NSW GOVERNMENT | Planning & Environment

Employment Lands Development Program

2014 Update Report

Centre for Demography, Economics & Research

Abstract: ELDP 2014 Update Report

The 2014 ELDP Update Report is a comprehensive analysis of the current state of play of industrial land supply and major business parks across the Sydney Region. It provides unparalleled data on existing and future planned stocks of industrial and business park lands. It offers valuable insights into the current availability of vacant industrial and business park 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 overtime to assess if there is enough land available, or in the pipeline, to meet likely future demand (supply standards).

This report is, therefore, an essential research base for anyone wanting to develop or invest in industrial property and business parks. It is also a vital 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 of the region.

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KEY FINDINGS AND TRENDS

Between January 2013 and January 2014 there was little change in overall zoned employment lands stock in the Sydney Region. 27% of this stock is undeveloped, and a significant proportion of this undeveloped stock is in Western Sydney and the Central Coast. There continues to be significant rezoning activity, particularly as a result of rezoning of new land in the Growth Centres, in addition to the continued introduction of the Standard Instrument LEPs. Take-up of undeveloped zoned land has continued to increase from the previous year along with the value ($) of industrial approvals.

In January 2014, there were 15,328 hectares of existing zoned employment lands, including both developed and undeveloped lands. This is an increase of 159 hectares (1%) from January 2013, resulting from the net effect of the addition of new industrial zones in the Growth Centres and take-up of industrial lands.

In January 2014, there were 4,087 hectares of undeveloped zoned employment lands, including lands that are both serviced and not serviced. This is a decrease of 203 hectares from January 2013, resulting from the net effect of the addition of new industrial zones together with some rezoning and take-up of existing industrial lands plus some data refinement.

In January 2014, there was 463 hectares of undeveloped zoned and serviced employment lands, which in certain cases may be able to be developed. This is a decrease of 215 hectares from January 2013. The decline is largely due to data refinement, but is also due to some undeveloped and serviced land being developed (take-up).

In January 2014, there were 2,902 hectares of proposed employment lands identified in planning strategies, which have yet to be rezoned. This is a decrease of 214 hectares, due mainly to the rezoning of two new precincts in the North West and South West Growth Centres (Leppington North/Austral and Box Hill). There was no new land identified for proposed employment lands in 2013.

During 2013, 258 hectares of industrial land (IN zone) were rezoned for other purposes. Of this, 35 hectares was rezoned to a zone in which industrial uses are not permitted, mainly residential zones. The remaining 223 hectares was rezoned to B5, B6 or B7 zone which continue to permit industrial uses. For the first time the B5, B6 and B7 will be monitored as part of the 2014 report. Notwithstanding these losses, 174 hectares of new employment lands were added in the Growth Centres.

In 2012/13 a total of $650 million of industrial building activity was approved in the Sydney Region, this is an increase from the value of activity in the previous year in 2011/12 ($510 million). The increase in industrial approvals focused largely on the warehouse sector and ‘other industries’, rather than the factory sector which saw a minor increase of only $4 million.

Figure 1 - Zoned Employment Lands Stock by Subregion (Jan 2014)

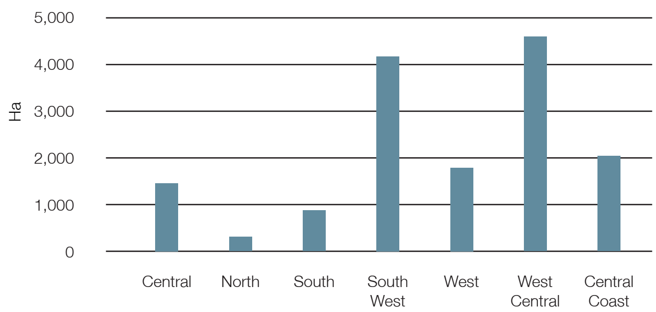


Figure 2 - Rezoning of Employment Lands to other Zones

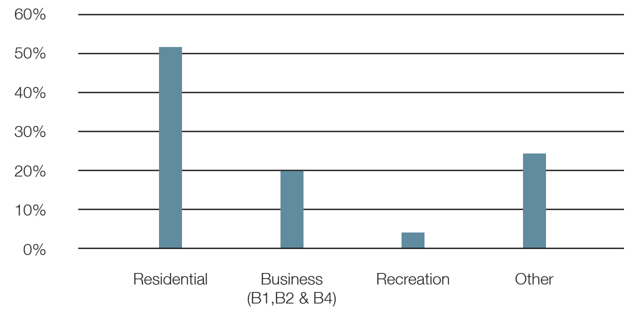


Figure 3 - Value ($m) of Industrial Approvals

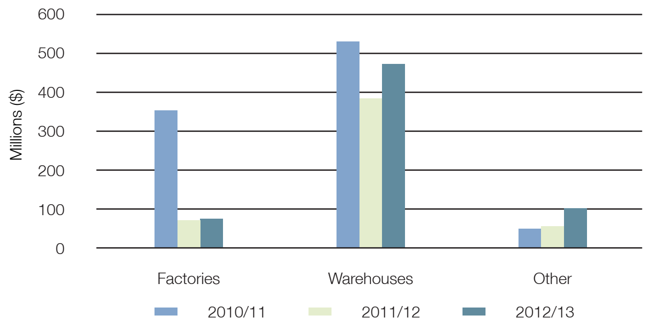
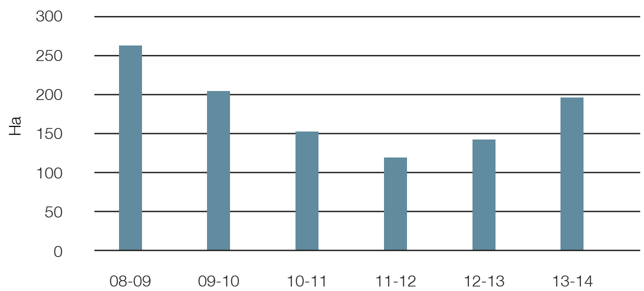


Figure 4 - Take-up of Employment Lands (Ha)



In total, 196 hectares of employment lands were taken up by industrial development in 2013. This follows the recent trend in take-up rates from 2011 (120 ha) and 2012 (143 ha).

In terms of adequacy of stocks at January 2014, using the average take-up data recorded over the past 6 years (180 ha per annum), there are 2.5 years supply of undeveloped and serviced land. Using a low take-up rate of 80 hectares per annum there will be 6 years supply, however using a high take-up rate of 300 hectares per annum there will only be 1.5 years supply. At a high take up rate, the amount of undeveloped and serviced zoned land does not meet the supply standard benchmark of 5-7 years. This is a similar result to the past 4 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.

2013 was the second year in which Business Parks (those with over 50 hectares of zoned land and strategy identified) have been monitored. There has been very little change in established Business Parks over the past year, with no take-up of existing zoned and serviced land recorded. Despite this, 79 hectares of new undeveloped land (Leppington North Business Park) has been added to the program. Continued monitoring of land take-up in the newer Business Parks (Marsden Park and Leppington North) should provide insight into the future of Business Park development in Sydney, and there continues to be significant stocks of undeveloped land remaining at Norwest Business Park which could be developed.

Figure 5 - Adequacy of Supply of Employment Lands

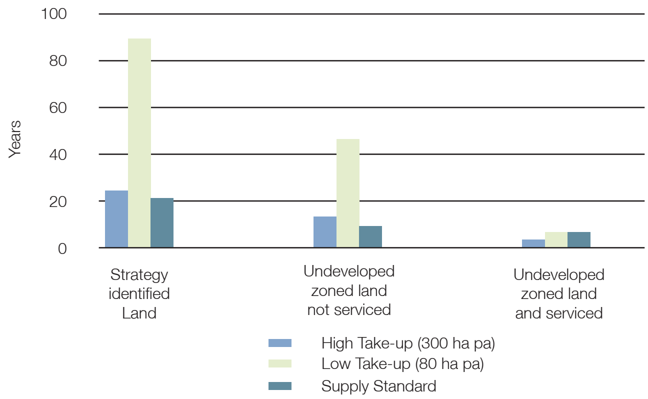
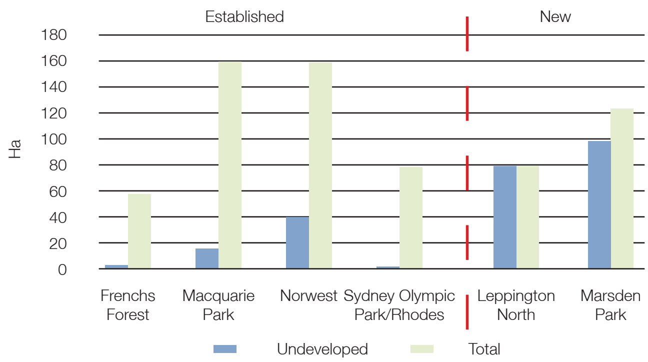
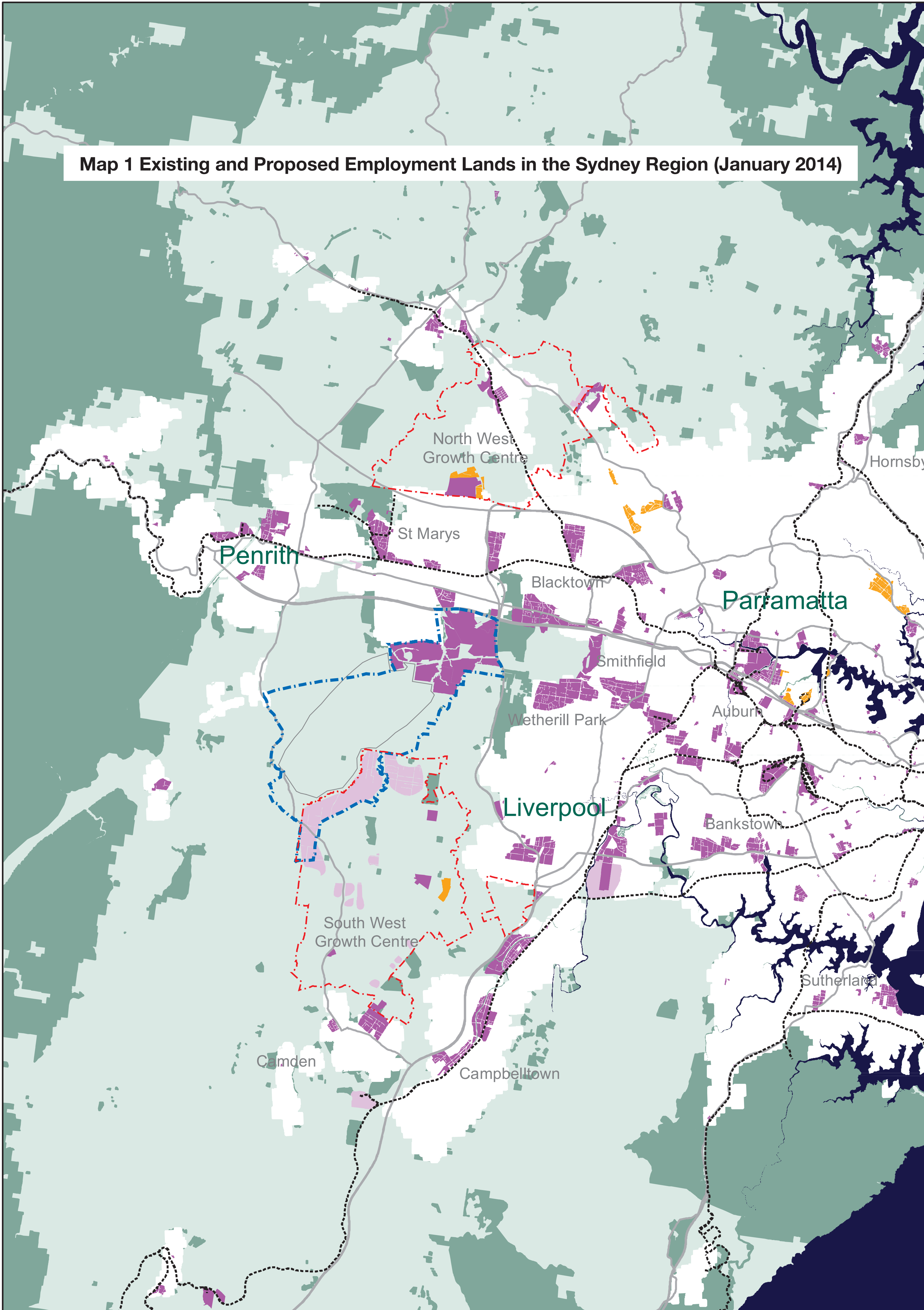
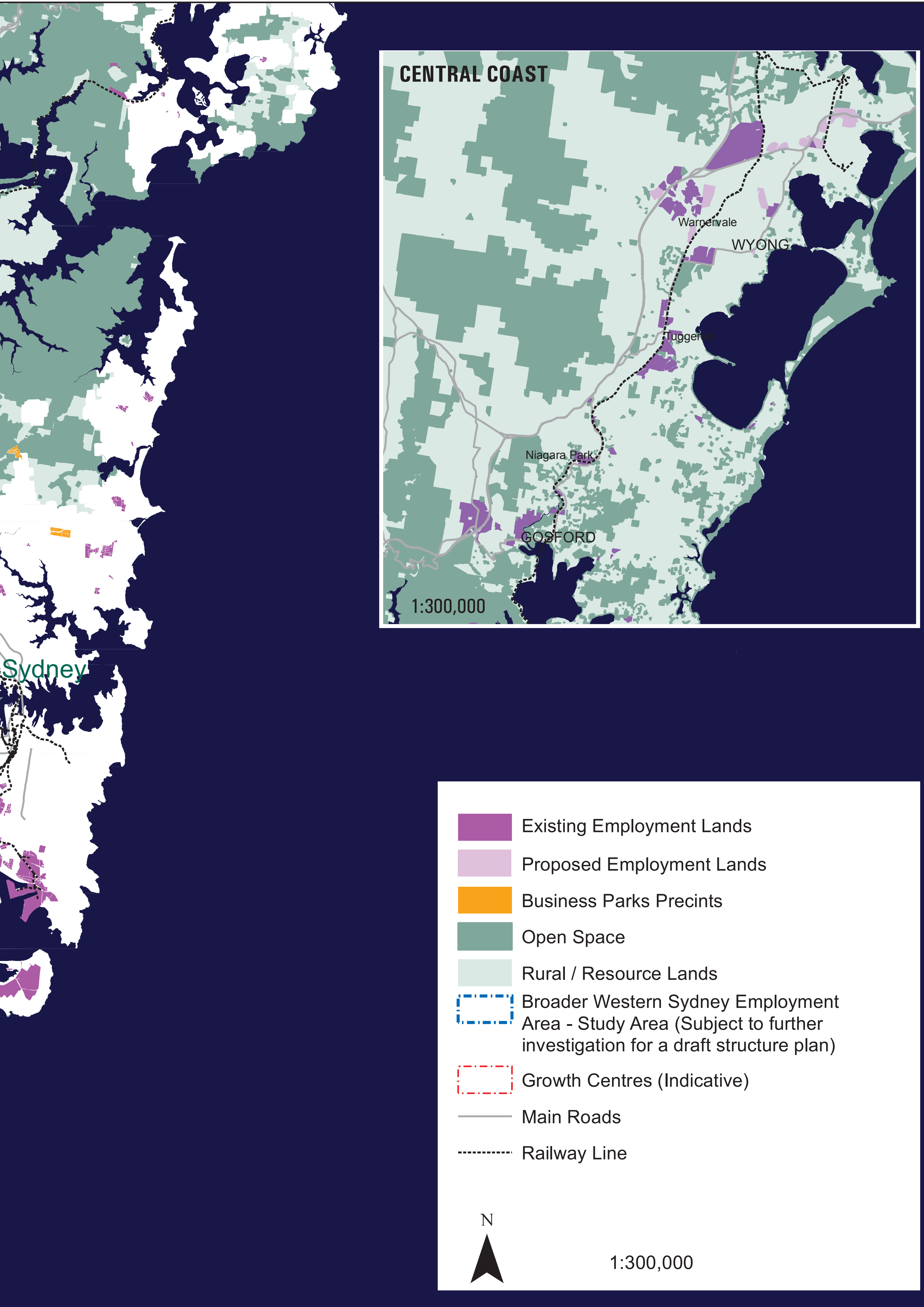


Figure 6 Zoned Business Park Land Stocks (Ha) - Jan 2014



Map 1 Existing and Proposed Employment Lands in the Sydney Region (January 2014)




CENTRAL COAST
Warnervale
WYONG
Niagara Park
GOSFORD
1:300,000
Sydney
Existing Employment Lands
Proposed Employment Lands
Business Parks Precints
Open Space
Rural / Resource Lands
Broader Western Sydney Employment Area - Study Area (Subject to further investigation for a draft structure plan)
Growth Centres (Indicative)
Main Roads
Railway Line
N
1:300,000

INTRODUCTION

This report is an update of the ***Employment Lands Development Program (ELDP) 2013 Update Report***. It provides information on total stocks of Employment Lands for the Sydney Region (including Central Coast). The report contains data, collected from Sydney Water, at January 2014. For the Central Coast Region, aerial photography was used to determine development status as of January 2014. Updated data is also presented on industrial building activity for June 2012 to July 2013 and take-up of Employment Lands from January 2013 to January 2014. Further, data on business parks has continued to be monitored and provided since the first time last year.

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

Chapter 1 - Supply for Employment Lands

Chapter 1

Supply for Employment Lands

There were 15,328 hectares of employment lands in the Sydney Region as at January 2014. In terms of total land stocks, 2013 saw a modest increase of 159 hectares (1.1%) of zoned employment lands in the Sydney Region. This was largely due to the rezoning of three new industrial precincts within the North West and South West Growth Centres, some GIS data refinements and 35 hectares loss due to rezoning.

The loss of 35 hectares of land through rezoning occurred across 22 precincts, of which, the largest rezonings occurred in the Botany Bay LGA (13 hectares) followed by Strathfield LGA (5.5 hectares) and Hornsby LGA (4.8 hectares). This is not a significant loss of industrial land compared to 2011 (415 hectares). However, this also reflects a new approach to how the ELDP monitors loss of industrial land, discussed below.

Of the 35 hectares of industrial land lost due to rezoning, 52% (or 18.3 hectares) was rezoned to a residential zone. When further analysed 14.4 hectares (or 41%) was rezoned to the R3 (Medium Density Residential) zone, which was concentrated in the Botany Bay (9.3 hectares), Hornsby (4.3 hectares), Canada Bay (0.8 hectares) and Ashfield (0.2 hectares) LGAs. Additionally 2.5 hectares (or 7%) was rezoned to the R2 (Low Density Residential) zone, which occurred in the Bankstown LGA. Finally 1.4 hectares (or 4%) was rezoned to the R1 (General Residential) zone in the Leichhardt LGA.

The B2 (Local Centre) and B4 (Mixed Use) zones account for a further 20% (6.9 hectares) of rezoned land and these zones include ‘shop top housing’ as a mandatory permissible use. Only 0.3 hectares was rezoned to the B2 zone in Ashfield LGA. The remaining 6.6 hectares was rezoned to the B4 zone in Ashfield, Botany Bay, Kogarah and Parramatta LGAs.

There were significant employment land zone additions between January 2013 and January 2014 totalling 174.1 hectares. This was due to the release of two new precincts in the South West and North West Growth Centres, namely Leppington North (70.8 hectares) and Austral (44.8 hectares), which were rezoned together in March 2013 and Box Hill Industrial (58.5 hectares) which was rezoned in April 2013.

Since the Standard Instrument was introduced in 2006 a shift has been observed towards a large portion of industrial zoned land being rezoned to one of the business zones. In particular it is noted that 223 hectares was rezoned from industrial to a B5, B6 and/or B7 zone in 2013. Of this, 150 hectares (67%) was rezoned B5 (Business Development), 41 hectares (18%) was rezoned B7 (Business Park) and 31 hectares (14%) was rezoned B6 (Enterprise Corridor). This illustrates that there is strong tendency for rezoning industrial land to make it more versatile for future employment uses.

This year for the first time, the ELDP 2014 Update Report will include analysis of land that is rezoned from industrial to the B5, B6 and B7 zones. These business zones permit a mixture of land uses and including various types of industrial uses. As such, although industrial land may be rezoned to a business zone, specific industrial uses will still be permissible in these three business zones. It is important these areas continue to be monitored as industrial sites, even when the zoning has been changed to one of these three business zones, recognising that they will continue to support industrial uses and the changing nature of industry.

The distribution of employment lands identified in previous years remains unchanged with the vast majority of employment lands being located in Western Sydney (10,583 hectares or 69%).

The net amount of undeveloped zoned land decreased by 203 hectares during 2013. 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 215 hectares in 2013. The decline is largely due to some undeveloped and serviced zoned land becoming developed such as Former Wonderland (26 hectares developed) and Erskine Park (15 hectares developed). The decline is also due to rezoning of industrial land to non-industrial uses and data refinement.

Consistent with the overall decline in undeveloped land there was a reduction in the amount (hectares) of undeveloped land available between January 2013 and January 2014 across most lot sizes. In terms of area, the greatest decline in undeveloped lands were in the > 10 hectare category (-293 hectares), 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 (59% of all undeveloped zoned land), although the number of lots in this larger size is still quite low (4% of total lots). This result is consistent with the findings of previous years. The number of lots of undeveloped zoned land over 10 hectares also decreased marginally (from 93 to 80 lots) in 2013. This was partly due to development occurring in Blacktown LGA (i.e. Huntingwood West, Eastern Creek and Former Wonderland) and some data refinement.

Stocks of proposed future employment land decreased by 214 hectares between 2013 and 2014 to a total of 2,902 hectares. This was due to several proposed areas being rezoned to an industrial zone in 2013 in the North West and South West Growth Centres. In June 2013, the Department exhibited a Draft Structure Plan for the broader Western Sydney Employment Area. The Draft Structure 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’. Though subject to further investigations, this potential land may contribute significantly to stocks of undeveloped employment lands in the future.

Table 1 - Zoned Employment Lands Stock by Subregion

The Employment Lands Stock table below compares total stocks, as well as the split between developed and undeveloped, of employment lands between January 2011 and January 2014 by the six metropolitan Sydney subregions and Central Coast Region as shown in the 2013 Draft Metropolitan Strategy for Sydney to 2031.

Subregion	Jan-11			Jan-12			Jan-13			Jan-14			Net Change
	Un-developed	Developed	Total	Un-developed	Developed	Total	Un-developed	Developed	Total	Un-developed	Developed	Total	Jan 13 - Jan 14
Central	82.7	1,405.5	1,488.2	184.3	1,292.1	1,476.5	121.6	1,408.7	1,530.3	45.8	1,432.1	1,477.9	-52.5
North	31.0	397.6	428.6	35.6	345.3	380.9	25.7	314.7	340.3	19.1	312.5	331.6	-8.7
South	145.4	789.9	935.3	154.9	771.4	926.3	141.1	761.5	902.6	73.0	823.2	896.2	-6.4
South West	854.2	3,210.1	4,064.1	800.5	3,238.6	4,039.1	647.8	3,346.4	3,994.2	715.1	3,459.1	4,174.2	180.0
West	855.5	1,062.4	1,918.0	831.1	1,060.5	1,891.7	733.5	1,058.1	1,791.6	754.2	1,056.9	1,811.1	19.5
West Central	1,454.4	3,265.3	4,719.8	1,473.9	3,157.1	4,631.0	1,464.2	3,104.6	4,568.8	1,356.3	3,241.2	4,597.6	28.8
Central Coast	1,120.1	909.4	2,029.6	1,139.3	909.5	2,048.8	1,156.2	885.3	2,041.5	1,123.1	916.3	2,039.4	-2.1
Sydney Region	4,543.3	11,040.2	15,583.5	4,619.6	10,774.5	15,394.2	4,290.0	10,879.3	15,169.3	4,086.6	11,241.4	15,328.0	158.7

Source: ELDP (Sydney Water, Nearmap and Gosford Council)

Figure 7 - Zoned Employment Lands Stock by Subregion (January 2014)

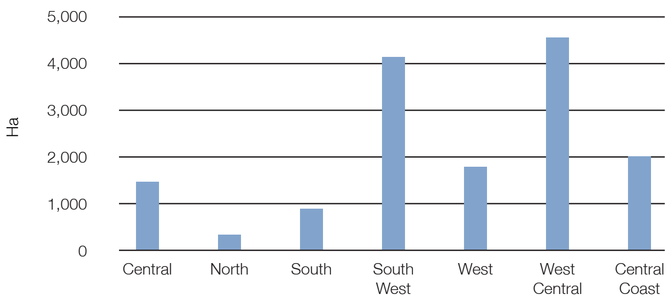


Figure 8 - Undeveloped and Zoned Employment Land by Subregion

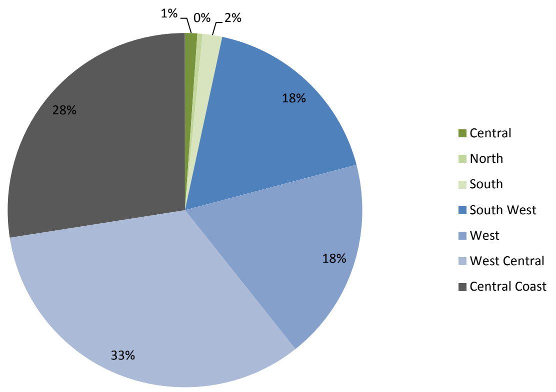
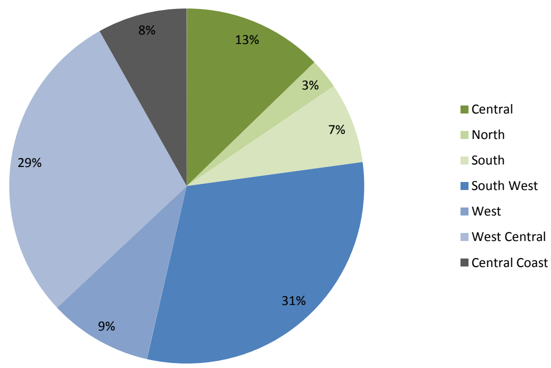


Figure 9 - Developed and Zoned Employment Land by Subregion



Observation:

The majority of employment land continues to be located in western Sydney (South West and West Central Subregion) including 69% of undeveloped land and 69% of developed stocks.

Table 2 - Zoned Employment Lands Stock by Precinct

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 2014 by LGA and individual employment lands precinct. Employment lands precincts are defined as contiguous areas of zoned industrial (or similar) land. 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.

Subregion	LGA	Precinct	Jan-12			Jan-13			Jan-14			Net Change
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Jan 13 - Jan 14
Central	Ashfield	Canterbury Road, Hurlstone Park	0.0	0.3	0.3	-	0.3	0.3		0.3	0.3	-
		Carlton Cres	0.0	0.3	0.3	-	0.3	0.3				-0.3
		Flour Mill Site	0.0	3.5	3.6	0.0	3.5	3.5	0.0	2.9	2.9	-0.6
		Hordern Pde		0.1	0.1	0.0	0.1	0.1				-0.1
		Milton St North	0.1	0.2	0.3	0.0	0.3	0.3		0.3	0.3	0.0
		Parramatta Rd, btw Liverpool and Slone Sts	0.0	1.1	1.1	0.0	1.1	1.1		1.1	1.1	0.0
		Parramatta Rd, Frederick St	0.0	2.1	2.1	0.0	2.1	2.1		2.1	2.1	0.0
		Parramatta Rd, Haig Ave		0.1	0.1	0.0	0.1	0.1		0.1	0.1	0.0
		West St		0.2	0.2	0.0	0.2	0.2		0.2	0.2	0.0
	Ashfield Total		0.1	7.9	8.0	0.0	7.9	8.0	0.0	6.9	7.0	-1.0
	Botany Bay	Banksmeadow	23.9	207.2	231.1	15.0	215.6	230.7	12.0	212.7	224.7	-5.9
		Botany	4.3	63.1	67.4	1.2	66.1	67.3	0.7	66.0	66.7	-0.6
		British American Tobacco Site		16.5	16.5	0.0	16.5	16.5		5.9	5.9	-10.6
		Mascot	9.9	69.4	79.3	3.2	73.9	77.1	1.9	73.4	75.2	-1.8
		Port Botany				58.5	50.4	108.9	1.0	107.5	108.5	-0.3
	Botany Bay Total		38.1	356.2	394.3	77.9	422.5	500.4	15.6	465.5	481.1	-19.3
	Burwood	Tangarra St East		1.2	1.2	0.0	0.7	0.7		0.7	0.7	0.0
	Burwood Total		0.0	1.2	1.2	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	0.6	0.6				-0.6
		Bushells Site, Burwood Rd		3.9	3.9	0.0	3.9	3.9		3.9	3.9	0.0
		Concord West		7.6	7.6	0.0	7.6	7.6		7.6	7.6	0.0
		Harris Road, Five Dock		0.2	0.2	0.0	0.1	0.1				-0.1
		Oulton Avenue	0.1	0.0	0.1	0.1	0.0	0.1	0.1		0.1	0.0
		Parramatta Road/Queens Road	0.8	11.6	12.4	0.1	12.2	12.3	0.2	12.0	12.3	-0.1
		Rhodes, Leeds Street	0.3	6.2	6.5	0.3	6.2	6.5	0.3	6.2	6.4	0.0
	Canada Bay Total		1.2	30.0	31.2	0.5	30.6	31.1	0.6	29.7	30.3	-0.8
	Lane Cove	Burns Bay (Tuta Laboratories)										0.0
		Gore Cove Terminal	0.0	7.8	7.9	0.0	8.1	8.1		7.7	7.7	-0.4
		Lane Cove West	6.6	44.0	50.6	5.8	44.5	50.2	5.8	44.5	50.2	0.0
		Lane Cove West (150 Epping Rd)		3.2	3.2	0.0	2.3	2.3		2.3	2.3	0.0
	Lane Cove Total		6.6	55.1	61.7	5.8	54.9	60.7	5.8	54.5	60.2	-0.4
	Leichhardt	Allen and Flood St		1.0	1.0	0.0	1.0	1.0		1.0	1.0	0.0
		Balmain Road	0.0	1.3	1.4	0.0	1.3	1.4	0.0	1.4	1.4	0.0
		Bays Precinct (Glebe Island/White Bay)	12.4	61.2	73.6	10.1	71.2	81.3	3.1	67.4	70.5	-10.8
		Lilyfield Rd	0.0	1.0	1.0	0.0	1.0	1.0		1.0	1.0	0.0
		Lords Rd		1.1	1.1	0.0	1.1	1.1		1.1	1.1	0.0
		Marion/Walter St	0.0	1.3	1.3	0.0	1.3	1.3		1.3	1.3	0.0
		Moore St, Catherine St	0.2	5.6	5.9	0.2	5.7	5.9	0.1	5.8	5.9	0.0
		Moore St, McKenzie St		1.1	1.1	0.0	1.0	1.0		1.0	1.0	0.0
		Mort Bay	0.1	0.2	0.3	0.0	0.3	0.3		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		7.0	7.0	0.0
		Parramatta Rd/Tebutt St	0.0	5.2	5.2	0.0	5.2	5.2		5.2	5.2	0.0
		Victoria Rd, Robert St (East of Mullens St)	0.2	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)	0.0	2.2	2.2	0.0	2.2	2.2	0.0	2.1	2.2	0.0
		Victoria Rd, Terry St/Wellington St (Carrier Site)		3.2	3.2	0.0	3.2	3.2		1.8	1.8	-1.4
	Leichhardt Total		13.1	94.4	107.4	10.4	104.6	115.0	3.3	99.5	102.7	-12.2

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

Subregion	LGA	Precinct	Jan-12			Jan-13			Jan-14			Net Change
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Jan 13 - Jan 14
		Alice St, Newtown										0.0
		Camperdown	0.1	2.8	2.8	0.1	2.8	2.8	0.1	2.8	2.8	0.0
		Dulwich Hill, Constitution Rd										0.0
		Dulwich Hill, New Canterbury Rd		0.5	0.5	0.0	0.5	0.5		0.5	0.5	0.0
		Dulwich Hill, Terry Rd										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	0.6		0.6	0.3	0.4	0.6	0.3	0.4	0.6	0.0
		Lewisham, Parramatta Rd										0.0
	Marrickville	Marrickville	3.7	62.9	66.5	2.2	64.0	66.2	1.4	64.8	66.2	0.0
		Marrickville, Addison Rd										0.0
		Marrickville, Cowper St										0.0
		Marrickville, Meeks Rd		1.5	1.5	0.0	1.5	1.5		1.5	1.5	0.0
		Newtown, Gladstone St										0.0
		Petersham, Parramatta Rd										0.0
		Petersham, Trafalgar St										0.0
		Princes Hwy Frontages	0.8	7.4	8.1	0.3	7.6	7.9	0.3	7.6	7.9	0.0
		St Peters, Grove Street		2.0	2.0	0.0	2.0	2.0		2.0	2.0	0.0
		St Peters, King St										0.0
		St Peters, Princes Hwy	1.3	13.4	14.7	1.3	15.3	16.6	0.9	15.7	16.6	0.0
		St Peters, Unwins Bridge Rd		4.5	4.5	0.0	4.4	4.4		4.4	4.4	0.0
		Stanmore Bridge Rd West										0.0
	Marrickville	Stanmore, Bridge Rd East	0.0	1.7	1.7	0.0	1.6	1.6		1.6	1.6	0.0
		Sydney Airport Environs	1.1	17.4	18.5	0.0	15.6	15.6		15.6	15.6	0.0
		Tempe Rd, Bus Depot		2.4	2.4	0.0	2.4	2.4		2.4	2.4	0.0
		Tempe, Carrington Rd	0.2	12.5	12.7	0.1	12.4	12.5	0.1	12.3	12.5	0.0
		Tempe, Princes Hwy		3.7	3.7	0.0	3.7	3.7		3.7	3.7	0.0
	Marrickville Total		7.7	134.1	141.8	4.3	135.6	139.9	3.1	136.8	139.9	0.0
Central	Randwick	Port Botany	82.2	172.5	254.8	0.8	201.8	202.5	0.3	203.9	204.2	1.7
	Randwick Total		82.2	172.5	254.8	0.8	201.8	202.5	0.3	203.9	204.2	1.7
		Former ADI Site		1.6	1.6	0.0	1.6	1.6		1.6	1.6	0.0
		Gladesville	0.1	20.1	20.2	0.1	20.1	20.2	0.1	20.0	20.1	0.0
	Ryde	Macquarie Park, Delhi Road										0.0
		Macquarie Park, Talavera Road		0.0	0.0							0.0
		West Ryde	0.1	6.0	6.1	0.0	6.0	6.0		6.0	6.0	0.0
	Ryde Total		0.2	27.7	28.0	0.1	27.6	27.8	0.1	27.6	27.7	0.0
		Chullora	1.0	0.4	1.4	0.0	0.3	0.3		0.3	0.3	0.0
		Flemington (Arthur St, Homebush Business Park and Mason Park)	7.2	54.5	61.8	2.3	59.3	61.6	0.5	53.1	53.5	-8.1
	Strathfield	South Strathfield/Enfield	13.1	103.5	116.6	8.5	107.8	116.3	6.2	106.5	112.7	-3.6
		Strathfield Mail	0.1	13.6	13.7	0.0	13.6	13.6		8.3	8.3	-5.3
		Water Street	0.2	5.0	5.2	0.2	5.0	5.2	0.2	5.0	5.2	0.0
	Strathfield Total		21.6	177.0	198.6	11.1	185.9	197.0	6.9	173.2	180.1	-16.9
		Alexandria	6.9	130.5	137.4	5.8	130.8	136.6	5.8	128.9	134.7	-1.9
		Bays Precinct (Glebe Island/ White Bay)	0.0	0.2	0.2	0.0	0.2	0.2		0.2	0.2	0.0
		Blackwattle Bay	0.2	1.1	1.3	0.0	1.3	1.3		1.3	1.3	0.0
	Sydney	Glebe (Lower Avon St)		0.1	0.1							0.0
		Glebe (Parramatta Rd/Arundell St)	0.2	2.2	2.3	0.0	1.8	1.8		1.8	1.8	0.0
		Mascot				0.0	0.2	0.2				-0.2
		Rosebery	0.9	13.3	14.2	0.1	14.0	14.1		14.1	14.1	-0.1
		Wentworth Park		0.5	0.5							0.0
	Sydney Total		8.2	147.8	156.0	5.9	148.3	154.3	5.8	146.3	152.1	-2.2
		Artarmon	5.2	58.8	63.9	4.8	59.0	63.8	4.3	58.7	63.0	-0.8
	Willoughby	East Chatswood	0.0	26.4	26.4	0.0	26.3	26.3	0.0	26.0	26.0	-0.3
		Lane Cove West	0.1	3.0	3.0	0.0	3.0	3.0		3.0	3.0	0.0
	Willoughby Total		5.3	88.1	93.4	4.8	88.3	93.1	4.3	87.6	92.0	-1.2
Central Subregion Total			184.3	1,292.1	1,476.5	121.6	1,408.7	1,530.3	45.8	1,432.1	1,477.9	-52.5

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

Subregion	LGA	Precinct	Jan-12			Jan-13			Jan-14			Net Change
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Jan 13 - Jan 14
North	Hornsby	Asquith	4.9	39.3	44.2	4.9	37.9	42.8	9.9	41.9	51.9	9.0
		Dural Service Centre	4.3	32.5	36.7							0.0
		Hornsby East	0.0	1.0	1.0	0.0	1.0	1.0		1.0	1.0	0.0
		Hornsby Heights		1.3	1.3	0.0	1.3	1.3		1.3	1.3	0.0
		Hornsby West	0.0	1.9	2.0	0.0	1.9	1.9	0.0	1.9	1.9	0.0
		Mount Ku-ring-gai	18.7	52.0	70.7	19.5	50.8	70.3	7.4	49.9	57.3	-13.0
		Pennant Hills	0.0	1.4	1.4	0.0	1.3	1.3		1.3	1.3	0.0
		Thornleigh	2.3	26.5	28.8	0.3	28.1	28.4	0.3	23.2	23.6	-4.8
		Waitara	0.4	7.0	7.4	0.0	8.1	8.1	0.0	7.3	7.3	-0.8
	Hornsby Total		30.6	162.8	193.4	24.8	130.4	155.2	17.7	127.9	145.6	-9.6
	Manly	Manly Vale	0.4	9.7	10.1	0.2	9.9	10.1	0.2	9.9	10.1	0.0
	Manly Total		0.4	9.7	10.1	0.2	9.9	10.1	0.2	9.9	10.1	0.0
	Pittwater	Mona Vale	0.2	22.5	22.6	0.1	22.4	22.5	0.1	22.4	22.5	0.0
		North Narrabeen		2.5	2.5	0.0	2.5	2.5		2.5	2.5	0.0
		Warriewood Valley	0.9	15.4	16.3	0.5	14.4	14.8	0.9	14.8	15.7	0.9
	Pittwater Total		1.1	40.4	41.4	0.6	39.3	39.8	1.1	39.7	40.7	0.9
	Warringah	Brookvale	2.8	84.0	86.7	0.0	86.1	86.1	0.0	86.1	86.1	0.0
		Cromer	0.7	43.6	44.3	0.1	44.1	44.2	0.2	44.0	44.2	0.0
		Forestville		2.2	2.2	0.0	2.2	2.2		2.2	2.2	0.0
		Frenchs Forest										0.0
		Harbord	0.0	2.7	2.7	0.0	2.7	2.7		2.7	2.7	0.0
	Warringah Total		3.5	132.4	136.0	0.2	135.1	135.2	0.2	135.0	135.2	0.0
North Subregion Total			35.6	345.3	380.9	25.7	314.7	340.3	19.1	312.5	331.6	-8.7
South	Canterbury	Ashbury		3.1	3.1	0.0	3.1	3.1		3.1	3.1	0.0
		Belmore	0.4	3.3	3.7	0.2	3.5	3.7	0.1	3.6	3.7	0.0
		Burwood Rd, Belmore	0.2	5.2	5.4							0.0
		Canterbury		1.7	1.7							0.0
		Canterbury Road, Campsie		3.2	3.2	0.0	3.2	3.2		3.2	3.2	0.0
		Chapel Street		7.3	7.3	0.0	7.3	7.3		7.3	7.3	0.0
		Clemton Park	1.5	23.2	24.7	0.0	17.1	17.1	0.0	17.0	17.0	-0.1
		Croydon Park	0.0	1.5	1.5	0.0	1.5	1.5		1.5	1.5	0.0
		Kingsgrove North	0.0	35.7	35.7	0.0	35.6	35.6	0.0	35.3	35.3	-0.3
		Kingsgrove South										0.0
		Lakemba	0.9	11.0	11.9	0.8	11.2	12.1	0.4	11.5	11.8	-0.2
		Punchbowl, Wattle Street	0.0	11.7	11.8		11.7	11.7		11.7	11.7	0.0
		Riverwood	0.7	48.9	49.6	0.2	49.1	49.3		49.0	49.0	-0.2
		Viking St, Campsie		0.0	0.0							0.0
		West Riverwood, Wiggs Road	0.1	5.9	6.0	0.0	5.9	5.9		5.9	5.9	0.0
		Wiley Park	0.1	1.8	1.9							0.0
	Canterbury Total		3.8	163.5	167.3	1.2	149.1	150.4	0.5	149.0	149.5	-0.9
	Hurstville	Beverley Hills		1.5	1.5	0.0	1.5	1.5		1.5	1.5	0.0
		Hurstville		1.3	1.3	0.0	1.3	1.3	0.0	1.3	1.3	0.0
		Kingsgrove South	0.2	25.0	25.2	0.1	25.3	25.4	0.2	25.3	25.4	0.0
		Peakhurst, Boundary Rd	0.4	55.9	56.3	0.1	56.0	56.1	0.1	56.0	56.1	0.0
		Penshurst		1.6	1.6	0.0	1.5	1.5		1.5	1.5	0.0
	Hurstville Total		0.7	85.2	85.9	0.3	85.6	85.9	0.3	85.6	85.9	0.0
	Kogarah	Blakehurst	0.2	1.4	1.6	0.0	1.6	1.6		1.6	1.6	0.0
		Carlton	0.1	9.8	9.8	0.1	9.7	9.8	0.1	9.7	9.8	0.0
		Hurstville South	0.1	1.7	1.8	0.0	1.6	1.6		1.6	1.6	0.0
		Kogarah, Gray Ave	0.0	0.7	0.7	0.0	0.7	0.7				-0.7
	Kogarah Total		0.3	13.5	13.9	0.1	13.6	13.7	0.1	13.0	13.0	-0.7
	Rockdale	Bexley		2.1	2.1	0.0	2.1	2.1		2.1	2.1	0.0
		Bexley, Queen Victoria St		0.3	0.3	0.0	0.3	0.3		0.3	0.3	0.0
		Bonar Street										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
		Rockdale, Garnet St		0.6	0.6	0.0	0.6	0.6		0.6	0.6	0.0
		Rockdale, West Botany St	0.2	22.6	22.8	0.1	22.0	22.1	0.2	21.9	22.1	0.0
		Turrella	1.0	13.1	14.1	0.8	12.6	13.4		13.4	13.4	0.0
		Turrella (former Streets Icecream site)										0.0
		Wolli Creek		1.5	1.5	0.0	1.5	1.5		1.5	1.5	0.0
	Rockdale Total		1.3	48.9	50.1	1.0	47.8	48.9	0.3	48.6	48.9	0.0

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

Subregion	LGA	Precinct	Jan-12			Jan-13			Jan-14			Net Change
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Jan 13 - Jan 14
South	Sutherland	Caringbah/Taren Point	2.7	142.0	144.8	1.3	142.7	144.0	1.1	142.9	144.0	0.0
		Engadine (Princes Hwy)		0.6	0.6	0.0	0.6	0.6		0.6	0.6	0.0
		Heathcote	0.0	0.5	0.5	0.0	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	0.1	3.6	3.7	0.0
		Kirrawee	4.5	56.7	61.1	3.5	56.7	60.2	8.4	51.8	60.2	0.0
		Kurnell	141.4	232.0	373.4	133.5	236.5	370.0	62.3	302.8	365.1	-4.9
		Menai	0.0	4.3	4.4	0.0	4.3	4.3		4.3	4.3	0.0
		Miranda	0.1	8.2	8.4	0.1	8.2	8.3		8.3	8.3	0.0
		Taren Point Bulky Goods		12.3	12.3	0.0	12.2	12.2		12.2	12.2	0.0
	Sutherland Total		148.8	460.3	609.0	138.5	465.3	603.8	71.9	527.1	599.0	-4.9
South Subregion Total			154.9	771.4	926.3	141.1	761.5	902.6	73.0	823.2	896.2	-6.4
South West	Bankstown	Chullora	27.1	183.0	210.0	22.3	190.3	212.5	11.9	197.3	209.1	-3.4
		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	1.0	3.2	4.2	0.0	4.2	4.2		4.2	4.2	0.0
		Leightonfield Station	5.9	157.8	163.6	3.5	158.4	161.9	0.0	159.7	159.7	-2.2
		Milperra	1.5	102.2	103.7	1.3	102.4	103.7	1.4	100.9	102.3	-1.3
		Padstow North	3.0	91.5	94.5	1.9	92.5	94.4	1.1	93.0	94.0	-0.4
		Padstow South	4.9	42.5	47.5	1.8	43.5	45.3	2.0	43.3	45.3	0.0
		Punchbowl		2.9	2.9	0.3	2.5	2.9		0.3	0.3	-2.5
		Revesby	3.3	130.4	133.7	1.1	132.3	133.3	0.8	132.1	132.9	-0.4
		Sefton	0.5	30.8	31.3	0.3	31.0	31.3	0.2	29.7	29.9	-1.4
	Bankstown Total		47.4	775.9	823.3	32.8	788.6	821.4	17.8	792.0	809.8	-11.7
	Camden	Leppington North							66.7	4.1	70.8	70.8
		Little Street, Camden	0.1	5.4	5.4	0.0	2.3	2.3	0.0	2.3	2.3	0.0
		Narellan	6.5	28.4	34.9	6.0	28.4	34.4	5.6	28.7	34.4	0.0
		Oran Park	18.5		18.5	18.5	0.0	18.5	18.5		18.5	0.0
		Smeaton Grange	88.6	110.2	198.8	75.2	122.7	197.9	72.6	126.1	198.7	0.7
		Turner Road	42.5	0.1	42.6	36.6	2.1	38.7	35.9	2.7	38.7	0.0
	Camden Total		156.1	144.1	300.2	136.3	155.5	291.8	199.3	163.9	363.3	71.5
	Campbelltown	Campbelltown, Blaxland Road	56.6	83.4	140.1	33.7	104.7	138.5	45.4	90.4	135.8	-2.6
		Ingleburn	38.7	279.5	318.2	27.0	290.4	317.4	28.2	296.6	324.7	7.3
		Leumeah	2.7	16.5	19.2	2.1	16.7	18.7	2.1	16.6	18.7	0.0
		Macquarie Fields		1.4	1.4	0.0	1.3	1.3		1.3	1.3	0.0
		Minto	37.1	220.1	257.2	24.0	231.2	255.3	28.7	247.6	276.3	21.0
	Campbelltown Total		135.1	600.9	736.0	86.8	644.4	731.2	104.4	652.5	756.9	25.7
	Fairfield	Bonnyrigg Plaza	1.1	9.0	10.1	1.0	9.0	10.1	0.5	9.4	9.9	-0.2
		Cabramatta CBD	0.4	1.0	1.4	0.3	1.0	1.3	0.3	1.0	1.3	0.0
		Council Depot	0.0	2.5	2.5	0.0	2.4	2.4		2.4	2.4	-0.1
		Fairfield		5.0	5.0	0.0	4.7	4.7		4.7	4.7	0.0
		Fairfield East	1.2	98.3	99.5	0.4	99.1	99.4	0.0	99.4	99.4	0.0
		Greystanes	13.7		13.7	10.7	1.6	12.3	2.3	10.0	12.3	0.0
		Lansvale	0.9	56.8	57.7	0.4	56.6	57.0	0.2	56.7	56.9	0.0
		Railway Parade, Cabramatta		4.1	4.1	0.0	4.1	4.1		1.8	1.8	-2.3
		Smithfield, South	1.3	42.2	43.5	0.4	42.2	42.6	0.2	42.3	42.6	0.0
		South of Sydney Water Pipeline	160.5	96.3	256.8	87.7	169.3	257.0	107.9	200.8	308.7	51.7
		Wetherill Park	51.6	511.0	562.6	41.8	512.7	554.5	33.4	521.0	554.4	-0.1
	Fairfield Total		230.6	826.1	1,056.7	142.6	902.7	1,045.4	144.9	949.6	1,094.4	49.1
	Liverpool	Austral							44.8		44.8	44.8
		Cecil Park	0.0	1.6	1.6	0.0	1.6	1.6		1.6	1.6	0.0
		Chipping Norton	5.2	95.9	101.1	1.7	99.4	101.1	0.8	100.1	100.9	-0.2
		Cross Roads, Casula	7.4	10.8	18.2	7.4	10.8	18.2	16.9		16.9	-1.4
		Hoxton Park Airport	7.6	33.4	40.9	6.2	32.6	38.8	3.7	36.1	39.8	0.9
		Moorebank	23.5	314.1	337.7	15.2	319.9	335.1	11.9	323.9	335.9	0.8
		Orange Grove		21.6	21.6	0.0	21.5	21.5	0.2	21.4	21.5	0.0
		Priddle/Scrivener St	0.1	23.2	23.2	0.0	23.2	23.2	0.0	23.2	23.2	0.0
		Sappho Road	1.2	16.3	17.5	0.7	16.8	17.5	0.7	16.7	17.5	0.0
		Yarunga/Prestons	93.9	260.2	354.1	125.8	216.1	341.9	118.2	224.2	342.4	0.5
	Liverpool Total		138.9	777.0	915.9	157.0	741.9	898.8	197.2	747.2	944.4	45.6
	Wollondilly	Appin	2.7	8.6	11.3	2.7	7.6	10.3	2.9	7.3	10.3	0.0
		Bargo		0.7	0.7	0.0	0.7	0.7		0.7	0.7	0.0
		Maldon	55.9	46.4	102.3	57.6	46.2	103.8	30.8	72.9	103.7	-0.1
		Picton	2.7	26.3	29.0	1.1	26.3	27.4	1.1	26.2	27.3	-0.1
		Picton (Coull St)	2.1		2.1	2.1	0.0	2.1	2.1		2.1	0.0
		Warragamba/Silverdale	28.9	32.6	61.5	28.8	32.6	61.3	14.6	46.7	61.3	0.0
	Wollondilly Total		92.4	114.5	206.9	92.3	113.3	205.6	51.5	153.9	205.4	-0.2
South West Subregion Total			800.5	3,238.6	4,039.1	647.8	3,346.4	3,994.2	715.1	3,459.1	4,174.2	180.0

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

Subregion	LGA	Precinct	Jan-12			Jan-13			Jan-14			Net Change
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Jan 13 - Jan 14
West	Blue Mountains	Blackheath	0.4	1.6	2.0	0.2	1.7	2.0	0.2	1.7	2.0	0.0
		Blaxland	0.5	5.3	5.9	0.0	5.0	5.0		5.0	5.0	0.0
		Blaxland (Great Western Hwy)	0.0	0.2	0.2	0.0	0.2	0.2		0.2	0.2	0.0
		Glenbrook		0.2	0.2	0.0	0.2	0.2		0.2	0.2	0.0
		Katoomba	16.5	30.2	46.7	13.7	33.4	47.1	12.6	33.7	46.4	-0.8
		Lawson	18.2	13.8	32.0	17.6	14.4	32.0	17.4	13.9	31.4	-0.6
		Valley Heights/Springwood	2.9	12.2	15.1	2.9	12.2	15.1	1.6	12.6	14.2	-0.9
		Wentworth Falls		0.1	0.1	0.0	0.1	0.1				-0.1
	Blue Mountains Total		38.5	63.6	102.1	34.4	67.1	101.6	31.8	67.3	99.2	-2.4
	Hawkesbury	Mulgrave/Vineyard	15.9	57.0	72.9	9.5	41.6	51.2	5.9	45.0	51.0	-0.2
		North Richmond	3.8	10.2	13.9	0.0	10.2	10.2		10.2	10.2	0.0
		Richmond	0.4	4.6	5.0	0.2	4.5	4.7	0.2	4.5	4.7	0.0
		Richmond, Racecourse Rd	0.0	4.0	4.1	0.0	4.0	4.0		4.0	4.0	0.0
		Wilberforce	1.8	7.5	9.3	0.7	8.5	9.2	0.7	8.5	9.2	0.0
		Windsor/South Windsor	19.5	76.9	96.4	17.8	77.6	95.4	16.9	78.5	95.4	0.0
	Hawkesbury Total		41.4	160.3	201.7	28.2	146.5	174.6	23.7	150.8	174.5	-0.2
West	Penrith	Emu Heights										0.0
		Emu Plains	23.8	107.3	131.1	14.5	116.5	131.0	45.7	83.7	129.4	-1.6
		Erskine Park	208.0	189.8	397.7	147.7	228.4	376.1	182.7	250.3	433.0	56.9
		Great Western Hwy, St Marys		1.9	1.9	0.0	1.9	1.9		1.9	1.9	0.0
		Jamisontown	5.5	72.3	77.8	5.2	72.6	77.8	4.9	72.5	77.4	-0.4
		Kingswood	1.5	19.8	21.3	1.5	19.8	21.3	1.4	19.9	21.3	0.0
		Llandilo	3.3		3.3	34.5	0.0	34.5	0.0		0.0	-34.5
		North Penrith	82.0	196.2	278.1	76.9	162.0	238.9	78.0	173.2	251.3	12.4
		South of Sydney Water Pipeline	348.1		348.1	337.2	0.0	337.2	337.2		337.2	0.0
		St Marys	48.9	193.4	242.3	48.4	185.1	233.5	46.8	179.3	226.1	-7.4
		St Marys Leagues	3.1		3.1	3.1	3.1	6.3		3.0	3.0	-3.3
		St Marys North	2.4	54.5	56.9	1.8	55.0	56.8	1.8	55.0	56.8	0.0
		The Northern Road, Llandilo	24.8	1.4	26.2							0.0
	Penrith Total		751.3	836.6	1,587.9	670.9	844.5	1,515.4	698.7	838.8	1,537.5	22.1
West Subregion Total			831.1	1,060.5	1,891.7	733.5	1,058.1	1,791.6	754.2	1,056.9	1,811.1	19.5
West Central	Auburn	Auburn (Cumberland Industries)		0.7	0.7	0.0	0.7	0.7		0.7	0.7	0.0
		Auburn (Queen St)		5.6	5.6	0.0	5.6	5.6		5.6	5.6	0.0
		Auburn West	0.2	6.6	6.8	0.0	6.7	6.8	0.0	6.7	6.8	0.0
		Chullora	1.9		1.9							0.0
		Church Street, Rookwood		1.8	1.8	0.0	1.8	1.8		1.8	1.8	0.0
		Clyburn	18.5	39.0	57.4	6.1	50.6	56.7	6.1	47.5	53.6	-3.1
		Homebush Bay	0.2	21.1	21.2	0.1	21.1	21.2		20.8	20.8	-0.5
		Lidcome East	2.1	28.0	30.1	2.1	27.9	30.0		29.7	29.7	-0.4
		Lidcome South	0.1	6.9	7.0	0.1	6.9	7.0	0.0	7.1	7.1	0.0
		Lidcome West		41.8	41.8	0.0	41.7	41.7		41.7	41.7	0.0
		New Street West	0.0	0.4	0.4	0.0	0.4	0.4	0.0	0.4	0.4	0.0
		Parramatta Road, Corridor										0.0
		Railway Street, Rookwood		0.9	0.9	0.0	0.6	0.6		0.9	0.9	0.2
		Regents Park	3.7	75.1	78.8	3.3	75.0	78.3	1.8	76.2	78.0	-0.3
		Silverwater	5.8	145.9	151.7	3.6	147.3	150.9	3.6	147.1	150.8	-0.2
	Auburn Total		32.5	373.7	406.2	15.5	386.4	401.9	11.6	386.1	397.7	-4.2
	Blacktown	Arndell Park	22.5	139.2	161.7	20.8	124.4	145.2	16.9	131.0	147.9	2.7
		Blacktown Rd (St Martins)		6.0	6.0	5.4	0.6	6.0		5.9	5.9	-0.1
		Eastern Creek	375.9	177.9	553.8	381.0	165.3	546.3	378.3	184.3	562.6	16.3
		Former Wonderland	30.0	26.0	56.0	27.9	28.1	56.0	2.1	53.9	56.0	0.0
		Glendenning	48.1	152.4	200.5	47.6	150.4	198.0	38.7	155.4	194.1	-3.9
		Greystanes	23.4	5.6	29.0	14.5	12.1	26.6	12.2		12.2	-14.4
		Huntingwood	4.4	112.9	117.3	4.2	112.9	117.1	7.4	116.1	123.5	6.4
		Huntingwood (WSEH)	66.3	16.4	82.6	68.1	14.2	82.3	70.8	20.1	90.9	8.6
		Huntingwood West	41.4	20.4	61.7	39.6	21.2	60.8	12.2	48.6	60.8	0.0
		Kings Park (Blacktown North)	3.0	211.0	214.0	1.6	212.0	213.7	0.9	211.9	212.7	-0.9
		Marsden Park	237.1		237.1	255.5	16.7	272.2	217.7	20.5	238.2	-34.0
		Minchinbury	22.9	96.2	119.1	22.0	96.9	118.9	18.6	100.1	118.7	-0.2
		Mount Druitt	6.3	41.2	47.5	5.5	42.0	47.5	3.0	44.5	47.5	0.0
		North Dunheved	18.5	0.0	18.5	18.4	0.0	18.4	18.4		18.4	0.0
		Prospect		35.2	35.2	0.0	35.2	35.2		35.2	35.2	0.0
		Prospect (Flushcombe Rd)	0.0	1.2	1.2							0.0
		Quarantine Station		21.9	21.9	0.0	21.9	21.9		21.9	21.9	0.0
		Riverstone	5.8	40.8	46.5	3.5	43.0	46.4	3.2	43.2	46.4	0.0

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

Subregion	LGA	Precinct	Jan-12			Jan-13			Jan-14			Net Change
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Jan 13 - Jan 14
West Central	Blacktown	Riverstone West	97.8	9.5	107.3	87.0	16.0	103.0	87.0	16.0	103.0	0.0
		Ropes Creek	185.5	0.0	185.5	192.7	0.0	192.7	185.7		185.7	-7.1
		Ropes Crossing	3.9	0.0	3.9	0.0	3.9	3.9		3.9	3.9	0.0
		Seven Hills (Blacktown LGA)	13.9	189.9	203.8	12.9	186.6	199.5	12.2	185.8	198.0	-1.5
		St Marys										0.0
		The Raceway Precinct	10.6	11.9	22.5	8.6	12.7	21.4	6.7	14.6	21.4	0.0
	Blacktown Total		1,217.0	1,315.5	2,532.5	1,217.0	1,316.0	2,533.0	1,092.1	1,412.9	2,504.9	-28.1
	Holroyd	Bonds Spinning Mill		8.0	8.0	0.0	8.0	8.0		8.0	8.0	0.0
		Girraween	1.0	82.3	83.3	0.3	83.0	83.3		83.3	83.3	0.0
		Greystanes	83.3	84.5	167.7	62.9	103.8	166.6	59.4	117.8	177.1	10.5
		Smithfield, North	21.4	328.9	350.3	22.1	326.9	349.0	12.6	336.4	349.0	0.0
		South Parramatta	1.0	15.0	16.0	0.7	13.1	13.8	0.6	13.2	13.8	0.0
		South Wentworthville	0.2	5.3	5.5	0.2	5.3	5.5	0.2	5.3	5.5	0.0
		Yennora (Holroyd)	5.6	182.4	188.0	0.8	185.8	186.6	0.6	186.0	186.6	0.0
	Holroyd Total		112.4	706.4	818.8	87.0	725.9	812.8	73.3	750.0	823.3	10.5
	Parramatta	Alfred Street, Parramatta		0.2	0.2	0.0	0.2	0.2		0.2	0.2	0.0
		Camellia/Rosehill	15.9	222.7	238.6	16.6	221.6	238.2	16.2	220.4	236.7	-1.5
		Church St, North Parramatta	0.2	10.8	11.0	0.0	11.0	11.0		11.0	11.0	0.0
		Clyde	2.1	14.0	16.2	2.1	14.1	16.1	0.0	16.1	16.1	0.0
		Ermington	0.7	46.5	47.2	0.7	45.6	46.3	0.0	45.5	45.6	-0.7
		Granville										0.0
		Gregory Place, Harris Park		1.9	1.9	0.0	1.9	1.9		1.9	1.9	0.0
		Guildford South		4.6	4.6	0.0	4.6	4.6		4.4	4.4	-0.2
		Guildford/Merrylands	1.5	4.6	6.2	0.3	5.8	6.1	0.2	5.8	6.0	-0.1
		Moreton St										0.0
		Old Windsor Road	0.1	9.0	9.1	0.1	9.0	9.1	0.6	8.5	9.1	0.0
		Old Windsor Road, Northmead	2.7	23.8	26.5	2.0	23.8	25.8	0.5	25.3	25.8	0.0
		Pendle Hill	2.4	16.0	18.4	1.6	16.8	18.4	1.5	16.9	18.4	0.0
		Pharmacia		5.2	5.2	0.0	5.2	5.2		5.2	5.2	0.0
		Regents Park		0.1	0.1							0.0
		River Road West, Parramatta	0.2	6.5	6.8	0.0	6.8	6.8		4.9	4.9	-1.9
		Rydalmere	12.0	91.8	103.7	9.5	93.5	103.0	1.3	101.4	102.7	-0.3
		Seven Hills (Parramatta LGA)		3.7	3.7	0.0	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	50.3	51.2	0.9	50.2	51.1		51.1	51.1	0.0
		Victoria Rd		3.3	3.3	0.0	3.3	3.3		3.3	3.3	0.0
	Parramatta Total		39.2	526.3	565.4	34.2	528.2	562.4	20.8	536.8	557.7	-4.7
	The Hills	Annangrove	60.0	56.7	116.7	98.3	17.8	116.1	98.3	16.9	115.2	-0.9
		Box Hill							58.5		58.5	58.5
		Castle Hill	1.6	121.3	122.9	1.2	81.8	83.0	1.6	80.4	82.0	-1.0
		Dural		0.2	0.2							0.0
		North Rocks	6.9	37.0	43.9	7.9	37.0	44.9		43.6	43.6	-1.3
		Northmead, James Rouse Drive	0.0	4.7	4.7							0.0
		Rouse Hill	1.2	3.7	4.9							0.0
		Winston Hills	3.1	11.6	14.7	3.1	11.6	14.7		14.7	14.7	0.0
	The Hills Total		72.8	235.2	308.0	110.6	148.1	258.7	158.5	155.5	314.0	55.2
West Central Total			1,473.9	3,157.1	4,631.0	1,464.2	3,104.6	4,568.8	1,356.3	3,241.2	4,597.6	28.8

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

Subregion	LGA	Precinct	Jan-12			Jan-13			Jan-14			Net Change
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Jan 13 - Jan 14
Central Coast	Gosford	Blackwall	1.5	1.6	3.1	1.5	1.6	3.1	1.4	1.6	2.9	-0.2
		Erina		10.5	10.5	0.0	10.5	10.5		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
		Kariong	11.4		11.4	11.4	0.0	11.4	11.4		11.4	0.0
		Kincumber	0.2	8.5	8.7	0.2	8.5	8.7	0.2	8.5	8.7	0.0
		Lisarow	6.5	55.9	62.4	6.5	55.9	62.3	6.5	55.9	62.3	0.0
		North Gosford and Wyoming	3.5	20.6	24.1	2.3	21.8	24.1	1.7	22.2	23.9	-0.2
		Somersby	168.5	123.8	292.3	161.0	131.2	292.2	161.8	131.9	293.7	1.5
		West Gosford	11.8	105.7	117.4	11.5	105.8	117.3	11.0	106.3	117.3	-0.1
		Woy Woy		34.4	34.4	0.0	34.4	34.4		34.4	34.4	0.0
		Woy Woy, Alma Ave		0.9	0.9	0.0	0.9	0.9		0.9	0.9	0.0
		Woy Woy, Nagari Rd	0.0	1.8	1.8	0.0	1.8	1.8		1.5	1.5	-0.3
		Woy Woy, Rawson Rd		4.1	4.1	0.0	4.1	4.1		4.1	4.1	0.0
	Gosford Total		206.4	375.7	582.2	197.5	384.5	582.0	197.1	385.7	582.7	0.8
	Wyong	Bateau Bay	0.4		0.4	0.4	0.0	0.4				-0.4
		Berkeley Vale	0.1	8.5	8.5	0.0	8.5	8.5		8.5	8.5	-
		Bushells Ridge	543.7	88.5	632.3	552.4	79.9	632.3	552.4	79.9	632.3	-0.0
		Charmhaven	6.1	30.2	36.3	6.1	30.1	36.2	6.1	30.1	36.2	-
		Doyalson	3.9	7.8	11.7	4.3	7.2	11.6	4.4	7.2	11.6	-
		Gwandalan	4.7	1.0	5.7	4.3	1.3	5.7	4.4	1.3	5.7	0.0
		Long Jetty	0.1	3.3	3.4	0.0	3.4	3.4		3.4	3.4	-
		Long Jetty/The Entrance		1.1	1.1	0.0	1.1	1.1		1.1	1.1	-
		North Wyong	46.7	82.2	128.9	46.9	81.8	128.7	46.9	81.8	128.7	-
		Ourimbah, Pacific Hwy	3.7	6.7	10.4	3.7	6.7	10.4	3.2	7.2	10.4	-
		Tuggerah	47.5	245.2	292.7	54.2	232.0	286.2	41.7	243.8	285.5	-0.7
		Wyong	275.9	59.3	335.2	286.4	48.8	335.2	267.0	66.4	333.4	-1.8
	Wyong Total		932.9	533.8	1,466.7	958.7	500.8	1,459.5	926.0	530.6	1456.7	-2.8
Central Coast Subregion Total			1,139.3	909.5	2,048.8	1,156.2	885.3	2,041.5	1,123.1	916.3	2,039.4	-2.1
Sydney Region Total			4,619.6	10,774.5	15,394.2	4,290.0	10,879.3	15,169.3	4,086.6	11,241.4	15,328.0	158.7

NB: Changes to precinct sizes are generally due to data refinement and updates, and in few cases a zoning change. Zoning changes for 2013-14 are shown in Table 5.

Marginal increases in undeveloped or developed zoned land 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 Land

The table below compares the amount of undeveloped and serviced zoned land for January 2010 to January 2014. Land is defined as 'serviced' if it has a water and sewer connection based on Sydney Water data within Metropolitan Sydney. Servicing data provided by Gosford Councils based on waste collection information. 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.

Subregion	LGA	Precinct	Undeveloped and Serviced Land					
			Jan-10	Jan-11	Jan-12	Jan-13	Jan-14	Net change (Jan-13 - Jan-14)
Central	Botany Bay	Banksmeadow	8.5	8.5	8.0	8.0	6.9	-1.1
South West	Bankstown	Chullora	10.5	10.5	12.5	8.2	0.4	-7.8
	Camden	Narellan	5.7	5.9	5.7	5.7	5.3	-0.4
		Oran Park	0.0	0.0	18.5	18.5	18.5	0.0
		Smeaton Grange	54.7	49.7	50.8	51.9	46.5	-5.4
		Turner Road	0.0	0.0	17.1	8.1	11.4	3.3
	Campbelltown	Campbelltown, Blaxland Road	34.2	33.5	31.0	26.1	16.8	-9.3
		Ingleburn	37.7	36.9	34.3	25.3	19.6	-5.7
		Minto	32.2	32.2	31.6	20.5	15.1	-5.4
	Fairfield	Wetherill Park	23.0	24.1	27.7	23.9	17.2	-6.7
	Liverpool	Casula, Cross Rds	6.1	6.1	6.1	7.4	16.9	9.5
		Hoxton Park Airport	0.0	0.0	5.9	4.7	2.2	-2.5
		Moorebank	13.5	12.8	12.2	9.7	11.6	1.9
		Yarunga/Prestons	16.5	18.6	10.5	16.3	16.6	0.3
West	Blue Mountains	Katoomba	9.4	7.8	8.3	6.4	5.0	-1.4
		Lawson	11.1	11.1	11.1	10.2	10.9	0.7
	Penrith	Emu Plains	14.3	13.3	12.0	11.7	10.6	-1.1
		Erskine Park	172.2	76.6	165.3	54.2	39.3	-14.9
		North Penrith	27.8	26.3	32.1	16.0	19.2	3.2
		St Marys	20.4	16.6	11.7	12.3	6.7	-5.6
West Central	Auburn	Clyburn	6.5	6.5	6.1	6.1	6.1	0.0
	Blacktown	Arndell Park	13.6	13.6	14.4	13.6	9.3	-4.3
		Eastern Creek	178.1	164.1	9.5	12.8	20.5	7.8
		Former Wonderland	38.7	38.7	27.9	27.9	2.1	-25.8
		Glendenning	31.2	30.8	31.4	30.4	23.3	-7.1
		Marsden Park	0.0	10.3	12.1	12.1	12.1	0.0
		Minchinbury	15.0	15.0	15.0	6.9	3.2	-3.7
		Mount Druitt	6.6	6.6	6.1	5.3	2.9	-2.4
		The Raceway Precinct	9.7	8.9	7.3	8.6	5.3	-3.3
	Holroyd	Greystanes	56.0	38.3	24.8	10.2	12.2	2.0
		Smithfield, North*	20.3	20.1	19.7	20.6	2.5	-18.1
	Parramatta	Rydalmere	7.5	7.5	7.7	7.7	0.2	-7.5
	The Hills	Annangrove	0.0	11.3	11.3	11.3	11.3	0.0
		North Rocks	7.5	7.5	6.9	7.9	0.0	-7.9
Central Coast	Gosford	Somersby**	0.0	0.0	10.1	21.1	20.8	-0.3
Sydney Region Total			1,012.0	892.0	830.2	677.8	463.0	-214.8

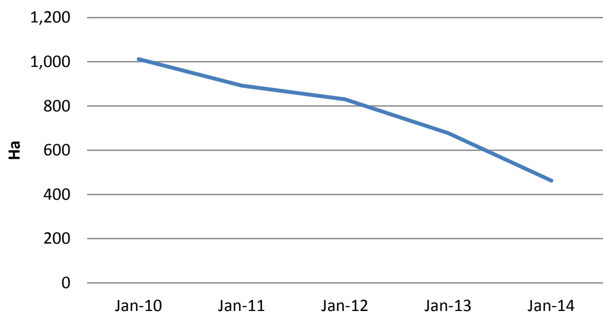
NB: Only showing those precincts with over 5 ha of undeveloped and serviced zoned land in January 2014.

^ Significant drop at Erskine Park due to refinement of Sydney Water asset attribute data.

* Servicing data for Somersby only available for July 2012, May 2013 and January 2014 from Gosford City Council.

Source: ELDP (Sydney Water and Gosford Council)

Figure 10 - Undeveloped and Serviced Land



Observation:

2013 saw the continued decline in undeveloped and serviced employment land stocks, due mainly to the take-up of land in Western Sydney precincts.

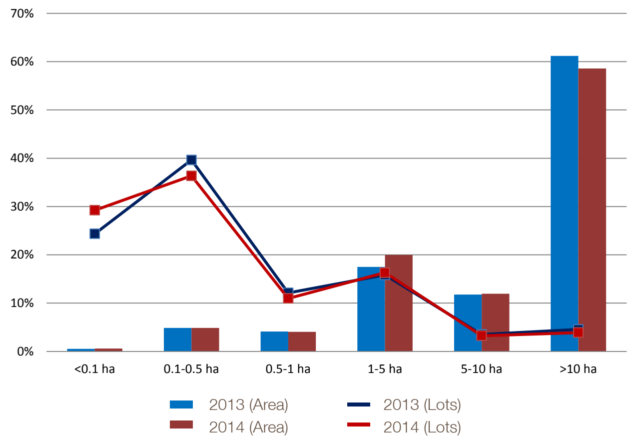
Table 4 - Sydney Region - Area of Undeveloped Zoned Employment Land by Lot Size (January 12 - January 14)

The table and figure below provides a breakdown of undeveloped zoned employment lands by lot size for January 2012 to January 2014. Lot sizes are grouped into 6 cohorts ranging from less than 0.1 hectare to more than 10 hectares. This data is presented by the number of lots (No.) and total area (Ha) for each cohort.

Lot Sizes	Lots						Net Change		Total Area						Net Change	
	2012		2013		2014		Lots (2013-2014)		2012		2013		2014		Total Area (2013-2014)	
	No	%	No	%	No	%	No	%	Ha	%	Ha	%	Ha	%	Ha	%
<0.1 ha	1,314	41%	498	24%	602	29%	104	5%	45	1%	23	1%	24	1%	1	0%
0.1-0.5 ha	1,026	32%	811	40%	749	36%	-62	-3%	262	6%	209	5%	193	5%	-16	0%
0.5-1 ha	290	9%	248	12%	226	11%	-22	-1%	206	4%	177	4%	161	4%	-16	0%
1-5 ha	378	12%	324	16%	336	16%	12	0%	847	18%	750	17%	795	20%	45	2%
5-10 ha	84	3%	72	4%	67	3%	-5	0%	595	13%	506	12%	476	12%	-30	0%
>10 ha	90	3%	93	5%	80	4%	-13	-1%	2,666	58%	2,625	61%	2332	59%	-293	-3%
Sydney Region Total	3,182	100%	2,046	100%	2,060	100%	14		4,620	100%	4,290	100%	3,981	100%	-309	

Source: NSW Land and Property Information

Figure 11 - Sydney Region - Area of Undeveloped Zoned Employment Lands by Lot Size (January 13 - January 14)



Observation:

The greatest amount of undeveloped zoned land still remains in lots over 10 hectares in size (59% of all undeveloped zoned land), although the number of lots in this larger size remains quite low (4% of total lots).

Table 5 - Record of Zoning Changes

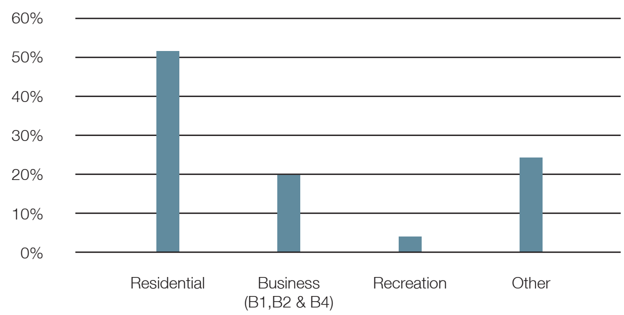
This table provides details of all known zoning changes to employment lands precincts between January 2013 and January 2014, including new industrial additions, and also losses due to rezonings. The table also provides a detailed breakdown of the various zones (under the Standard Instrument Local Environmental Plan) that were used when rezoning these precincts. For the first time, rezoning of Industrial land to B5, B6 and B7 has been separately recorded and will continue to be monitored through the ELDP. (See Table 6)

Precinct	LGA	2013	2014													Total Rezoned Land	Land Zone Additions
		IN	IN	R1	R2	R3	R4	B1	B2	B4	RE1	RE2	SP2	W1	E2		
Austral	Liverpool	0.0	44.8													0.0	44.8
Banksmeadow	Botany Bay	230.7	228.1			2.6										2.6	
Bibby St, Chiswick	Canada Bay	0.6	0.0			0.6										0.6	
Box Hill Industrial	The Hills	0.0	58.5													0.0	58.5
British American Tobacco Site	Botany Bay	16.5	6.1			6.7				3.7						10.4	
Carlton Cres	Ashfield	0.3	0.0						0.3							0.3	
Council Depot	Fairfield	2.4	2.3												0.1	0.1	
Flour Mill Site	Ashfield	3.5	3.0			0.0				0.4						0.5	
Harris Road, Five Dock	Canada Bay	0.2	0.0			0.2										0.2	
Hordon Pde	Ashfield	0.1	0.0			0.1										0.1	
Kogarah, Gray Avenue	Kogarah	0.7	0.0							0.7						0.7	
Leppington North	Camden	0.0	70.8													0.0	70.8
Punchbowl	Bankstown	2.9	0.4		2.5											2.5	
Railway Parade, Cabramatta	Fairfield	4.1	3.4									0.7				0.7	
River Road West, Parramatta	Parramatta	6.8	5.0							1.8						1.8	
Rydalmere	Parramatta	103.0	102.8								0.3					0.3	
Strathfield Mail	Strathfield	13.6	8.3										5.3			5.3	
Thornleigh	Hornsby	28.4	23.6			4.3					0.5					4.8	
Victoria Rd, Terry St/ Wellington St (Carrier Site)	Leichhardt	3.2	1.8	1.4												1.4	
Water Street	Strathfield	5.2	5.0										0.2			0.2	
Wentworth Falls	Blue Mountains	0.8	0.0												0.8	0.8	
Wyong	Wyong	335.2	333.3												1.9	1.9	
Total		758.2	897.1	1.4	2.5	14.4	0.0	0.0	0.3	6.6	0.8	0.7	5.5	0.0	2.9	35.1	174.1
Net Difference 2013-14 IN Lands for rezoned precincts	139.0																
% of Total Rezoned Land				4.0%	7.1%	41.0%	0.0%	0.0%	0.9%	18.8%	2.2%	2.0%	15.8%	0.0%	8.1%	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.

Source: ELDP and LEPs

Figure 12 - Rezoning of Employment Lands to other Zones



Observation:

2013 saw a loss of 35 ha of Industrial land which was rezoned to non-employment or mixed use zones. The majority of this land was located in the inner and middle ring LGAs of Sydney and was converted to a residential zone.

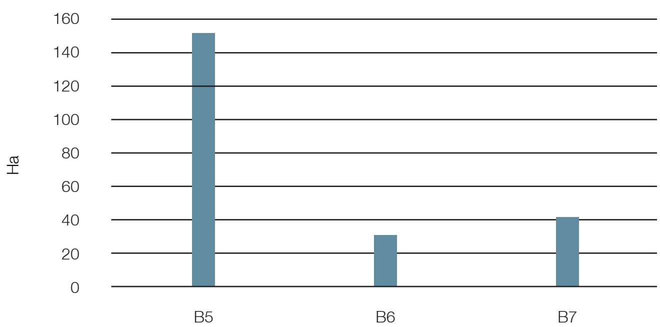
2013 also saw the addition of 174ha of Industrial zoned land, which was located in outer ring LGAs in the North West and South West Growth Centres (The Hills, Liverpool and Camden).

Table 6 - Record of Zoning Changes to B5, B6 and B7 (January 13 - January 14)

Precinct	LGA	2013	2014				Total Rezoned
		IN	IN	B5	B6	B7	
Botany	Botany Bay	67.3	47.9			19.4	19.4
Cabramatta CBD	Fairfield	1.4	0.0		1.4		1.4
Camellia/Rosehill	Parramatta	238.7	238.1	0.6			0.6
Canterbury Road, Campsie	Canterbury	3.2	0.0	0.6	2.6		3.2
Canterbury Road, Hurlstone Park	Ashfield	0.3	0.0		0.3		0.3
Fairfield	Fairfield	4.7	0.0		4.7		4.7
Fairfield East	Fairfield	99.4	86.1	13.3			13.3
Flemington (Arthur St, Homebush Business Park and Mason Park)	Strathfield	61.6	53.7		7.9		7.9
Hornsby East	Hornsby	1.0	0.0	1.0			1.0
Hornsby West	Hornsby	1.9	0.0	1.9			1.9
Hoxton Park Airport^	Liverpool	38.8	35.3	3.5			3.5
Lansvale	Fairfield	57.0	14.9	42.1			42.1
Leppington North	Camden	0.0	0.0				0.0
Manly Vale	Manly	10.1	5.7		4.4		4.4
Mascot	Botany Bay	77.1	31.0	27.2		18.9	46.1
Parramatta Rd, btw Liverpool and Slone Sts	Ashfield	1.1	0.0		1.1		1.1
Parramatta Rd, Frederick St	Ashfield	2.1	0.0		2.1		2.1
Parramatta Rd, Haig Ave	Ashfield	0.1	0.0		0.1		0.1
Pennant Hills	Hornsby	1.3	0.0		1.3		1.3
Princes Hwy Frontages	Marrickville	7.9	4.5		3.4		3.4
Smithfield North	Holroyd	349.0	342.2	6.8			6.8
Smithfield South	Fairfield	42.6	39.4	3.2			3.2
South Parramatta	Holroyd	13.8	8.6	5.3			5.3
South Strathfield/Enfield	Strathfield	116.3	113.2			3.1	3.1
South Wentworthville	Holroyd	5.5	0.0	5.5			5.5
Tempe, Princes Hwy	Marrickville	3.7	1.7		2.0		2.0
Waitara	Hornsby	7.3	0.0	7.3			7.3
Wetherill Park	Fairfield	554.5	522.7	31.8			31.8
Sydney Region Total			3,036.3	150.1	31.3	41.4	222.8

Source: ELDP

Figure 13 - Industrial Land rezoned to B5, B6 and B7



Observation:

2013 saw 223 ha of Industrial land rezoned to B5, B6 or B7 zones, which continue to permit industrial uses but allow for a wider range of employment uses.

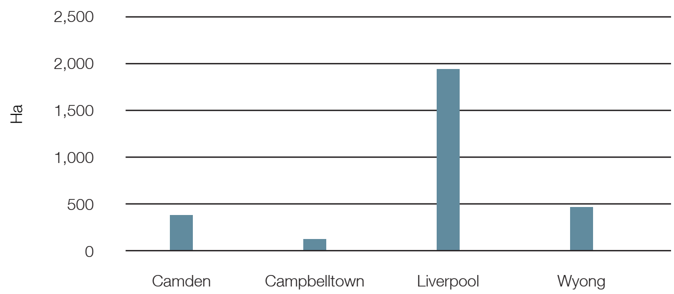
Table 7 - Proposed Employment Land

This table identifies employment land precincts which are proposed to be rezoned for industrial purposes throughout the Sydney Region. These future areas are located within South West Growth Centres, the North Wyong Structure Plan area and have also been identified in subregional strategies.

	Precinct	LGA	Area (Ha)
Proposed South West	Catherine Fields	Camden	73.2
	Future Industrial	Camden	87.6
	Glen Lee	Camden	37.6
	Lowes Creek	Camden	87.7
	Lowes Creek/Marylands	Camden	63.7
	Marylands	Camden	25.5
	Glen Lee	Campbelltown	112.3
	Future Industrial	Liverpool	1,124.9
	Kemps Creek	Liverpool	446.8
	Moorebank Defence Lands	Liverpool	336.0
	Rossmore	Liverpool	40.2
	Proposed South West Total		2,435.4
North Wyong Structure Plan	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
	North Wyong Structure Plan Total		467.0
Proposed Employment Land Total			2,902.4

Source: ELDP (Growth Centre Structure Plans, North Wyong Structure Plan and draft South West Subregional Strategy)

Figure 14 - Proposed New Employment Land by LGA (Ha)



Observation:

The majority of proposed Employment lands remain in South Western Sydney (84%) with 16% remaining in Wyong on the Central Coast. In 2013 there was no proposed Industrial Land in North Western Sydney.

Chapter 2 - Demand for Employment Land

Chapter 2

Demand for Employment Lands

Property analyst reports[1] indicate that the Sydney industrial market has begun to show early signs for recovery with recorded demand for industrial space increasing in certain industrial subsectors. The strong Australian dollar for the past 6 years has seen an improvement in demand by import based businesses for transport and warehousing space, whilst demand for manufacturing space has been in decline. In particular, investment sentiment strengthened across the outer west industrial sector of Sydney during 2013, with Sydney remaining one of the most in-demand property markets nationally.

Demand in Sydney for the past 12 months has been focused on the warehouse subsector in which the trend has been towards larger distribution centres and warehouses, particularly by transport and logistics companies. Outer Western Sydney has experienced strong growth relating to the construction of new warehouse and distribution centres, particularly within the Western Sydney Employment Area.

The manufacturing sector has continued to experience a decline in demand for industrial space, especially in trade exposed business sectors. The decline in demand is due largely to the manufacturing sector still feeling the effects of the impact of the strong A$. In addition there has been an increase in imported manufactured articles which has further decreased demand for state based manufacturing[2].

In contrast the increase in imported manufactured articles has had a positive impact on transport and logistics, which has continued to see growth driving occupier demand[3]. The constant growth in freight volumes and efficiency advancement are also directing the need for new facilities in the transport and distribution subsector. A noticeable factor of the rise in efficiency is due to taking advantage of locations which reduce 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.

The level of activity in the industrial property market has increased over the past couple of years as international investors, as well as a number of local market participants, have shown renewed investment in new builds. There has been demand for prime or modern assets, including large format, high quality and well-leased distribution facilities particularly in Western Sydney. In the first quarter of 2013 lease deals for buildings in excess of 5,000 sq.m increased by 38% compared to the previous corresponding period. Further almost three quarters of this take-up was located in the Outer West Sydney Region where new buildings are being concentrated[4]. ELDP data confirms this locational pattern with Blacktown LGA accommodating 57% (112 ha) of the total employment land take-up for 2013.

1 BIS Shrapnel, Sydney Industrial Property – Market Forecasts and Strategies 2013 – 2023, November 2013 (p15-23); CBRE, Australia Industrial MarketView, Q2 2013; and Knight Frank, Sydney Industrial Market Overview, May 2013 (pg1-8).
2 BIS Shrapnel, Sydney Industrial Property – Market Forecasts and Strategies 2013 – 2023, November 2013 (p15).
3 CBRE, Australia Industrial MarketView, Q2 2013.
4 Knight Frank, Sydney Industrial Market Overview, May 2013 (pg4).

The value ($) of industrial development approvals has increased from the $510 million of industrial building activity approved in the Sydney Region in financial year 2011/12, to $650 million. All industrial sectors experienced an increase in development approval activity, including a modest increase in the manufacturing sector.

Warehouse building activity remained the primary form of building approvals. This accounted for $474 million (73% of total industrial DAs), predominantly in the North West, West Central and South West Subregions, while 'other' industrial accounts for a further $102 million . Examples of approvals include Toll IPEC Freight Transport, Warehouse and Distribution Facility in Huntingwood and the extension of the Coles Myer Chilled Distribution Centre at Eastern Creek.

In total, 196 hectares of employment land were taken up by industrial development in 2013. This is an increase in take-up rates from 2012 (143 hectares), 2011 (120 hectares) and 2010 (153 hectares) and illustrates the renewed demand for industrial constructions.

The majority of take up (94%) occurred in Western Sydney, with the West Central subregion providing the major share (133.4 hectares), with a further 33 hectares in South West and 17 hectares in the West subregions.

Take-up activity was concentrated in the precincts of Huntingwood West (27 hectares), Former Wonderland, (26 hectares), Greystanes (22 hectares), Eastern Creek (19 hectares), Yarrunga/Prestons (10 hectares) and Erskine Park, (9 hectares). These results demonstrate that development is particularly focused within the Western Sydney Employment Area.

Property analysts predict the outlook for demand of warehouse space is positive over the next 10 years. Key drivers of growth will be population growth, increased residential and public infrastructure construction, business investment and non-residential construction[5]. In the longer term, the projects identified in the Long Term Transport Master Plan, such as intermodal terminals and freight lines, may also present catalysts for renewed activity in this sector.

The outlook for the manufacturing sector is less positive. A combination of the strong dollar and businesses ceasing or moving production overseas means the forecast for new manufacturing premises is to remain flat over the next couple of years[6].

5 CBRE, Australia Industrial MarketView, Q3 2013
6 BIS Shrapnel, Sydney Industrial Property – Market Forecasts and Strategies 2013 – 2023, November 2013 (p19-20)

Table 8 - Value ($) of Industrial Approvals for 2012/13 by LGA and Subregion

The building activity table below shows the monetary value ($) of all Industrial Development Approvals for the financial year from July 2012 to June 2013 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.

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	-	2,884,000	50,861,000	53,745,000
	Burwood	-	-	-	-
	Canada Bay	-	410,000	-	410,000
	Hunters Hill	-	-	-	-
	Lane Cove	-	385,000	640,000	1,025,000
	Leichhardt	-	-	-	-
	Marrickville	419,000	5,004,000	150,000	5,573,000
	Mosman	-	-	-	-
	North Sydney	-	-	-	-
	Randwick	-	137,000	-	137,000
	Ryde	-	355,000	-	355,000
	Strathfield	-	875,000	-	875,000
	Sydney	27,778,000	8,629,000	-	36,407,000
	Waverley	-	1,600,000	-	1,600,000
	Willoughby	358,000	790,000	2,000,000	3,148,000
	Woollahra	-	-	-	-
	Central Total	28,555,000	21,069,000	53,651,000	103,275,000
North	Hornsby	-	12,538,000	1,350,000	13,888,000
	Ku-ring-gai	-	-	-	-
	Manly	-	-	-	-
	Pittwater	-	-	-	-
	Warringah	78,000	5,290,000	858,000	6,226,000
	North Total	78,000	17,828,000	2,208,000	20,114,000
South	Canterbury	230,000	-	-	230,000
	Hurstville	-	110,000	-	110,000
	Kogarah	200,000	-	-	200,000
	Rockdale	-	5,450,000	-	5,450,000
	Sutherland Shire	-	2,490,000	1,195,000	3,685,000
	South Total	430,000	8,050,000	1,195,000	9,675,000
South West	Bankstown	4,235,000	2,053,000	7,318,000	13,606,000
	Camden	410,000	9,137,000	12,177,000	21,724,000
	Campbelltown	619,000	18,446,000	5,820,000	24,885,000
	Fairfield	2,657,000	1,782,000	4,876,000	9,315,000
	Liverpool	111,000	40,260,000	605,000	40,976,000
	Wollondilly	-	-	1,141,000	1,141,000
	South West Total	8,032,000	71,678,000	31,937,000	111,647,000
West	Blue Mountains	1,144,000	1,520,000	508,000	3,172,000
	Hawkesbury	10,500,000	1,100,000	60,000	11,660,000
	Penrith	3,380,000	95,632,000	1,720,000	100,732,000
	West Total	15,024,000	98,252,000	2,288,000	115,564,000
West Central	Auburn	6,922,000	32,925,000	3,039,000	42,886,000
	Blacktown	7,702,000	192,271,000	810,000	200,783,000
	Holroyd	5,715,000	5,097,000	-	10,812,000
	Parramatta	2,161,000	4,230,000	882,000	7,273,000
	The Hills Shire	-	6,572,000	100,000	6,672,000
	West Central Total	22,500,000	241,095,000	4,831,000	268,426,000
Central Coast	Gosford	-	12,862,000	5,280,000	18,142,000
	Wyong	-	3,056,000	1,037,000	4,093,000
	Central Coast Total	-	15,918,000	6,317,000	22,235,000
Sydney Region Total		74,619,000	473,890,000	102,427,000	650,936,000

Figure 15 - Value ($) of Industrial Approvals for 2012/13 by Subregion

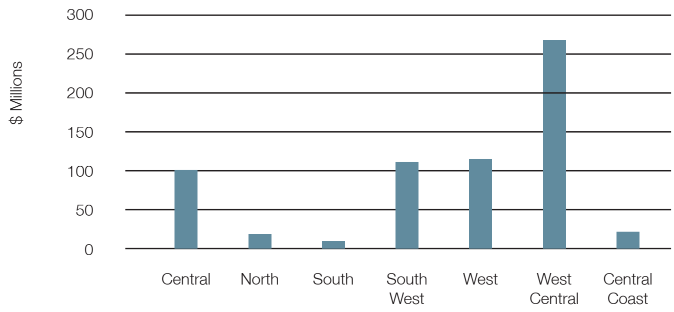
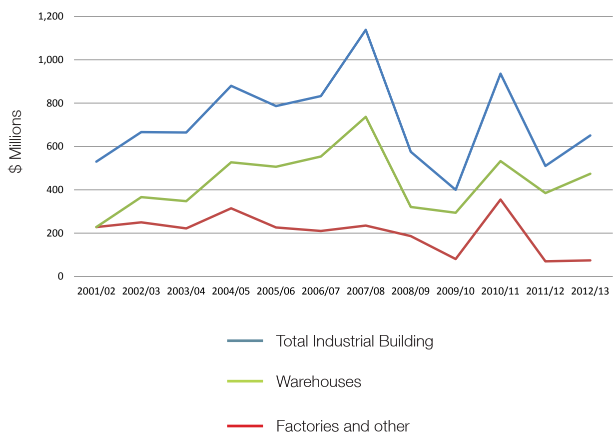


Figure 16 - Sydney Region - Value ($) of Industrial Approvals (2001/02 to 2012/13)



Observation:

In 2012/13 $496 million (76%) of Industrial Development approvals were for land in Sydney's West.

The West Central subregion was the location for $268 million (41%) of the total Industrial Development Approvals.

Warehousing remains the dominant sector accounting for 73% of the value of Industrial Development Approvals across the Sydney Region in 2012/13

Table 9 - Take-up of Employment Land by Key Precincts (January 08 - January 14)

The table below summarises take-up of employment lands over the 6 consecutive calendar years 2008, 2009, 2010, 2011, 2012 and 2013. 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 and this data was validated using aerial photography*. For the Central Coast, where this data is not available, aerial photography* was used to identify take-up of land, but only for 2010 through to 2013.

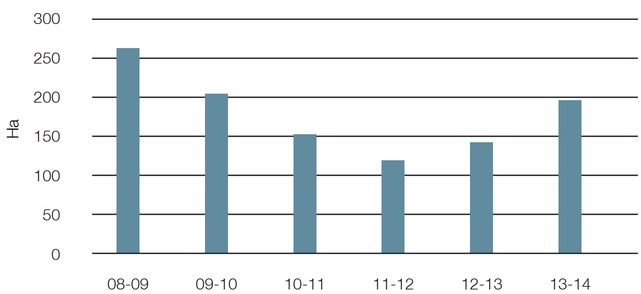
Subregion	LGA	Precinct	Jan 08 - Jan 09	Jan 09 - Jan 10	Jan 10 - Jan 11	Jan 11 - Jan 12	Jan 12 - Jan 13	Jan 13 - Jan 14	Total Ha
Central	Randwick	Port Botany	1.3	5.3	0.1	0.5	0.0	0.0	7.2
South	Sutherland	Kurnell	1.8	22.4	0.2	0.0	0.0	0.9	25.3
South West	Camden	Smeaton Grange	19.6	3.3	9.0	0.7	0.0	0.0	32.6
	Campbelltown	Campbelltown, Blaxland Road	0.0	0.0	0.0	0.0	15.1	3.7	18.8
	Campbelltown	Ingleburn	14.9	4.8	0.3	0.4	0.0	4.2	24.5
	Campbelltown	Minto	3.4	0.5	6.1	0.5	0.0	0.0	10.5
	Fairfield	South of Sydney Water Pipeline	0.0	0.0	0.0	10.0	0.0	0.0	10.0
	Fairfield	Wetherill Park	12.2	6.2	0.0	0.0	0.0	2.7	21.2
	Liverpool	Hoxton Park	0.0	0.0	38.1	0.0	0.0	0.0	38.1
	Liverpool	Yarunga/Prestons	15.6	22.5	5.3	1.4	0.0	10.1	54.9
West	Penrith	Erskine Park	28.3	50.6	0.0	19.9	30.7	8.9	138.5
	Penrith	North Penrith	0.9	7.2	4.3	0.4	0.0	7.0	19.8
West Central	Auburn	Chullora	2.0	0.3	0.1	5.1	0.0	4.0	11.4
	Auburn	Regents Park	8.8	1.4	1.2	0.8	0.0	0.2	12.4
	Blacktown	Blacktown Rd, St Martins	0.0	0.0	0.0	0.0	0.0	5.4	5.4
	Blacktown	Eastern Creek	25.5	4.3	11.4	32.3	0.0	18.5	92.0
	Blacktown	Former Wonderland	0.0	9.5	0.0	10.7	0.0	25.8	46.0
	Blacktown	Glendenning	10.4	5.7	0.2	0.8	0.0	2.2	19.2
	Blacktown	Huntingwood West	0.0	0.0	0.0	18.8	0.0	26.7	45.5
	Blacktown	Marsden Park	0.0	0.0	0.0	0.0	16.7	0.0	16.7
	Blacktown	Minchinbury	6.5	0.0	0.0	0.0	0.0	0.0	6.5
	Blacktown	Ropes Crossing	0.0	10.5	0.0	0.0	0.0	0.0	10.5
	Blacktown	Seven Hills (Blacktown LGA)	7.9	3.0	0.4	0.1	0.0	0.4	11.8
	Holroyd	Greystanes	0.0	0.0	16.8	0.0	7.1	22.3	46.2
	Parramatta	Rydalmere	0.0	0.0	0.0	0.0	0.0	8.3	8.3
	The Hills	Annangrove	0.0	0.0	6.0	0.0	0.0	0.0	6.0
Central Coast*	Gosford	Somersby	0.0	0.0	15.5	0.0	7.8	1.6	24.9
	Wyong	Tuggerah	0.0	0.0	0.0	1.9	0.0	4.1	6.0
	Wyong	Wyong	0.0	0.0	18.9	0.5	5.1	0.0	24.5
Sydney Region Total			264	205	153	120	143	196	1,081

Note: Table 9 shows only the precincts where in one or more of the years there was take-up of 5 hectares or more.

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 in those 2 years.

Source: Photomaps by nearmap.com

Figure 17 - Take up of Employment Lands



Source: ELDP (Sydney Water, Nearmap)

Observation:

In 2013 there was sharp increase in take-up of Employment Lands in the key precincts since 2012. 96% of this take-up occurred in Western Sydney.

Table 10 - Status of Employment Lands at January 2012 to January 2014

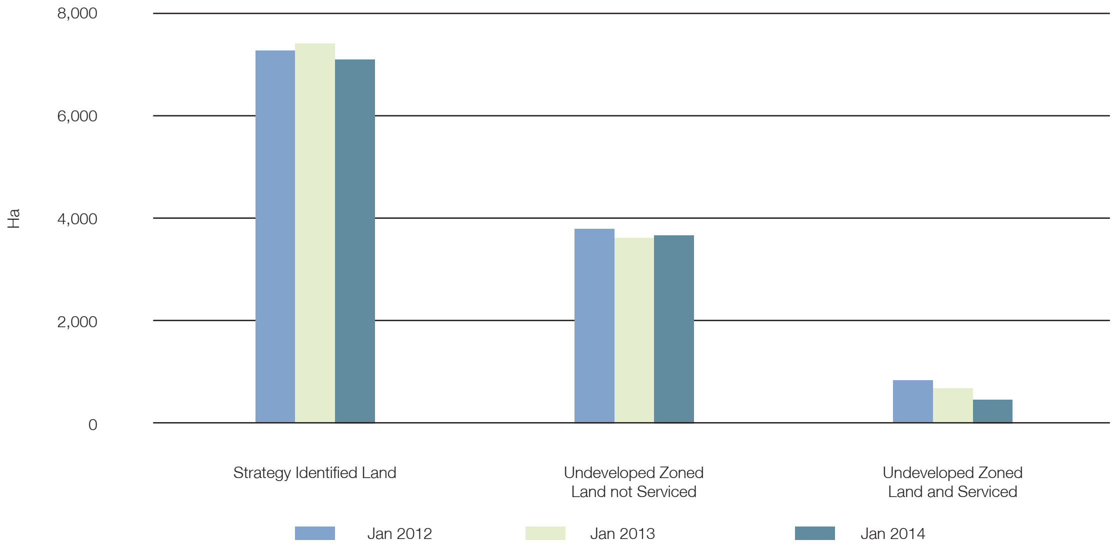
The table and figure below compares employment land stock at different stages of the development pipeline between January 2013 and January 2014. This shows all currently identified land (i.e. both zoned and unzoned/proposed undeveloped lands) referred to as ‘Strategy Identified Land’, as well as how 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)	Jan 2014 (Ha)	Net Change (Ha) 2013-2014
Strategy identified land	7,269	7,406	7,097	-309
Undeveloped zoned land:	4,620	4,290	3,981	-309
• Undeveloped zoned land not serviced	3,789	3,612	3,658	46
• Undeveloped zoned land and serviced	830	678	463	-215

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 industrial lands as well as undeveloped zoned industrial land.

Source: ELDP (Sydney Water and Gosford Council)

Figure 18 - Status of Employment Lands at January 2012 to January 2014



Observation:

Employment land stocks have slightly decreased in all categories in 2013. The largest proportional loss was in the undeveloped and serviced category which decreased by 215ha (or 46% of stocks).

Chapter 3 - Gap Analysis

Chapter 3

Gap Analysis

In terms of adequacy of stocks of employment lands at January 2014, the broad pattern was similar to that of the last 4 years. Based on a high take-up rate of 300 hectares per annum, there would be enough 'Strategy Identified Land' (i.e. that which has already been identified in planning strategies for future zoning or currently zoned and undeveloped land) to last 24 years (7,097 hectares). Of this total potential stock, there is 3,626 hectares of undeveloped zoned land, which is not serviced (water and sewer connection), providing up to 12 years of supply, using the high take-up rate. Both these amounts meet the supply standards for 'Strategy Identified Land' (20 years) 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 year supply (463 hectares) of undeveloped zoned land which is also serviced (water and sewer connection) and can be considered ready for development. This is a decrease from a 2 year supply in 2013 and falls significantly under the supply standard of 5-7 years supply for undeveloped and serviced land.

This finding is similar to the results of the last 4 years and suggests that action should focus around the servicing of existing zoned land where this meets the current needs of industry. To address this issue, the Department completed an audit in 2012 of key employment 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. The audit identified a series of critical infrastructure projects which would aid in unlocking development potential across a number of the precincts. This Audit will be updated again in 2014.

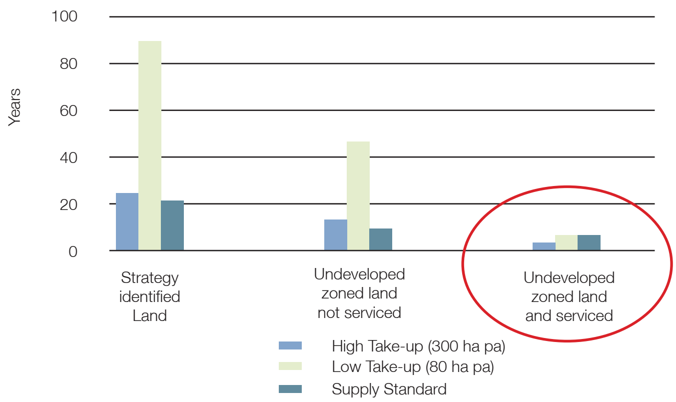
Table 11 - Assessment of the Adequacy of Employment Lands Supply at January 2013

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 a 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-14 (Ha)	High take-up (300 ha pa)	Low take-up (80 ha pa)	
Strategy identified land	7,097	24	89	20 yrs
Undeveloped zoned land not serviced	3,626	12	45	8-10yrs
Undeveloped zoned land and serviced	463	1.5	6	5-7 yrs

Source: ELDP (Sydney Water and Gosford Council)

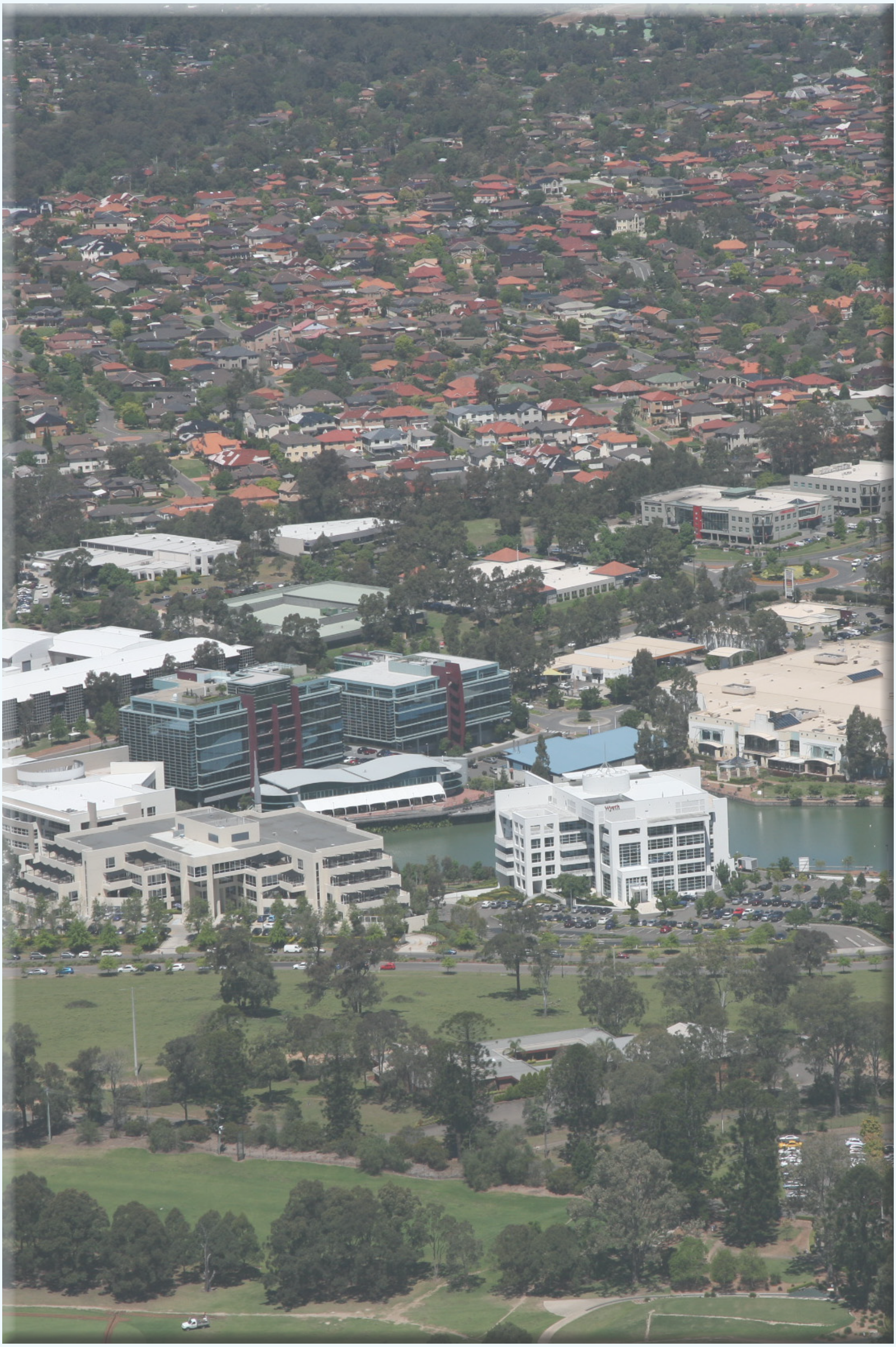
Figure 19 - Adequacy of Supply of Employment Lands



Observation:

There are sufficient stocks of existing undeveloped and proposed future employment lands under both the high and low take-up rates to meet supply standards

However, there is a consistent undersupply of zoned and serviced land under a high take-up scenario. This illustrates the need to focus on servicing existing zoned land to meet the needs of industry growth.



Chapter 4 - Business Parks

Chapter 4

Business Parks

Since 2013, the ELDP has been monitoring major business parks within Sydney 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.

Six established or emerging business parks have been incorporated into the ELDP to date, namely: Frenchs Forest (Warringah); Leppington North (Camden); 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 the 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. In 2013 79 ha of land in Leppington North was rezoned to B7, therefore this Business Park has been incorporated into the ELDP. This precinct was included due to its potential size and contribution to the Planned Major Centre of Leppington.

As monitoring of business parks began in 2013, data has only been presented for 2013 and 2014. It provides a snapshot of development status between these two years. For most of the business parks the zoned land is largely fully developed or at the very early stages of development. Consequently, there was not a lot of development that occurred in 2013 throughout the identified business parks.

The amount of undeveloped land remaining in the Sydney Olympic Park/Rhodes and Frenchs Forest precincts has slightly dropped to 2% and 5% respectively in 2013 compared to 4% and 6% in 2012. At January 2014, Macquarie Park had around 16 hectares of undeveloped land available (10% of its total stocks) while Norwest has significant tracts of undeveloped land still remaining (39.7 hectares or about a quarter of its total stocks). For the relatively new Marsden Park Business Park, the majority of the land is currently undeveloped (99 hectares or 80% of total stocks). For North Leppington which was added in 2013, 79 ha or 100% of the total stock is categorised as undeveloped.

Across the six business parks there is relatively little undeveloped land which is currently serviced (in terms of water and sewer) and therefore considered ready for development (12 hectares or 8% of undeveloped zoned land). Macquarie Park offers the only precinct with significant undeveloped and serviced lands (10 hectares).

Of the undeveloped zoned land, the majority of land is held in relatively large parcels which are between 1-5 hectares in size (130 hectares). There is also a significant amount of parcels undeveloped under 5 ha. This indicates 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.

There was no take-up of zoned business park land in 2013. This compares to 2012 when take-up did occur within two of the six business park precincts, namely Marsden Park (10 hectares) and Sydney Olympic Park/Rhodes (2 hectares). These figures demonstrate that development within business parks, especially the more established ones where land is largely occupied, is more likely to occur through intensification of existing development or refurbishment and redevelopment of spaces, rather than consumption of vacant land.

Table 12 - Development Status of Zoned Business Park Precincts at January 2014

Tables 12 – 15 and Figures 20-22 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 hectares and are identified as a Planner Major Centre, 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 recent take-up.

Business Park Precinct	Jan-13 (Ha)			Jan-14 (Ha)			Jan 13-14 (Ha)		
	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total
Frenchs Forest	3.2	54.5	57.6	2.7	55.1	57.8	-0.5	0.6	0.1
Leppington North	0.0	0.0	0.0	79.2	0.0	79.2	79.2	0.0	79.2
Macquarie Park	17.1	142.0	159.1	15.8	143.8	159.6	-1.3	1.8	0.5
Marsden Park	98.5	24.7	123.2	98.5	24.7	123.2	0.0	0.0	0.0
Norwest	39.1	119.9	159.0	39.7	119.0	158.8	0.6	-0.9	-0.3
Sydney Olympic Park/Rhodes	2.9	75.7	78.5	1.8	76.7	78.5	-1.0	1.0	0.0
Total	160.8	416.7	577.5	237.8	419.3	657.1	77.0	2.6	79.6

Figure 20 - Zoned Business Park Land Stocks - Jan 14

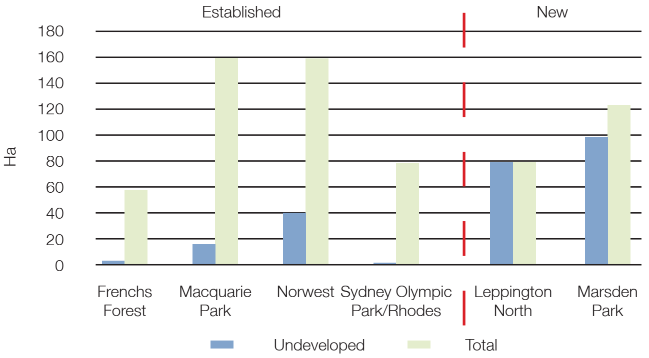


Table 13 - Undeveloped and Serviced Zoned Business Park lands at January 2014

Business Park Precinct	Jan - 13 Undeveloped and Serviced Zoned Land (Ha)	Jan - 14 Undeveloped and Serviced Zoned Land (Ha)
Frenchs Forest	0.5	1.1
Leppington North	0.0	0.0
Macquarie Park	11.5	10.3
Marsden Park	0.0	0.0
Norwest	0.6	0.6
Sydney Olympic Park/Rhodes	1.0	0.0
Total	13.6	12.0

Table 14 - Area (Ha) of Undeveloped Zoned Business Park land by lot size at January 2014

Lot Sizes	Jan-13	Jan-13	Jan-14	Jan-13
	No of Lots	Area (Ha)	No of Lots	Area (Ha)
<0.1ha	4	0.2	6	0.3
0.1-0.5ha	12	2.7	16	3.5
0.5-1ha	16	12.0	31	22.3
1-5ha	34	68.4	67	129.9
5-10ha	7	57.3	7	57.3
>10ha	2	20.3	4	28.2
Total	75	160.8	131	241.4

Table 15 - Take-up (Ha) of Zoned Business Park land (Jan 12 to Jan 14)

Business Park Precinct	Take-up (Ha)	Jan-13
	Jan12 to Jan-13	Jan13 to Jan-14
Frenchs Forest	0.0	0.0
Leppington North	0.0	0.0
Macquarie Park	0.0	0.0
Marsden Park	10.1	0.0
Norwest	0.0	0.0
Sydney Olympic Park/Rhodes	1.5	0.0
Total	11.6	0.0

Figure 21 - Undeveloped and Serviced Zoned Business Park lands 2013 to 2014

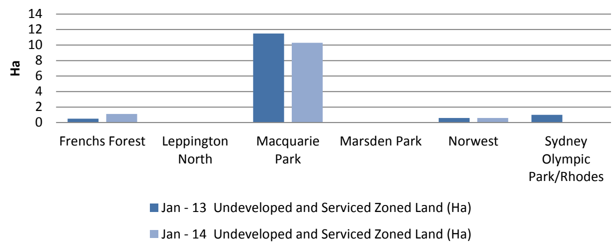
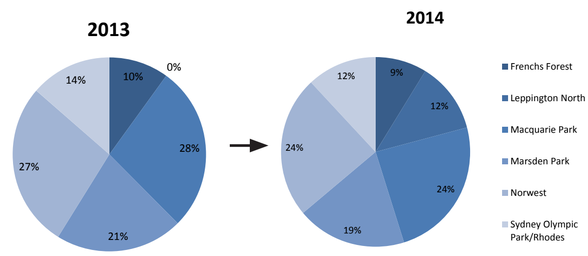


Figure 22 - Developed Business Park Precinct in 2013 and 2014



Observation:

There is relatively little remaining stocks of undeveloped land in more established Business Parks, such as Macquarie Park, Sydney Olympic Park and Frenchs Forest, with the exception of Norwest which has a quarter of the zoned undeveloped

For newly released business parks (Marsden Park and Leppington North) there are significant stocks of undeveloped land available.

Observation Summary

Observation Summary

- 2013 saw a modest increase in total land stocks of zoned employment lands. This was largely due to the rezoning of three new industrial precincts in the West Central (Box Hill Precinct) and the South West (Leppington North and Austral Precincts) subregions.
- The majority of employment land continues to be located in western Sydney (West, South West and West Central Subregion) including 69% of undeveloped land and 69% of developed stocks.
- 2013 saw the continued decline in undeveloped and serviced employment land stocks, due mainly to the take-up of land in Western Sydney precincts.
- The greatest amount of undeveloped zoned land still remains in lots over 10 hectares in size (59% of all undeveloped zoned land), although the number of lots in this larger size remains quite low (4% of total lots).
- 2013 saw a loss of 35 ha of Industrial land which was rezoned to non-employment or mixed use zones. The majority of this land was located in the inner and middle ring LGAs of Sydney and was converted to a residential zone.
- 2013 also saw the addition of 174ha of Industrial zoned land, which was located in outer ring LGAs in the North West and South West Growth Centres (The Hills, Liverpool and Camden).
- 2013 saw 223 ha of Industrial land rezoned to B5, B6 or B7 zones, which continue to permit industrial uses but allow for a wider range of employment uses
- 2013 also saw a further 79 hectares of Business Park (B7 zone) land added at Leppington North
- The majority of proposed Employment lands remain in South Western Sydney (84%) with 16% remaining in Wyong on the Central Coast. In 2013 there was no proposed Industrial Land in North Western Sydney.
- In 2012/13 $496 million (76%) of Industrial Development approvals were for land in Sydney's West.
- The West Central subregion was the location for $268 million (41%) of the total Industrial development approvals.
- Warehousing remains the dominant sector accounting for 73% of the value of industrial Development Approvals across the Sydney Region in 2012/13
- In 2013 there was sharp increase in take-up of Employment Lands in the key precincts since 2012. 96% of this take-up occurred in Western Sydney.
- Employment land stocks have slightly decreased in all categories in 2013. The largest proportional loss was in the undeveloped and serviced category which decreased by 215ha (or 46% of stocks).
- There are sufficient stocks of existing undeveloped and proposed future employment lands under both the high and low take-up rates to meet supply standards. However, there is a consistent undersupply of zoned and serviced land under a high take-up scenario. This illustrates the need to focus on servicing existing zoned land to meet the needs of industry growth.
- There is relatively little remaining stocks of undeveloped land in more established Business Parks, such as Macquarie Park, Sydney Olympic Park and Frenchs Forest, with the exception of Norwest which has a quarter of the zoned land undeveloped.
- For newly released business parks (Marsden Park and Leppington North) there are significant stocks of undeveloped land available.

Glossary

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. The Business Parks which are included in the ELDP are those which have a zoned area greater than 50 ha and are identified as a Planned Major Centre, 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 with 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.

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 template.

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 to 2031.

Sydney Region: Refers to Metropolitan Sydney comprising 6 subregions as defined in the Draft Metropolitan Strategy for Sydney 2031, 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 land 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: Photomaps by nearmap.com

Photography: Craig Allchin

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

Industrial Building Approvals: Australian Bureau of Statistics

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

Centre for Demography, Economics & Research

Centre for Demography, Economics and Research is a part of the Department of Planning & Environment

Centre for Demography, Economics and Research

Centre for Demography, Economics and Research provides a one stop shop for the evidence base underlying the planning system. The Centre is accountable for whole-of–government population projections, centralised data management, demand and supply analysis, forecasting of housing and employment targets, and for specialist economic advice.

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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