NSW GOVERNMENT | Planning & Infrastructure

ELDP 2013 UPDATE REPORT

Employment Lands Development Program

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KEY FINDINGS AND TRENDS

Between January 2012 and January 2013 there was little change in overall zoned employment lands stock in the Sydney Region. 28% of this stock is undeveloped, and a significant portion of this undeveloped stock is in Western Sydney and the Central Coast. There continues to be significant rezoning activity, most likely due to the introduction of a number of Standard Instrument LEPs. Take-up of undeveloped zoned land has increased from the previous year, while the value ($) of industrial approvals declined.

In January 2013, there were 15,169 hectares of existing zoned employment lands, including both developed and undeveloped lands. This is a decrease of 225 hectares (1.5%) from January 2012, resulting from the net effect of rezoning to other uses and refinement of areas through data updates.

In January 2013, there were 4,290 hectares of undeveloped zoned employment lands, including lands which are serviced and not serviced. This is a decrease of 330 hectares from January 2012, the result of land becoming developed, as well as some rezoning and data refinement.

In January 2013, there were 678 hectares of undeveloped zoned and serviced employment lands, which in certain cases may be able to be developed. This is a decrease of 152 hectares from January 2012. The decline is largely due to data refinement, but is also due to some undeveloped and serviced land becoming developed.

In January 2013, there were 3,116 hectares of proposed employment lands identified in planning strategies, which have yet to be rezoned. This is an increase of 467 hectares from January 2012, due to the addition of proposed future employment lands identified in the North Wyong Structure Plan.

During 2012, 156 ha of industrial land were rezoned for other purposes. While this is significantly lower than 2011 (415 ha), it shows how the roll out of the Standard Instrument LEP is impacting on industrial zonings. The B5 (Business Development) zone accounts for 65% of all rezoned industrial land. Residential zones account for a further 25% of all rezoned industrial land, and the B1, B2 and B4 zones account for a further 4% of rezoned land, which include ‘shop top housing’ as a mandatory permissible use. Notwithstanding these losses, 93 ha of new employment lands were added in existing urban areas.

In 2011/12 a total of $510 million of industrial building activity was approved in the Sydney Region. This is a significant decrease from the value of activity in the previous year in 2010/11 ($936 million), which had experienced a spike in values, largely underpinned by major developments in Botany and Eastern Creek.

In total, 143 hectares of employment lands were taken up by industrial development in 2012. This is an increase in take-up rates from 2011 (120 ha), though remains lower than rates recorded in 2010 (153 ha), 2009 (205 ha) and 2008 (264 ha).

Figure 1 - Zoned Employment Lands Stock by Subregion (January 2013)

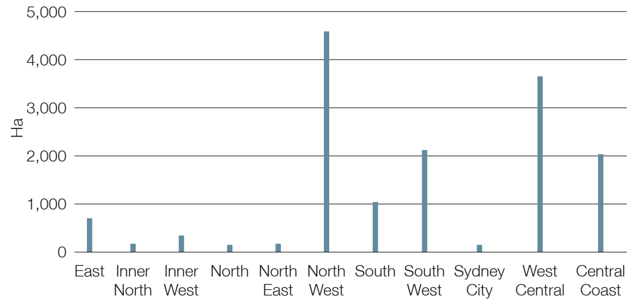


Figure 2 - Rezoning of Employment Lands to other zones

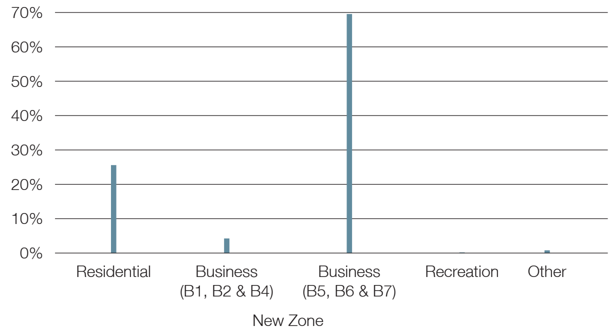


Figure 3 - Value ($) of Industrial Approvals

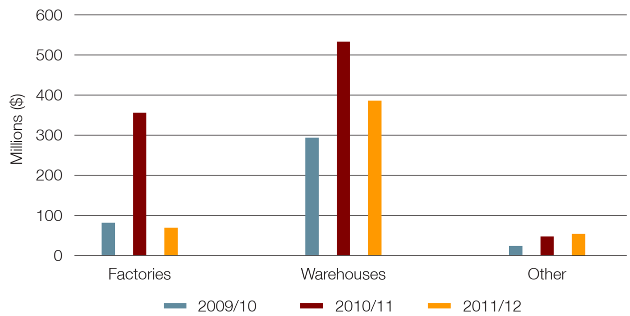
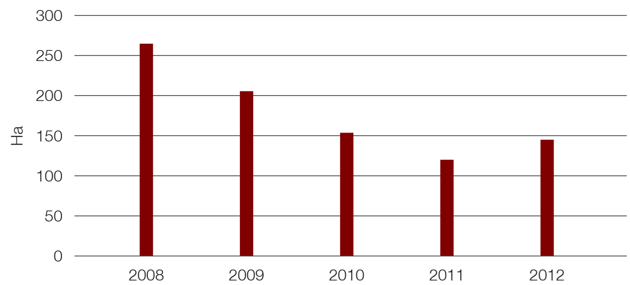


Figure 4 - Take-Up of Employment Lands



In terms of adequacy of stocks at January 2013, the amount of undeveloped and serviced zoned land did not meet the supply standard benchmark of 5-7 years using a high take-up rate of 300 hectares per annum (only 2 years supply). This is a similar result to the past 3 years, and demonstrates that action is required to service more zoned land. This will be required to bring more land to the market to meet demand to facilitate development and enable increased take-up rates.

Major business parks, which are over 50 hectares (of zoned land) in size and also identified as existing or potential Specialised Precincts in the Draft Metropolitan Strategy for Sydney to 2031, have been included in the ELDP for the first time. Across the five identified business parks there is a range of development stages from: largely fully developed (e.g. Macquarie Park, Sydney Olympic Park/Rhodes and Frenchs Forest); to those with remaining significant undeveloped lands (e.g. Norwest); to those which are recently rezoned and development is just commencing (e.g. Marsden Park). Future monitoring of these precincts will be important to understand the supply of land to support ongoing demand for business park development and also planning for new business parks.

ELDP 2013 UPDATE REPORT

INTRODUCTION

This report is an update of the ***Employment Lands Development Program (ELDP) 2012 Update Report***. It provides information on total stocks of Employment Lands for the Sydney Region (including the Central Coast). The report contains data, collected from Sydney Water, at January 2013. In the Central Coast Region, aerial photography[1] was used to determine development status as of January 2013. Updated data is also presented on industrial building activity for 2011/2012 and take-up of Employment Lands from January 2012 to January 2013. Further, data on business parks has also been provided for the first time in the ELDP.

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

STATE OF PLAY 2013

Demand for Employment Lands

Property analysts report[2] recorded a drop in demand for industrial space in 2012, following a rebound in demand in 2010 referred to in the ***ELDP 2011 Update Report***. Limited finance has led to companies staying put rather than investing in new premises.

Where demand exists for new industrial space it continues to be dominated by the warehousing sector. In particular, there has been a dramatic growth in demand for on-line retailing (e-taliers) which require access to a range of premises from large scale warehouses on major arterials in the outer urban areas, to smaller local distribution spaces which can rapidly service delivery of goods across the metropolitan area.

Demand for factory space has been weaker as the manufacturing sector continues to face overseas competition due to the high Australian dollar and declines in consumer and business expenditure.

The resurgence in dwelling approvals and completions within Sydney recorded by the Metropolitan Development Program[3] during 2012 can be expected to support economic growth and potentially create further demand for warehousing and some manufacturing sectors through increased consumer spending and construction activity [4].

Despite weakening demand, completion of new industrial space in Sydney reached a new post-GFC peak during the first half of 2012, with financial year completions for 2011/12 estimated to be up to 470,000 sqm. There has also been renewed interest in speculative development with some major developers and Listed Property Trusts commencing new projects with a speculative component[5] .

The level of activity in the industrial property market has increased recently as international investors, as well as a number of local market participants, have shown renewed investment in new builds. In particular, there has been demand for prime or modern assets, including large format, high quality and well-leased distribution facilities, as a result of low prevailing vacancy rates for this type of development[6].

Following the sharp increase in the value ($) of industrial development approvals in 2010/11 (a total of $936 million of industrial building activity approved in the Sydney Region), there was a return to previous levels of $510 million in 2011/12. It should be noted that the sharp increase in 2010/11 was underpinned by Amcor's $150 million paper recycling facility in Botany and Coca Cola Amatil's $55 million preform and closure manufacturing facility at Eastern Creek[7].

Warehouse building activity remained the primary form of building approvals. This accounted for $385 million (75% of total industrial DAs), predominantly in the North West, West Central and South West subregions. Factories accounted for $70 million of approvals, also predominantly in the South West, North West and West Central subregions, while 'other' industrial accounts for a further $55 million.

In total, 143 hectares of employment land were taken up by industrial development in 2012. This is an increase in take-up rates from 2011 (120 hectares), though remains lower than rates recorded in 2010 (153 hectares), 2009 (205 hectares) and 2008 (264 hectares).

The majority of take-up (75%) occurred in Western Sydney, with the North West providing the major share (72 hectares), with a further 20 hectares in the South West and 16 hectares in West Central. The Central Coast had 20 hectares of take-up in 2012.

Take-up activity was concentrated in the precincts of Erskine Park (31 hectares), Campbelltown, Blaxland Road (15 hectares), Greystanes (7 hectares), Somersby (8 hectares) and Wyong (5 hectares). A further 17 hectares of take-up was also recorded at Marsden Park and shows commencement of development in this greenfield precinct.

Property analysts expect that industrial construction will lift once growth in the state economy picks up, largely triggered by a recovery in residential construction[8]. It is unlikely however to reach of levels seen in the lead up to the opening of the M7, in the absence of a similar major new infrastructure catalyst. In the longer term though, projects identified in the Long Term Transport Master Plan, such as intermodal terminals and freight lines, may present future catalysts for renewed activity.

1 Photomaps by nearmap.com
2 BIS Shrapnel, *Sydney Industrial Property - Market Forecasts and Strategies 2012 - 2022*, December 2012 (p11-17)
3 Department of Planning & Infrastructure *MDP December 2012 Quarterly Report*, December 2012
4 BIS Shrapnel, *Sydney Industrial Property - Market Forecasts and Strategies 2012 - 2022*, December 2012 (p17)
5 BIS Shrapnel, *Sydney Industrial Property - Market Forecasts and Strategies 2012 - 2022*, December 2012 (p19)

6 Urbis Insights '*Australian Industrial sector has strong interest but requires careful assessment*', April 2013
7 BIS Sharpnel, *Sydney Industrial Property - Market Forecasts and Strategies 2011-2021*, December 2011 (p 27)
8 BIS Sharpnel, *Sydney Industrial Property - Market Forecasts and Strategies 2011-2021*, December 2012 (p 29)

Supply of Employment Lands

There were 15,169 hectares of employment lands in the Sydney Region as at January 2013. In terms of total land stocks, 2012 saw a modest reduction of 225 hectares (1.5%) of zoned employment lands in the Sydney Region. This was due to a net amount 93 hectares of new employment land being added to the ELDP (including the expansion of land at Port Botany) less 156 hectares lost due to rezoning and a further 162 hectares due to GIS refinements, resulting in the overall net loss of 225 hectares to total stocks.

The 156 hectares of land rezoned occurred across 17 precincts and was largely located in those LGAs which gazetted Standard Instrument LEPs[9] during 2012. This reflects how Councils are looking to convert existing industrial zones into the Standard Instrument LEP format. Whilst this was still a significant amount of industrial land rezoned, it is substantially lower than the amount of land rezoned during 2011 (415 hectares), but still notably higher than that rezoned in 2010 (12 hectares).

Of the 156 hectares of industrial land lost due to rezoning, 65% (or 101 hectares) was rezoned to the B5 (Business Development) zone. This was concentrated in the precincts of Castle Hill (37 hectares), Dural Service Centre (36 hectares)[10] and Mulgrave/ Vineyard (22 hectares). A further 8 hectares was rezoned to B6 (Enterprise Corridor). There was no land rezoned to B7 (Business Park) during 2012, compared to 104 hectares in 2011. Residential zones, predominantly R2 (Low Density Residential), account for a further 25% (39 hectares) of all rezoned industrial land.

The B1, B2 and B4 zones account for a further 4% (7 hectares) of rezoned land and these zones include 'shop top housing' as a mandatory permissible use.

The distribution of employment lands identified in previous years persists, with the vast majority of employment lands located in Western Sydney (10,355 hectares or 68%).

The net amount of undeveloped zoned land decreased by 330 hectares during 2012. This was the result of land becoming developed (take-up), as well as some rezoning and data refinement. The amount of undeveloped and serviced zoned land (in terms of water and sewer connection) decreased by 152 hectares in 2012. The decline is largely due to data refinement (noticeably in the Erskine Park precinct), but is also due to some undeveloped and serviced zoned land becoming developed.

Across all of the size categories of undeveloped zoned land there was a reduction in the amount (hectares) of undeveloped land available between January 2012 and January 2013, consistent with the overall decline in undeveloped land. In terms of area, the greatest declines in undeveloped lands were in the 1-5 hectare and 5-10 hectare categories (-97 and -89 hectares respectively), which may be due in part to take-up. The greatest amount of undeveloped zoned land still remains in lots over 10 hectares in size (61% of all undeveloped zoned land), although the number of lots in this larger size is still quite low (5% of total lots), consistent with the findings of previous years.

In terms of the number of undeveloped land parcels by size categories, there was a significant drop in the number of very small parcels (-816 lots) which were less than 0.1 hectares or 1,000 square metres. This may be due to data refinement as well as rezoning and some development occurring. However, the number of lots of undeveloped zoned land over 10 hectares increased marginally (from 90 to 93 lots) in 2012.

Stocks of proposed future employment lands increased by 467 hectares between 2012 and 2013. This was due to the inclusion of proposed employment lands identified in the North Wyong Structure Plan in the Central Coast which was released by the Department in October 2012. The Department has also exhibited a Draft Structure Plan for the broader Western Sydney Employment Area. Though subject to extensive further investigations, this potential land may contribute significantly to stocks of undeveloped employment lands in the future. The Draft Strucure Plan identifies an additional 2,100 hectares of employment land over the next 30 years to meet existing demand, as well as the preservation of a further 4,250 hectares of additional employment lands. Once the Draft Structure Plan is finalised the identified 'proposed' employment lands will be added to the ELDP as 'Strategy Identified Land'.

In terms of adequacy of stocks of employment lands at January 2013, the broad pattern was similar to that of the last 3 years. Based on a high take-up rate of 300 hectares per annum, there would be enough 'Strategy Identified Land' (ie. that which has already been identified in planning strategies for future zoning or currently zoned and undeveloped) to last 25 years (7,406 hectares). Of this total potential stock, there is 3,612 hectares of undeveloped zoned land, which is not serviced (water and sewer connection), providing up to 12 years of supply, using the same high take-up rate. Both of these amounts meet the supply standards for 'Strategy Identified Land' (20 years) and undeveloped zoned which is not serviced (8-10 years supply) respectively.

However, based on the high take-up rate of 300 hectares per annum, there is only 2 years supply (678 hectares) of undeveloped zoned land which is also serviced (water and sewer connection). This falls significantly under the supply standard of 5-7 years supply.

9 Standard Instrument Local Environmental Plans (LEPs) prepared under the *Standard Instrument (Local Environmental Plans) Order 2006*

10 Note: Dural Service Centre was rezoned to 3(e), but has been included with B5 given that it is a comparable zone

This finding is similar to the results of the last 3 years and suggests that action should focus around servicing and encouraging take-up of existing zoned land where this meets the current needs of industry. To address this issue, the Department has completed an audit of 20 key employment lands precincts that contain significant amounts of undeveloped zoned land to determine what may be some of the impediments to take-up of this land, including infrastructure and servicing issues. This audit identified a series of critical infrastructure projects which would aid in unlocking development potential across a number of the 20 precincts.

Business Parks

The ELDP 2013 Update Report has been expanded for the first time to monitor major business parks in recognition of the growing importance of these locations for job growth and the evolution of some industrial areas towards higher density employment areas which combine a mix of manufacturing, logistics, warehousing, R&D and office uses.

Five established or emerging business parks have been incorporated into the ELDP to date, namely: Frenchs Forest (Warringah); Macquarie Park (Ryde); Marsden Park (Blacktown); Norwest (The Hills); and Sydney Olympic Park/Rhodes (Auburn/Canada Bay). These were selected as they are business parks of a significant scale (over 50 hectares, based on an analysis of all business park zoned land in the Sydney Metropolitan Region) and have been identified as Specialised Precincts or potential Specialised Precincts in the Draft Metropolitan Strategy for Sydney to 2031. They generally have a B7 (Business Park) zone, but may also include components of other similar employment zones reflecting their broader functions.

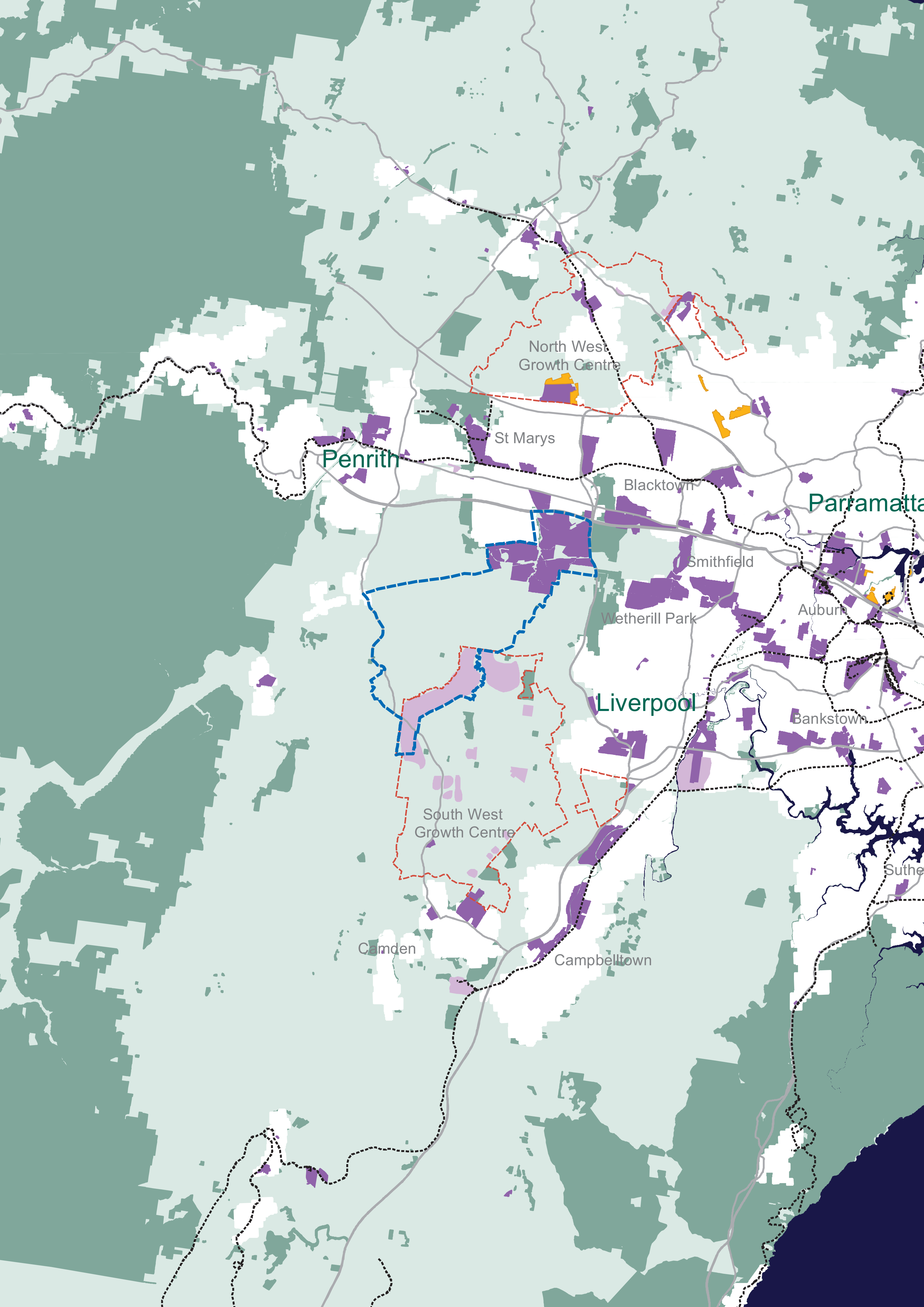
Data has only been presented for January 2013 and provides a snapshot of development status at that time. For most of the business parks the zoned land is largely fully developed. This demonstrates that redevelopment of existing sites within these business parks will be required to ensure ongoing growth.

For Sydney Olympic Park/Rhodes and Frenchs Forecast only 4% and 6% of land remains undeveloped, respectively in those precincts. Macquarie Park has around 17 hectares of undeveloped land available (11% of its total stocks) while Norwest has significant tracts of undeveloped land still remaining (39 hectares or about a quarter of its total stocks). For the relatively newly released Marsden Park Business Park, the majority of the land is currently undeveloped (99 hectares or 80% of its total stocks).

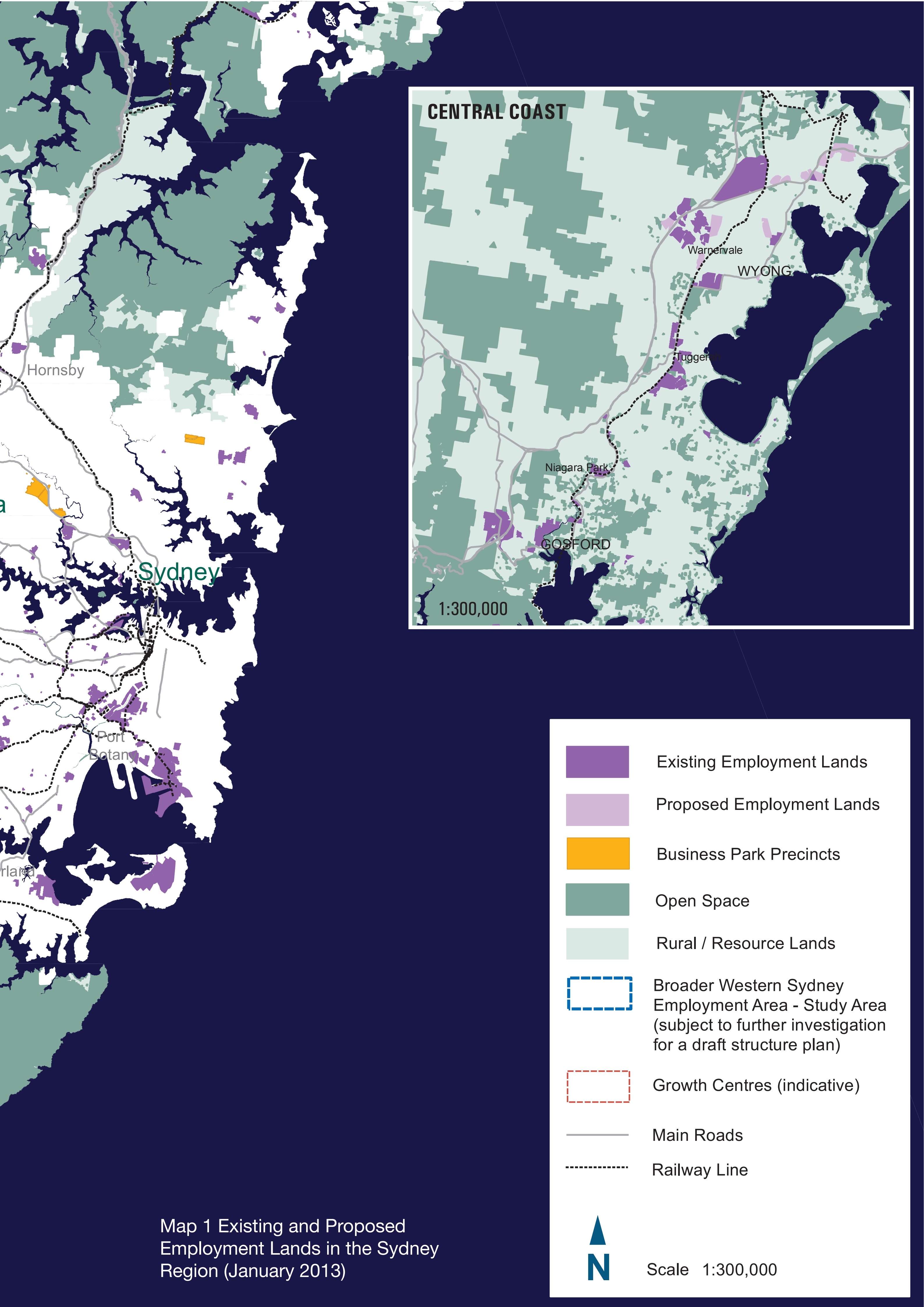
Across the five business parks there is relatively little undeveloped land which is currently serviced (in terms of water and sewer) and therefore considered ready for development (14 hectares or 8% of all undeveloped zoned land). Macquarie Park offers the only precinct with significant undeveloped and serviced lands (12 hectares).

Of the undeveloped zoned land, the majority of land is held in parcels which are between 1-5 or 5-10 hectares in size (68 hectares and 57 hectares respectively), though in terms of numbers of parcels, the greatest numbers of undeveloped land parcels occur within the 0.1 to 0.5, 0.5-1 and 1-5 hectare categories. This shows that there is a range of undeveloped land parcels available to meet the different needs of business park uses from smaller industrial strata units to larger footprint campus style office developments.

During 2012, the only records of take-up of land (i.e. vacant to developed) within the five business park precincts occurred at Marsden Park (10 hectares) and Sydney Olympic Park/Rhodes (2 hectares). However, it is important to note that for business parks, especially the more established ones where land is largely occupied, development is more likely to occur through intensification of existing development or refurbishment and redevelopment of spaces, rather than consumption of vacant land.



North West
Growth Centre
St Marys
Penrith
Blacktown
Parramatta
Smithfield
Auburn
Wetherill Park
Liverpool
Bankstown
South West
Growth Centre
Camden
Campbelltown



Map 1 Existing and Proposed Employment Lands in the Sydney Region (January 2013)

Table 1 - Zoned Employment Lands Stock by Subregion

The Employment Lands Stock table below compares total stocks, as well as split between developed and undeveloped, of employment lands between January 2010 and January 2013 by the 10 metropolitan Sydney subregions and Central Coast region as shown in the 2010 Metropolitan Plan for Sydney 2036.

Subregion	Jan-10			Jan-11			Jan-12			Jan-13			Net Change Jan-12 to Jan-13
	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	
East	33.1	599.5	632.6	33.4	599.9	633.3	120.3	528.7	649.1	78.6	624.3	702.9	53.8
Inner North	6.3	184.5	190.7	6.6	181.4	188.0	12.1	170.9	183.0	10.8	170.8	181.5	-1.4
Inner West	33.5	310.4	343.9	33.2	312.4	345.6	36.0	310.6	346.5	22.0	329.7	351.7	5.2
North	30.0	156.9	186.9	27.7	158.7	186.4	30.6	162.8	193.4	24.8	130.4	155.2	-38.2
North East	3.2	239.1	242.3	3.2	238.9	242.2	5.0	182.5	187.5	0.9	184.3	185.2	-2.4
North West	1,955.8	2,533.6	4,489.4	2,140.1	2,557.8	4,697.9	2,120.9	2,611.3	4,732.2	2,061.0	2,522.3	4,583.3	-148.9
South	151.6	958.8	1,110.4	152.2	950.4	1,102.6	162.6	905.5	1,068.1	145.4	897.1	1,042.5	-25.6
South West	577.2	1,627.3	2,204.5	521.3	1,681.8	2,203.1	522.4	1,636.5	2,159.0	472.3	1,655.0	2,127.4	-31.6
Sydney City	2.6	151.5	154.1	2.6	151.5	154.1	8.2	147.8	156.0	5.9	148.3	154.3	-1.7
West Central	523.9	3,284.4	3,808.4	502.1	3,298.8	3,800.9	462.1	3,208.4	3,670.5	312.1	3,331.8	3,643.9	-26.7
Central Coast	1,139.6	875.0	2,014.6	1,120.1	909.4	2,029.6	1,139.3	909.5	2,048.8	1,156.2	885.3	2,041.5	-7.3
Sydney Region	4,456.9	10,921.0	15,377.9	4,542.5	11,041.0	15,583.5	4,619.6	10,774.5	15,394.2	4,290.0	10,879.3	15,169.3	-224.9

Table 2 - Zoned Employment Lands Stock by Precinct

This second Employment Lands Stock table below compares total stocks, as well as split between developed and undeveloped, of employment lands between January 2011 and January 2013 by LGA and individual employment lands precinct. Employment lands precincts are defined as contiguous areas of zoned industrial (or similar) land which form the basis of data collection for the ELDP and range from less than 0.1 hectare to over 500 hectares.

Subregion	LGA	Precinct	Jan-11			Jan-12			Jan-13			Net Change
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Jan 12 - Jan 13
East	Botany Bay	Banksmeadow	15.7	221.1	236.8	23.9	207.2	231.1	15.0	215.6	230.7	-0.4
		Botany	1.3	65.2	66.4	4.3	63.1	67.4	1.2	66.1	67.3	-0.1
		British American Tobacco Site		16.5	16.5		16.5	16.5	0.0	16.5	16.5	-0.1
		Mascot	8.7	70.2	78.9	9.9	69.4	79.3	3.2	73.9	77.1	-2.2
		Port Botany							58.5	50.4	108.9	108.9
	Botany Bay Total		25.6	373.0	398.6	38.1	356.2	394.3	77.9	422.5	500.4	106.1
	Randwick	Port Botany	7.8	226.9	234.7	82.2	172.5	254.8	0.8	201.8	202.5	-52.3
	Randwick Total		7.8	226.9	234.7	82.2	172.5	254.8	0.8	201.8	202.5	-52.3
East Total			33.4	599.9	633.3	120.3	528.7	649.1	78.6	624.3	702.9	53.8
Inner North	Lane Cove	Burns Bay (Tuta Laboratories)										0.0
		Gore Cove Terminal		7.8	7.8	0.0	7.8	7.9	0.0	8.1	8.1	0.2
		Lane Cove West	5.8	45.7	51.5	6.6	44.0	50.6	5.8	44.5	50.2	-0.4
		Lane Cove West (150 Epping Rd)		2.3	2.3		3.2	3.2	0.0	2.3	2.3	-0.8
	Lane Cove Total		5.8	55.9	61.7	6.6	55.1	61.7	5.8	54.9	60.7	-1.0
	Ryde	Former ADI Site		1.6	1.6		1.6	1.6	0.0	1.6	1.6	0.0
		Gladesville	0.1	23.7	23.8	0.1	20.1	20.2	0.1	20.1	20.2	0.0
		Macquarie Park, Delhi Road		0.6	0.6							0.0
		West Ryde		5.9	5.9	0.1	6.0	6.1	0.0	6.0	6.0	-0.1
		Macquarie Park, Talavera Road		0.0	0.0		0.0	0.0				0.0
	Ryde Total		0.1	31.8	31.9	0.2	27.7	28.0	0.1	27.6	27.8	-0.2
	Willoughby	Artarmon	0.7	64.3	65.0	5.2	58.8	63.9	4.8	59.0	63.8	-0.1
		East Chatswood		26.3	26.3	0.0	26.4	26.4	0.0	26.3	26.3	-0.1
		Lane Cove West	0.1	3.0	3.0	0.1	3.0	3.0	0.0	3.0	3.0	-0.1
	Willoughby Total		0.7	93.6	94.4	5.3	88.1	93.4	4.8	88.3	93.1	-0.2
Inner North Total			6.6	181.4	188.0	12.1	170.9	183.0	10.8	170.8	181.5	-1.4
Inner West	Ashfield	Canterbury Road, Hurlstone Park		0.3	0.3	0.0	0.3	0.3	0.0	0.3	0.3	0.0
		Carlton Cres		0.3	0.3	0.0	0.3	0.3	0.0	0.3	0.3	0.0
		Flour Mill Site	0.0	3.5	3.5	0.0	3.5	3.6	0.0	3.5	3.5	0.0
		Hordern Pde		0.1	0.1		0.1	0.1	0.0	0.1	0.1	0.0
		Milton St North		0.2	0.2	0.1	0.2	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		0.1	0.1	0.0	0.1	0.1	0.0
		West St		0.2	0.2		0.2	0.2	0.0	0.2	0.2	0.0
	Ashfield Total		0.0	7.9	7.9	0.1	7.9	8.0	0.0	7.9	8.0	-0.1
	Burwood	Tangarra St East		1.2	1.2		1.2	1.2	0.0	0.7	0.7	-0.6
	Burwood Total			1.2	1.2	0.0	1.2	1.2	0.0	0.7	0.7	-0.6
	Canada Bay	Bibby St, Chiswick		0.6	0.6		0.6	0.6	0.0	0.6	0.6	0.0
		Bushells Site, Burwood Rd		3.9	3.9		3.9	3.9	0.0	3.9	3.9	0.0
		Concord West		7.6	7.6		7.6	7.6	0.0	7.6	7.6	0.0
		Harris Road, Five Dock		0.1	0.1		0.2	0.2	0.0	0.1	0.1	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	0.2	12.2	12.4	0.8	11.6	12.4	0.1	12.2	12.3	0.0
		Rhodes, Leeds Street		6.4	6.4	0.3	6.2	6.5	0.3	6.2	6.5	0.0
	Canada Bay Total		0.2	30.9	31.1	1.2	30.0	31.2	0.5	30.6	31.1	-0.1

Table 2 - Zoned Employment Lands Stock by Precinct (cont.)

Subregion	LGA	Precinct	Jan-11			Jan-12			Jan-13			Net Change
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Jan 12 - Jan 13
		Allen and Flood St		1.0	1.0		1.0	1.0	0.0	1.0	1.0	0.0
		Balmain Road		1.4	1.4	0.0	1.3	1.4	0.0	1.3	1.4	0.0
		Bays Precinct (Glebe Island/White Bay)	20.2	52.8	73.0	12.4	61.2	73.6	10.1	71.2	81.3	7.7
		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		1.1	1.1	0.0	1.1	1.1	0.0
		Marion/Walter St	0.0	1.3	1.3	0.0	1.3	1.3	0.0	1.3	1.3	0.0
		Moore St, Catherine St		5.9	5.9	0.2	5.6	5.9	0.2	5.7	5.9	0.0
		Moore St, McKenzie St		1.0	1.0		1.1	1.1	0.0	1.0	1.0	0.0
	Leichhardt	Mort Bay	0.0	0.2	0.2	0.1	0.2	0.3	0.0	0.3	0.3	0.0
		Parramatta Rd, Mallet St, Pyrmont Bridge Rd	0.0	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	5.2	5.2	0.0
Inner West		Victoria Rd, Robert St (East of Mullens St)	0.1	3.0	3.1	0.2	3.0	3.1	0.1	3.0	3.1	-0.1
		Victoria Rd, Robert St (Former Martin Bright Steelworks)	0.0	2.2	2.2	0.0	2.2	2.2	0.0	2.2	2.2	0.0
		Victoria Rd, Terry St/ Wellington St (Carrier Site)		3.2	3.2		3.2	3.2	0.0	3.2	3.2	0.0
	Leichhardt Total		20.3	86.3	106.6	13.1	94.4	107.4	10.4	104.6	115.0	7.5
		Chullora	0.3	1.7	2.0	1.0	0.4	1.4	0.0	0.3	0.3	-1.1
		Flemington (Arthur St, Homebush Business Park and Mason Park)	4.9	56.7	61.6	7.2	54.5	61.8	2.3	59.3	61.6	-0.1
	Strathfield	South Strathfield/Enfield	7.5	108.9	116.4	13.1	103.5	116.6	8.5	107.8	116.3	-0.3
		Strathfield Mail		13.6	13.6	0.1	13.6	13.7	0.0	13.6	13.6	-0.1
		Water Street	0.0	5.2	5.2	0.2	5.0	5.2	0.2	5.0	5.2	0.0
	Strathfield Total		12.6	186.1	198.7	21.6	177.0	198.6	11.1	185.9	197.0	-1.6
Inner West Total			33.2	312.4	345.6	36.0	310.6	346.5	22.0	329.7	351.7	5.2
		Asquith	9.1	33.8	42.9	4.9	39.3	44.2	4.9	37.9	42.8	-1.4
		Dural Service Centre	3.3	33.3	36.6	4.3	32.5	36.7				-36.7
		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		1.3	1.3	0.0	1.3	1.3	0.0
North	Hornsby	Hornsby West		1.9	1.9	0.0	1.9	2.0	0.0	1.9	1.9	0.0
		Mount Ku-ring-gai	13.6	52.2	65.8	18.7	52.0	70.7	19.5	50.8	70.3	-0.4
		Pennant Hills		1.4	1.4	0.0	1.4	1.4	0.0	1.3	1.3	-0.1
		Thornleigh	1.7	26.6	28.4	2.3	26.5	28.8	0.3	28.1	28.4	-0.4
		Waitara	0.0	7.2	7.2	0.4	7.0	7.4	0.0	8.1	8.1	0.7
	Hornsby Total		27.7	158.7	186.4	30.6	162.8	193.4	24.8	130.4	155.2	-38.2
North Total			27.7	158.7	186.4	30.6	162.8	193.4	24.8	130.4	155.2	-38.2
	Manly	Manly Vale	0.2	9.8	10.0	0.4	9.7	10.1	0.2	9.9	10.1	0.0
	Manly Total		0.2	9.8	10.0	0.4	9.7	10.1	0.2	9.9	10.1	0.0
		Mona Vale	0.1	22.4	22.5	0.2	22.5	22.6	0.1	22.4	22.5	-0.1
	Pittwater	North Narrabeen		2.5	2.5		2.5	2.5	0.0	2.5	2.5	0.0
		Warriewood Valley	0.5	15.8	16.3	0.9	15.4	16.3	0.5	14.4	14.8	-1.5
North East	Pittwater Total		0.6	40.7	41.3	1.1	40.4	41.4	0.6	39.3	39.8	-1.6
		Brookvale	0.3	85.0	85.3	2.8	84.0	86.7	0.0	86.1	86.1	-0.6
		Cromer	0.6	43.6	44.2	0.7	43.6	44.3	0.1	44.1	44.2	-0.1
	Warringah	Forestville		2.2	2.2		2.2	2.2	0.0	2.2	2.2	0.0
		Frenchs Forest	1.5	54.9	56.5							0.0
		Harbord		2.7	2.7	0.0	2.7	2.7	0.0	2.7	2.7	0.0
	Warringah Total		2.5	188.4	190.9	3.5	132.4	136.0	0.2	135.1	135.2	-0.8
North East Total			3.2	238.9	242.2	5.0	182.5	187.5	0.9	184.3	185.2	-2.4

Table 2 - Zoned Employment Lands Stock by Precinct (cont.)

Subregion	LGA	Precinct	Jan-11			Jan-12			Jan-13			Net Change
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Jan 12 - Jan 13
North West	Blacktown	Arndell Park	20.8	123.7	144.5	22.5	139.2	161.7	20.8	124.4	145.2	-16.5
		Blacktown Rd (St Martins)		6.0	6.0		6.0	6.0	5.4	0.6	6.0	0.0
		Eastern Creek	407.6	154.6	562.2	375.9	177.9	553.8	381.0	165.3	546.3	-7.5
		Former Wonderland	40.9	15.1	56.0	30.0	26.0	56.0	27.9	28.1	56.0	0.0
		Glendenning	47.6	147.4	195.0	48.1	152.4	200.5	47.6	150.4	198.0	-2.5
		Greystanes	25.9	5.6	31.5	23.4	5.6	29.0	14.5	12.1	26.6	-2.4
		Huntingwood	7.0	110.1	117.1	4.4	112.9	117.3	4.2	112.9	117.1	-0.2
		Huntingwood (WSEH)	47.8	23.2	71.0	66.3	16.4	82.6	68.1	14.2	82.3	-0.3
		Huntingwood West	59.8	1.4	61.1	41.4	20.4	61.7	39.6	21.2	60.8	-0.9
		Kings Park (Blacktown North)	2.1	211.6	213.7	3.0	211.0	214.0	1.6	212.0	213.7	-0.4
		Marsden Park	206.1		206.1	237.1		237.1	255.5	16.7	272.2	35.1
		Minchinbury	20.5	98.2	118.7	22.9	96.2	119.1	22.0	96.9	118.9	-0.2
		Mount Druitt	6.7	40.8	47.5	6.3	41.2	47.5	5.5	42.0	47.5	0.0
		North Dunheved	15.6		15.6	18.5	0.0	18.5	18.4	0.0	18.4	0.0
		Prospect		35.2	35.2		35.2	35.2	0.0	35.2	35.2	0.0
		Quarantine Station		21.9	21.9		21.9	21.9	0.0	21.9	21.9	0.0
		Riverstone	3.7	42.7	46.4	5.8	40.8	46.5	3.5	43.0	46.4	-0.1
		Riverstone West	86.4	9.6	95.9	97.8	9.5	107.3	87.0	16.0	103.0	-4.3
		Ropes Creek	192.7		192.7	185.5	0.0	185.5	192.7	0.0	192.7	7.2
		Ropes Crossing	0.4	10.6	11.0	3.9	0.0	3.9	0.0	3.9	3.9	0.0
		Seven Hills (Blacktown LGA)	6.3	192.9	199.2	13.9	189.9	203.8	12.9	186.6	199.5	-4.3
		St Marys	2.9		2.9							0.0
		The Raceway Precinct	15.0	5.5	20.6	10.6	11.9	22.5	8.6	12.7	21.4	-1.1
		Prospect (Flushcombe Rd)				0.0	1.2	1.2				-1.2
	Blacktown Total		1,215.8	1,256.0	2,471.8	1,217.0	1,315.5	2,532.5	1,217.0	1,316.0	2,533.0	0.5
	Blue Mountains	Blackheath	0.1	1.9	2.0	0.4	1.6	2.0	0.2	1.7	2.0	0.0
		Blaxland		5.0	5.0	0.5	5.3	5.9	0.0	5.0	5.0	-0.9
		Blaxland (Great Western Hwy)		0.2	0.2	0.0	0.2	0.2	0.0	0.2	0.2	0.0
		Glenbrook		0.2	0.2		0.2	0.2	0.0	0.2	0.2	0.0
		Katoomba	17.3	28.5	45.8	16.5	30.2	46.7	13.7	33.4	47.1	0.4
		Lawson	17.7	13.9	31.6	18.2	13.8	32.0	17.6	14.4	32.0	0.0
		Valley Heights/ Springwood	2.7	12.3	15.0	2.9	12.2	15.1	2.9	12.2	15.1	0.0
		Wentworth Falls		0.1	0.1		0.1	0.1	0.0	0.1	0.1	0.0
	Blue Mountains Total		37.8	62.1	99.9	38.5	63.6	102.1	34.4	67.1	101.6	-0.5
	Hawkesbury	Mulgrave/Vineyard	15.1	58.0	73.0	15.9	57.0	72.9	9.5	41.6	51.2	-21.8
		North Richmond	3.2	10.3	13.6	3.8	10.2	13.9	0.0	10.2	10.2	-3.7
		Richmond	0.7	4.0	4.7	0.4	4.6	5.0	0.2	4.5	4.7	-0.4
		Richmond, Racecourse Rd		4.0	4.0	0.0	4.0	4.1	0.0	4.0	4.0	-0.1
		Wilberforce	1.5	7.7	9.2	1.8	7.5	9.3	0.7	8.5	9.2	-0.1
		Windsor/South Windsor	17.9	77.5	95.5	19.5	76.9	96.4	17.8	77.6	95.4	-1.0
	Hawkesbury Total		38.5	161.5	199.9	41.4	160.3	201.7	28.2	146.5	174.6	-27.1
	Penrith	Emu Heights	36.1		36.1							0.0
		Emu Plains	24.1	107.0	131.1	23.8	107.3	131.1	14.5	116.5	131.0	-0.1
		Erskine Park	223.9	179.5	403.3	208.0	189.8	397.7	147.7	228.4	376.1	-21.7
		Great Western Hwy, St Marys	0.2	1.7	1.9		1.9	1.9	0.0	1.9	1.9	0.0
		Jamisontown	3.7	72.0	75.7	5.5	72.3	77.8	5.2	72.6	77.8	0.0
		Kingswood	1.5	15.3	16.8	1.5	19.8	21.3	1.5	19.8	21.3	0.0
		North Penrith	69.3	207.3	276.7	82.0	196.2	278.1	76.9	162.0	238.9	-39.2
		South of Sydney Water Pipeline	337.2		337.2	348.1		348.1	337.2	0.0	337.2	-10.9
		St Marys	50.5	191.0	241.5	48.9	193.4	242.3	48.4	185.1	233.5	-8.7
		St Marys Leagues		10.3	10.3	3.1		3.1	3.1	3.1	6.3	3.1
		St Marys North	2.1	54.8	56.8	2.4	54.5	56.9	1.8	55.0	56.8	-0.1
		Llandilo	3.3		3.3	3.3		3.3	34.5	0.0	34.5	31.2
		The Northern Road, Llandilo	27.4		27.4	24.8	1.4	26.2				-26.2
	Penrith Total		779.3	839.0	1,618.2	751.3	836.6	1,587.9	670.9	844.5	1,515.4	-72.5

Table 2 - Zoned Employment Lands Stock by Precinct (cont.)

Subregion	LGA	Precinct	Jan-11			Jan-12			Jan-13			Net Change
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Jan 12 - Jan 13
North West	The Hills	Annangrove	59.8	56.3	116.1	60.0	56.7	116.7	98.3	17.8	116.1	-0.6
		Castle Hill	0.4	122.7	123.1	1.6	121.3	122.9	1.2	81.8	83.0	-39.9
		Dural		0.2	0.2		0.2	0.2				-0.2
		North Rocks	7.5	37.0	44.5	6.9	37.0	43.9	7.9	37.0	44.9	1.0
		Northmead, James Ruse Drive		4.7	4.7	0.0	4.7	4.7				-4.7
		Rouse Hill	1.2	3.7	4.8	1.2	3.7	4.9				-4.9
		Winston Hills		14.7	14.7	3.1	11.6	14.7	3.1	11.6	14.7	0.0
	The Hills Total		68.8	239.3	308.1	72.8	235.2	308.0	110.6	148.1	258.7	-49.3
North West Total			2,140.1	2,557.8	4,697.9	2,120.9	2,611.3	4,732.2	2,061.0	2,522.3	4,583.3	-148.9
South	Canterbury	Ashbury		3.1	3.1		3.1	3.1	0.0	3.1	3.1	0.0
		Belmore	0.3	3.4	3.7	0.4	3.3	3.7	0.2	3.5	3.7	0.0
		Burwood Rd, Belmore		5.4	5.4	0.2	5.2	5.4				-5.4
		Canterbury		1.5	1.5		1.7	1.7				-1.7
		Canterbury Road, Campsie		3.2	3.2		3.2	3.2	0.0	3.2	3.2	0.0
		Chapel Street		7.3	7.3		7.3	7.3	0.0	7.3	7.3	0.0
		Clemton Park	1.2	23.4	24.5	1.5	23.2	24.7	0.0	17.1	17.1	-7.7
		Croydon Park		1.5	1.5	0.0	1.5	1.5	0.0	1.5	1.5	0.0
		Kingsgrove North	0.0	35.7	35.7	0.0	35.7	35.7	0.0	35.6	35.6	0.0
		Kingsgrove South										0.0
		Lakemba	0.7	11.4	12.1	0.9	11.0	11.9	0.8	11.2	12.1	0.2
		Punchbowl, Wattle Street		15.3	15.3	0.0	11.7	11.8		11.7	11.7	0.0
		Riverwood	1.7	47.4	49.1	0.7	48.9	49.6	0.2	49.1	49.3	-0.3
		Viking St, Campsie		0.0	0.0		0.0	0.0				0.0
		West Riverwood, Wiggs Road	0.1	5.9	6.0	0.1	5.9	6.0	0.0	5.9	5.9	-0.1
		Wiley Park		1.9	1.9	0.1	1.8	1.9				-1.9
	Canterbury Total		3.9	166.3	170.2	3.8	163.5	167.3	1.2	149.1	150.4	-16.9
	Hurstville	Beverley Hills		1.5	1.5		1.5	1.5	0.0	1.5	1.5	0.0
		Hurstville		1.3	1.3		1.3	1.3	0.0	1.3	1.3	0.0
		Kingsgrove South	0.0	25.1	25.1	0.2	25.0	25.2	0.1	25.3	25.4	0.2
		Peakhurst, Boundary Rd	0.1	56.2	56.3	0.4	55.9	56.3	0.1	56.0	56.1	-0.2
		Penshurst		1.5	1.5		1.6	1.6	0.0	1.5	1.5	0.0
	Hurstville Total		0.1	85.7	85.8	0.7	85.2	85.9	0.3	85.6	85.9	-0.1
	Kogarah	Blakehurst	0.1	1.5	1.6	0.2	1.4	1.6	0.0	1.6	1.6	0.0
		Carlton	0.1	9.7	9.8	0.1	9.8	9.8	0.1	9.7	9.8	0.0
		Hurstville South		1.6	1.6	0.1	1.7	1.8	0.0	1.6	1.6	-0.2
		Kogarah, Gray Ave		0.7	0.7	0.0	0.7	0.7	0.0	0.7	0.7	0.0
	Kogarah Total		0.2	13.5	13.7	0.3	13.5	13.9	0.1	13.6	13.7	-0.2
	Marrickville	Alice St, Newtown		0.8	0.8							0.0
		Camperdown		2.8	2.8	0.1	2.8	2.8	0.1	2.8	2.8	0.0
		Dulwich Hill, Constitution Rd		0.0	0.0							0.0
		Dulwich Hill, New Canterbury Rd		0.6	0.6		0.5	0.5	0.0	0.5	0.5	0.0
		Dulwich Hill, Terry Rd		0.6	0.6							0.0
		Lewisham, New Canterbury Rd		1.4	1.4	0.0	1.4	1.4	0.0	1.4	1.4	0.0
		Lewisham, Old Canterbury Rd	0.4	2.7	3.1	0.6		0.6	0.3	0.4	0.6	0.0
		Lewisham, Parramatta Rd		0.8	0.8							0.0
		Marrickville	0.4	70.3	70.7	3.7	62.9	66.5	2.2	64.0	66.2	-0.3
		Marrickville, Addison Rd		0.9	0.9							0.0
		Marrickville, Cowper St		0.9	0.9							0.0
		Marrickville, Meeks Rd	0.0	2.7	2.7		1.5	1.5	0.0	1.5	1.5	0.0
		Newtown, Gladstone St		0.9	0.9							0.0
		Petersham, Parramatta Rd		0.2	0.2							0.0
		Petersham, Trafalgar St		0.7	0.7							0.0
		Princes Hwy Frontages	1.2	12.5	13.7	0.8	7.4	8.1	0.3	7.6	7.9	-0.3
		St Peters, Grove Street		2.0	2.0		2.0	2.0	0.0	2.0	2.0	0.0
		St Peters, King St	0.2	6.6	6.8							0.0
		St Peters, Princes Hwy	0.4	11.7	12.1	1.3	13.4	14.7	1.3	15.3	16.6	1.9
		St Peters, Unwins Bridge Rd	0.1	4.4	4.5		4.5	4.5	0.0	4.4	4.4	-0.1
		Stanmore, Bridge Rd West		0.5	0.5							0.0
		Stanmore, Bridge Rd East		1.6	1.6	0.0	1.7	1.7	0.0	1.6	1.6	0.0
		Sydney Airport Environs	1.1	14.5	15.6	1.1	17.4	18.5	0.0	15.6	15.6	-2.9
		Tempe Rd, Bus Depot		0.2	0.2		2.4	2.4	0.0	2.4	2.4	0.0

Table 2 - Zoned Employment Lands Stock by Precinct (cont.)

Subregion	LGA	Precinct	Jan-11			Jan-12			Jan-13			Net Change
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Jan 12 - Jan 13
South	Marrickville	Tempe, Carrington Rd	0.9	11.6	12.5	0.2	12.5	12.7	0.1	12.4	12.5	-0.2
		Tempe, Princes Hwy	2.2	8.2	10.5		3.7	3.7	0.0	3.7	3.7	0.0
	Marrickville Total		6.8	160.4	167.2	7.7	134.1	141.8	4.3	135.6	139.9	-1.9
	Rockdale	Bexley		2.1	2.1		2.1	2.1	0.0	2.1	2.1	0.0
		Bexley, Queen Victoria St		0.3	0.3		0.3	0.3	0.0	0.3	0.3	0.0
		Bonar Street	0.2	2.8	3.0							0.0
		Kogarah, Production Ave	0.1	8.8	8.9	0.1	8.8	8.9	0.1	8.8	8.9	0.0
		Princes Highway, Waines Cres	0.0	0.8	0.9							0.0
		Rockdale, Garnet St		1.5	1.5		0.6	0.6	0.0	0.6	0.6	0.0
		Rockdale, West Botany St	0.1	21.8	21.9	0.2	22.6	22.8	0.1	22.0	22.1	-0.7
		Turrella	0.8	12.6	13.4	1.0	13.1	14.1	0.8	12.6	13.4	-0.6
		Turrella (former Streets Icecream site)	0.0	1.4	1.4							0.0
		Wolli Creek		7.3	7.3		1.5	1.5	0.0	1.5	1.5	0.0
	Rockdale Total		1.3	59.4	60.6	1.3	48.9	50.1	1.0	47.8	48.9	-1.3
	Sutherland	Caringbah/Taren Point	1.3	142.6	143.9	2.7	142.0	144.8	1.3	142.7	144.0	-0.8
		Engadine (Princes Hwy)		0.6	0.6		0.6	0.6	0.0	0.6	0.6	0.0
		Heathcote		0.5	0.5	0.0	0.5	0.5	0.0	0.5	0.5	0.0
		Heathcote (Burns Rd)		3.7	3.7	0.1	3.6	3.7	0.1	3.6	3.7	0.0
		Kirrawee	3.5	56.7	60.2	4.5	56.7	61.1	3.5	56.7	60.2	-0.9
		Kurnell	135.0	236.2	371.2	141.4	232.0	373.4	133.5	236.5	370.0	-3.4
		Menai		4.3	4.3	0.0	4.3	4.4	0.0	4.3	4.3	0.0
		Miranda	0.1	8.2	8.3	0.1	8.2	8.4	0.1	8.2	8.3	-0.1
		Taren Point Bulky Goods		12.3	12.3		12.3	12.3	0.0	12.2	12.2	0.0
	Sutherland Total		139.9	465.1	605.1	148.8	460.3	609.0	138.5	465.3	603.8	-5.2
South Total			152.2	950.4	1,102.6	162.6	905.5	1,068.1	145.4	897.1	1,042.5	-25.6
South West	Camden	Little Street, Camden	0.0	1.4	1.4	0.1	5.4	5.4	0.0	2.3	2.3	-3.1
		Narellan	6.2	28.2	34.4	6.5	28.4	34.9	6.0	28.4	34.4	-0.5
		Smeaton Grange	86.9	121.1	208.0	88.6	110.2	198.8	75.2	122.7	197.9	-0.9
		Turner Road	43.3		43.3	42.5	0.1	42.6	36.6	2.1	38.7	-4.0
		Oran Park	18.5		18.5	18.5		18.5	18.5	0.0	18.5	0.0
	Camden Total		155.0	150.7	305.7	156.1	144.1	300.2	136.3	155.5	291.8	-8.5
	Campbelltown	Campbelltown, Blaxland Road	53.5	85.1	138.4	56.6	83.4	140.1	33.7	104.7	138.5	-1.6
		Ingleburn	39.2	278.3	317.5	38.7	279.5	318.2	27.0	290.4	317.4	-0.8
		Leumeah	2.2	16.5	18.7	2.7	16.5	19.2	2.1	16.7	18.7	-0.4
		Macquarie Fields		1.4	1.4		1.4	1.4	0.0	1.3	1.3	0.0
		Minto	34.7	220.5	255.2	37.1	220.1	257.2	24.0	231.2	255.3	-1.9
	Campbelltown Total		129.4	601.8	731.2	135.1	600.9	736.0	86.8	644.4	731.2	-4.7
	Liverpool	Cecil Park		1.6	1.6	0.0	1.6	1.6	0.0	1.6	1.6	0.0
		Chipping Norton	5.0	96.1	101.1	5.2	95.9	101.1	1.7	99.4	101.1	0.0
		Cross Roads, Casula	6.1	37.2	43.3	7.4	10.8	18.2	7.4	10.8	18.2	0.0
		Hoxton Park Airport	1.5	39.9	41.3	7.6	33.4	40.9	6.2	32.6	38.8	-2.1
		Moorebank	22.2	313.3	335.5	23.5	314.1	337.7	15.2	319.9	335.1	-2.6
		Orange Grove	4.4	36.3	40.6		21.6	21.6	0.0	21.5	21.5	0.0
		Priddle/Scrivener St	0.0	23.2	23.2	0.1	23.2	23.2	0.0	23.2	23.2	-0.1
		Sappho Road	1.2	16.3	17.5	1.2	16.3	17.5	0.7	16.8	17.5	-0.1
		Yarrunga/Prestons	103.2	253.8	357.0	93.9	260.2	354.1	125.8	216.1	341.9	-12.2
	Liverpool Total		143.6	817.6	961.1	138.9	777.0	915.9	157.0	741.9	898.8	-17.1
	Wollondilly	Appin	2.7	7.6	10.2	2.7	8.6	11.3	2.7	7.6	10.3	-1.0
		Bargo	0.2	1.6	1.8		0.7	0.7	0.0	0.7	0.7	0.0
		Maldon	56.0	46.2	102.2	55.9	46.4	102.3	57.6	46.2	103.8	1.5
		Picton	2.6	24.7	27.3	2.7	26.3	29.0	1.1	26.3	27.4	-1.6
		Picton (Coull St)	2.1		2.1	2.1		2.1	2.1	0.0	2.1	0.0
		Warragamba/Silverdale	29.7	31.6	61.3	28.9	32.6	61.5	28.8	32.6	61.3	-0.1
	Wollondilly Total		93.3	111.7	205.0	92.4	114.5	206.9	92.3	113.3	205.6	-1.3
South West Total			521.3	1,681.8	2,203.1	522.4	1,636.5	2,159.0	472.3	1,655.0	2,127.4	-31.6

Table 2 - Zoned Employment Lands Stock by Precinct (cont.)

Subregion	LGA	Precinct	Jan-11			Jan-12			Jan-13			Net Change
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Jan 12 - Jan 13
Sydney City	Sydney	Alexandria	1.2	133.8	135.0	6.9	130.5	137.4	5.8	130.8	136.6	-0.7
		Bays Precinct (Glebe Island/White Bay)	0.7	0.2	0.9	0.0	0.2	0.2	0.0	0.2	0.2	0.0
		Blackwattle Bay	0.2	0.9	1.2	0.2	1.1	1.3	0.0	1.3	1.3	-0.1
		Glebe (Lower Avon St)		0.1	0.1		0.1	0.1				-0.1
		Glebe (Parramatta Rd/ Arundell St)	0.2	2.2	2.3	0.2	2.2	2.3	0.0	1.8	1.8	-0.6
		Mascot							0.0	0.2	0.2	0.2
		Rosebery	0.3	13.8	14.2	0.9	13.3	14.2	0.1	14.0	14.1	0.0
		Wentworth Park		0.5	0.5		0.5	0.5				-0.5
	Sydney Total		2.6	151.5	154.1	8.2	147.8	156.0	5.9	148.3	154.3	-1.7
Sydney City Total			2.6	151.5	154.1	8.2	147.8	156.0	5.9	148.3	154.3	-1.7
West Central	Auburn	Auburn (Cumberland Industries)		0.7	0.7		0.7	0.7	0.0	0.7	0.7	0.0
		Auburn (Queen St)		5.5	5.5		5.6	5.6	0.0	5.6	5.6	0.0
		Auburn West	0.0	6.7	6.8	0.2	6.6	6.8	0.0	6.7	6.8	0.0
		Chullora		1.5	1.5	1.9		1.9				-1.9
		Church Street, Rookwood		1.8	1.8		1.8	1.8	0.0	1.8	1.8	0.0
		Clyburn	11.7	31.7	43.4	18.5	39.0	57.4	6.1	50.6	56.7	-0.7
		Homebush Bay		49.3	49.3	0.2	21.1	21.2	0.1	21.1	21.2	0.0
		Lidcome East	2.1	27.9	30.0	2.1	28.0	30.1	2.1	27.9	30.0	-0.1
		Lidcome South	0.2	7.4	7.6	0.1	6.9	7.0	0.1	6.9	7.0	0.0
		Lidcome West	0.0	51.3	51.3		41.8	41.8	0.0	41.7	41.7	-0.1
		New Street West		0.4	0.4	0.0	0.4	0.4	0.0	0.4	0.4	0.0
		Parramatta Road, Corridor	11.7	86.3	98.0							0.0
		Railway Street, Rookwood		0.6	0.6		0.9	0.9	0.0	0.6	0.6	-0.3
		Regents Park	4.4	74.1	78.5	3.7	75.1	78.8	3.3	75.0	78.3	-0.6
		Silverwater	3.2	147.8	150.9	5.8	145.9	151.7	3.6	147.3	150.9	-0.8
	Auburn Total		34.9	491.6	526.5	32.5	373.7	406.2	15.5	386.4	401.9	-4.4
	Bankstown	Chullora	19.5	190.5	210.0	27.1	183.0	210.0	22.3	190.3	212.5	2.5
		Condell Park		29.1	29.1	0.2	28.9	29.1	0.2	28.9	29.1	0.0
		Edward Dunlop Paper		2.9	2.9	0.1	2.8	2.9	0.1	2.8	2.9	0.0
		Greenacre Bowls		4.2	4.2	1.0	3.2	4.2	0.0	4.2	4.2	0.0
		Leightonfield Station	1.2	162.3	163.5	5.9	157.8	163.6	3.5	158.4	161.9	-1.7
		Milperra	0.4	103.2	103.7	1.5	102.2	103.7	1.3	102.4	103.7	0.0
		Padstow North	2.3	92.3	94.7	3.0	91.5	94.5	1.9	92.5	94.4	-0.1
		Padstow South	2.0	42.5	44.5	4.9	42.5	47.5	1.8	43.5	45.3	-2.2
		Punchbowl		2.9	2.9		2.9	2.9	0.3	2.5	2.9	0.0
		Revesby	2.7	130.9	133.6	3.3	130.4	133.7	1.1	132.3	133.3	-0.3
		Sefton	0.9	30.4	31.3	0.5	30.8	31.3	0.3	31.0	31.3	0.0
	Bankstown Total		29.2	791.2	820.6	47.4	775.9	823.3	32.8	788.6	821.4	-1.9
	Fairfield	Bonnyrigg Plaza	2.1	8.0	10.1	1.1	9.0	10.1	1.0	9.0	10.1	0.0
		Cabramatta CBD	0.3	1.0	1.3	0.4	1.0	1.4	0.3	1.0	1.3	0.0
		Council Depot		2.4	2.4	0.0	2.5	2.5	0.0	2.4	2.4	0.0
		Fairfield		4.7	4.7		5.0	5.0	0.0	4.7	4.7	-0.3
		Fairfield East	0.2	99.2	99.4	1.2	98.3	99.5	0.4	99.1	99.4	-0.1
		Greystanes	14.0	0.0	14.0	13.7		13.7	10.7	1.6	12.3	-1.4
		Lansvale	0.4	56.6	57.0	0.9	56.8	57.7	0.4	56.6	57.0	-0.7
		Railway Parade, Cabramatta		1.9	1.9		4.1	4.1	0.0	4.1	4.1	0.0
		Smithfield, South	0.9	41.3	42.2	1.3	42.2	43.5	0.4	42.2	42.6	-0.9
		South of Sydney Water Pipeline	252.1	0.0	252.1	160.5	96.3	256.8	87.7	169.3	257.0	0.2
		Wetherill Park	33.6	522.0	555.6	51.6	511.0	562.6	41.8	512.7	554.5	-8.1
	Fairfield Total		303.7	737.1	1,040.8	230.6	826.1	1,056.7	142.6	902.7	1,045.4	-11.4
	Holroyd	Bonds Spinning Mill		8.0	8.0		8.0	8.0	0.0	8.0	8.0	0.0
		Girraween	0.3	83.0	83.3	1.0	82.3	83.3	0.3	83.0	83.3	0.0
		Greystanes	87.1	85.7	172.8	83.3	84.5	167.7	62.9	103.8	166.6	-1.1
		Smithfield, North	20.4	328.7	349.0	21.4	328.9	350.3	22.1	326.9	349.0	-1.2
		South Parramatta	0.4	15.3	15.7	1.0	15.0	16.0	0.7	13.1	13.8	-2.2
		South Wentworthville		5.5	5.5	0.2	5.3	5.5	0.2	5.3	5.5	0.0
		Yennora (Holroyd)	0.6	187.5	188.1	5.6	182.4	188.0	0.8	185.8	186.6	-1.4
	Holroyd Total		110.3	712.1	822.4	112.4	706.4	818.8	87.0	725.9	812.8	-6.0

Table 2 - Zoned Employment Lands Stock by Precinct (cont.)

Subregion	LGA	Precinct	Jan-11			Jan-12			Jan-13			Net Change
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Jan 12 - Jan 13
West Central	Parramatta	Alfred Street, Parramatta		0.2	0.2		0.2	0.2	0.0	0.2	0.2	0.0
		Camellia/Rosehill	7.9	232.6	240.5	15.9	222.7	238.6	16.6	221.6	238.2	-0.4
		Church St, North Parramatta	0.1	26.5	26.6	0.2	10.8	11.0	0.0	11.0	11.0	0.0
		Clyde	2.1	14.4	16.5	2.1	14.0	16.2	2.1	14.1	16.1	-0.1
		Ermington	0.4	45.3	45.7	0.7	46.5	47.2	0.7	45.6	46.3	-0.9
		Granville	0.1	3.4	3.5							0.0
		Gregory Place, Harris Park		1.9	1.9		1.9	1.9	0.0	1.9	1.9	0.0
		Guildford South		4.6	4.6		4.6	4.6	0.0	4.6	4.6	0.0
		Guildford/Merrylands	0.6	5.4	6.0	1.5	4.6	6.2	0.3	5.8	6.1	-0.1
		Moreton St		4.0	4.0							0.0
		Old Windsor Road	0.1	9.0	9.1	0.1	9.0	9.1	0.1	9.0	9.1	0.0
		Old Windsor Road, Northmead	1.8	24.7	26.4	2.7	23.8	26.5	2.0	23.8	25.8	-0.7
		Pendle Hill	3.5	14.9	18.4	2.4	16.0	18.4	1.6	16.8	18.4	0.0
		Pharmacia		5.2	5.2		5.2	5.2	0.0	5.2	5.2	0.0
		Regents Park	0.2		0.2		0.1	0.1				-0.1
		River Road West, Parramatta		6.8	6.8	0.2	6.5	6.8	0.0	6.8	6.8	0.0
		Rydalmere	9.7	93.8	103.5	12.0	91.8	103.7	9.5	93.5	103.0	-0.8
		Seven Hills (Parramatta LGA)		3.7	3.7		3.7	3.7	0.0	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	0.8	52.4	53.1	0.9	50.3	51.2	0.9	50.2	51.1	0.0
		Victoria Rd		3.3	3.3		3.3	3.3	0.0	3.3	3.3	0.0
	Parramatta Total		27.8	363.2	591.0	39.2	526.3	565.4	34.2	528.2	562.4	-3.1
West Central Total			502.1	3,298.8	3,800.9	462.1	3,208.4	3,670.5	312.1	3,331.8	3,643.9	-26.7
Central Coast	Gosford	Blackwall	1.5	1.6	3.1	1.5	1.6	3.1	1.5	1.6	3.1	0.0
		Erina		10.7	10.7		10.5	10.5	0.0	10.5	10.5	0.0
		Gosford Industrial Area	3.1	8.0	11.1	3.1	8.0	11.1	3.1	8.0	11.1	0.0
		Kincumber	0.2	8.5	8.7	0.2	8.5	8.7	0.2	8.5	8.7	0.0
		Lisarow	6.0	56.3	62.4	6.5	55.9	62.4	6.5	55.9	62.3	0.0
		North Gosford and Wyoming	3.5	20.6	24.1	3.5	20.6	24.1	2.3	21.8	24.1	0.0
		Somersby	169.2	123.8	293.0	168.5	123.8	292.3	161.0	131.2	292.2	-0.1
		West Gosford	12.2	105.3	117.4	11.8	105.7	117.4	11.5	105.8	117.3	-0.1
		Woy Woy		34.4	34.4		34.4	34.4	0.0	34.4	34.4	0.0
		Woy Woy, Alma Ave		0.9	0.9		0.9	0.9	0.0	0.9	0.9	0.0
		Woy Woy, Nagari Rd		1.8	1.8	0.0	1.8	1.8	0.0	1.8	1.8	0.0
		Woy Woy, Rawson Rd		4.1	4.1		4.1	4.1	0.0	4.1	4.1	0.0
		Kariong	11.4		11.4	11.4		11.4	11.4	0.0	11.4	0.0
	Gosford Total		207.1	376.1	583.2	206.4	375.7	582.2	197.5	384.5	582.0	-0.2
	Wyong	Bateau Bay				0.4		0.4	0.4	0.0	0.4	0.0
		Berkeley Vale		8.5	8.5	0.1	8.5	8.5	0.0	8.5	8.5	-0.1
		Bushells Ridge	543.8	88.5	632.4	543.7	88.5	632.3	552.4	79.9	632.3	0.0
		Charmhaven	6.1	30.2	36.3	6.1	30.2	36.3	6.1	30.1	36.2	-0.1
		Doyalson	3.9	7.8	11.7	3.9	7.8	11.7	4.3	7.2	11.6	-0.1
		Gwandalan	4.7	1.0	5.7	4.7	1.0	5.7	4.3	1.3	5.7	-0.1
		Long Jetty		3.3	3.3	0.1	3.3	3.4	0.0	3.4	3.4	0.0
		Long Jetty/The Entrance		1.1	1.1		1.1	1.1	0.0	1.1	1.1	0.0
		North Wyong	37.4	82.0	119.4	46.7	82.2	128.9	46.9	81.8	128.7	-0.2
		Ourimbah, Pacific Hwy	3.7	6.8	10.4	3.7	6.7	10.4	3.7	6.7	10.4	0.0
		Tuggerah	34.1	245.0	279.2	47.5	245.2	292.7	54.2	232.0	286.2	-6.5
		Wyong	279.2	59.2	338.4	275.9	59.3	335.2	286.4	48.8	335.2	0.0
	Wyong Total		913.1	533.4	1,446.4	932.9	533.8	1,466.7	958.7	500.8	1,459.5	-7.2
Central Coast Total			1,120.1	909.4	2,029.6	1,139.3	909.5	2,048.8	1,156.2	885.3	2,041.5	-7.3
Sydney Region			4,542.5	11,041.0	15,583.5	4,619.6	10,774.5	15,394.2	4,290.0	10,879.3	15,169.3	-224.9

NB: Changes to precinct size from 2012 to 2013 are generally due to data refinement and updates, unless indicated as a zoning change shown in Table 5.
Marginal increases in undeveloped or developed zoned land from 2012 to 2013 for some precincts are generally a result of data refinement and updates. 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 means a value less than 0.05 hectares (ie. 500 m²) was recorded and then rounded to '0.0'.

Table 3 - Undeveloped and Serviced Zoned Land (January 2010 - January 2013)

The table below compares the amount of undeveloped and serviced zoned land for January 2010, January 2011, January 2012 and January 2013. Land is defined as 'serviced' if it has a water and sewer connection based on Sydney Water data. It is acknowledged that this does not include servicing in terms of power, roads or other infrastructure. Only precincts with over 5 hectares of undeveloped and serviced zoned land have been included and Central Coast Councils have been excluded from this analysis as Sydney Water data do not cover these LGAs (except for Gosford City Council in July 2012 and May 2013).

Subregion	LGA	Precinct	Undeveloped & Serviced Zoned Land				Net change (Jan-12 - Jan-13)
			Jan -10	Jan - 11	Jan - 12	Jan - 13	
North West	Blacktown	Arndell Park	13.6	13.6	14.4	13.6	-0.8
		Eastern Creek	178.1	164.1	9.5	12.8	3.2
		Former Wonderland	38.7	38.7	27.9	27.9	0.0
		Glendenning	31.2	30.8	31.4	30.4	-1.0
		Marsden Park	0.0	10.3	12.1	12.1	0.0
		Minchinbury	15.0	15.0	15.0	6.9	-8.1
		Mount Druitt	6.6	6.6	6.1	5.3	-0.8
		The Raceway Precinct	9.7	8.9	7.3	8.6	1.3
	Blue Mountains	Katoomba	9.4	7.8	8.3	6.4	-1.9
		Lawson	11.1	11.1	11.1	10.2	-0.9
	Penrith	Emu Plains	14.3	13.3	12.0	11.7	-0.3
		Erskine Park^	172.2	76.6	165.3	54.2	-111.0
		North Penrith	27.8	26.3	32.1	16.0	-16.2
		St Marys	20.4	16.6	11.7	12.3	0.5
	The Hills	Annangrove	0.0	11.3	11.3	11.3	0.0
		North Rocks	7.5	7.5	6.9	7.9	1.0
South West	Camden	Narellan	5.7	5.9	5.7	5.7	-0.1
		Oran Park	0.0	0.0	18.5	18.5	0.0
		Smeaton Grange	54.7	49.7	50.8	51.9	1.0
		Turner Road	0.0	0.0	17.1	8.1	-9.0
	Campbelltown	Campbelltown, Blaxland Road	34.2	33.5	31.0	26.1	-4.9
		Ingleburn	37.7	36.9	34.3	25.3	-9.0
		Minto	32.2	32.2	31.6	20.5	-11.1
	Liverpool	Casula, Cross Rds	6.1	6.1	6.1	7.4	1.4
		Hoxton Park Airport	0.0	0.0	5.9	4.7	-1.1
		Moorebank	13.5	12.8	12.2	9.7	-2.5
		Yarrunga/Prestons	16.5	18.6	10.5	16.3	5.7
West Central	Auburn	Clyburn	6.5	6.5	6.1	6.1	0.0
	Bankstown	Chullora	10.5	10.5	12.5	8.2	-4.3
	Fairfield	Wetherill Park	23.0	24.1	27.7	23.9	-3.9
	Holroyd	Greystanes	56.0	38.3	24.8	10.2	-14.7
		Smithfield, North	20.3	20.1	19.7	20.6	0.9
	Parramatta	Rydalmere	7.5	7.5	7.7	7.7	0.0
East	Botany Bay	Banksmeadow	8.5	8.5	8.0	8.0	0.0
Central Coast	Gosford	Somersby*	N/A	N/A	10.1	21.1	11.0
Sydney Region Total			1012.0	892.0	830.2	677.8	-152.4

NB: Only showing those precincts with over 5 ha of undeveloped and serviced zoned land in January 2013.
^ Significant drop at Erskine Park due to refinement of Sydney Water asset attribute data.
* Servicing data for Somersby only available for July 2012 and May 2013 from Gosford City Council.

Table 4 - Sydney Region - Area of Undeveloped Zoned Employment Lands by Lot Size (January 2012 - January 2013)

The table and figure below provides a breakdown of undeveloped zoned employment lands by lot sizes for January 2012 and January 2013. Lot sizes are grouped into 6 cohorts ranging from less than 0.1 hectare to more than 10 hectares. The data is presented on both the number of lots (No.) and total area (Ha) for each cohort.

Lot Sizes	Lots				Net Change		Total Area				Net Change	
	2012		2013		Lots (2012-2013)		2012		2013		Total Area (2012-2013)	
	No	%	No	%	No	%	Ha	%	Ha	%	Ha	%
<0.1 ha	1,314	41%	498	24%	-816	-17%	45	1%	23	1%	-22	0%
0.1-0.5 ha	1,026	32%	811	40%	-215	7%	262	6%	209	5%	-53	-1%
0.5-1 ha	290	9%	248	12%	-42	3%	206	4%	177	4%	-29	0%
1-5 ha	378	12%	324	16%	-54	4%	847	18%	750	17%	-97	-1%
5-10 ha	84	3%	72	4%	-12	1%	595	13%	506	12%	-89	-1%
>10 ha	90	3%	93	5%	3	2%	2,666	58%	2,625	61%	-41	3%
Sydney Region Total	3,182	100%	2,046	100%	-1,136		4,620	100%	4,290	100%	-330	

Figure 5 - Sydney Region - Area of Undeveloped Zoned Employment Lands by Lot Size (January 2012 - January 2013)

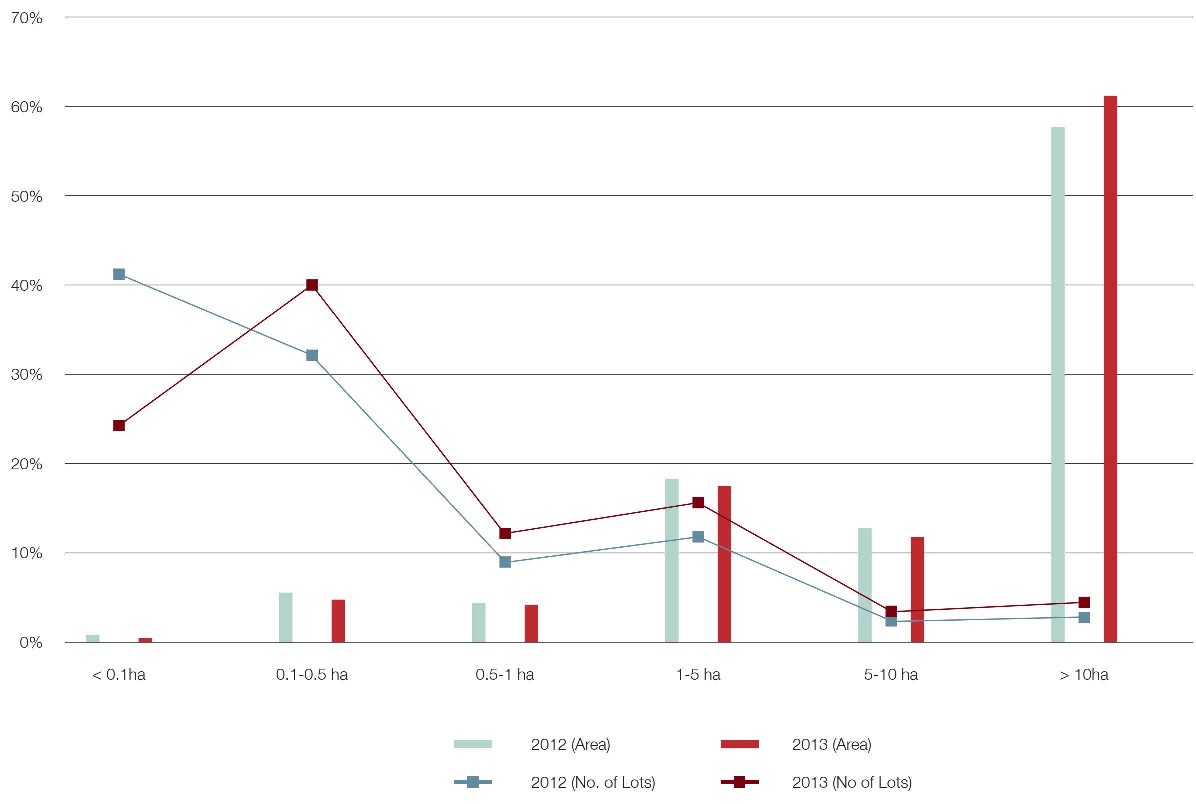


Table 5 - Record of Zoning Changes

This table provides details of all known zoning changes to employment lands precincts between January 2012 and January 2013, including new industrial zone additions, and also losses due to rezonings. The table also provides a detailed breakdown of all the various zones (under the Standard Instrument Local Enviromental Plan) that were used when rezoning these precincts.

Precinct	LGA	2012	2013																Total Rezoned Land	Land Zone Additions
		IN	IN	R1	R2	R3	R4	B1	B2	B4	B5	B6	B7	RE1	RE2	SP2	W1	E2		
Burwood Rd, Belmore	Canterbury	5.4					0.7		3.3		0.4	1.0							5.3	
Castle Hill	The Hills	122.9	82.8								37.4								37.4	
Clemton Park	Canterbury	24.7	17.1			0.8	3.6	1.9			1.2								7.5	
Canterbury	Canterbury	1.7														1.1			1.1	
Dural Service Centre [1]	Hornsby	36.6									36.0								36.0	
Glebe (Lower Avon St)	Sydney	0.1		0.1															0.1	
Glebe (Parramatta Rd/ Arundell St)	Sydney	2.3	1.8							0.5									0.5	
Llandilo [2]	Penrith	3.3	34.5		3.3														3.3	36.1
Mulgrave/Vineyard	Hawkesbury	72.9	51.4								22.4								22.4	
Northmead, James Ruse Drive	The Hills	4.7					1.4					3.4							4.8	
North Richmond	Hawkesbury	13.9	10.3								3.4								3.4	
Port Botany [3]	Botany/ Randwick	254.8	311.8																	56.7
Regents Park	Auburn	78.5	78.5											0.3					0.3	
Rouse Hill	The Hills	4.9				1.9						3.0							4.9	
St Peters, Unwins Bridge Rd	Marrickville	4.5	4.4		0.1														0.1	
Tangarra St East	Burwood	1.2	0.7			0.5													0.5	
The Northern Road, Llandilo	Penrith	26.2	0.0		26.2														26.2	
Wentworth Park	Sydney	0.5								0.5									0.5	
Wiley Park	Canterbury	1.9				0.6			0.4		0.2	0.7							1.8	
Total		661.1	593.2	0.1	29.6	3.7	5.7	1.9	3.7	1.1	101.0	8.1	0.0	0.3	0.0	1.1	0.0	0.0	156.1	92.8
Net Difference 2012-13 IN Lands for rezoned precincts	-67.9																			
% of Total Rezoned Land				0.0%	19.0%	2.4%	3.6%	1.2%	2.4%	0.7%	64.7%	5.2%	0.0%	0.2%	0.0%	0.7%	0.0%	0.0%	100%	

NB: Only rezoned amounts of land greater than 0.1ha are included in the above table. Numbers may not add up exactly due to rounding.

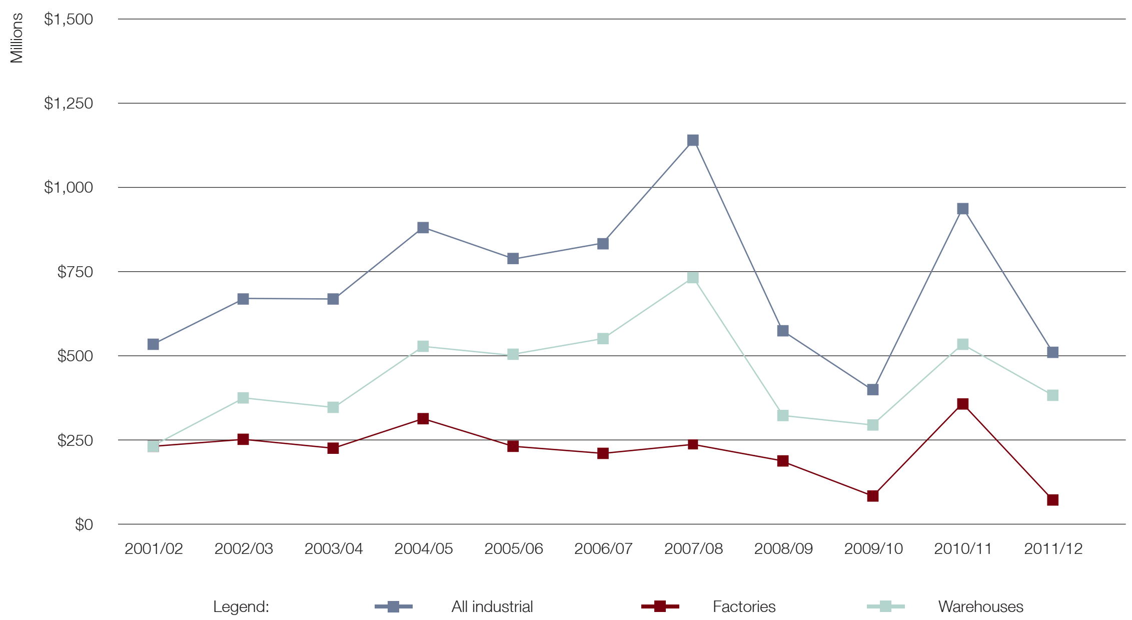
1. Rezoned amount of 36.6ha in the Dural Service Centre precinct was actually to 3(e), but has been included in B5, which is a comparable Standard Instrument LEP zone, for the purpose of this analysis.
2. Rezoned amount of 3.3ha in Llandilo precinct was actually to "Urban Zone", but has been included in R2, which is a comparable Standard Instrument LEP zone, for the purpose of this analysis.
3. New land added to the Port Botany precinct falls under the SPI zone, but has been included in the IN zone (as employment lands) for the purpose of this analysis.

Table 6 - Value ($) of Industrial Approvals for 2011/12 by LGA and Subregion

The building activity table below shows the monetary value ($) of all industrial Development Approvals for the financial year from July 2011 to June 2012 by LGA and Subregion for the Sydney Region. The data is derived from ABS non-residential building approvals data and covers ‘warehouses’, ‘factories’ and ‘other industry’. This data includes new development, alterations and additions and is limited to DAs valued at over $50,000.

LGA	Factories and other secondary production buildings	Warehouses (excluding produce storage)	Other Industries	Total industrial building
Botany Bay	2,778,700	6,630,000	675,934	10,084,634
Randwick	420,000	5,662,500	0	6,082,500
Waverley	881,265	0	0	881,265
Woollahra	0	0	0	0
East Subregion	4,079,965	12,292,500	675,934	17,048,399
Sydney	130,000	4,300,000	11,275,428	15,705,428
Sydney City Subregion	130,000	4,300,000	11,275,428	15,705,428
Marrickville	2,980,000	10,641,375	1,000,000	14,621,375
Hurstville	0	600,000	600,000	1,200,000
Kogarah	50,000	0	0	50,000
Rockdale	80,000	0	0	80,000
Sutherland Shire	250,000	958,000	870,000	2,078,000
Canterbury	80,000	1,790,000	80,000	1,950,000
South Subregion	3,440,000	13,989,375	2,550,000	19,979,375
Bankstown	1,031,300	41,397,564	2,873,000	45,301,864
Fairfield	3,610,000	18,505,515	3,411,000	25,526,515
Auburn	805,000	22,838,197	8,073,640	31,716,837
Holroyd	0	19,398,500	50,000	19,448,500
Parramatta	5,142,160	4,653,420	500,000	10,295,580
West Central Subregion	10,588,460	106,793,196	14,907,640	132,289,296
Liverpool	16,617,550	34,540,000	1,936,287	53,093,837
Camden	3,525,469	10,500,000	400,000	14,425,469
Campbelltown	6,207,143	18,303,475	1,360,000	25,870,618
Wollondilly	100,000	140,000	500,000	740,000
South West Subregion	26,450,162	63,483,475	4,196,287	94,129,924
Leichhardt	180,000	110,000	0	290,000
Ashfield	0	7,375,000	0	7,375,000
Burwood	0	0	0	0
Canada Bay	0	80,000	0	80,000
Strathfield	0	1,299,000	92,000	1,391,000
Inner West Subregion	180,000	8,864,000	92,000	9,136,000
Blue Mountains	0	1,380,000	0	1,380,000
Hawkesbury	390,000	1,546,794	1,083,690	3,020,484
Penrith	7,015,000	48,000,235	7,143,000	62,158,235
Blacktown	11,617,880	66,775,263	8,332,571	86,725,714
Hunters Hill	0	0	0	0
The Hills Shire	0	25,415,974	180,000	25,595,974
North West Subregion	19,022,880	143,118,266	16,739,261	178,880,407
Lane Cove	0	4,650,000	0	4,650,000
Mosman	0	0	0	0
North Sydney	0	0	0	0
Ryde	0	0	0	0
Willoughby	0	0	611,300	611,300
Inner North Subregion	0	4,650,000	611,300	5,261,300
Hornsby	3,655,810	287,650	145,000	4,088,460
Ku-ring-gai	0	178,000	0	178,000
North Subregion	3,655,810	465,650	145,000	4,266,460
Manly	0	0	0	0
Pittwater	0	92,477	0	92,477
Warringah	0	9,461,414	763,112	10,224,526
North East Subregion	0	9,553,891	763,112	10,317,003
Gosford	2,700,000	6,442,000	1,447,928	10,589,928
Wyong	205,000	10,989,000	1,240,000	12,434,000
Central Coast Region	2,905,000	17,431,000	2,687,928	23,023,928
Sydney Region Total	70,452,277	384,941,353	54,643,890	510,037,520

Figure 6 - Sydney Region - Value ($) of Industrial Approvals (2001/02 to 2011/12)



* NB: Following a spike in DA values for warehousing and factories in 2010/11, which was underpinned by significant developments in Botany and Eastern Creek, DA values have returned to previous levels in 2011/12.

Figure 7 - Value ($) of Industrial Approvals for 2011/12 by Subregion

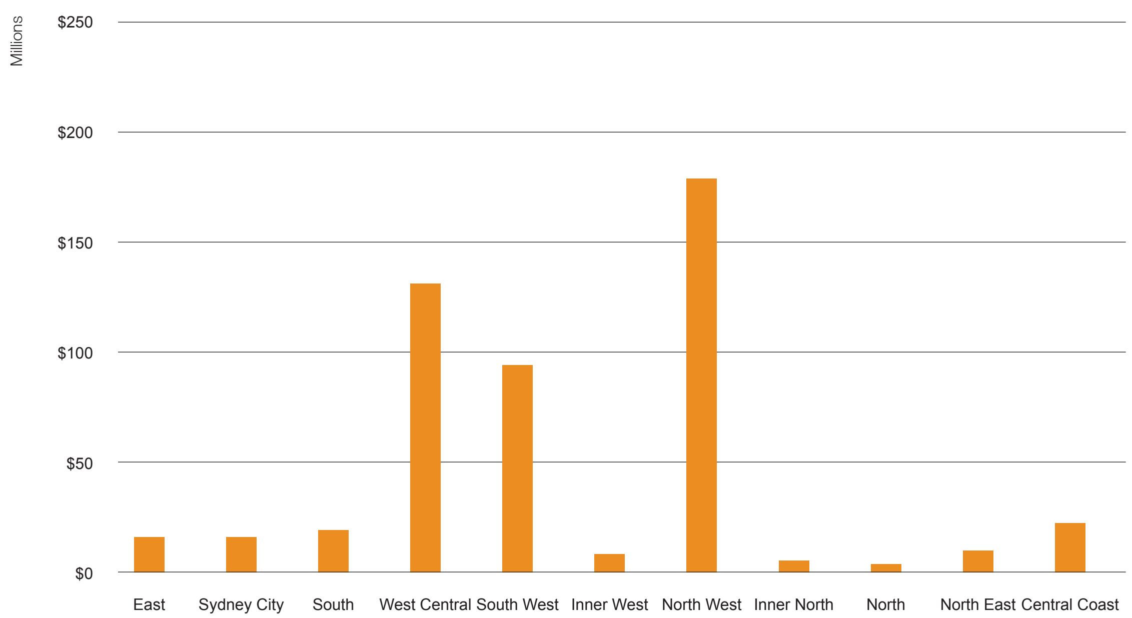


Table 7 - Take-up of Employment Lands by Key Precincts (January 2008 - January 2013)

The table below summarises take-up of employment lands over the 5 consecutive calendar years 2008, 2009, 2010, 2011 and 2012. Take-up is defined as land that has been consumed by industrial development (i.e. vacant employment lands which have been developed over a 12 month period). Only those precincts which experienced take-up of 5 or more hectares in one or more of the years is shown in the table. However, the subregion totals shown in the table also include all the smaller cases of take-up. For Metropolitan Sydney, Sydney Water data was used to identify a change in development status from undeveloped to developed. In the Central Coast, where this data is not avaliable, aerial photography* was used to identify take-up of land, but only for the 2010, 2011 and 2012.

Subregion	Precinct	Jan 08-Jan 09 (Ha)	Jan 09- Jan 10 (Ha)	Jan 10 - Jan 11 (Ha)	Jan 11 - Jan 12 (Ha)	Jan 12 - Jan 13 (Ha)	Total Ha
East	Port Botany	1.3	5.3	0.1	0.5	0.0	7.2
East Total		3.6	11.9	0.3	0.5	1.2	17.5
North West	Eastern Creek	25.5	4.3	11.4	32.3	0.0	73.5
	Annangrove	0.0	0.0	6.0	0.0	0.0	0.0
	Erskine Park	28.3	50.6	0.0	19.9	30.7	129.6
	Former Wonderland	0.0	9.5	0.0	10.7	0.0	20.2
	Glendenning	10.4	5.7	0.2	0.8	0.0	17.0
	Huntingwood West	0.0	0.0	0.0	18.8	0.0	18.8
	Marsden Park	0.0	0.0	0.0	0.0	16.7	16.7
	Minchinbury	6.5	0.0	0.0	0.0	0.0	6.5
	North Penrith	0.9	7.2	4.3	0.4	7.0	12.8
	Ropes Crossing	0.0	10.5	0.0	0.0	0.0	10.5
	Seven Hills (Blacktown LGA)	7.9	3.0	0.4	0.1	0.0	11.4
North West Total		115.6	94.7	33.9	87.5	71.8	403.5
South	Kurnell	1.8	22.4	0.2	0.0	0.0	24.4
South Total		9.3	27.5	0.4	2.8	3.4	43.4
South West	Ingleburn	14.9	4.8	0.3	0.4	0.0	20.3
	Minto	3.4	0.5	6.1	0.5	0.0	10.5
	Smeaton Grange	19.6	3.3	9.0	0.7	0.0	32.6
	Hoxton Park	0.0	0.0	38.1	0.0	0.0	38.1
	Campbelltown, Blaxland Road	0.0	0.0	0.0	0.0	15.1	15.1
	Yarrunga/Prestons	15.6	22.5	5.3	1.4	0.9	44.8
South West Total		71.2	38.0	61.2	7.2	19.7	197.3
West Central	Regents Park	8.8	1.4	1.2	0.8	0.0	12.2
	Greystanes	0.0	0.0	16.8	0.0	7.1	23.9
	Chullora	2.0	0.3	0.1	5.1	0.0	7.4
	South of Sydney Water Pipeline	0.0	0.0	0.0	10.0	0.0	10.0
	Wetherill Park	12.2	6.2	0.0	0.0	0.0	18.5
West Central Total		45.6	16.8	19.7	17.8	15.5	115.4
Sydney Region Subtotal (excl Central Coast)		264.4	205.0	118.6	116.9	123.0	827.9
Central Coast	Somersby	N/A	N/A	15.5	0.0	7.8	23.3
	North Wyong	N/A	N/A	0.0	0.2	0.0	0.2
	Tuggerah	N/A	N/A	0.0	1.9	0.0	1.9
	Wyong	N/A	N/A	18.9	0.5	5.1	24.5
Central Coast Total		N/A	N/A	34.4	3.0	19.9	37.4
Sydney Region Total		264^	205^	153	120	143	865^

NB: Table 7 shows only the precincts where in one or more of the years there was take-up of 5 hectares or more.
* Source: PhotoMaps by nearmap.com
^ The Sydney Region Totals for ‘Jan 08 - Jan 09’ and ‘Jan 09 - Jan 10’ do not include Central Coast and therefore the ‘Total Ha’ column does not include Central Coast data for those 2 years.

Table 8 - Status of Employment Lands at January 2012 and January 2013

The table and figure below compares employment lands stock at different stages of the development pipeline between January 2012 and January 2013. This shows all currently identified land (i.e. both zoned and unzoned/proposed) referred to as 'Strategy Identified Land', 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 a water and sewer connection).

Status of Employment Lands	Jan 2012 (Ha)	Jan 2013 (Ha)	Net Change (Ha) 2012 - 2013
Strategy identified land	7,269	7,406	137
Undeveloped zoned land:	4,620	4,290	-330
- Undeveloped zoned land not serviced	3,789	3,612	-177
- Undeveloped zoned land and serviced	830	678	-152*

NB: 'Undeveloped zoned land' is a subset of 'Strategy identified land', and 'Undeveloped zoned land not serviced' and 'Undeveloped zoned land and serviced' are both subsets of ' Undeveloped zoned land'. 'Strategy identified land' includes land which is identified in published NSW Government or council documents as committed future or potential industial lands as well as undeveloped zoned industrial land.
* Significant drop in undeveloped zoned and serviced land largely due to refinement of Sydney Water asset attribute data at Erskine Park.

Figure 8 - Status of Employment Lands at January 2012 and January 2013

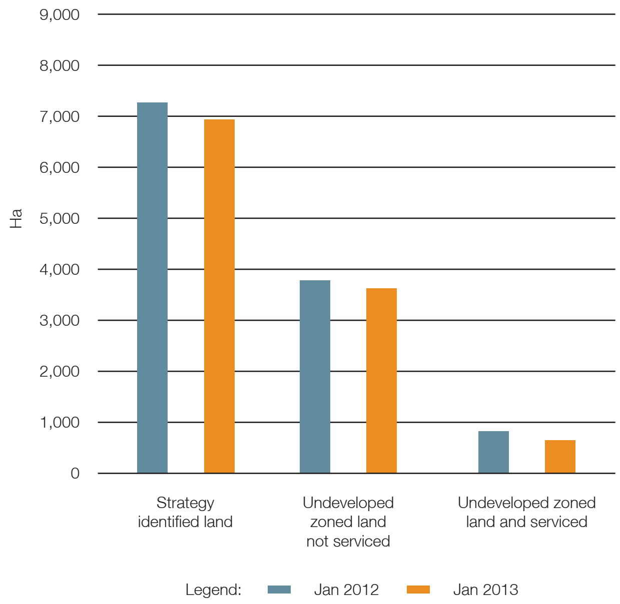


Table 9 - Assessment of the Adequacy of Employment Lands Supply at January 2013

The table below estimates how long (in number of years) current stocks of employment lands at different stages of the development pipeline may last based on high or low take-up rates. Supply standards, presented as number of years, have been applied to ensure adequate stocks are available at different stages in recognition of time taken to identify, zone and service employment lands.

Status of Employment Lands	Number of years estimated supply			Supply Standards
	Jan-13 (ha)	High take-up (300 ha pa)	Low take-up (80 ha pa)	
Strategy identified land	7,406	25	93	20 yrs
Undeveloped zoned land not serviced	3,612	12	45	8-10 yrs
Undeveloped zoned land and serviced	678	2	8	5-7 yrs

Business Parks

Table 10-13 and Figure 9 below provide data on major Business Parks within the Sydney Metropolitan Region. Business Parks which are included in this analysis are those which have a zoned area greater than 50 ha and are identified as a Specialised Precinct or Potential Specialised Precinct in the *Draft Metropolitan Strategy for Sydney to 2031*. Tables below include data on development status, the amount of undeveloped and serviced (water and sewer) zoned land, lot sizes of undeveloped zoned land and also recent take-up.

Table 10 - Development status of zoned business park precincts at January 2013

Business Park Precinct	Jan-13 (Ha)		
	Undeveloped	Developed	Total
Frenchs Forest	3.2	54.5	57.6
Macquarie Park	17.1	142.0	159.1
Marsden Park	98.5	24.7	123.2
Norwest	39.1	119.9	159.0
Sydney Olympic Park/Rhodes	2.9	75.7	78.5
Total	160.8	416.7	577.5

Table 12 - Area (Ha) of undeveloped zoned business park land by lot size at January 2013

Lot Sizes	No of Lots	%	Area (Ha)	%
<0.1ha	4	5%	0.2	0%
0.1-0.5ha	12	16%	2.7	2%
0.5-1ha	16	21%	12.0	7%
1-5ha	34	45%	68.4	43%
5-10ha	7	9%	57.3	36%
>10ha	2	3%	20.3	13%
Total	75	100%	160.8	100%

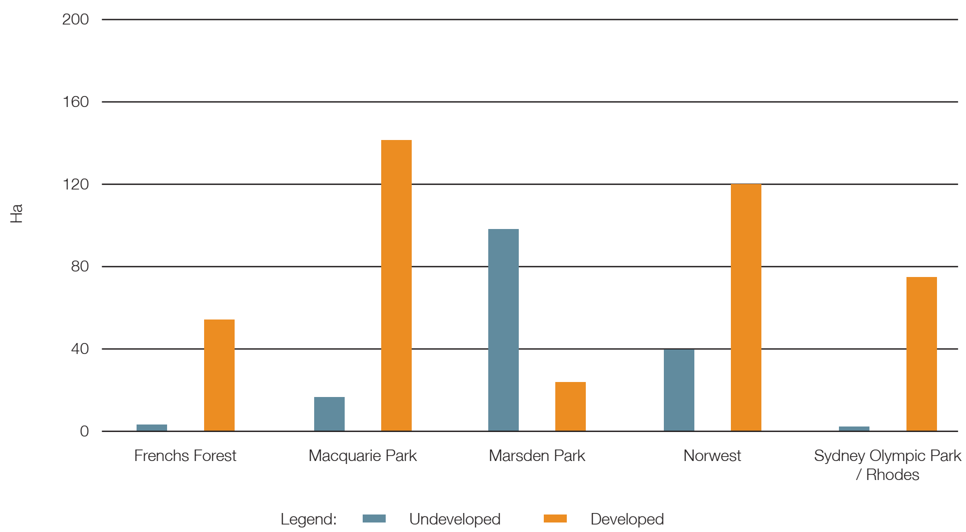
Table 11 - Undeveloped and Serviced zoned business park lands at January 2013

Business Park Precinct	Undeveloped and Serviced Zoned Land (Ha)
Frenchs Forest	0.5
Macquarie Park	11.5
Marsden Park	0.0
Norwest	0.6
Sydney Olympic Park/Rhodes	1.0
Total	13.6

Table 13 - Take-up (Ha) of zoned business park land (Jan 12 - Jan 13)

Business Park Precinct	Take-up (Ha)
Frenchs Forest	0.0
Macquarie Park	0.0
Marsden Park	10.1
Norwest	0.0
Sydney Olympic Park/Rhodes	1.5
Total	11.6

Figure 9 - Zoned Business Park Lands Stock (Jan 13)



Glossary

Business Parks: For the purpose of the ELDP Business Parks are defined as major precincts which support a mix of manufacturing, logistics, warehousing, R&D and office functions that enable companies to consolidate functions. Business Parks which are included in the ELDP are those which have a zoned area greater than 50 ha and are identified as a Specialised Precinct or Potential Specialised Precinct in the *Draft Metropolitan Strategy for Sydney to 2031*.

Employment Lands: Land that is zoned for industry and/or warehouse uses including manufacturing; transforming 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 supply of Employment Lands for the Sydney Region and assisting infrastructure coordination.

Employment Land Precincts: Contiguous areas of zoned industrial (or similar) land which form the basis of data collection for the ELDP and range from less than 0.1 hectares to over 500 hectares.

Existing supply: Land identified through Local Environmental Plans, State Environmental Planning Policies or other planning instruments as zoned for Employment Lands purposes, at the time of data collection.

Developed Employment Lands: Currently zoned Employment Lands that were occupied by an employment lands use, at the time of data collection.

Industrial Building Approvals Activity: Derived from ABS non-residential building activity data, this monitors the value in AUS $ 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 ways in which land is 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 standardised

Strategy Identified Land: Land which has been identified in endorsed NSW Government or council documents (including draft Subregional Strategies and Growth Centre Structure Plans), as future or potential Employment Lands, and also zoned Undeveloped Employment Lands.

Supply Standards: These calculate adequacy of Employment Lands supply, based on number of years for different stages of the development pipeline, using high and low take-up rates. They are based on industrial land planning practices used interstate and comparison standards for residential land provision. They are also based on planning horizons used in the new draft Metropolitan Strategy, currently being prepared (at the time of printing). format and set of provisions.

Sydney Region: Refers to Metropolitan Sydney comprising 10 subregions as defined in the 2005 Metropolitan Strategy, and the Central Coast comprising Wyong and Gosford LGAs.

Take-up: Quantity in hectares of zoned Employment Lands which has changed from 'undeveloped' (vacant) to 'developed' (occupied) over a 12 month period (eg between January 2011 and January 2012) based on Sydney Water data and confirmation 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 which also have a water and sewer connection based on Sydney Water data or data received from Gosford City Council (for that LGA).

Undeveloped Employment Lands: Currently zoned Employment Lands which were not occupied by an employment lands use, at the time of data collection. It may therefore be vacant or occupied by another use. This includes both newly zoned greenfield Employment Lands, as well as areas of undeveloped land within established urban areas which may have been vacated or have never been developed, or have been occupied by another use, such as housing.

Data Sources

Aerial Photography: Source - PhotoMaps by nearmap.com

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

Industrial Building Approvals: Source - Australian Bureau of Statistics

Lot Sizes: Source - NSW Land and Property Information

Servicing Data: Source - Gosford City Council and Sydney Water

Zoning Data: Source - Department of Planning and Infrastructure

GIS data created using GDA 1994 / MGA Zone 56

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Employment Lands Development Program