	792.0	809.8	25.9	787.1	813.1	3.3

Table 32 – Zoned employment land stocks by precinct in West Central Subregion (January 2013, 2014 and 2015) *continued*

LGA	Precinct	Jan-13 (Ha)			Jan-14 (Ha)			Jan-15 (Ha)			Jan 14 – Jan 15 (Ha)
		Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	
Blacktown	Arndell Park	20.8	124.4	145.2	16.9	131.0	147.9	16.5	129.3	145.8	-2.1
	Blacktown Rd (St Martins)	5.4	0.6	6.0		5.9	5.9		5.9	5.9	0.0
	Eastern Creek	381.0	165.3	546.3	378.3	184.3	562.6	358.6	203.0	561.6	-1.0
	Former Wonderland	27.9	28.1	56.0	2.1	53.9	56.0	2.1	53.9	56.0	0.0
	Glendenning	47.6	150.4	198.0	38.7	155.4	194.1	27.9	167.6	195.5	1.4
	Greystanes	14.5	12.1	26.6	12.2		12.2	20.7	5.5	26.3	14.0
	Huntingwood	4.2	112.9	117.1	4.3	112.9	117.1	4.1	113.1	117.3	0.1
	Huntingwood (WSEH)	68.1	14.2	82.3	66.1	15.4	81.5	62.6	18.2	80.8	-0.7
	Huntingwood West	39.6	21.2	60.8	12.2	48.6	60.8	4.3	56.5	60.8	0.0
	Kings Park (Blacktown North)	1.6	212.0	213.7	0.9	211.9	212.7	1.8	209.6	211.4	-1.3
	Marsden Park	255.5	16.7	272.2	217.7	20.5	238.2	217.7	20.5	238.2	0.0
	Minchinbury	22.0	96.9	118.9	18.6	100.1	118.7	24.5	94.2	118.8	0.0
	Mount Druitt	5.5	42.0	47.5	3.0	44.5	47.5	5.1	42.4	47.5	0.0
	North Dunheved	18.4		18.4	18.4		18.4	18.5		18.5	0.0
	Prospect		35.2	35.2		35.2	35.2		35.2	35.2	0.0
	Quarantine Station		21.9	21.9		21.9	21.9		21.9	21.9	
	Riverstone	3.5	43.0	46.4	3.2	43.2	46.4	20.0	41.9	61.9	15.5
	Riverstone West	87.0	16.0	103.0	87.0	16.0	103.0	87.2	15.9	103.0	0.0
	Ropes Creek	192.7		192.7	185.7		185.7	185.7		185.7	
	Ropes Crossing		3.9	3.9		3.9	3.9		3.9	3.9	
	Seven Hills (Blacktown LGA)	12.9	186.6	199.5	12.2	185.8	198.0	11.8	186.1	198.0	0.0
	The Raceway Precinct	8.6	12.7	21.4	6.7	14.6	21.4	4.1	17.3	21.4	0.0
Blacktown Total		1,217.0	1,316.0	2,533.0	1,084.2	1,404.9	2,489.1	1,073.1	1,442.0	2,515.1	26.0
Holroyd	Bonds Spinning Mill		8.0	8.0		8.0	8.0		8.0	8.0	0.0
	Girraween	0.3	83.0	83.3		83.3	83.3	1.8	84.6	86.4	3.1
	Greystanes	62.9	103.8	166.6	59.4	117.8	177.1	48.2	113.9	162.0	-15.1
	Smithfield, North	22.1	326.9	349.0	12.6	336.4	349.0	12.5	341.0	353.5	4.5
	South Parramatta	0.7	13.1	13.8	0.6	13.2	13.8	1.0	12.9	13.9	0.1
	South Wentworthville	0.2	5.3	5.5	0.2	5.3	5.5	0.6	4.9	5.5	0.0
	Yennora (Holroyd)	0.8	185.8	186.6	0.6	186.0	186.6	0.6	187.5	188.1	1.5
Holroyd Total		87.0	725.9	812.8	73.3	750.0	823.3	64.7	752.8	817.4	-5.9

Table 32 – Zoned employment land stocks by precinct in West Central Subregion (January 2013, 2014 and 2015) *continued*

LGA	Precinct	Jan-13 (Ha)			Jan-14 (Ha)			Jan-15 (Ha)			Jan 14 – Jan 15 (Ha)
		Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	
Parramatta	Alfred Street, Parramatta		0.2	0.2		0.2	0.2		0.2	0.2	
	Camellia/Rosehill	16.6	221.6	238.2	16.2	220.4	236.7	18.1	218.0	236.1	-0.6
	Church St, North Parramatta		11.0	11.0		11.0	11.0		11.0	11.0	0.0
	Clyde	2.1	14.1	16.1	0.0	16.1	16.1		16.2	16.2	0.1
	Ermington	0.7	45.6	46.3	0.0	45.5	45.6		45.6	45.6	0.0
	Gregory Place, Harris Park		1.9	1.9		1.9	1.9		1.9	1.9	0.0
	Guildford South		4.6	4.6		4.4	4.4		4.6	4.6	0.2
	Guildford/Merrylands	0.3	5.8	6.1	0.2	5.8	6.0	0.4	5.6	6.0	0.0
	Old Windsor Road	0.1	9.0	9.1	0.6	8.5	9.1	0.5	12.8	13.3	4.1
	Old Windsor Road, Northmead	2.0	23.8	25.8	0.5	25.3	25.8	0.5	25.3	25.8	0.0
	Pendle Hill	1.6	16.8	18.4	1.5	16.9	18.4	0.8	17.6	18.4	0.0
	Pharmacia		5.2	5.2		5.2	5.2		5.2	5.2	0.0
	River Road West, Parramatta		6.8	6.8		4.9	4.9		4.9	4.9	0.0
	Rydalmere	9.5	93.5	103.0	1.3	101.4	102.7	1.7	102.8	104.5	1.8
	Seven Hills (Parramatta LGA)		3.7	3.7		3.7	3.7		3.7	3.7	0.0
	South Clyde	0.5	11.3	11.7	0.5	11.3	11.7	0.5	11.3	11.7	0.0
	South Granville/ Chester Hill	0.9	50.2	51.1		51.1	51.1		51.2	51.2	0.0
	Victoria Rd		3.3	3.3		3.3	3.3		3.3	3.3	0.0
Parramatta Total		34.2	528.2	562.4	20.8	536.8	557.7	22.4	541.0	563.4	5.7
The Hills	Annangrove	98.3	17.8	116.1	98.3	16.9	115.2	115.2	29.7	144.9	29.7
	Box Hill				58.5		58.5	57.7	1.8	59.5	0.9
	Castle Hill	1.2	81.8	83.0	1.6	80.4	82.0	1.2	81.6	82.8	0.8
	North Rocks	7.9	37.0	44.9		43.6	43.6		43.6	43.6	0.0
	Winston Hills	3.1	11.6	14.7		14.7	14.7		14.7	14.7	0.0
The Hills Total		110.6	148.1	258.7	158.5	155.5	314.0	174.1	171.4	345.4	31.4
	West Central Total	**1,497.0**	**3,893.3**	**5,390.2**	**1,366.2**	**4,025.3**	**5,391.5**	**1,380.1**	**4,075.8**	**5,455.9**	**64.3**

Notes:

Changes to precinct sizes in the West Central subregion are due to data refinement from a data audit (boundary adjustment or new site identified). Notable changes include Greystanes (boundary adjustment), Riverstone (boundary adjustment) and Annangrove (boundary adjustment to include sewerage plant). Historical data is not recorded for any new sites identified through the audit.

Figures may not add up exactly due to rounding. Where no value is shown in a cell this indicates that the amount of land recorded is 0 hectares. Where '0.0' is shown in a cell this indicates a value less than 0.05 hectares (i.e. 500sqm) was recorded and then rounded to '0.0'.

Data anomalies (January 2014 figures) corrected for Huntingwood and Huntingwood (WSEA) precincts.

Source: ELDP, Sydney Water, Photomaps by nearmap.com.au

Maps

Figure 41 – Employment Lands and Business Parks in the Sydney Metropolitan Region (January 2015)

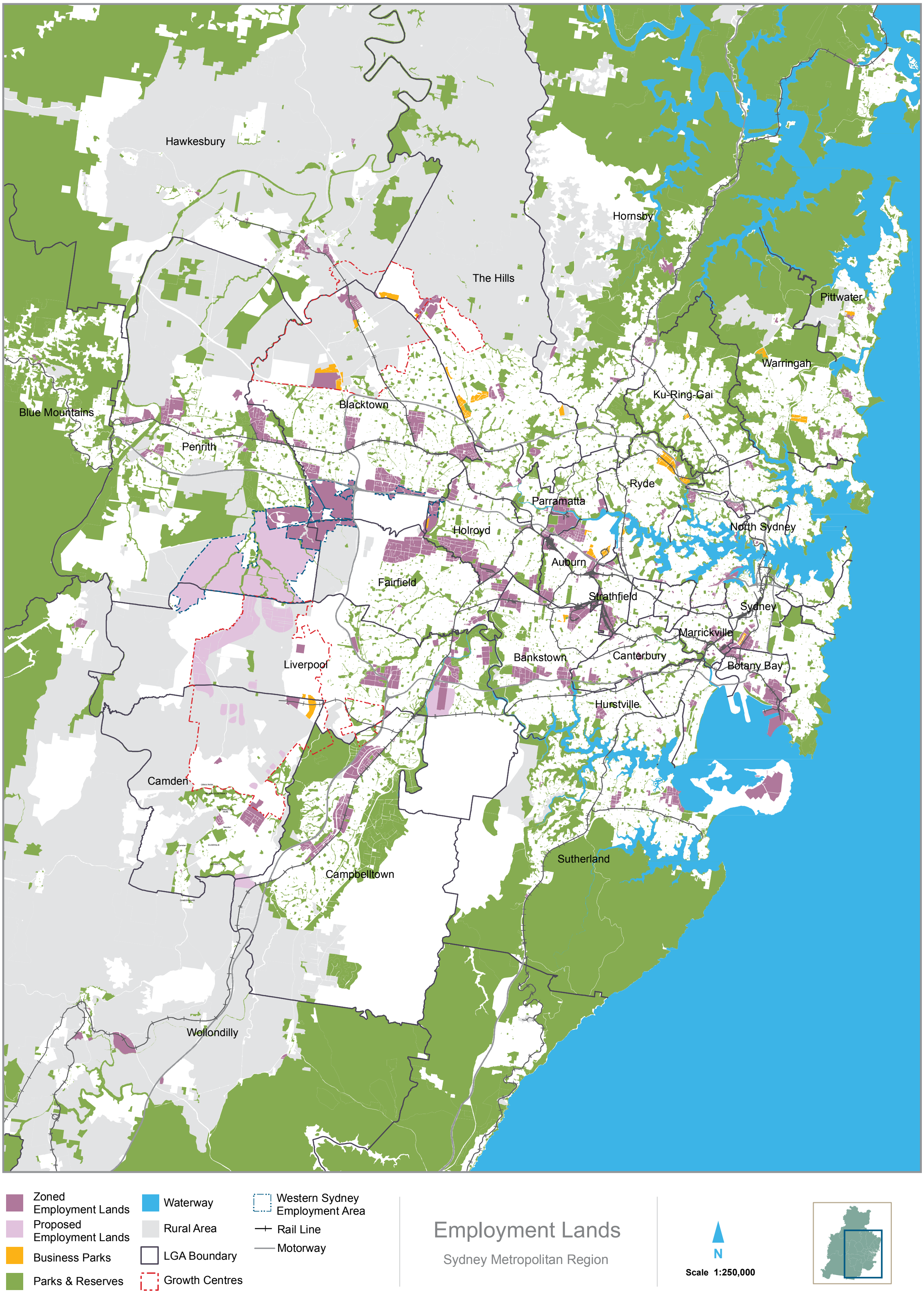


Figure 42 – Employment Lands and Business Parks in the Central Subregion (January 2015)

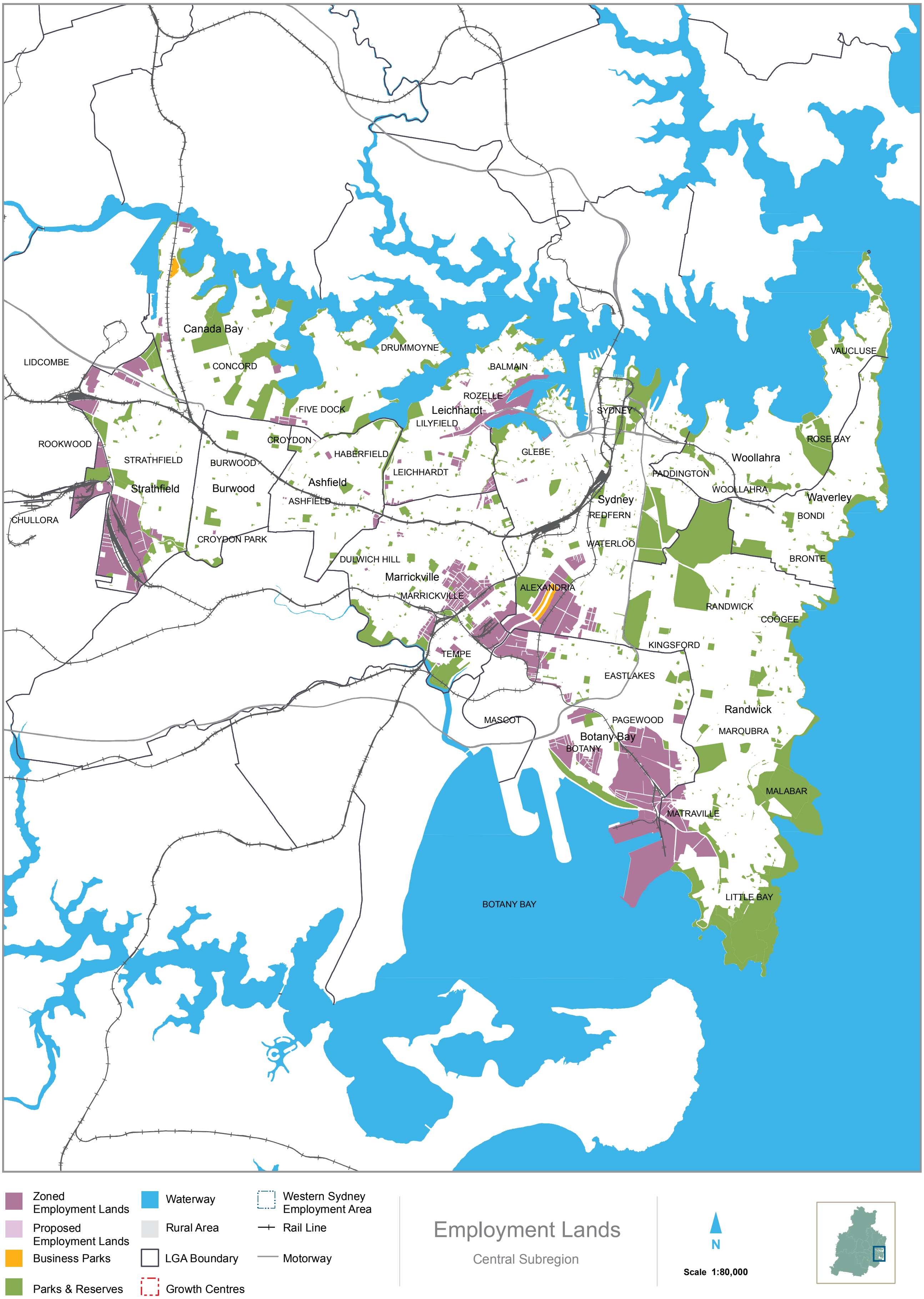


Figure 43 – Employment Lands and Business Parks in the North Subregion (January 2015)

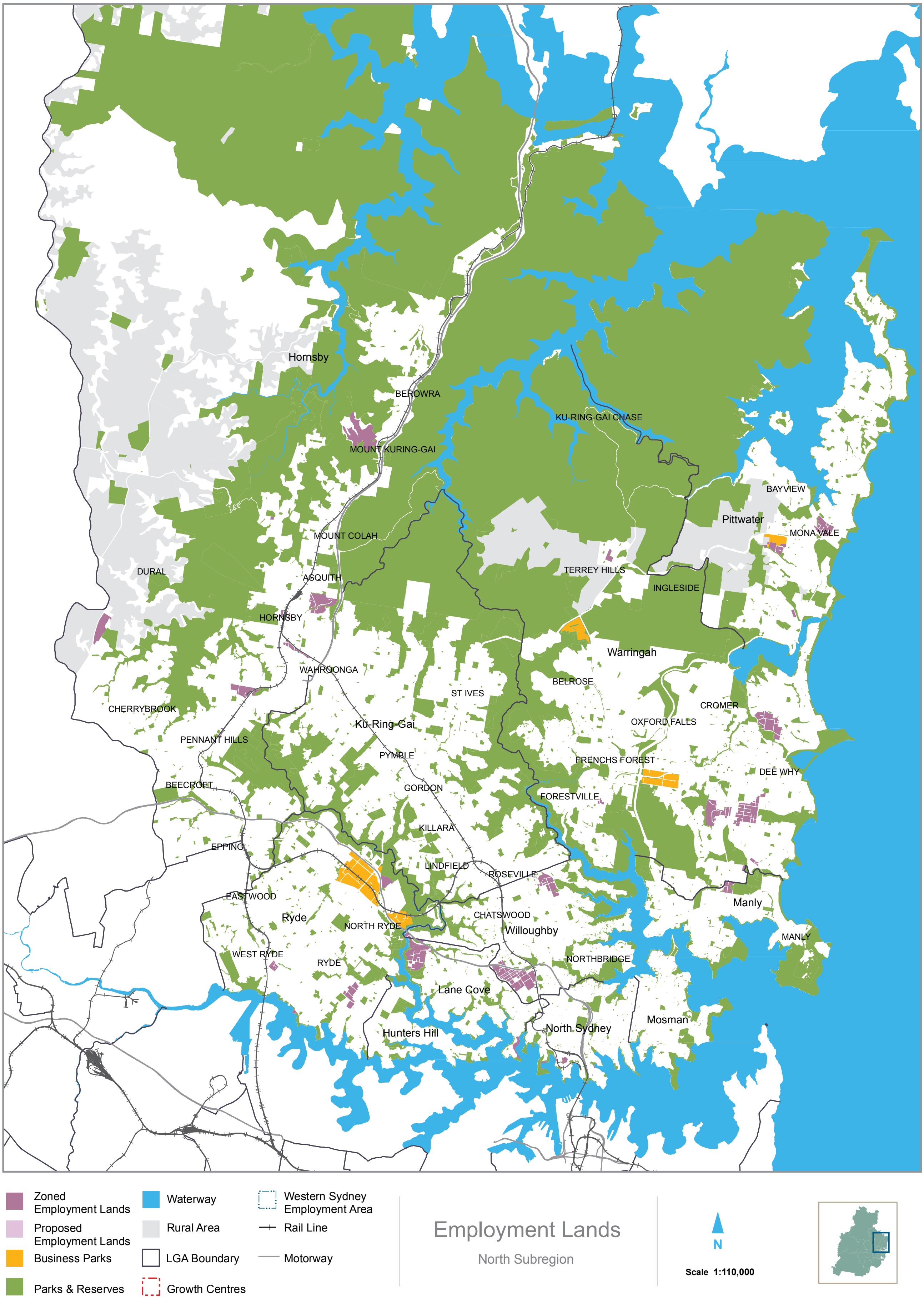


Figure 44 – Employment Lands and Business Parks in the South Subregion (January 2015)

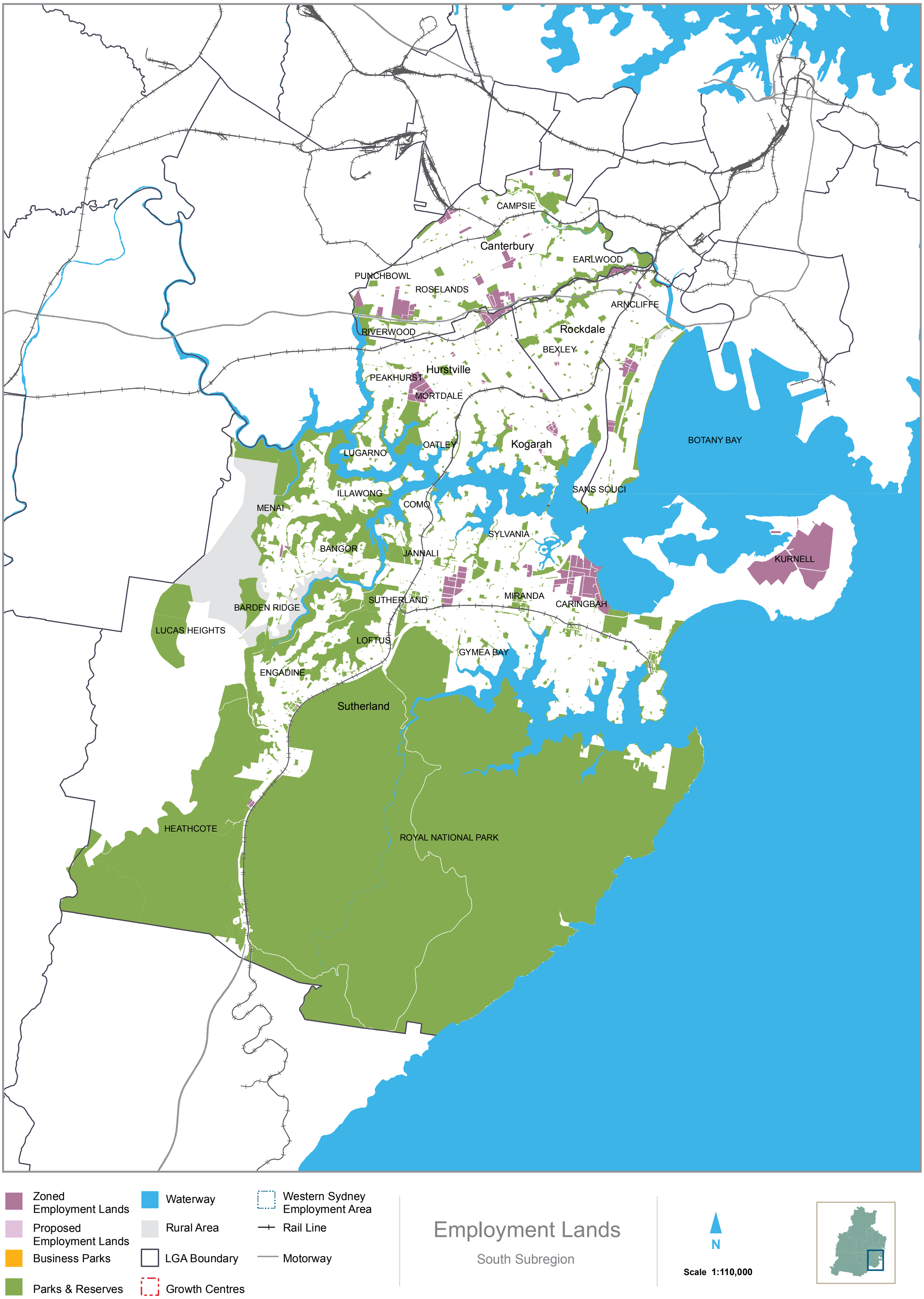


Figure 45 – Employment Lands and Business Parks in the South West Subregion (January 2015)

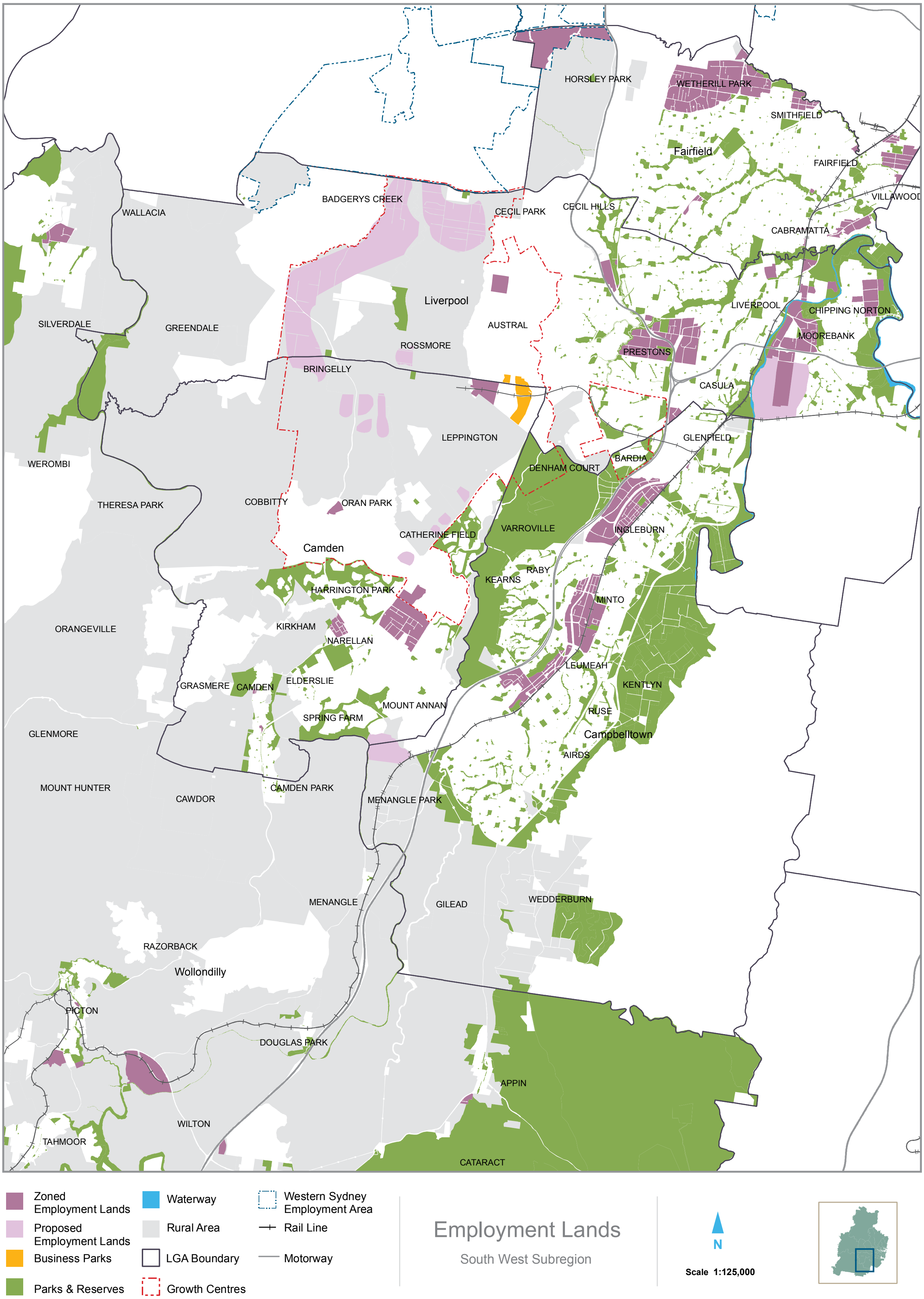


Figure 46 – Employment Lands and Business Parks in the West Central Subregion (January 2015)

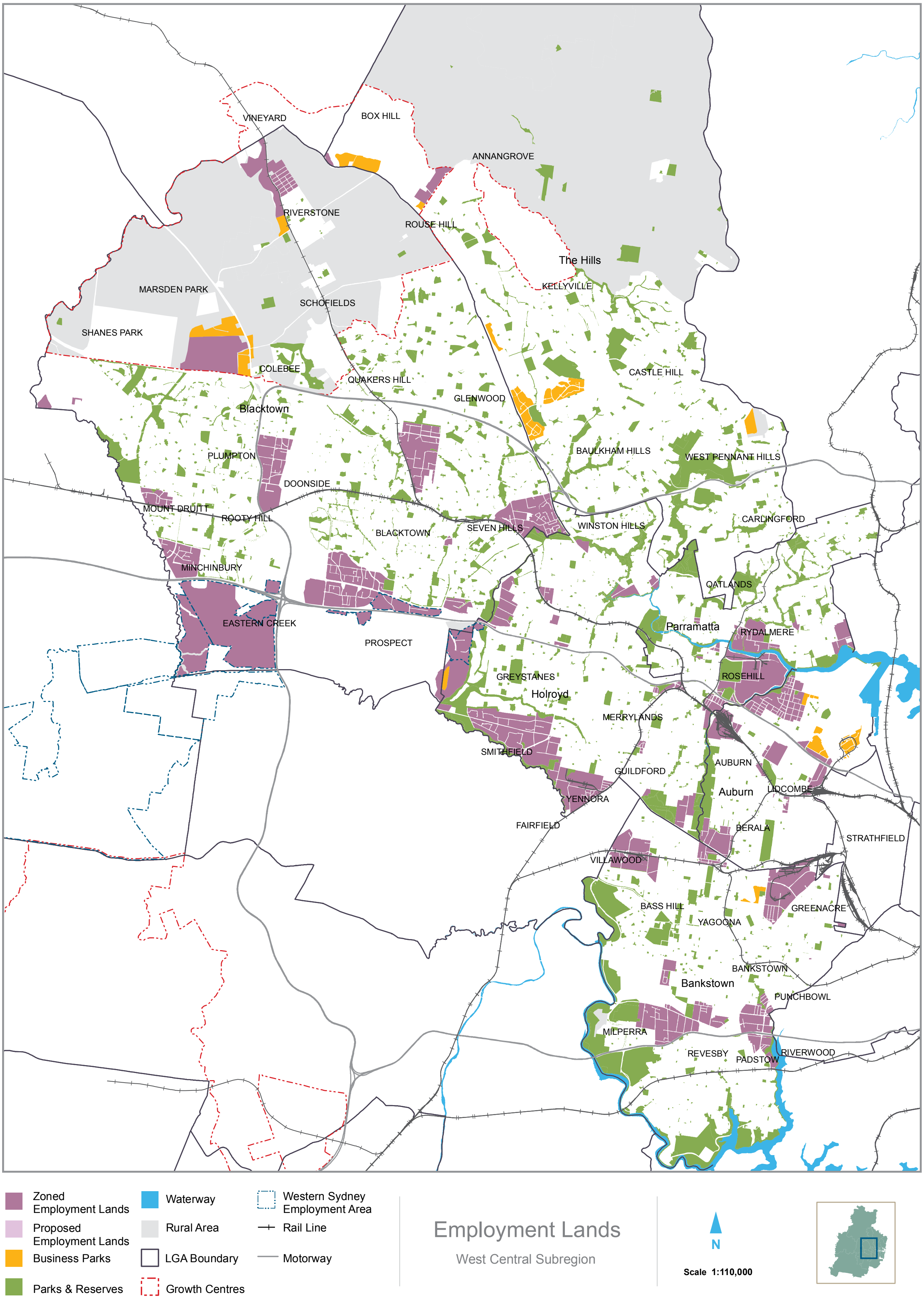


Figure 47 – Employment Lands and Business Parks in the West Subregion (January 2015)

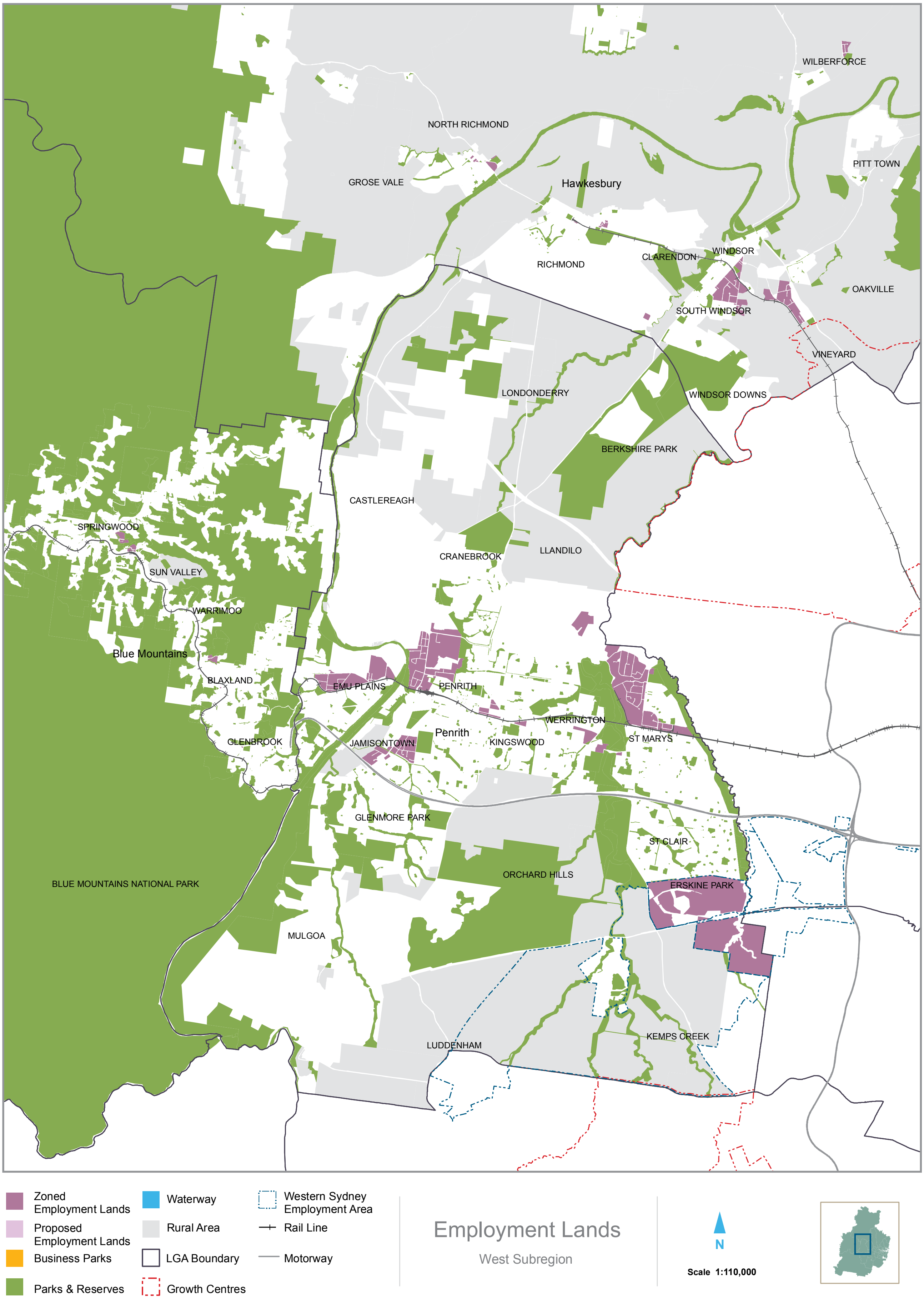
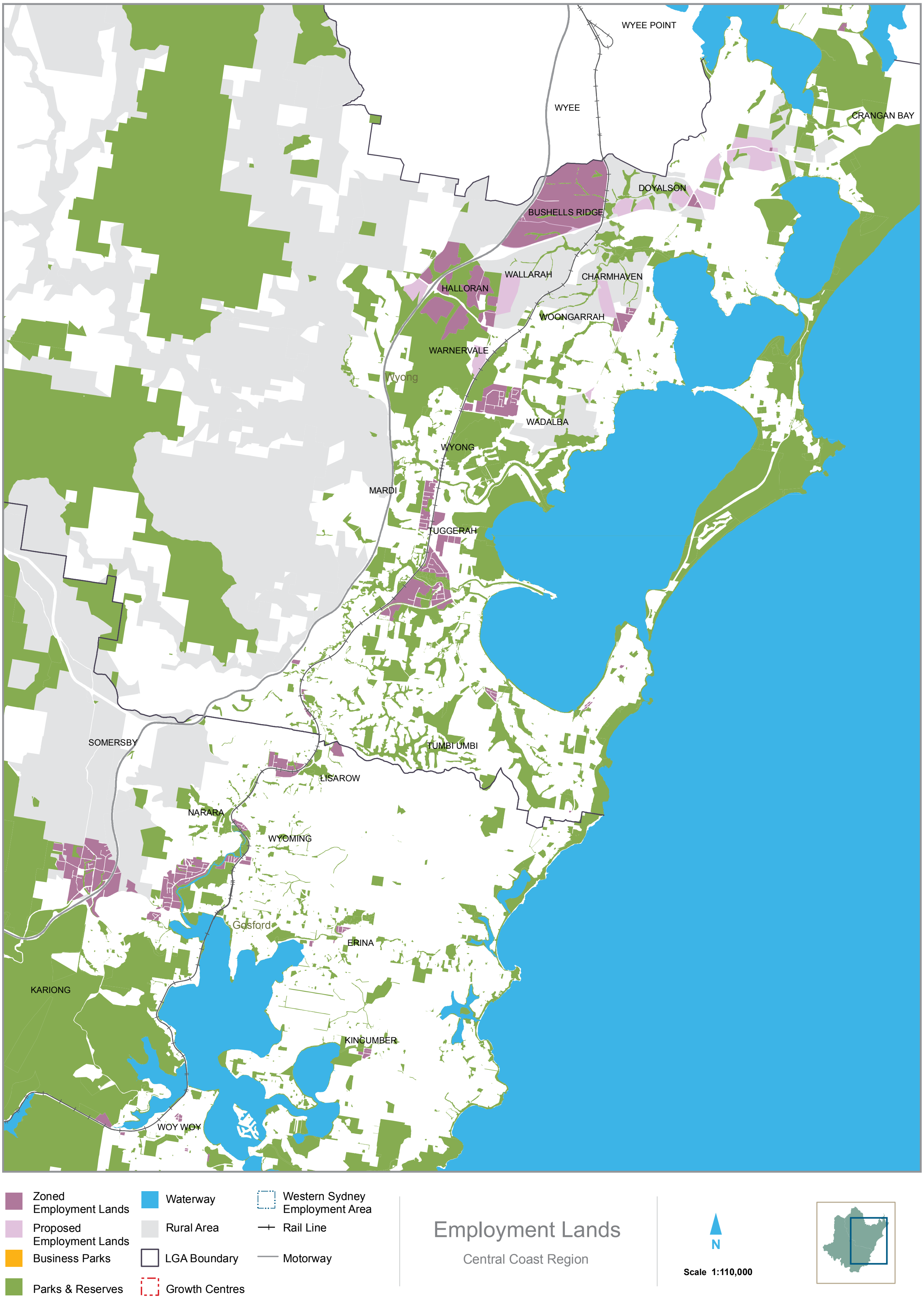


Figure 48 – Employment Lands and Business Parks in the Central Coast Region (January 2015)



ELDP Consultation Program

The purpose of the ELDP Consultation Program was to gain a better understanding of the needs of key stakeholders in regards to Employment Lands in the Sydney Metropolitan and Central Coast Regions and to inform the development of the ELDP 2015 Report and future reports.

The Program had the following aims:

- To check and verify existing data on stocks of Employment Land from the ELDP 2014 Report and previous reports
- To understand the usefulness of the report in its current form and to identify areas for improvement
- To find gaps in information where evidence for Employment Lands is not available and identify additions to data that could fill these gaps
- To identify more useable ways of presenting the information in the report (such as data, text and map presentation)
- To facilitate discussion about the future direction of Employment Lands planning and additional evidence that could provide the basis for change
- To discuss the usefulness and possible alternatives to the way we measure stocks of serviced lands and the relevant benchmarks.

The following tasks were undertaken as part of the Program:

Audit

An audit was undertaken of existing reports and processes including:

- Past released ELDP reports
- Relevant industry reports from 2014
- Analysis of the GIS Zoning layer against the Employment Precincts layer
- Processes and methodologies used for data collection, extraction and analysis
- Examples of other ways of data presentation (including other jurisdictions and industry reports)

Stakeholder Consultation

A data quality survey and emails seeking feedback and comments were sent to more than 30 internal and external stakeholders. These included Councils, industry professionals, consulting firms, NSW Government Agencies and planning teams within the Department of Planning and Environment. Meetings were also held with selected internal and external stakeholders including Sydney Water, Parramatta Council and BIS Shrapnel.

Site visits

Site visits were undertaken to verify some of the data and to take photos. Places visited included industrial areas within Gosford and Wyong LGAs, Marsden Park Industrial area, Eastern Creek, Erskine Park, Prestons, Potts Hill, Silverwater and Camellia.

As a result of the audit and stakeholder consultation, the following enhancements have been included in the ELDP 2015 Report:

- Separate reporting for the Sydney Metropolitan and Central Coast Regions
- Further categorisation and analysis of the Sydney Metropolitan data by the East (North, South and Central subregions) and the West (South West, West Central and West subregions)
- Major industrial development approvals and completions
- Gateway determinations and Planning Proposals in relation to industrial lands and business parks
- Existing supply of Business Parks (between 10 – 50 hectares) and their distribution, development and servicing status
- Additional details of undeveloped and serviced land supply
- Updated Jobs in Employment Lands data
- Boundary adjustments and data refinements to a number of Precincts to ensure consistency with the latest GIS zoning layers

Glossary of Terms

Business Parks: For the purpose of the ELDP, Business Parks are defined as major precincts that are generally zoned B7 Business Park but may also include components of similar employment zones reflecting their broader functions. These Business Parks support a mix of manufacturing, logistics, warehousing, research and development and office functions that enable companies to consolidate functions. Business Parks are further defined as follows:

- **Major Business Parks:** Defined as those business parks which have a zoned area greater than 50 hectares.
- **Other Business Parks:** Defined as those business parks which have a zoned area between 10 and 50 hectares.

Employment Lands: Land that is zoned for industry and/or warehouse uses including manufacturing; transport and warehousing; service and repair trades and industries; integrated enterprises with a mix of administration, production, warehousing, research and development; and urban services and utilities.

Employment Lands Development Program (ELDP): This is the State Government's key program for managing the supply of Employment Lands for the Sydney Metropolitan and Central Coast Regions.

Employment Land Precincts: Areas of zoned industrial land (or similar) land which forms the basis of data collection for the ELDP. Precincts range from less than 1.0 hectare to over 500 hectares.

Industrial Building Approval Activity: Derived from ABS non-residential building activity data, this monitors the value in $ of estimated building works from Development Applications for industrial buildings, including 'factories', 'warehouses' and 'other industry' (such as industrial laboratories, oil depots, agricultural and aquacultural buildings). Data includes both refurbishments and new builds and only includes DAs with an estimated value of over $50,000.

Local Environmental Plans (LEPs): Planning instruments which guide planning decisions for local government areas (LGAs). Through zoning and development controls, they allow councils and other consent authorities to manage the way in which land can be used.

Standard Instrument LEPs: Means an LEP that is based on the Standard Instrument (Local Environmental Plans) Order 2006 (also known as the "LEP Template"), which uses a standard template.

Strategy Identified Land: Land which has been identified in endorsed NSW Government or council documents (e.g. *A Plan for Growing Sydney*, Growth Centre Structure Plans), as future or potential Employment Lands, and also zoned Undeveloped Employment Lands.

Sydney Metropolitan Region: Refers to Metropolitan Sydney comprising six subregions as defined in *A Plan for Growing Sydney.* It is further categorised by the East (North, South and Central subregions) and the West (South West, West Central and West subregions).

Central Coast Region: Refers to the Local Government Areas of Gosford and Wyong.

Take-up: Quantity in hectares of zoned Employment Lands which has changed from 'undeveloped' (vacant) to 'developed' (occupied) over a 12 month period (e.g. between January 2014 and January 2015) based on Sydney Water and Gosford Council data and confirmed by aerial photography and related information. It is defined as the point at which development has commenced on a site and the site is therefore no longer available for development.

Undeveloped and Serviced Employment Lands: Currently zoned Undeveloped Employment Lands where a sewerage or potable water service may be available for connection, based on Sydney Water and Gosford City Council data.

Undeveloped Employment Lands: Currently zoned Employment Lands which were not occupied by an employment land use at the time of data collection. It may therefore be vacant or occupied by another use.

Acronyms

ABS Australian Bureau of Statistics

DP&E Department of Planning and Environment

ELDP Employment Lands Development Program

LEP Local Environmental Plan

LGA Local Government Area

SEPP State Environmental Planning Policy

WSEA Western Sydney Employment Area

Data Sources

Aerial Photography: Photomaps by nearmap.com

Employment Lands Development Status: Gosford City Council, Sydney Water, Aerial Photography

Industrial Building Approvals: ABS, Building Approvals 2014, Customised Report, 2015

Lot Sizes: NSW Land and Property Information

Servicing Data: Gosford City Council and Sydney Water

Zoning Data: Department of Planning and Environment

GIS: Data created using ESRI ArcMap 10 using the coordinate projection GDA 1994 / MGA Zone 56

Employment Figures: Bureau of Transport Statistics (BTS)

Property Analyst Reports: BIS Shrapnel, CBRE, Knight Frank.

Data Sets

A GIS based mapping system was created by compiling January 2015 industrial zoning records, January 2015 Sydney Water data, January 2015 Gosford City Council data and the NSW Land and Property Information (LPI) cadastral data. The system enabled ease of cross-referencing data layers, helping to determine the supply, distribution and take-up of employment lands across the Sydney and Central Coast Regions.

To verify changes to the development status of employment lands, analysis of aerial imagery has also been undertaken to identify and assess development and changes that have been completed or commenced. ABS data on building approvals were also applied to inform trends on recent development of employment lands at the LGA level.

Photography Credits

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Research & Analysis Branch

With best-in-class capabilities in planning, land economics, data analytics, GIS & Information Technology, the Research & Analysis branch delivers appropriate, timely, reliable, robust statistical evidences and insights on housing and employment potential, residential and commercial development feasibility for planning, infrastructure and economic development across NSW.

Employment Lands Team

The Employment Lands Team within the Research and Analysis branch is a multi-disciplinary team that provides quality insights and evidence on planning for employment lands and commercial centres. The work of this team plays a critical role in informing NSW Government and industry on the changing industrial and commercial land use of Sydney and NSW and how to plan for future job creation and economic growth.

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