



EMPLOYMENT LAND STRATEGY GUIDELINES

Precinct Profiles

August 2021

COVID-19 AND THE POTENTIAL IMPACT ON DATA INFORMATION

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INTRODUCTION

The Department of Planning, Industry and Environment (DPIE) is currently in the process of preparing the Employment Land Strategy Guidelines (the Guidelines). The Guidelines will be used to assist councils in preparing their Employment Land Strategies (ELS) as part of the local strategic planning frameworks.

Building upon Urbis' work undertaken in 2016 and 2018 for DPIE, there is a need to understand the various land uses in industrial precincts around Greater Sydney and how their dynamics have changed in recent years.

Urbis has been engaged by DPIE to profile 19 precincts across Greater Sydney, which are shown in the map overleaf. These profiles will provide deeper insights into the following:

- The locational characteristics of various industrial precincts as well as their strengths and weaknesses;
- The existing land use zones in industrial precincts and existing building typologies within them
- Employment analysis, including estimates of the number of precinct workers, where they reside, how they travel to work and employment densities
- The role and function of industrial lands and what industries are locating in them
- The range of developed and undeveloped sites and identifying the potential for growth and densification.

The precinct profiles incorporate several key aspects, namely:

- Land audit
- Field work
- Spatial analysis.

The land audit involved the analysis of:

- The Employment Lands Development Monitor (ELDM) data
- The NSW Spatial Services' light detection and ranging (LiDAR) data.

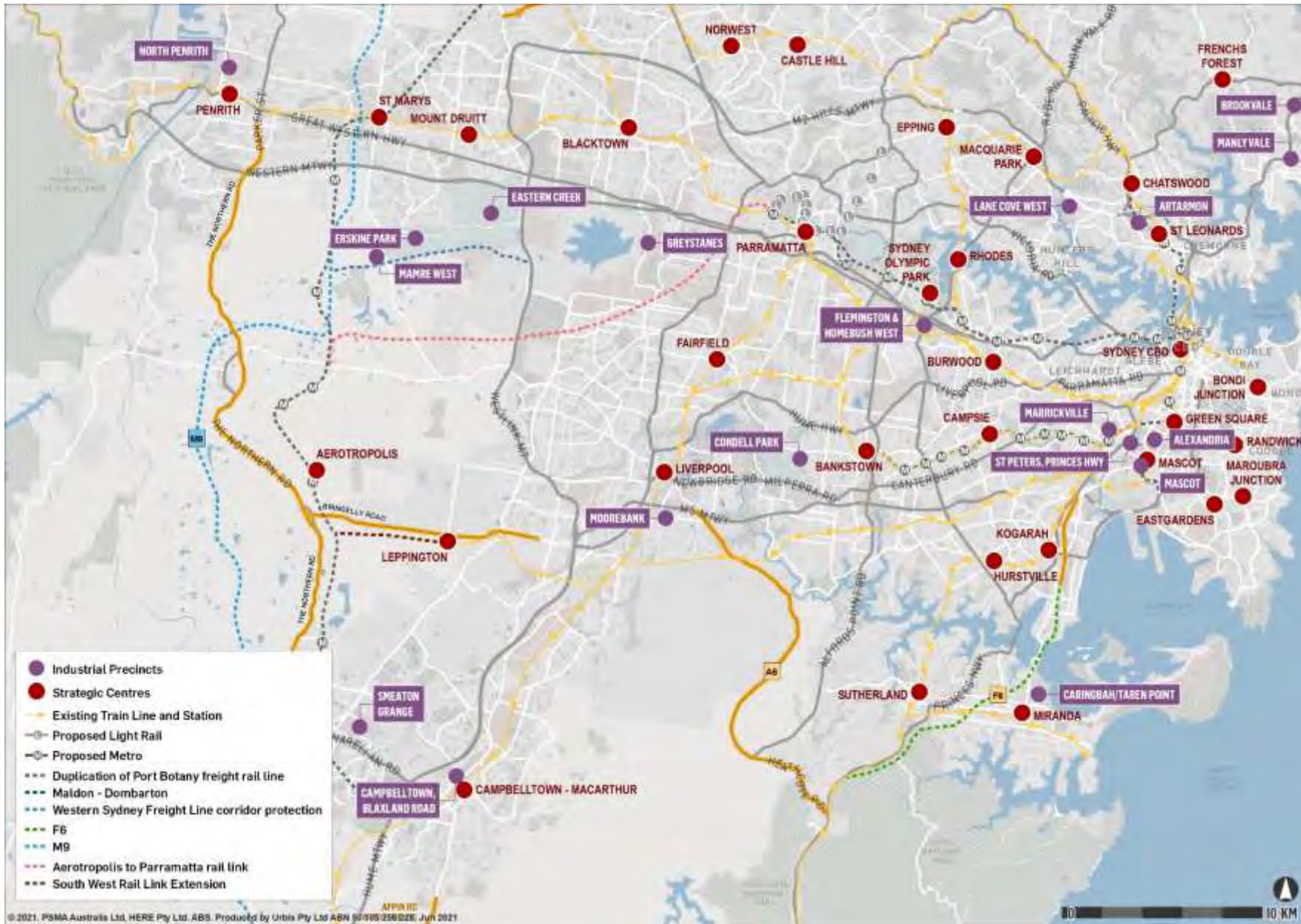
The field work comprised of site visits of each industrial precinct by the study team. Depending on the size of the precinct, between 2-5 hours were spent in each precinct, in order to ascertain:

- That the building levels and building types across each precinct aligned with LiDAR analysis output
- The accessibility, strength and weaknesses of the location
- The look and feel of the precinct, with consideration of the quality of building stock
- The nature of businesses and industrial typologies present.

The spatial analysis involved the analysis and mapping of:

- LiDAR data to determine the levels and footprints of existing buildings within each industrial precinct, in order to estimate the total floorspace
- Transport for NSW's Journey to Work data in order to determine the Statistical Area 1 (SA1) where workers live and their mode of travel to work
- 3D modelling that compares LEP height limits to existing building heights and identifies vacant parcels of land in order to understand if there are opportunities for densification and growth.

MAP OF PRECINCTS



ROLE AND FUNCTION CATEGORIES (2021)

This current work builds upon Urbis' previous 2016 and 2018 studies undertaken for DPIE.

The role and function categories have been refined with consideration of the following three dimensions:

- Whether the precinct serves a predominantly metropolitan or local role
- The property typology
- The function of the business.

The 2021 updated role and function categories, descriptions and examples are listed in the table below.

Precinct Role and Function	Description	Examples
Logistics and Warehouse (3PL/Distribution)	Refers to large scale logistics and warehousing operations by Third Party Logistics and large scale distribution centres	DHL, Toll, Coles Distribution Centre, Woolworths dark store
Logistics and Warehouse (Other)	Refers to all other logistics and warehouse land uses and premises that are not 3PL operated or large-scale distribution centres. This includes smaller standalone warehouses and strata warehouse units.	Australia Post Business Centre, machinery/equipment hire, records storage facilities
Primary Resource Processing and Large Scale Manufacturing	Operations where processing of primary materials occurs to produce materials. Also includes recycling facilities.	Concrete plants, recycling facilities, steel manufacturing, plastic manufacturing, packaging manufacturing, asphalt plants
Mining and Extraction	Mining and extractive industries (not present in study precincts)	
Metropolitan Infrastructure	Utilities infrastructure	Water, electricity sub-stations, data centres, road/rail constructions (e.g. WestConnex, Intermodal)
Office (Professional Services)	Stand alone offices	Head offices (e.g. Qantas), medical centres
Self Storage	Refers to self storage facilities	Kennards, Rent A Space, Storage King
Bulky Goods and Retail	Large format retail	Furniture stores, hardware stores, homemaker centres
Automotive	Automotive retail and service functions, including cars, motorbikes trucks, buses and boats	Smash repairs, service centres, vehicle parts stores, vehicle hire, vehicle sales and showrooms
Recreation and Lifestyle	Lifestyle amenities and services	Indoor sports centres, swimming pools, gyms, churches, childcare centres
Other	All other uses that do not fall into the above categories	E.g. artisan businesses (such as coffee roasters and breweries) working waterfront uses, hotels, pubs/TAB, training facilities, multi-level car parking

COMPONENTS OF PROFILES

The precinct profiles provide insights on the following areas:

- **Key locational attributes** – locational characteristics, key strengths and weaknesses, key strategic planning and transport infrastructure in and around the precinct as of May 2021.
- **Planning overview** – relevant zoning controls that govern the precinct and its surrounds, as well as any building height restrictions under planning controls as of May 2021.
- **Journey to work analysis** - Statistical Area 1 (SA1) where workers live by their chosen mode of transport to work (private vehicles, active transport and public transport) from the ABS last Census of Population and Housing conducted in 2016.
- **Nature and characteristics of the precinct** – building types and land uses that characterise the precinct, as well as key development activity, traffic access, condition of building stock and business clustering observed within the precinct as of May 2021.
- **Role and function analysis** – estimation of industrial floorspace (GFA) and developed land area, distribution of developed land area by type of uses and examples of tenants that operate within the precinct as of 2020.
- **Precinct built form** – maps the location, levels and footprints of buildings within the precinct, as well as the location of train / metro stations and lines, key industrial / business parks and major proposed developments as of 2020.
- **Potential capacity for growth** – the nature of employment and land for each precinct, historic land take-up, future development pipeline within the precinct. Also maps the vacant sites left for potential future development as of 2020.
- **Potential capacity for densification** – analysis of vacant and developed lots, distributed by lot size, for each precinct. Also maps and analyses the potential for additional height uplift on existing buildings as of 2020.

METHODOLOGY – ESTIMATING FLOORSPACE

Overview

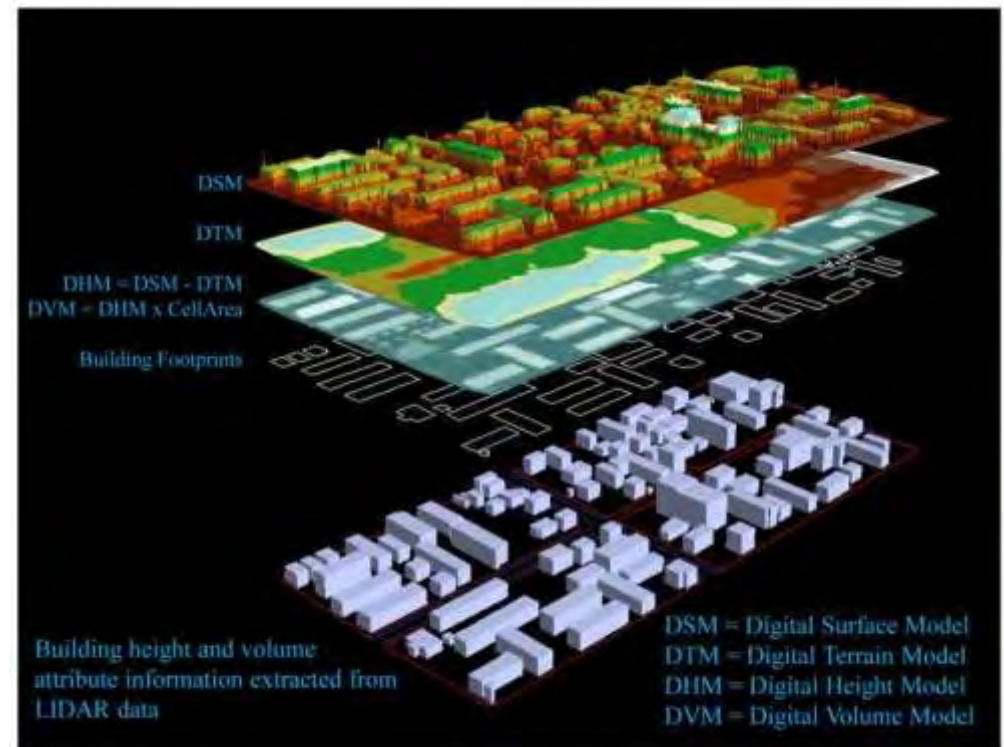
Estimating the total Gross Floor Area (GFA) for each precinct involved the following analysis:

- **Building level estimation** using NSW Spatial Service’s LiDAR data, Google Street Maps and fieldwork
- **Building footprint estimation** using Geoscape’s remotely sensed imagery
- **Precinct floorspace (GFA) estimation** using assumptions on office space and Gross Building Area (GBA) conversion ratios

Building Level Estimation

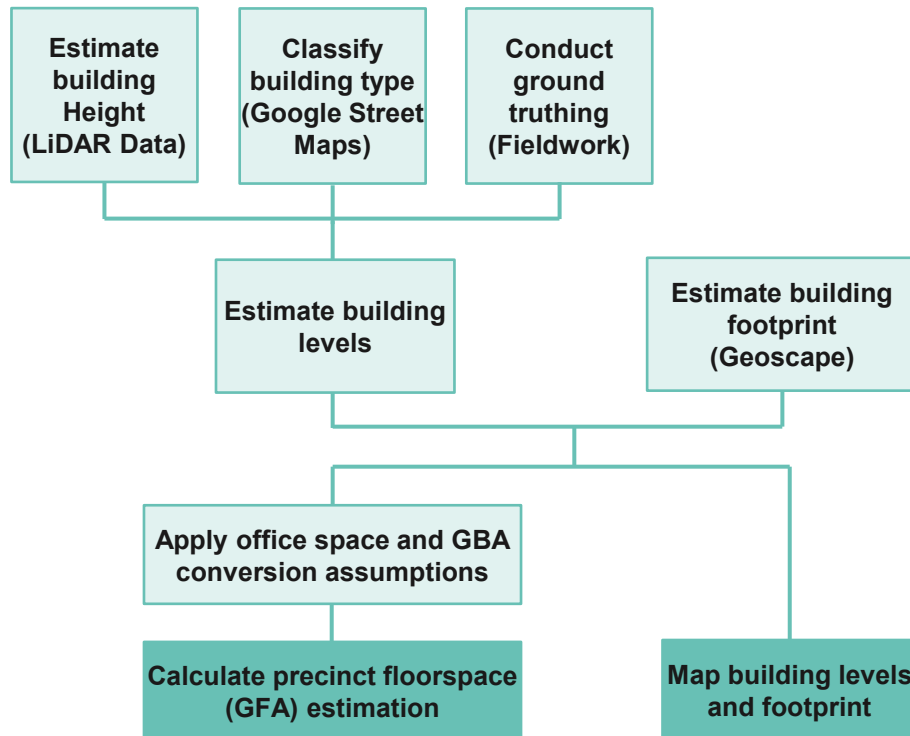
LiDAR data at a 1m DEM resolution was used to estimate the height of every building within each precinct. LiDAR data, obtained from Geoscience Australia, is a remote sensing technique that uses light detection and ranging to measure the distance between the ground and the roof of a building.

Example of LiDAR Extraction



Source: ResearchGate

Precinct Floorspace Estimation Methodology



METHODOLOGY – ESTIMATING FLOORSPACE

Building Level Estimation

Each building was then classified based on its building type, as outlined in the table to the right. A distinction was made between Industrial Warehouse / Office, comprising mezzanine- or multi-level office, and Industrial Warehouse, where all warehousing and ancillary office uses are contained to a single level.

Building types were identified using Google Street Maps. Different height assumptions were applied to each building type, based on previous work completed by Urbis.

Building levels were estimated by calculating the following:

$$\text{Number of Levels} = \frac{\text{Building Height}}{\text{Building Level Height Assumption}}$$

A ground truthing exercise was then conducted via fieldwork, whereby a study team visited each precinct to cross-check building type classifications and building levels.

While Google Street Maps is a valuable tool, conducting fieldwork presents additional insights, including:

- Providing access to individual sites and streets that Google Street Maps does not cover, particularly internal-facing complexes or buildings not visible from the street (e.g. at the rear of a site).
- Providing up-to-date information uniformly across all precincts, as the most recent Google Street Maps capture varies from precinct to precinct (some as far back as 2018).
- Allows for detailed observations on site topography (particularly slope and elevation) when reconciling building height errors. This was important to confirm that the adopted height assumptions were appropriate.

Manual adjustments were made where building types could not be clearly identified on Google Street Maps and outlier buildings did not align with height assumptions.

Building Type	Description	Height Assumption (metres per building level)
Industrial Warehouse / Office	Warehouse with mezzanine or multi-level ancillary office	4.5
Commercial Office / Hotel	Solely commercial or hotel function	3.5
Bulky Goods / Showrooms	Bulky goods or vehicle showroom functions	6
Industrial Warehouse	All warehousing / ancillary office functions contained to a single level	5.5
Multi-level Car Parking Lot	Multi-level car parking	2.5

Building Footprint Estimation

Data obtained from Geoscape was used to estimate the building footprint of every building within each precinct. Geoscape uses remotely sensed imagery, artificial intelligence and machine learning to digitally represent building polygons, which are defined as roof outlines of buildings greater than 9 sq.m.

A key limitation of this methodology is that the most recent capture of both LiDAR and Geoscape data is from 2020. This means that buildings that have been constructed since then will not appear in the data, while buildings that have been demolished since then have not yet been removed. Fieldwork observations have been crucial in resolving this discrepancy.

Building levels and footprints were then mapped (see Map 4 of precinct profiles) using the LiDAR and Geoscape dataset linkages to Australia's Geocoded National Address File (G-NAF).

METHODOLOGY – ESTIMATING FLOORSPACE

Precinct Floorspace (GFA) Estimation

Gross Floor Area includes mezzanine areas and ancillary office/retail areas but excludes stairs, lifts, building foyers, plant rooms and common areas.

Gross Building Area (GBA) was calculated as:

$$\text{Building GBA} = \text{Building Levels} \times \text{Building Footprint}$$

Gross Floor Area (GFA) was then calculated as:

$$\text{Building GFA} = \text{GBA} \times \text{Conversion Ratio (GBA to GFA)}$$

The assumptions used are outlined in the table below. The adopted 90% GBA to GFA Conversion Ratio is a standard design assumption for typical building typologies, based on Urbis' urban design experience.

Factor	Assumption
GBA to GFA Conversion Ratio	90% of GBA is attributed to GFA
Industrial Warehouse / Office Additional Floorspace Allowance	Additional 15% of gross building footprint

For buildings classified as Industrial Warehouse / Office, an additional office floorspace allowance was made to account for ancillary mezzanine or multi-level office areas found in these building types.

The office floorspace ratio was derived from a sample of Industrial Warehouse / Office buildings across multiple precincts. Office floorspace to total building footprint was calculated for this sample, which produced an average ratio of 15%.

Building GFA was then summed for buildings within each precinct to derive a total precinct GFA.



An example of a building classified as Industrial Warehouse / Office, as it contains mezzanine-level ancillary office uses.



An example of a building classified as Industrial Warehouse, whereby internal floor area is contained to a single level.

METHODOLOGY - HEIGHT CAPACITY UPLIFT

Theoretical Height Capacity Uplift Potential

To understand the theoretical capacity for further height intensification, LEP height limits under existing planning controls were compared to existing building heights. The additional capacity can be achieved if sites are redeveloped to more modern or multi-level developments. Existing buildings were then categorised as having limited, moderate or significant height uplift capacity, as outlined in the table below.

Height Capacity	Existing Building Height / Maximum Height Ratio
Limited Height Uplift Capacity	> 90%
Moderate Height Uplift Capacity	50% - 90%
Significant Height Uplift Capacity	< 50%

Properties where the existing building is already more than 90% of the maximum height limit are considered to have limited opportunity to further increase height. Properties with existing building heights of between 50% to 90% of the maximum height limit are considered to have moderate opportunity to increase development. Properties with existing building heights below 50% of the maximum height limit allowable are considered to have significant potential to increase development.

The additional height capacity output was mapped using ArcGIS Pro's 3D modelling tool (see Map 5 of precinct profiles). Vacant lots, defined as lots with a combined building footprint of less than 10% of its site area, were also mapped.

The 19 Precinct Profiles are presented in the next section in alphabetical order.

1. ALEXANDRIA

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

Alexandria Precinct Overview

Alexandria Industrial Precinct (Map 1.1) is located around 4.8 kilometres south of the Sydney CBD.

As at January 2020, the Alexandria precinct covered an area of approximately 151.7 hectares, of which 1.9 hectares was undeveloped.

The Precinct's major access route connections are Gardeners Road, for connections to the M1 Motorway and Campbell Road, for connections to Princes Highway.

A summary of the locational characteristics of the precinct is provided in Table 1.1.

Location and Key Transport Infrastructure

Map 1.1



Location Characteristics

Table 1.1

Characteristic	Detail
Distance to nearest train station	1.5 kilometres northeast (Green Square Station) 1.5 kilometres south (Mascot Station)
Distance to nearest motorway	2.2 kilometres northeast (M1 Motorway)
B-Double truck access	Yes
Surrounding land uses	<ul style="list-style-type: none"> Warehouses and low to medium residential dwellings to the north and east Mascot Town Centre, light industrial warehouses and a mix of low to high density residential to the south Sydney Park and WestConnex construction to the west

Strengths

1. Proximity to Sydney CBD and Sydney Airport
2. Serviced by train stations to the north and south
3. Good connections to food and beverage (The Grounds of Alexandria) and retail (Alexandria Homemaker Centre, Mascot Town Centre)

Weaknesses

1. Congestion issues, particularly along McEvoy Street, making it difficult for vehicles to enter/exit driveways

EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

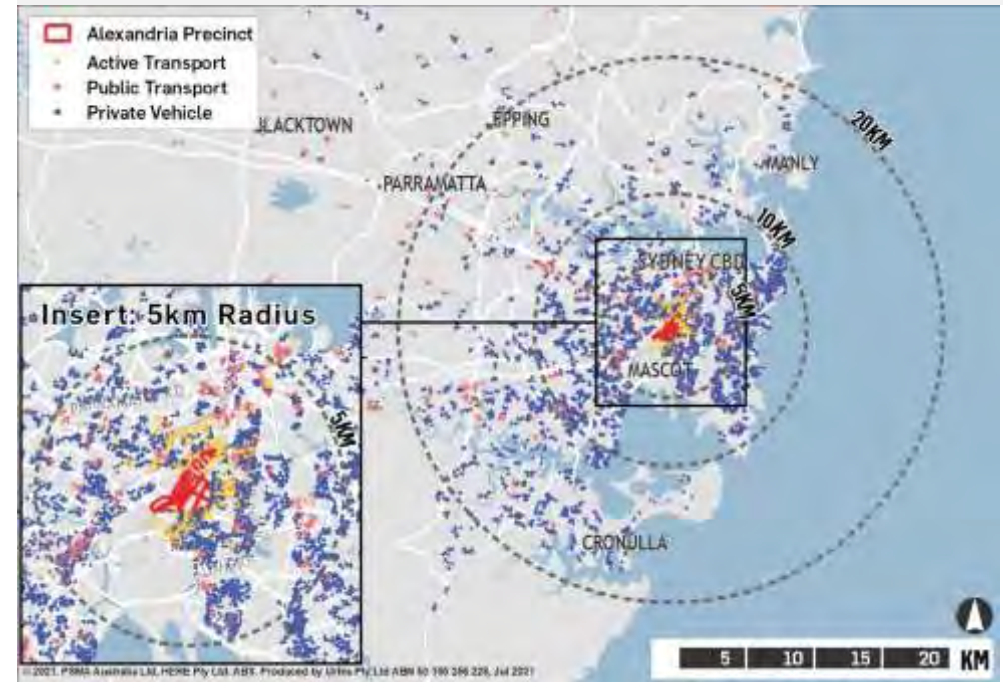
Map 1.3 shows the place of residence of those who work in the Alexandria Industrial Precinct and how they travel to work. The dots represent where workers live, and the two difference colours show how they travel to work, either by car or public transport.

Precinct workers' residences are largely concentrated within 10 km of the Precinct, accounting for 69% of all precinct workers. Workers are more likely to travel in from the southwestern suburbs.

The majority of workers (80%) travel to work via private vehicles, despite Green Square and Mascot Train Stations servicing the north and south ends of the Precinct. Potential traffic pressures may arise due to the increased demand for on-street parking where there is no dedicated on-site parking. Approximately 6% of precinct workers travel to work via active modes of transport, largely residing directly to the north or east of the Precinct.

Where do Precinct Workers Live, 2016

Map 1.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

The Alexandria Precinct contains an IN1 General Industrial zone to the southwest, B6 Enterprise Corridor to the east and two small pockets of B7 Business Park zones to the north and southeast. The current tenants within this Precinct are consistent with the permitted uses for each zone.

Map 1.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct.

IN1 GENERAL INDUSTRIAL ZONE

To the southwest of the Precinct are the IN1 General Industrial zoned lands, which features the historic Alexandra Canal that runs between Burrows and Bourke Roads.

The IN1 zone is largely characterised by older warehouses with ancillary office uses. The IN1 zone also features most of the Precinct's primary resource processing uses, including concrete and asphalt plants and recycling centres. These uses are concentrated along Burrows Road. To the west of the IN1 zone lies Sydney Park and WestConnex construction. There is northbound and southbound access to / from sites along Burrows and Bourke Roads, while sites along Euston Road are only accessible via southbound traffic.

The building levels of the IN1 zone are typically 1-storey, with some 2-storey buildings such as Mascot Tech Park, a block of strata office/showroom units situated along Gardeners Road. Gardeners Road is a wide, 6-lane east-westbound road, which acts as a buffer from the high density dwellings to the south. Access to / from sites along Gardeners Road are limited to eastbound traffic.

B7 BUSINESS PARK ZONES

To the north of the Precinct lies a detached pocket of B7 Business Park uses. The zone features older warehouses with ancillary office uses. Several warehouses have been converted into commercial office uses, a trend observed across

Eastern City industrial precincts. The zone features Expo 112, a strata warehouse complex with ancillary office/showroom spaces fronting McEvoy Street. Expo 112 largely caters for high end, boutique creative businesses. The zone neighbours medium density residential dwellings, buffered by natural vegetation.

To the southwest of the Precinct lies a second pocket of B7 Business Park uses. The zone features mostly older warehouses with ancillary office uses that cater to traditional industrial uses such as automotive (e.g. repairs) and warehousing. Platinum Business Park is a relatively modern strata warehouse/office complex located within this B7 pocket. This zone has also seen a number of warehouse conversions to office uses and supports several creative businesses, including artisan bakeries, photography/recording studios and boutique bridal stores.



The IN1 General Industrial zone features older, high-clearance warehouses for traditional industrial activities such as concrete manufacturing and distribution.

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

B6 BUSINESS ENTERPRISE ZONE

To the east of the Precinct are the B6 Enterprise Corridor zoned lands, which comprise a wide array of land uses.

Bourke Road features a versatile mix of new and old, large warehouses with ancillary offices and strata office/warehouse units. Ancillary offices attached to these warehouses typically range from 1-3 storeys. Bourke road also features two Equinix data centres (SY3 and SY4). Entry / exist from premises along Bourke Street are accessible both northbound and southbound.

Huntley and Maddox Streets to the north of the B6 zone feature Goodman's Alexandria Industrial Estate and Perry Park Industrial Estate. These estates comprise modern strata warehouse units with ancillary office uses, typically larger than those seen elsewhere within the Precinct.

This zone also features several warehouses that have been converted to office spaces, much like those seen within the B7 Business Park zones. Most notably, The Mill by Dexus is a creative business park set within a historic brick and sawtooth warehouses. It features commercial and retail spaces across ten buildings between 1-3 storeys high. The business park includes The Grounds of

Alexandria, a destination food and beverage precinct, which attracts high levels of foot traffic exposure to the site. Given the high levels of visitation to the precinct, surrounding streets often experience congestion issues.

O'Riordan Street features a large presence of bulky goods retailing and vehicle showrooms, as well as commercial offices (1-4 storeys) with warehousing attached. Situated toward the south of the B6 zone is Sydney Corporate Park, a 14-hectare destination business park that comprises entertainment, leisure, retail, services and dining, in addition to a large corporate park offering.



2-3 storey offices commonly seen across the B6 zone. (Map x.A)



Sydney Corporate Park features recreational activities, such as bouldering. (Map x.A)



Sydney Corporate Park also features a large corporate offering. (Map x.A)

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Chart 1.1 illustrates the type of uses (determined by property type and business function) that currently occupy the precinct. The data was collected by Urbis in May 2021 and included a combination of:

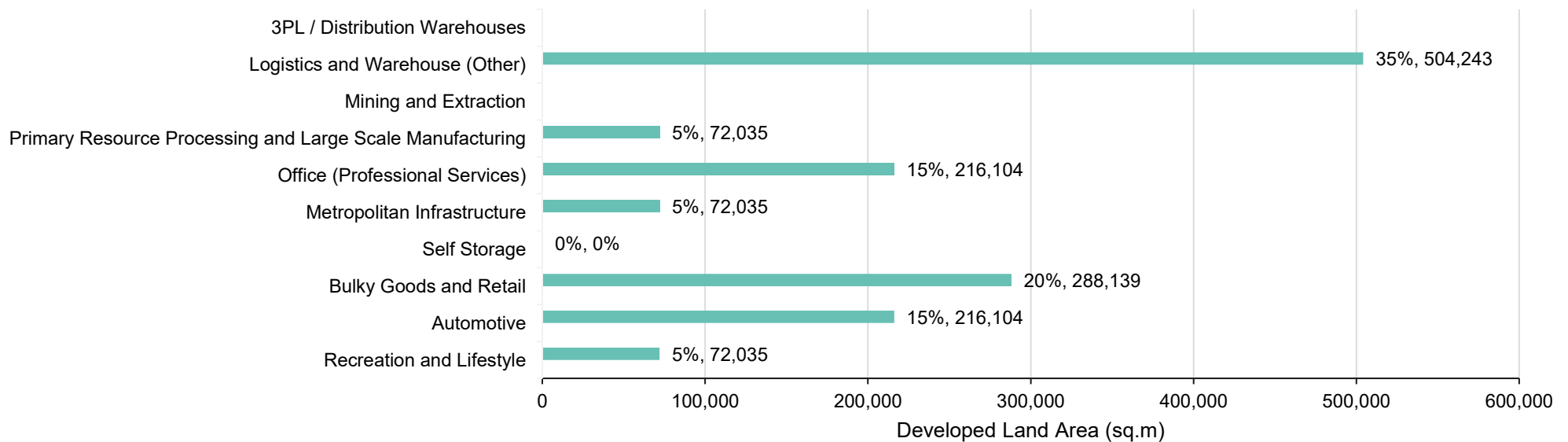
- Physical inspection of properties within the precinct
- Geographic information system analysis
- Interviews with various tenants.

As at May 2021, Urbis estimates that the precinct supports 1,047,050 sq.m of industrial floorspace on approximately 1,440,695 sq.m of developed land area. The Precinct serves a mixed role.

The Precinct features various industrial land typologies, with the most prominent being Logistics and Warehouse (Other) and Bulky Goods and Retail, together accounting for around 50% of the land area distribution. Other notable uses include Office (Professional Services) and Automotive, accounting for 15% of developed land area each. There is also a small presence of Primary Resource Processing and Large Scale Manufacturing, Metropolitan Infrastructure and Recreation and Lifestyle.

Developed Land Area by Typology, Alexandria Precinct

Chart 1.1



Source: Urbis

MAP 1.4: ROLE AND FUNCTION - WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the share of typologies reflected in the Alexandria Precinct and examples of tenants are detailed in Table 1.2.

Approximately 35% of developed land area is attributed to Logistics and Warehouse (Other) dispersed throughout the Precinct, while an additional 20% is dedicated to Bulky Goods and Retail, largely concentrated along O’Riordan Street.

The Precinct contains approximately 15% of land area attributed to Office (Professional Services), due to the presence of several head offices, and Automotive uses, largely due to the vehicle showrooms present along O’Riordan Street. Other uses within the Precinct include Primary Resource Processing and Large Scale Manufacturing, Metropolitan Infrastructure and Recreation and Lifestyle.

Developed Land Area Distribution by Typology, Alexandria Precinct

Table 1.2

	Distribution	Example Tenants
3PL / Distribution Warehouses	<1%	B6 Business Enterprise Zone: DB Schenker Air (logistics)
Logistics and Warehouse (Other)	35%	B6 Business Enterprise Zone: Peters of Kensington (customer pick up warehouse), Unitex Rugs (rug wholesale and distribution), Australia Post Business Centre (parcel delivery/collection and bulk mail lodgement), IN1 General Industrial Zone: Wrights the Butchers (wholesale factory), Printforce (printing services), AlSCO (linen and workwear rental service), Rexel (electrical supplies distribution and office), Kennards Hire Lift and Shift (equipment rental) B7 Business Park Zone: SUNSTUDIOS (photography studio)
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing	5%	IN1 General Industrial Zone: Holcim Concrete (concrete plant), Bingo Recycling (recycling centre), Visy Dry Recyclables Facility (recycling centre), Fulton Hogan Asphalt Plant (asphalt plant), Sims Metal Management (scrap metal yard) B7 Business Park Zone: Concrite (concrete plant)
Office (Professional Services)	15%	B6 Business Enterprise Zone: Breville Head Office (appliances), Fulton Hogan Head Office (infrastructure construction) B7 Business Park Zone: General Pants (clothing store, head office), Koala Head Office (furniture)
Metropolitan Infrastructure	5%	IN1 General Industrial Zone: Waverley/Woollahra Council Depot (depot facility), Equinix SY4 (data centre), Transgrid Substation (substation) B6 Business Enterprise Zone: Equinix SY3 (data centre),
Self Storage		
Bulky Goods and Retail	20%	B6 Business Enterprise Zone: Supercheap Auto, Officeworks, Domayne, Tradelink, Alexandria Homemaker Centre, Ultra Football (football store)
Automotive	15%	B6 Business Enterprise Zone: MG (showroom), Mazda (showroom), Jaguar Land Rover (showroom), Peugeot (showroom), Bentley (showroom and repairer)
Recreation and Lifestyle	5%	B6 Business Enterprise Zone: Archie Brothers (cocktail bar and arcade), All Sorts Indoor Sports Centre (indoor sports centre), Sky Zone (trampoline park, rock climbing and laser tag), Montessori Academy (child care), Aquatic Achievers Swim School (swim school), NUBO (learning centre)
Other	<1%	B7 Business Park Zone: Rocks Brewing (artisan brewery), Sonoma Artisan Bakery (artisan bakery),
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 1.3 shows the quantum of zoned industrial land within the Alexandria Precinct.

As at December 2020, there was a total of 151.7 hectares of zoned industrial land in the Alexandria Precinct, of which 149.8 hectares has been developed and only 1.9 hectares (1.3%) remained undeveloped.

Between 2016 and 2020, the Precinct experienced an average land take-up of 2.4 hectares per annum. There are currently 34 projects within the future pipeline, with a total estimated value of around \$323.1 million. This includes the Equinix SY5 Data Centre (~\$91.5 million), currently under construction, and proposed warehouse with ancillary office uses at 202 Euston Road (~\$37.5 million).

Nature of Employment and Land Table 1.3

Factor	Value
Total Employment, 2021 projection	23,282 jobs
Total Developed Land Area, 2020	149.8 ha
Total Undeveloped Land Area, 2020	1.9 ha
Future Pipeline and Estimated Value	33 projects, ~\$306.1m
Average Annual Land Take-Up (2016 – 2020)	2.4 ha
Total Floorspace, 2021 (Gross Floor Area)	1,047,050 sq.m
Average Land Area per Employee	64.3 sq.m
Average Gross Floor Area per Employee	45.0 sq.m

Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis

As at 2021, total employment in the precinct is estimated to be 23,282 jobs. Of the 53.5 hectares of zoned industrial land, there is approximately 1,047,050 sq.m of Gross Floor Area. This equates to an average land area of 64.3 sq.m per employee or floorspace of 45.0 sq.m per employee.

Map 1.5 indicates the Precinct's potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

A majority 69% of site area within the Precinct has moderate to significant height uplift capacity, while a further 28% has limited capacity for additional height uplift. This indicates high levels of flexibility for additional height within the Precinct.

Additional Height Uplift Capacity, May 2021 Map 1.5



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 1.4, the Alexandria Precinct comprises of 290 lots, 12 of which are vacant sites. These vacant sites vary in size but 50% are sites of over 4,000 sq.m in size.

The developed sites are generally evenly distributed between small, medium and large sized lots. Lots of 1,000 sq.m or less comprise 36% of total sites, while large lots over 4,000 sq.m comprise 34%. The Precinct contains a mix of small to medium sized standalone and strata unit warehouses with large corporate

business parks and bulky retail centres.

Average site coverage within the Precinct is relatively high, but generally decreases as lot size increases. Lots of less than 1,000 sq.m achieved average site coverage of over 80% and this falls to around 60% for lots over 4,000 sq.m, likely attributed to on-site parking provisions. This indicates potential capacity for further densification, particularly on larger lots, subject to other site and planning constraints.

Distribution of Sites by Lot Size, Alexandria Precinct

Table 1.4

Size	Vacant Sites		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	0	0%	67	24%	88%	67	23%
501 - 1,000 sq.m	1	8%	32	12%	82%	33	11%
1,001 - 2,000 sq.m	2	17%	33	12%	72%	35	12%
2,001 - 3,000 sq.m	1	8%	34	12%	64%	35	12%
3,001 - 4,000 sq.m	2	17%	17	6%	65%	19	7%
4,001 - 5,000 sq.m	3	25%	22	8%	56%	25	9%
More than 5,000 sq.m	3	25%	73	26%	61%	76	26%
Total	12	100%	278	100%	62%	290	100%

2. ARTARMON

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

Artarmon Precinct Overview

Artarmon Industrial Precinct (Map 2.1) is located around 5.8 kilometres north of the Sydney CBD.

As at January 2020, the Artarmon Precinct covered an area of approximately 151.7 hectares, of which approximately 1.9 hectares (1.3%) remained undeveloped.

The Precinct's major access route connections are the Lane Cove Tunnel (for connections to the M1 Gore Hill Freeway and M2 Motorway) and Pacific Highway.

A summary of the locational characteristics of the Precinct is provided in Table 2.1.

Location and Key Transport Infrastructure

Map 2.1



Location Characteristics

Table 2.1

Characteristic	Detail
Distance to nearest train station	1 kilometre southwest (St Leonards Station)
Distance to nearest motorway	1.1 kilometres northwest (M2 Motorway)
B-Double truck access	Yes
Surrounding land uses	<ul style="list-style-type: none"> Lane Cove Tunnel to the north Old industrial warehouses to the east Royal North Shore Hospital precinct, Gore Hill Park and St Leonards commercial centre to the south A strip of bulky goods retailing and a mix of high- and low-density residential dwellings along Pacific Highway to the west

Strengths

1. Access to both the M2 Motorway and M1 Gore Hill Freeway
2. Cohesive precinct
3. Proximity to Royal North Shore Hospital and Gore Hill Park

Weaknesses

1. St Leonards Station has limited walkability to most of the Precinct
2. Potential for traffic congestion on narrow roads, particularly due to trucks turning/stopping

PLANNING - WHAT IS THE ZONING MIX?

Map 2.2 opposite provides a summary of the relevant planning instruments and controls for the Artarmon Precinct.

The IN1 General Industrial zoning of the Precinct typically encourages traditional industrial land uses, particularly automotive uses.

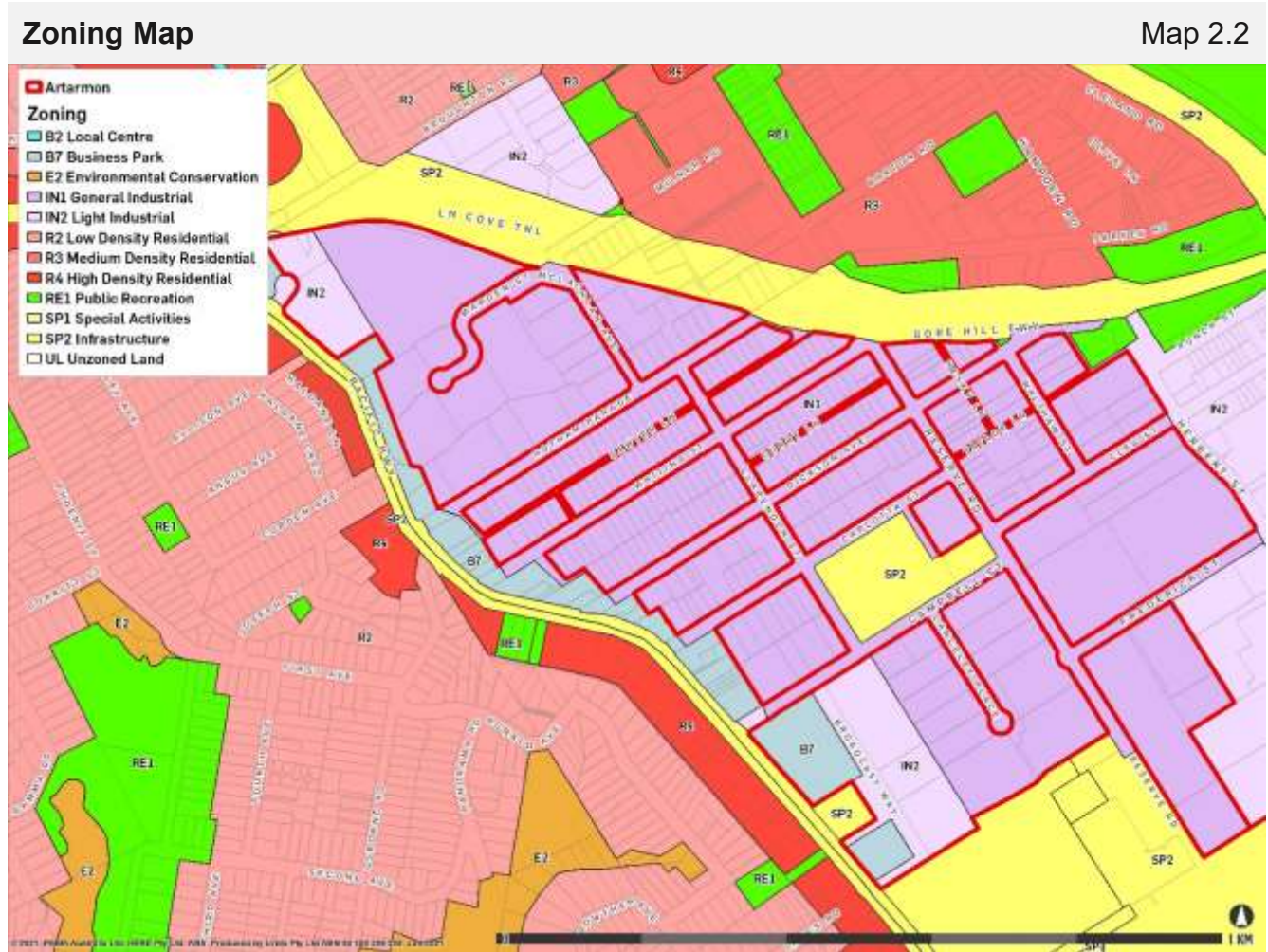
The IN2 Light Industrial and B7 Business Park zones encourage commercial office and data centre uses.

There is an SP2 Infrastructure zone in the centre of the Precinct, comprising a concrete plant. This does not form part of the Precinct and has a different zoning to similar primary resource processing uses found within the IN1 General Industrial zones of the Precinct.

To the south of the Precinct lies an SP2 Infrastructure zone, comprising the Royal North Shore Hospital precinct.

To the west of the Precinct lies a strip of B7 Business Park and R4 High Density Residential uses fronting the Pacific Highway. The B7 Business Park zone largely comprises bulky goods and retail uses and automotive showrooms while the R4 High Density Residential zone comprises a mix of low and high density residential dwellings.

There are height limits specified for the IN2 Light Industrial and B7 Business Park pocket to the south of the Precinct and no height limits under planning controls for the remainder.



EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

Map 2.3 shows the place of residence of those who work in the Artarmon Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car, public transport or active transport (e.g. walking or cycling).

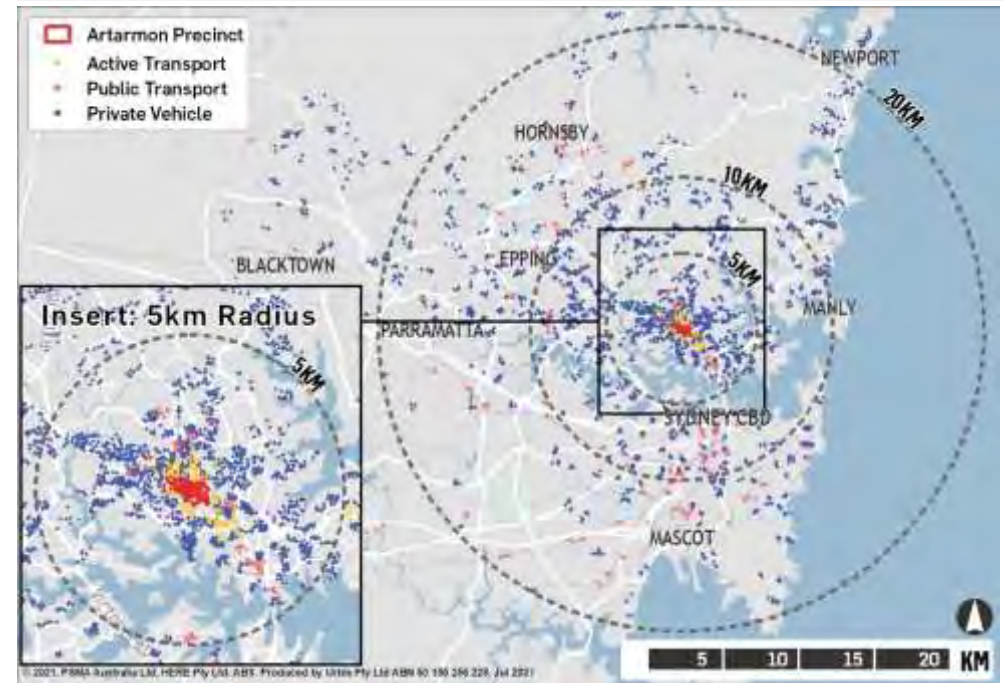
Worker's residences are widely scattered throughout Metropolitan Sydney, however high densities occur closer to the Precinct. Around 61% of workers reside within 10km of the Precinct. These workers are largely located to the east and west of the Precinct. The remaining 39% reside beyond the 10 km of the Precinct, particularly around northwest Sydney.

As at the 2016 Census, approximately 83% of workers travel to work by private vehicles, likely due to the convenience of the M2 Lane Cove Tunnel connecting the Precinct to northwest Sydney. However, public transport use is likely to have increased since the opening of the Northwest Metro in 2019, connecting St Leonards to Chatswood and Macquarie Park through to Rouse Hill.

Approximately 5% of precinct workers take active modes of transport to work. These workers generally reside directly to the north and south of the Precinct.

Where do Precinct Workers Live, 2016

Map 2.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

Uses within this Precinct are consistent with the IN1 General Industrial, IN2 Light Industrial and B7 Business Park zonings. Map 2.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct.

The Precinct is largely characterised by standalone warehouse/office buildings with storage to the rear and ancillary office uses (typically 2-storeys) fronting the road. The Precinct is a well-established area, with densely clustered older-style buildings dominating the streetscape. Parking is largely limited to street parking, as on-site parking appears quite limited.

A clustering of automotive uses is evident within the Precinct, particularly concentrated to the west of Reserve Road and north of Campbell Street. These uses largely include vehicle servicing centres, vehicle showrooms, vehicle rentals and smash repairs.

Marden Street and McLachlan Avenue to the Precinct's northwest feature a concentration of primary resource processing uses. Along these streets are a concrete plant, recycling centre and chemical/mineral production plant.

Bulky goods retailing are found along Reserve Road, largely surrounding

HomeHQ Artarmon, a 3-storey homemaker centre. Several strata warehouse unit complexes can also be found along Reserve Road (south of Campbell Street). These are older-style buildings that also contain ancillary office uses.

Along Broadcast Way to the south of the Precinct lies much of the Precinct's recent development activity. This includes the recent completion of Ausgrid's regional depot, which comprises two levels of commercial office with additional warehouse space, iSeek's financial data centre (Australian Liquidity Centre) and Fox Sports' head office and production studios.

The Precinct features a unique media and communications cluster. Along with Fox Studios are SBS and ABC network studios and offices, although housed in older-style facilities. Supporting this cluster are several smaller media-related businesses, including studios, creative agencies and audiovisual equipment suppliers.

Bulky goods and retailing along Pacific Highway to the Precinct's west acts as a buffer from the residential uses across the highway. Northbound access to the Precinct along Pacific Highway is somewhat limited, with only a few right-turn traffic lights present along the highway.



Primary resource processing facilities can be found in the northwest of the Precinct (Map 1.4A).



A modern showroom/warehouse/office space located on Carlotta Street (Map 1.4B).



Most buildings in the Precinct contain office uses fronting the main street and warehousing to the rear (Map 1.4C).

ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 2.1 illustrates the type of uses (determined by property type and business function) that currently occupy the Artarmon Precinct. The data was collected by Urbis in May 2021 and included a combination of:

- Physical inspection of properties within the Precinct
- Geographic information system analysis
- Interviews with various tenants.

As at May 2021, Urbis estimates that the Precinct has around 463,835 sq.m of industrial floorspace on approximately 434,708 sq.m of developed land area. The Precinct serves a mixed role with largely a local focus.

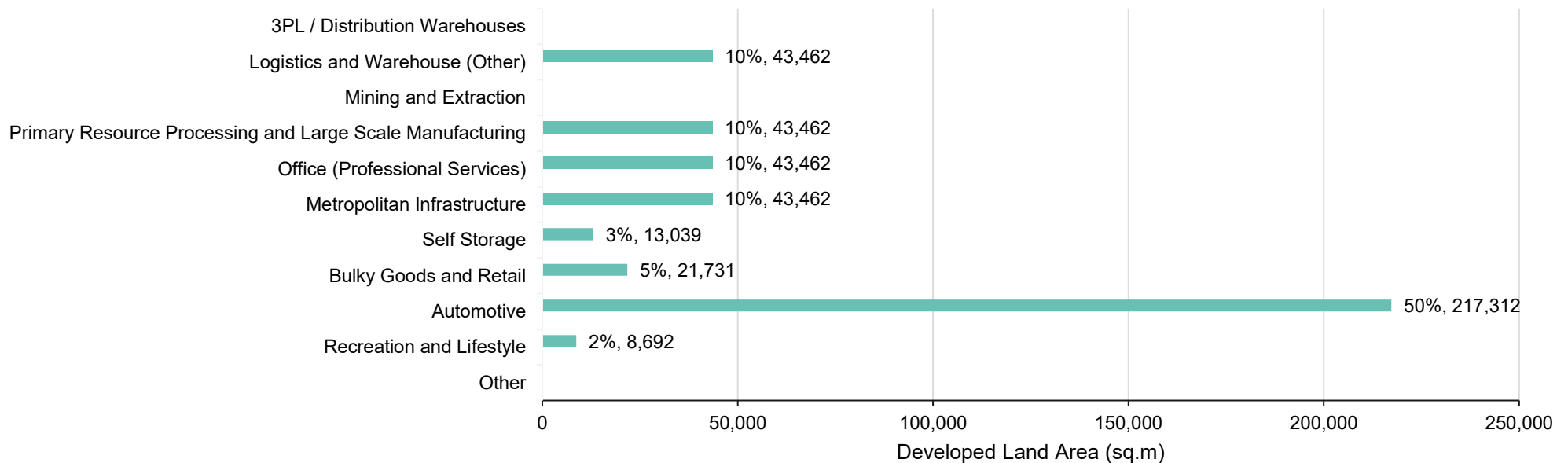
There is a large cluster of Automotive uses within the Precinct, accounting for around 50% of total developed land area. These uses are largely concentrated to the northwest of the Precinct.

Primary Resource Processing and Large Scale Manufacturing accounts for around 10% of developed land area and is generally situated to the northwest of the Precinct. Logistics and Warehouse (Other) and Office (Professional Services) each account for a further 10% of developed land area and are dispersed throughout the Precinct.

There is also a small presence of Self Storage facilities and Bulky Goods and Retail to the southeast of the Precinct, as well as Recreation and Lifestyle uses dispersed throughout.

Developed Land Area by Typology, Artarmon Precinct

Chart 2.1



Source: Urbis

MAP 2.4: ROLE AND FUNCTION - WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the typology of current developed land area in the Artarmon Precinct and examples of tenants are detailed in Table 2.2.

Automotive uses dominate the industrial land typology within the Precinct, accounting for around half of developed land use. Types of automotive business uses include service centres, showrooms and car rentals.

Around 10% of developed land area is attributed to the Office (Professional Services) use, which includes a unique media and telecommunications cluster.

The Precinct is home to offices and studios for Fox Studios, SBS and ABC. Logistics and Warehouse (Other) functions contain media-related uses that leverage off this cluster, including production studios and content creation agencies.

Other prominent uses within the Precinct include Primary Resource Processing and Large Scale Manufacturing, Metropolitan Infrastructure, Bulky Goods and Retail, Self Storage and Recreation and Lifestyle.

Developed Land Area Distribution by Typology, Artarmon Precinct

Table 2.2

	Distribution	Example Tenants
3PL / Distribution Warehouses		
Logistics and Warehouse (Other)	10%	Stylevue (apparel), Fracks (air compressors sales & service), Werfen Office (medical equipment), Beyond Productions, Trapdoor Productions (content creation agency), Shootsta (video production services), Carlotta Studios (film & TV studio),
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing	10%	WEIR Minerals (head office, minerals processing and chemical production), Holcim Concrete (concrete plant), Hanson Concrete (concrete plant)
Office (Professional Services)	10%	SBS (head office and studios), ABC (studios and media production), Tradiebot (software company), Environmental Earth Sciences (environmental research service) Gore Hill Technology Park: Fox Sports (head office and studios), Ausgrid (offices) Artarmon Business Centre: DesignBuild (construction company), East Coast Audio Visual (audiovisual equipment supplier), Candela (medical equipment supplier), DNA Connect (IT technologies supplier)
Metropolitan Infrastructure	10%	Ausgrid Depot, Bing Recycling, Transurban, Waste Management Centre, Artarmon Ambulance Superstation, Lane Cove Fire Station, iSeek's Australian Liquidity Centre (finance data centre)
Self Storage	3%	Storage King, Kennards, Storage Works
Bulky Goods and Retail	5%	Bunnings, Home HQ Artarmon Victoria's Basement, Tradelink, Kayell (photography equipment store), Golf Mart (sporting goods store), OC Find Foods (food importer/distributor)
Automotive	50%	Mercedes (service centre), North Shore BMW (service centre), Mazda, Avis (car rental), Hertz (car rental), Alto Volkswagen North Shore (service centre), Tyre Pro (tyre shop), Scotts Honda Sales (showroom), Prestige Auto Traders (showroom), Subaru (service centre)
Recreation and Lifestyle	2%	Little Lion Early Learning (early learning), Papilo Early Learning (early learning), Climb Fit (indoor climbing), Athletes Authority (gym), Freeway Hotel (pub), Only About Children (early learning)
Other		
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 2.3 shows the quantum of zoned industrial land within the Artarmon Precinct.

As at December 2020, there was a total of 62.6 hectares of zoned industrial land in the Artarmon Precinct, of which 62.1 hectares had been developed and 0.5 hectares (39.9%) remained undeveloped.

Between 2016 and 2020, given that the Precinct had almost reached maximum development capacity, the Precinct recorded a slow average land take-up rate of 0.5 hectares per annum. There are 10 projects in the future pipeline with an estimated value of \$385.8 million. This includes two data centre developments along Broadcast Way with a combined estimated value of \$263.9 million and a \$75.6 million private hospital along Frederick Street.

As at 2021, total employment in the precinct is estimated to be 14,946 jobs. Of On the 62.1 hectares of developed industrial land, there is approximately

463,835 sq.m of Gross Floor Area. This equates to an average land area of 41.5 sq.m per employee or floorspace of 31.0 sq.m per employee influenced by the fact that a large proportion of automotive land uses do not have associated gross floor area.

Map 2.5 indicates the Precinct's potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

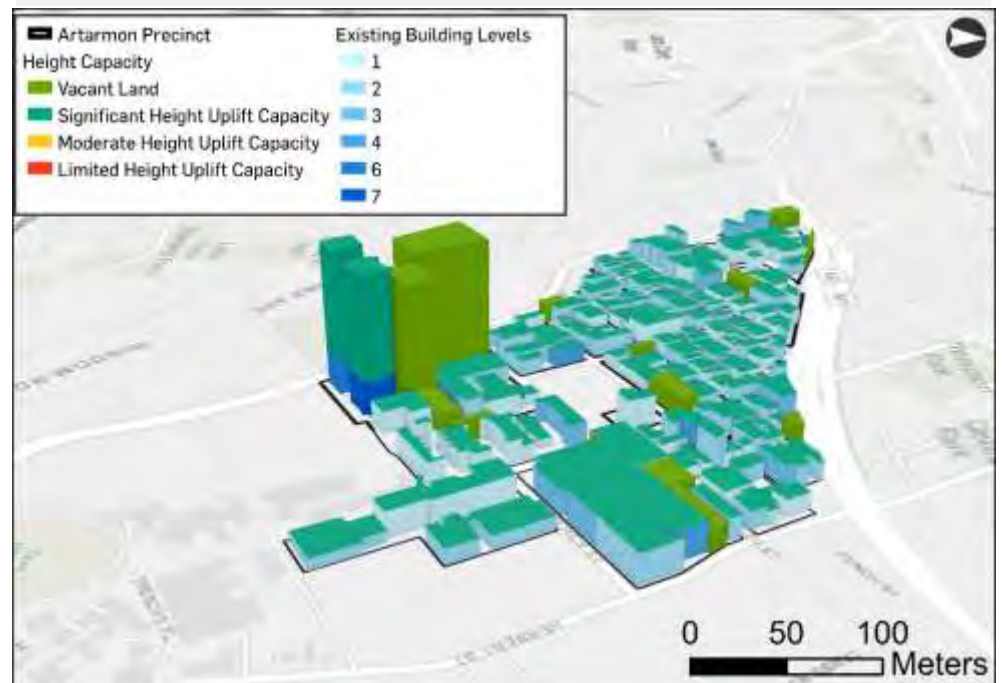
Height limits exist for a pocket of B7 Business Park and IN2 Light Industrial to the southwest of the Precinct. There are no maximum height limits specified for the remainder of the Precinct, so all other existing buildings have significant scope for additional height. However, the Precinct may also be affected by floorspace ratios and other controls, which impact development potential.

Nature of Employment and Land Table 2.3

Factor	Value
Total Employment, 2021 projection	14,946 jobs
Total Developed Land Area, 2020	62.1 ha
Total Undeveloped Land Area, 2020	0.5 ha
Future Pipeline and Estimated Value	10 projects, ~\$385.8m
Average Annual Land Take-Up (2016 – 2020)	23.3 ha
Total Floorspace, 2021 (Gross Floor Area)	463,835 sq.m
Average Land Area per Employee	41.5 sq.m
Average Gross Floor Area per Employee	31.0 sq.m

Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis

Additional Height Uplift Capacity, May 2021 Map 2.5



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 2.4, the Artarmon Precinct comprises of 305 lots, of which 11 are vacant. The distribution of vacant sites varies in size, with small, medium and large lots available for development.

Of the developed sites, a majority 68% are 1,000 sq.m or less in size. There are very few developed sites larger than 2,000 sq.m, which account for just 15% of all sites. Larger sites are typically found north of Hotham Parade and south of

Campbell Street.

Sites that are 3,000 sq.m or smaller achieve an average site coverage of over 70%, largely due to the dense clustering of smaller buildings found between Hotham Parade and Campbell Street. Average site coverage falls to 53% to 56% for larger sites, largely due to the at-grade parking provisions on these lots.

Distribution of Sites by Lot Size, Artarmon Precinct

Table 2.4

Size	Vacant Sites*		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	0	0%	27	9%	71%	27	9%
501 - 1,000 sq.m	1	9%	172	59%	77%	173	57%
1,001 - 2,000 sq.m	2	18%	52	18%	74%	54	18%
2,001 - 3,000 sq.m	2	18%	8	3%	77%	10	3%
3,001 - 4,000 sq.m	3	27%	9	3%	53%	12	4%
4,001 - 5,000 sq.m	0	0%	9	3%	56%	9	3%
More than 5,000 sq.m	3	27%	17	6%	58%	20	7%
Total	11	100%	294	100%	65%	305	100%

Note: Figures are based on land areas as at May 2021 and may differ from ELDM 2020 developed and undeveloped area estimates.

*A site is considered vacant if the total building area on the site is less than 10% of the site area.

Source: Geoscape Australia; Urbis

3. BROOKVALE

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

Brookvale Precinct Overview

Brookvale Industrial Precinct (Map 3.1) is located around 12.8 kilometres north of the Sydney CBD.

As at January 2020, the Brookvale Precinct covered an area of approximately 86.3 hectares, of which approximately 1 hectare (1.2%) remained undeveloped.

The Precinct's major access route connections are Beacon Hill Road, for connections to Warringah Road, as well as Pittwater Road and Condamine Street.

The Brookvale Structure Plan sets out a 20-year strategic vision for Brookvale, within which the Precinct lies. The plan aims to develop Brookvale as a strategic centre, which will deliver long term employment growth, supported by office, retail, services and housing.

A summary of the locational characteristics of the Precinct is provided in Table 3.1.

Location and Key Transport Infrastructure

Map 3.1



Location Characteristics

Table 3.1

Characteristic	Detail
Distance to nearest train station	8.7 kilometres west (Roseville Station)
Distance to nearest motorway	8.8 kilometres southwest (Warringah Freeway)
B-Double truck access	Yes
Surrounding land uses	<ul style="list-style-type: none"> Automotive and bulky goods retailing along Pittwater Road and low density housing in Beacon Hill to the north Large public open spaces and low density housing in North Curl Curl to the east Westfield Warringah Mall, Warringah Golf Course and low-density residential in North Manly and Brookvale to the south Bushland in Allenby Park to the west

Strengths

1. Proximity to retail in Warringah Mall
2. Ample open space for recreation surrounding the Precinct

Weaknesses

1. The region is not serviced by a railway line, instead relying heavily on bus services
2. Distance from motorway
3. Precinct is divided by a major arterial road

PLANNING - WHAT IS THE ZONING MIX?

Map 3.2 opposite provides a summary of the relevant planning instruments and controls for the Brookvale Precinct.

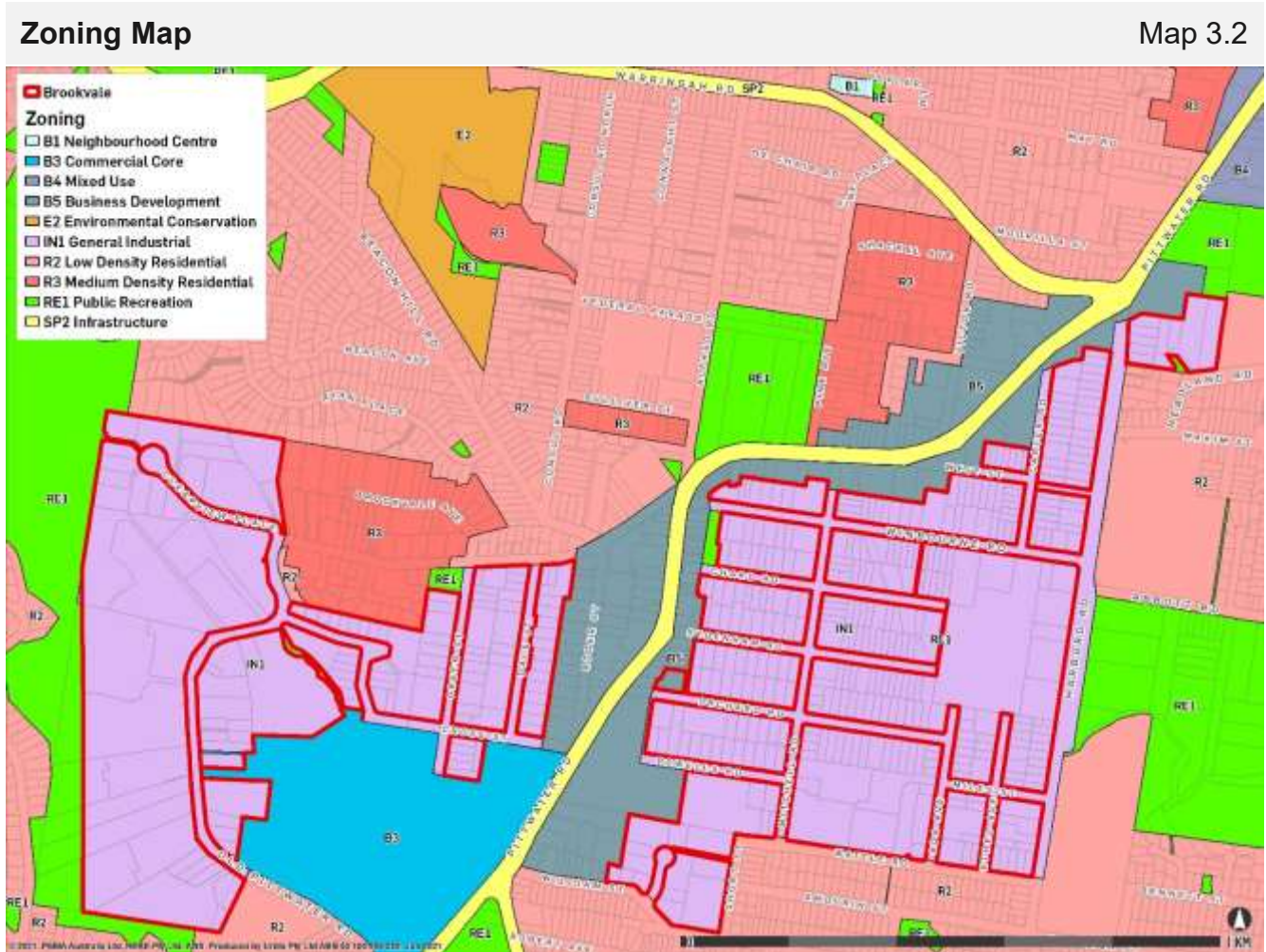
The IN1 General Industrial zoning of the Precinct typically encourages traditional industrial warehousing and automotive uses.

There is a B5 Business Development zone that runs through the Precinct, which comprises bulky goods retailing and automotive showroom uses.

The Precinct is largely surrounded by R2 Low Density Residential zones, with pockets of RE1 Public Recreation spaces.

There is a B3 Commercial Core zone to the south of the Precinct, accounting for Westfield Warringah Mall.

There are height limits under planning controls for this Precinct.



EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

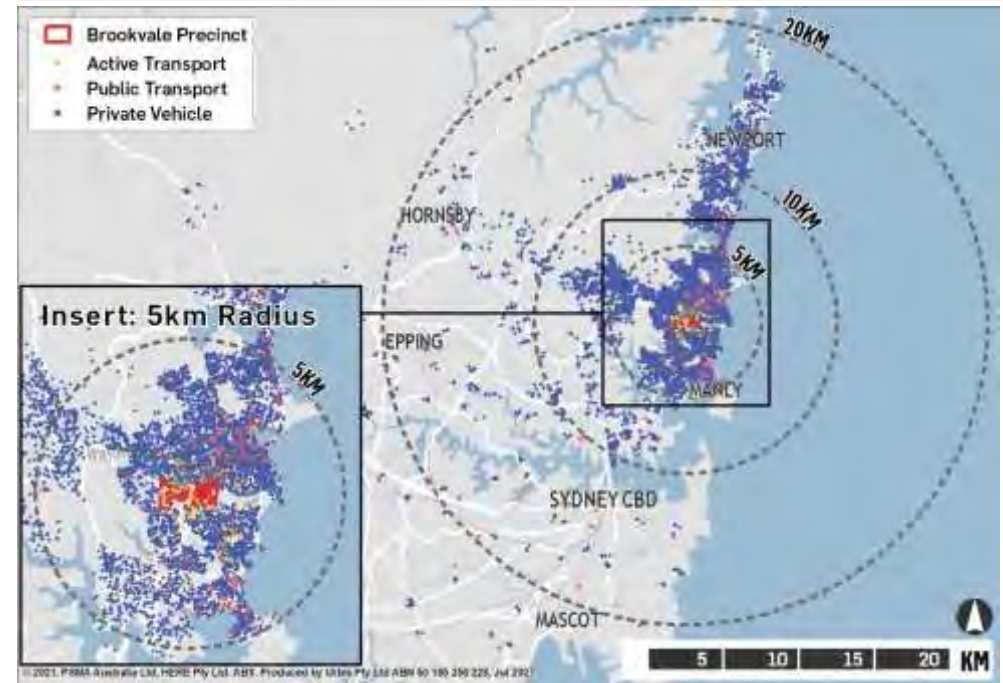
Map 3.3 shows the place of residence of those who work in the Brookvale Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car, public transport or active transport (e.g. walking or cycling).

The Precinct has a largely localised worker catchment, with 69% of workers residing within 5 km of the Precinct. Workers' residences are predominantly concentrated to the north of the Precinct. Beyond the 5 km radius, workers' residences are concentrated along the north coastline and northwest.

Around 87% of precinct workers travel to work by private vehicles while a further 9% take public transport. The remaining 4% of workers take active modes of transport, typically residing directly north or south of the Precinct.

Where do Precinct Workers Live, 2016

Map 3.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

Uses within this Precinct are consistent with an IN1 General Industrial zoning. Map 3.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct.

The Precinct is well-established and largely comprises single level older-style buildings. The Brookvale Precinct is divided into two distinct Sub-Precincts, due to their locations separated by Pittwater Road:

- Western Sub-Precinct
- Eastern Sub-Precinct.

WESTERN SUB-PRECINCT

This Sub-Precinct includes all sites to the west of Pittwater Road. The Sub-Precinct is accessible via Pittwater and Old Pittwater Roads, although southbound access along Pittwater Road is generally restricted to traffic light intersections.

Sites along Cross, Green and Dale Streets to the Sub-Precinct's east generally comprise small, older-style standalone warehouses that are densely clustered. Dale Street also features two relatively modern commercial office buildings (2-3 storeys) that predominantly feature medical uses, as well as a range of other professional services, including legal, finance and technology.

The Sub-Precinct features larger sites along Old Pittwater Road to the west, which mostly house strata office/warehouse unit complexes. Business within these complexes are generally 'clean' industrial uses. These strata complexes feature multi-level (2-4 storeys) office uses fronting Old Pittwater Road and warehouses uses to the rear of the building. This includes Peninsula Business Park and Warringah Business Centre, which are relatively older-style buildings. The newest industrial unit complex in the Precinct is situated at 97 Old Pittwater Road, which was completed in 2016.

The Sub-Precinct features one development that is a solely commercial building. Lifestyle Working is a relatively modern commercial development comprising two interconnected buildings (3- and 4-storeys). The buildings feature small office suites that accommodate a variety of professional services including accounting,

physiotherapy and real estate.

The Sub-Precinct neighbours Warringah Mall to the south and Allenby Park to the west, providing precinct workers and visitors with retail and recreational amenities. The Sub-Precinct is well buffered from the low-density residential dwellings to the north via natural vegetation.

EASTERN SUB-PRECINCT

This Sub-Precinct includes all sites to the east of Pittwater Road. The Sub-Precinct is accessible via Pittwater Road and Harbord Road, although northbound access along Pittwater Road is generally restricted to traffic light intersections.

The Sub-Precinct is largely characterised by older-style, small standalone warehouses that are densely clustered. Business uses within the Sub-Precinct include more traditional 'dirty' industrial uses, including primary resource processing and manufacturing (e.g. concrete plants and metal fabrication) and automotive uses (e.g. smash repairs).

Automotive as well as bulky goods and retail uses are largely concentrated along Harbord Road to the east of the Sub-Precinct. This includes automotive showrooms, vehicle rentals and trade centres. These lighter industrial uses act as a moderate buffer from the adjacent schools and residential areas.

To the east of the Precinct, between Winbourne and Sydenham Roads, lies Winbourne Industrial Estate. The estate features warehouses with ancillary office uses and houses a variety of businesses, including construction-related (steel suppliers, plumbing supplies), self storage, automotive uses (service centres, auto parts) as well as recreation and lifestyle uses (fitness and church).

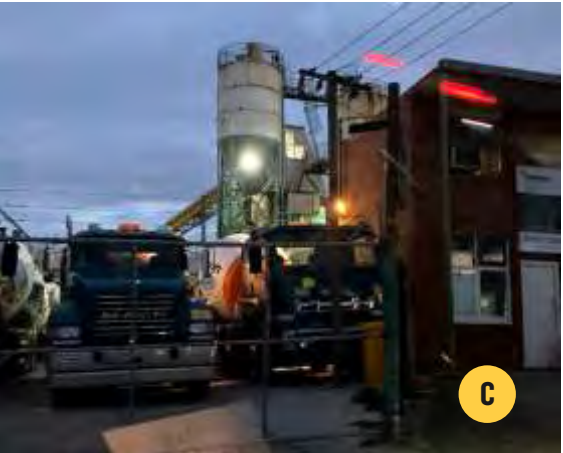
The Sub-Precinct features a small cluster of artisan uses to the south. This includes several breweries and coffee roasters, as well as a distillery. Artisan uses are found in warehouses and often incorporate a small retail component (taphouse or café), in addition to its manufacturing operations.

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses



Top, right, bottom left: the Precinct has a cluster of artisan uses, including breweries and distilleries. Bottom right: Other uses include primary resource processing, such as concrete plants.



ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 3.1 illustrates the type of uses (determined by property type and business function) that currently occupy the Brookvale Precinct. The data was collected by Urbis in May 2021 and included a combination of:

- Physical inspection of properties within the Precinct
- Geographic information system analysis
- Interviews with various tenants.

As at May 2021, Urbis estimates that the Precinct has around 954,787 sq.m of industrial floorspace on approximately 855,215 sq.m of developed land area. The Precinct serves a mixed role.

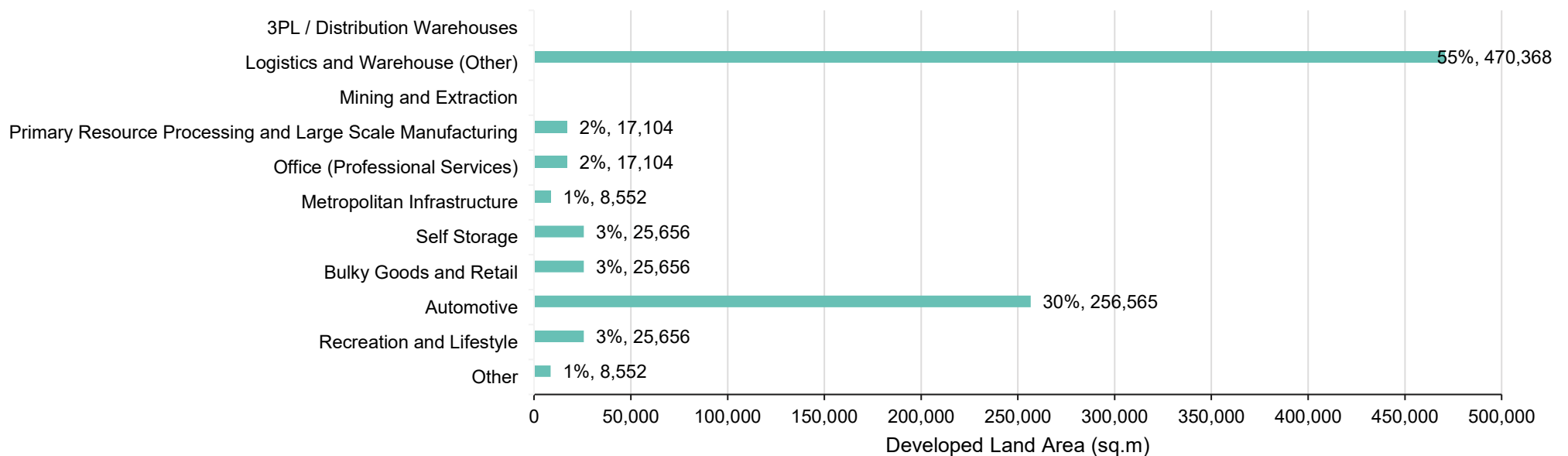
The most prevalent buildings within the Precinct are Logistics and Warehouse (Other), which account for approximately 55% of total developed land area.

Automotive uses account for around 30% of developed land use, which are dispersed throughout the Precinct.

There is a mix of other uses present within the Precinct that comprise a small proportion of developed land, including Self Storage, Bulky Goods and Recreation and Lifestyle.

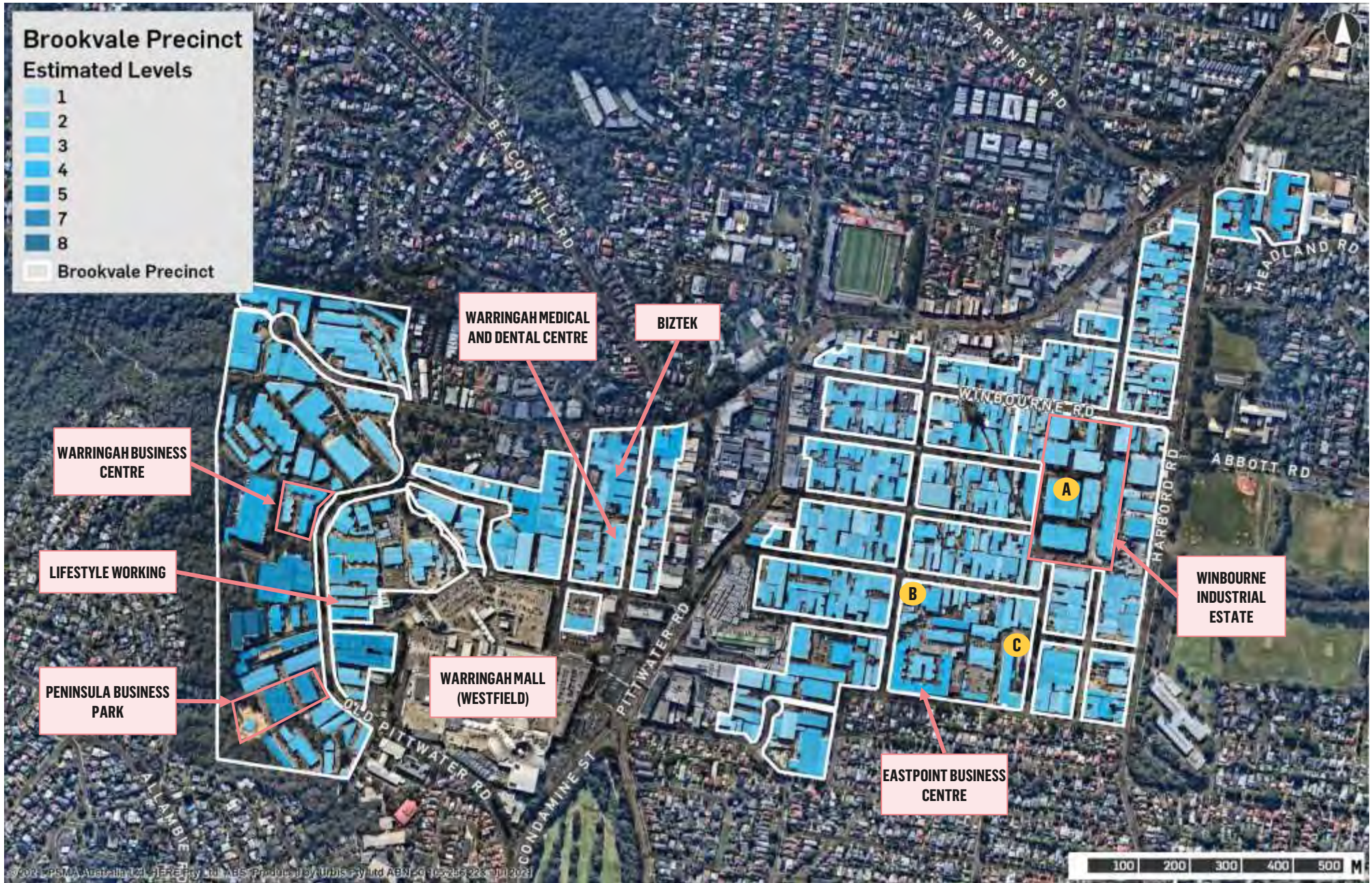
Developed Land Area by Typology, Brookvale Precinct

Chart 3.1



Source: Urbis

MAP 3.4: ROLE AND FUNCTION - WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the typology of current developed land area in the Brookvale Precinct and examples of tenants are detailed in Table 3.2.

Businesses within the Precinct vary widely, as reflected by the Precinct's distribution of developed land area.

Logistics and Warehouse (Other) accounts for around 55% of total developed land area, with business uses varying widely from construction-related suppliers

(steel, forklift attachments) to recreation-related (surfboards, snowboards, umbrellas).

Automotive uses present within the Precinct include automotive and marine repairs, service centres and car rentals.

There is a small presence of Other uses, attributed to a cluster of artisan businesses, which comprise breweries and distilleries, predominantly to the east of Pittwater Road and coffee roasters, largely to the west.

Developed Land Area Distribution by Typology, Brookvale Precinct

Table 3.2

	Distribution	Example Tenants
3PL / Distribution Warehouses		
Logistics and Warehouse (Other)	55%	Edcon Steel (head office, steel supplier), Harvey Norman (customer pickup warehouse), East West Engineering (forklift attachment supplier), Gyprock Trade (gyprock), Pool & Spa Warehouse (pool supplies), The Berry Man (food supplier), Surf SUP (surfboard supplier), id8 Studio (point of sale displays), BLUNT (umbrella suppliers), Chemron (chemical supplier), Kennards Hire (equipment hire), Brookvale Meats (meat supplier), Burton Snowboards (snowboard supplier), Kangarubber (foam rubber supplier), Speed Gas (gas supplier), Woolworths Fulfillment Centre (online orders processing)
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing	2%	Boral Concrete (concrete plant), Hanson Concrete, Brookvale Mini-Crete (concrete plant), Harrison Manufacturing (grease and lubricants manufacturing), Jehbco (silicone manufacturing), AMR Sheetmetal (metal fabricator), AUSREO (steel fabricator)
Office (Professional Services)	2%	Lifestyle Working: Enspira Financial (accounting), Precise Property (real estate agent), BJC Health (physiotherapy) Other: Warringah Day Surgery (medical), Service NSW Brookvale, Insight Australia (software company)
Metropolitan Infrastructure	1%	Sydney Water Storage Facility, United Resource Management, Cozens Paper Recycling
Self Storage	3%	Kennards Self Storage, Mako Self Storage, Storage King, Rent a Space, Global Self Storage
Bulky Goods and Retail	3%	Sydney Tools, John R Turk, Ozsale (fashion store), Aldi, Dulux Trade Centre, Reece's Plumbing, First Choice Liquor Market, Exclusive Tiles (tiles trade centre)
Automotive	30%	Right2drive (loan car provider), Audi (service centre), Mosman Smash Repairs, Nissan (service centre), hertz (car rental), Detail Autohauz, All Classic Car Restorations, Brookvale Auto Centre (auto repairs), mycar Tyre & Auto (tyre shop), Motorserve (auto repairs), Oceantec Marine (marine repairs), Warringbah Auto Body Repairs, Keith Burrows Auto Body Repairs, Smith Concepts (vehicle painting)
Recreation and Lifestyle	3%	Hillsong Church, BE Athletic (gym), Jumpd (indoor trampoline), Crossfit, Sandscastles Early Learning, Flasegrip Strength Training (fitness), Snap Fitness (gym), Elite Dance Studio, Little Scriblers (early learning), Only About Children (early learning), Brookvale Dance Centre
Other	1%	Breweries/Distilleries: Manly Spirits Co, Bucketty's Brewing Co, 7th Day Brewery, 4 Pines Brewery, Nomad Brewing Co, Dad & Dave's Brewing Coffee Roasters: Super Okay Coffee Roasters, Barrel One Coffee Roasters, Dane's Specialty Coffee, On The North Roasters Other: Momma Kombucha
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 3.3 shows the quantum of zoned industrial land within the Brookvale Precinct.

As at December 2020, there was a total of 86.3 hectares of zoned industrial land in the Brookvale Precinct, of which 85.3 hectares has been developed and 1 hectare (1.2%) remained undeveloped.

Between 2016 and 2020, the Precinct has experienced negligible growth, recording an average land take-up rate of -0.2 hectares per annum. The Precinct is largely established and has experienced minimal development activity during this period. There are 4 projects in the future pipeline with a total estimated value of \$12.7 million. This includes the construction of a self storage facility (~\$8 million) and a vehicle showroom (~\$3.9 million).

As at 2021, total employment in the precinct is estimated to be 12,513 jobs. Of the 85.3 hectares of developed industrial land, there is approximately 954,787 sq.m of Gross Floor Area. This equates to an average land area of 68.2 sq.m per employee or floorspace of 76.3 sq.m per employee.

Map 3.5 indicates the Precinct's potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

Approximately 43% of developed land area contains existing buildings within moderate height uplift, largely concentrated to the east of Pittwater Road. A further 47% have limited capacity for additional height, predominantly in the strata warehouse complexes along Old Pittwater Road to the Precinct's west.

Nature of Employment and Land

Table 3.3

Factor	Value
Total Employment, 2021 projection	12,513 jobs
Total Developed Land Area, 2020	85.3 ha
Total Undeveloped Land Area, 2020	1.0 ha
Future Pipeline and Estimated Value	4 projects, ~\$12.7m
Average Annual Land Take-Up (2016 – 2020)	-0.2 ha
Total Floorspace, 2021 (Gross Floor Area)	954,787 sq.m
Average Land Area per Employee	68.2 sq.m
Average Gross Floor Area per Employee	76.3 sq.m

Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis

Additional Height Uplift Capacity, May 2021

Map 3.5



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 3.4, the Brookvale Precinct comprises of 504 lots, of which 10 are vacant. Most vacant sites are small, with 60% between 501 and 1,000 sq.m in size.

Of developed sites, a majority 56% are 1,000 sq.m or smaller, while a further 28% are between 1,000 sq.m and 2,000 sq.m. These generally represent the small standalone warehouses to the east of Pittwater Road.

There are very few large sites, with only 8% of lots over 4,000 sq.m in size, largely attributed to the larger strata warehouse complexes along Old Pittwater Road to the Precinct's west.

Average site coverage for small lots is quite high, achieving between 60% to 69% for lots 3,000 sq.m or less. This then falls to an average of 44% to 53% for sites larger than 3,000.

Distribution of Sites by Lot Size, Brookvale Precinct

Table 3.4

Size	Vacant Sites*		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	0	0%	11	2%	69%	11	2%
501 - 1,000 sq.m	6	60%	267	54%	65%	273	54%
1,001 - 2,000 sq.m	1	10%	137	28%	60%	138	27%
2,001 - 3,000 sq.m	1	10%	23	5%	66%	24	5%
3,001 - 4,000 sq.m	0	0%	14	3%	49%	14	3%
4,001 - 5,000 sq.m	1	10%	15	3%	53%	16	3%
More than 5,000 sq.m	1	10%	27	5%	44%	28	6%
Total	10	100%	494	100%	54%	504	100%

Note: Figures are based on land areas as at May 2021 and may differ from ELDM 2020 developed and undeveloped area estimates.

*A site is considered vacant if the total building area on the site is less than 10% of the site area.

Source: Geoscape Australia; Urbis

4. CAMPBELLTOWN, BLAXLAND ROAD

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

Campbelltown, Blaxland Road Precinct Overview

Campbelltown, Blaxland Road (Campbelltown) Industrial Precinct (Map 4.1) is located around 41.8 kilometres southwest of the Sydney CBD and 21 kilometres northeast of the future Western Sydney International Airport. The Precinct forms part of the Glenfield to Macarthur Urban Renewal Precincts Strategy. The Strategy envisions Campbelltown as a health and education precinct, supported by a range of employment, retail and cultural facilities.

As at January 2020, the Campbelltown Precinct covered an area of approximately 128.3 hectares, of which approximately 23.1 hectares (18%) remained undeveloped.

The Precinct's major access route connections are the Hume Motorway, Badgally Road, Campbelltown Road and Blaxland Road.

A summary of the locational characteristics of the Precinct is provided in Table 4.1.

Location and Key Transport Infrastructure

Map 4.1



Location Characteristics

Table 4.1

Characteristic	Detail
Distance to nearest train station	Directly south (Campbelltown Station)
Distance to nearest motorway	2.3 kilometres west (Hume Motorway)
B-Double truck access	Yes
Surrounding land uses	<ul style="list-style-type: none"> • Parklands and low density residential dwellings in Woobine to the north • The railway line to the east and south, with retail within Campbelltown Town Centre beyond • Low density residential dwellings in Blair Athol to the west, with TAFE NSW and Western Sydney University Campbelltown Campuses beyond

Strengths

- Proximity to retail within Campbelltown Town Centre
- Proximity to Campbelltown train station
- Location within a strategic growth centre will likely enable the Precinct to attract future investment

Weaknesses

1. Some older buildings are not well maintained, particularly along Blaxland Road and to the south of Badgally Road

PLANNING - WHAT IS THE ZONING MIX?

Map 4.2 opposite provides a summary of the relevant planning instruments and controls for the Campbelltown Precinct.

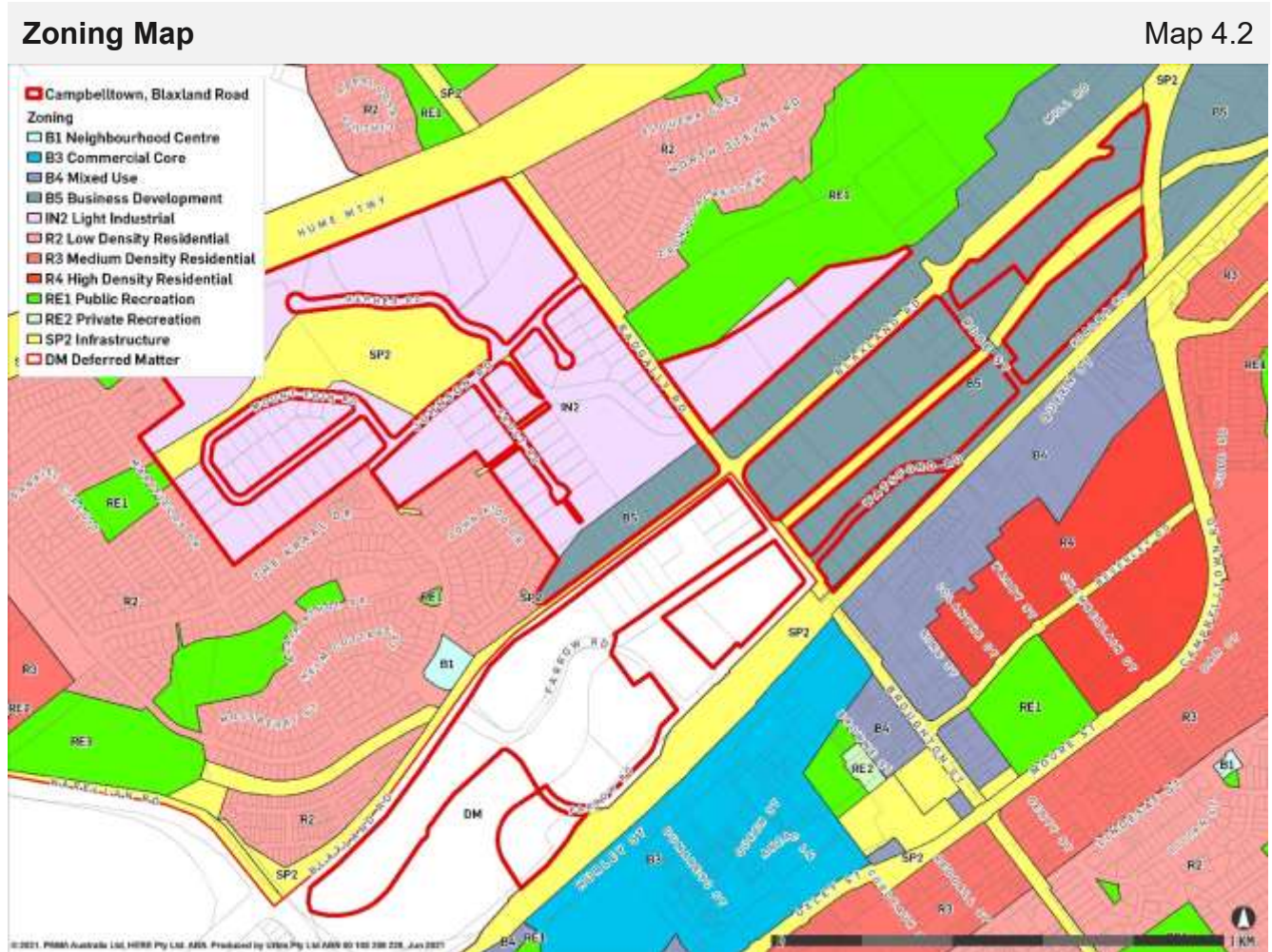
The IN2 Light Industrial zoning of the Precinct typically encourages 3PL and traditional warehouse uses.

The B5 Business Development zone typically encourages bulky goods and automotive uses.

The DM Deferred Matter zone comprises traditional industrial warehouses to the northeast and vacant land to the southwest.

To the south of the Precinct lies a B5 Mixed Use and B3 Commercial Core zone that form part of Campbelltown Town Centre. The centre largely comprises retail, commercial and high density residential uses.

There are height limits under planning controls for this Precinct.



EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

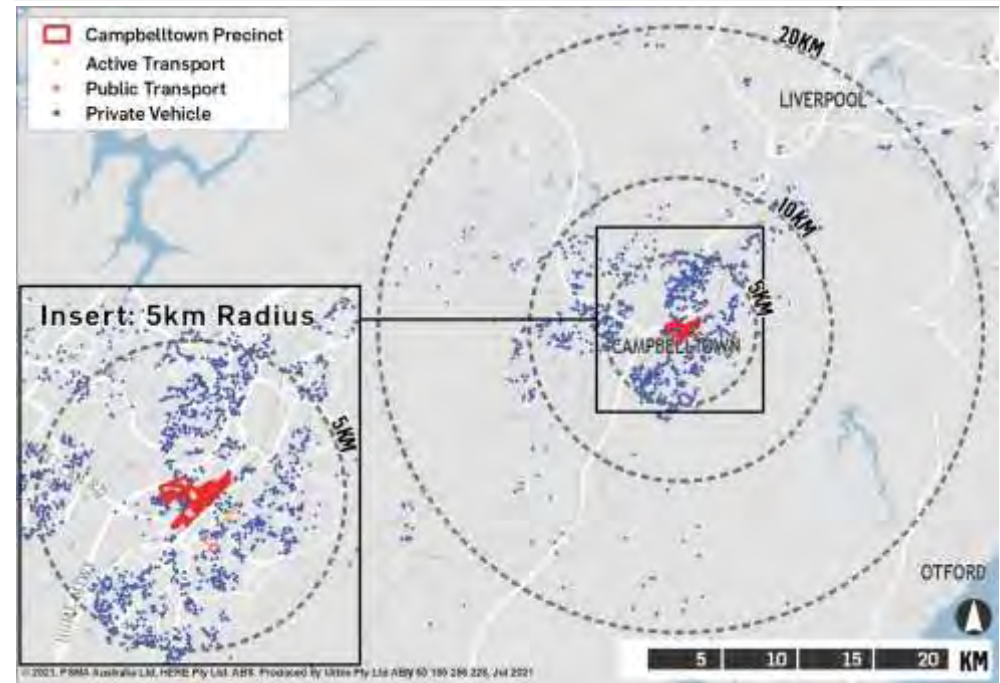
Map 4.3 shows the place of residence of those who work in the Campbelltown Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car, public transport or active transport (e.g. walking or cycling).

The Campbelltown Precinct has a largely localised workforce, with 51% of workers residing within 5 km of the Precinct and an additional 26% living within 5-10 km.

Most precinct workers travel to work by private vehicles, despite Campbelltown Station located directly south of the Precinct. This is likely because precinct workers do not reside along the train line and bus routes through the Precinct only service the Campbelltown region.

Where do Precinct Workers Live, 2016

Map 4.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

Uses within this Precinct are consistent with an IN1 General Industrial and B5 Business Development zones. Map 4.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct.

The Precinct is characterised by a mix of modern and old building stock that is largely one-storey high. The Precinct features wide roads for ease of B-double truck access and ample on-site parking as well as street parking.

Bulky goods and retailing and automotive uses are largely found along Blaxland Road, where businesses benefit from high exposure to passing traffic. Homemaker stores are concentrated along the east of Blaxland Road, while vehicle showrooms, rentals and servicing can be found to the west. There is a Bunnings Warehouse under construction that has almost reached completion, located to the far west of Blaxland Road.

Small, older-style warehouse are typically found along Watsford and Frost Roads, largely comprising construction materials suppliers, automotive parts stores and several churches. These are typically standalone warehouses with ancillary office uses, although some strata units are situated along Frost Road. The office component within these buildings generally comprise a small proportion of total building area.

Along Hepher and Mount Erin Roads to the Precinct's northwest lies larger, more modern warehouses. Hepher Road features large scale distribution centres, 3PL uses and a large records storage facility. It also features Campbelltown Business Precinct, a strata warehouse unit complex built on a large sloping site. Several recreation and lifestyle uses can be found along Mount Erin Road, including fitness centres, a gymnastics academy, a children's play centre and an early learning centre. Mount Erin Road primarily features low-impact industrial uses, minimising conflicts with the adjacent low density residential areas.



Strata warehouse units with ancillary office uses in Campbelltown Business Precinct to the north of the Precinct (Map 1.4C).



Top: a modern standalone office/warehouse found along Frost Road (Map x.C).
Left: Blaxland Road features older warehouses with primarily automotive or retail uses (Map 1.4A).

ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 4.1 illustrates the type of uses (determined by property type and business function) that currently occupy the Campbelltown Precinct. The data was collected by Urbis in May 2021 and included a combination of:

- Physical inspection of properties within the Precinct
- Geographic information system analysis
- Interviews with various tenants.

As at May 2021, Urbis estimates that the Precinct has around 380,839 sq.m of industrial floorspace on approximately 861,987 sq.m of developed land area. The Precinct predominantly serves a metropolitan role with some local functions.

The most prevalent buildings within the Precinct Logistics and Warehouse (Other), accounting for around 40% of developed land area, largely due to standalone warehouses with ancillary office concentrated along Frost Road and Watsford Road.

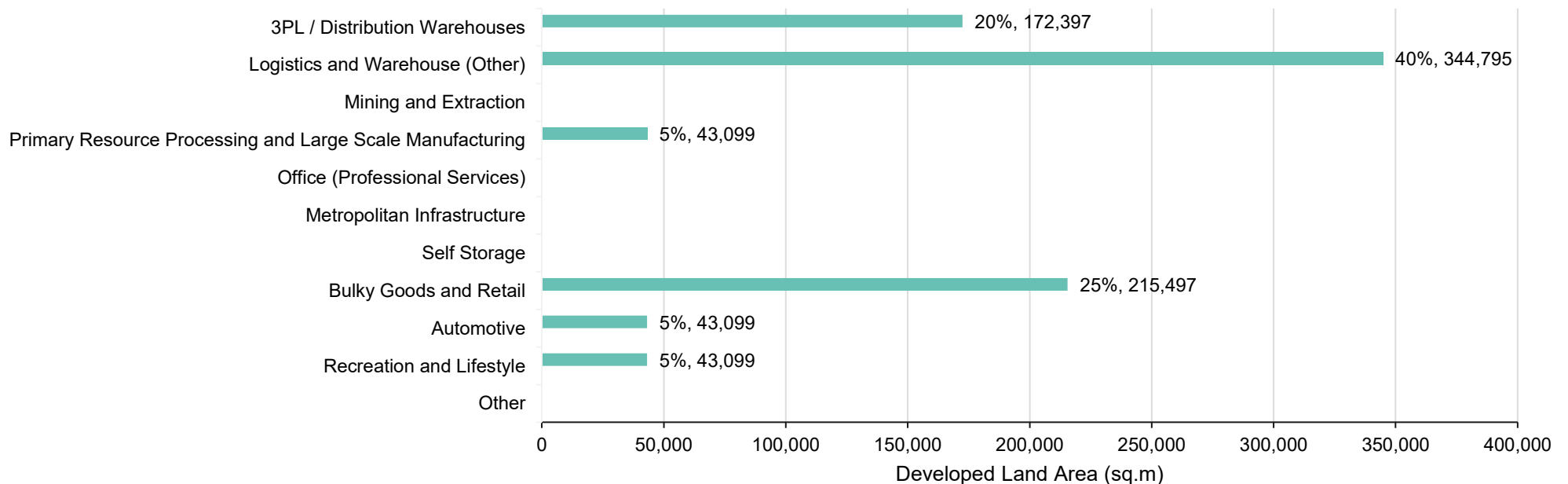
Bulky Goods and Retail accounts for around 25% of developed land area, which is largely concentrated along Blaxland Road.

3PL / Distribution Warehouses account for around 20% of developed land area, predominantly situated within the northwest of the Precinct.

There is a small presence of Primary Resource Processing and Large Scale Manufacturing, Automotive and Recreation and Lifestyle uses.

Developed Land Area by Typology, Campbelltown Precinct

Chart 4.1



Source: Urbis

MAP 4.4: ROLE AND FUNCTION - WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the typology of current developed land area in the Campbelltown Precinct and examples of tenants are detailed in Table 4.2.

Logistics and Warehouse (Other) uses dominate the industrial land typology within the Precinct, accounting for around 40% of total land use. These uses are typically located within standalone warehouses with ancillary office dispersed throughout the Precinct or the Campbelltown Business Precinct strata warehouse

complex.

Bulky Goods and Retail accounts for around 25% of developed land area, while Automotive uses account for 5%, with both uses concentrated along Blaxland Road.

Other uses present within the Precinct include Primary Resource Processing and Large Scale Manufacturing and Recreation and Lifestyle.

Developed Land Area Distribution by Typology, Campbelltown Precinct

Table 4.2

	Distribution	Example Tenants
3PL / Distribution Warehouses	20%	Fab Industrial Logistics (warehousing and logistics), SNR Logistics (logistics), Mendizabel Container Solutions (3PL warehousing and container unloading)
Logistics and Warehouse (Other)	40%	ACE Ohlsson (agricultural products), Zircon Fire (fire protection equipment), HardiQuip (construction equipment supplier), The Happy Nut Co (snack supplier), Nisbets Express (catering equipment), Zirco Data (records storage facility), Direct Plasterboard Outlet (wholesale plasterboard distributor), Pricewise Insulation (insulation materials), Rogers Willex (trailer supplier), Westox Building Products (building restoration products), Heaven's Kitchen (wholesale cake suppliers), Grace (information management and record storage), Ventis (ventilation equipment suppliers), Buildtech Homes (home builders), Adelec Power Services (high voltage electrical provider), Khazma Aluminium (window and door supplier), Rogue Fitness (exercise equipment supplier), ADDLER (metal supplier)
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing	5%	Viridi Group (timber manufacturer)
Office (Professional Services)	<1%	Icon Visual Marketing (marketing agency)
Metropolitan Infrastructure		
Self Storage	<1%	Kennards Self Storage
Bulky Goods and Retail	25%	Harvey Norman, Anaconda, Factory Seconds World, Ashley Furniture, Modern Tiles, Abela's Gun Shop (firearms dealer), Liquor Star (liquor store), Rogue Royalty (pet supplies store), PetO (pet supplies store) Homebase Campbelltown: Nick Scali Clearance Outlet, Carpet Court, Forty Winks, Workscene (workwear and safety gear), Bing Lee, Supercheap Auto, Godfreys, Rebel Sport, Beacon Lighting, Bing Lee
Automotive	5%	Vehicle Showroom: Yamaha, Harley Davidson, Mercedes Macarthur, Macarthur Jaguar, Macarthur Ford Vehicle Repairs: Ken Shafer Auto Body, Gemini Accident Repair, Amazonas 4WD Specialist Vehicle Hire: Thrifty Car & Truck Rental Retailers: AMX Superstores (motorcycle parts), Tyrepower, Elite Car Audio (car stereo store), Campbelltown Exhaust Centre (tyre shop)
Recreation and Lifestyle	5%	Mega Mini Golf, Inflatable World (amusement centre), Campbelltown Hotel (pub), Wolfden (fitness centre), The Shine Shed (play centre), Almahdi Mosque, Hillsong Church, Samoan Assembly of God
Other		
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 4.3 shows the quantum of zoned industrial land within the Campbelltown Precinct.

As at December 2020, there was a total of 128.3 hectares of zoned industrial land in the Campbelltown Precinct, of which 105.2 hectares has been developed and 23.1 hectares (18%) remained undeveloped.

Between 2016 and 2020, the Precinct has experienced modest growth, recording an average land take-up rate of 1 hectare per annum. There are five projects in the future development pipeline with an estimated value of \$9.9 million. This includes the construction of 25 industrial units along Kialba Road (to the east of the Precinct) and the development of a secondary college campus for 120 students along Watsford Road. Each project has an estimated value of around \$4 million.

Nature of Employment and Land Table 4.3

Factor	Value
Total Employment, 2021 projection	4,691 jobs
Total Developed Land Area, 2020	105.2 ha
Total Undeveloped Land Area, 2020	23.1 ha
Future Pipeline and Estimated Value	5 projects, ~\$9.9m
Average Annual Land Take-Up (2016 – 2020)	1.0 ha
Total Floorspace, 2021 (Gross Floor Area)	380,839 sq.m
Average Land Area per Employee	224.3 sq.m
Average Gross Floor Area per Employee	81.2 sq.m

Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis

As at 2021, total employment in the precinct is estimated to be 4,691 jobs. Of the 105.2 hectares of developed industrial land, there is approximately 380,839 sq.m of Gross Floor Area. This equates to an average land area of 224.3 sq.m per employee or floorspace of 81.2 sq.m per employee.

Map 4.5 indicates the Precinct's potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

Approximately 51% of site area within the Precinct contains buildings with moderate to significant capacity for additional height, largely concentrated along Blaxland and Frost Roads. Around 29% of sites have limited height uplift capacity, largely along Hopher and Mount Erin Roads. Vacant sites are dispersed throughout the Precinct.

Additional Height Uplift Capacity, May 2021 Map 4.5



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 4.4, the Campbelltown Precinct comprises of 163 lots, of which 22 are vacant. There are very few sites that are 1,000 sq.m or smaller. Vacant sites are distributed in size, although half are large sites of over 5,000 sq.m.

Of the developed sites, a majority 55% are between 1,001 sq.m and 3,000 sq.m, largely attributed to the standalone warehouses along Watsford and Frost Roads.

Sites that are larger than 4,000 sq.m account for 33% of total sites, which includes sites along Hephher Road and several bulky goods retail sites along Blaxland Road.

Average site coverage within the Precinct is relatively low, ranging from 32% to 54%. Most sites contain ample on-site parking, particularly retail sites along Blaxland Road.

Distribution of Sites by Lot Size, Campbelltown Precinct

Table 4.4

Size	Vacant Sites*		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	0	0%	0	0%	0%	0	0%
501 - 1,000 sq.m	2	9%	1	1%	32%	3	2%
1,001 - 2,000 sq.m	1	5%	15	11%	54%	16	10%
2,001 - 3,000 sq.m	6	27%	62	44%	49%	68	42%
3,001 - 4,000 sq.m	1	5%	17	12%	43%	18	11%
4,001 - 5,000 sq.m	1	5%	14	10%	47%	15	9%
More than 5,000 sq.m	11	50%	32	23%	43%	43	26%
Total	22	100%	141	100%	44%	163	100%

Note: Figures are based on land areas as at May 2021 and may differ from ELDM 2020 developed and undeveloped area estimates.

*A site is considered vacant if the total building area on the site is less than 10% of the site area.

Source: Geoscape Australia; Urbis

5. CARINGBAH / TAREN POINT

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

Caringbah/Taren Point Precinct Overview

Caringbah/Taren Point Industrial Precinct (Map 5.1) is located around 18.9 kilometres south of the Sydney CBD and 10.4 kilometres south of the Sydney Airport.

As at January 2020, the Caringbah/Taren Point Precinct covered an area of approximately 143.2 hectares, of which approximately 2.4 hectares (1.7%) remained undeveloped.

The Precinct's major access route connections are Taren Point Road and Captain Cook Drive.

A summary of the locational characteristics of the Precinct is provided in Table 5.1.

Location and Key Transport Infrastructure

Map 5.1



Location Characteristics

Table 5.1

Characteristic	Detail
Distance to nearest train station	1.8 kilometres south (Caringbah Station)
Distance to nearest motorway	9.6 kilometres north (M1 Motorway)
B-Double truck access	Yes
Surrounding land uses	<ul style="list-style-type: none"> Taren Point Public School and low to medium density residential dwellings in Taren Point to the north Georges River inlet and Woolooware Bay to the east Low density residential dwellings in Caringbah to the south Open space recreation areas (Gwawley Park) and low density residential dwellings in Miranda to the west

Strengths

- Proximity to the Sydney Airport and Port Botany
- Proximity to retail centres and hospitals in Miranda and Caringbah
- Proximity to parks, golf courses and waterways for recreation

Weaknesses

- Traffic congestion issues along Taren Point Road and Captain Cook Drive
- Distance from nearest motorway connection

PLANNING - WHAT IS THE ZONING MIX?

Map 5.2 opposite provides a summary of the relevant planning instruments and controls for the Caringbah/Taren Point Precinct.

The Caringbah/Taren Point Precinct is a composite of zonings, reflecting the various land uses within the Precinct. The B5 Business Development zone generally encourages bulky goods type land uses, while the IN1 General Industrial and B7 Business Park zones encourage more traditional industrial uses.

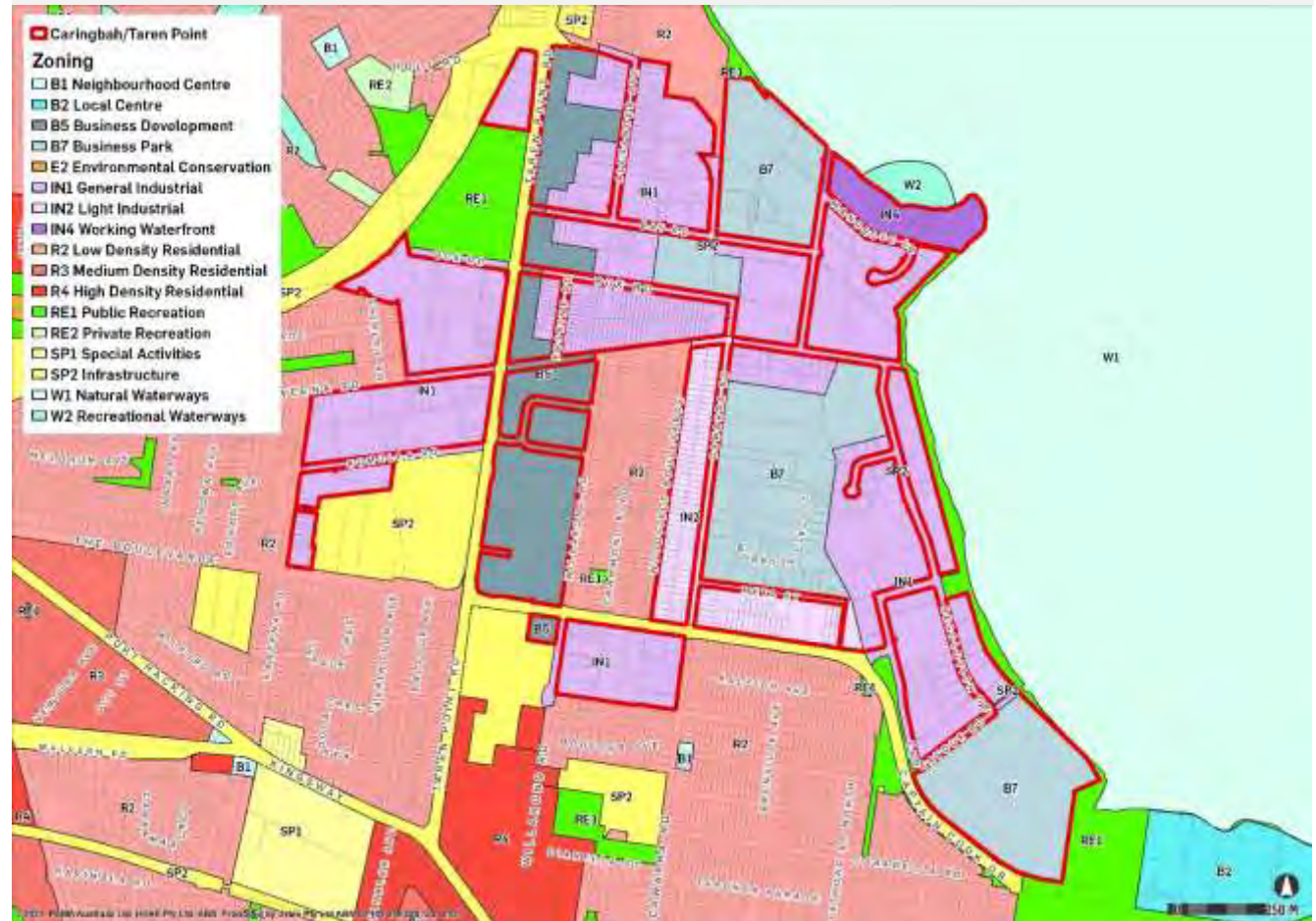
An IN4 Working Waterfront zone to the northeast of the Precinct contains various marine-related business uses.

Between Willarong Road and Woodfield Boulevard in the Precinct's southwest lies an R2 low density residential area. This zone neighbours bulky goods retailing and low impact automotive uses.

There are height limits under planning controls for this Precinct.

Zoning Map

Map 5.2



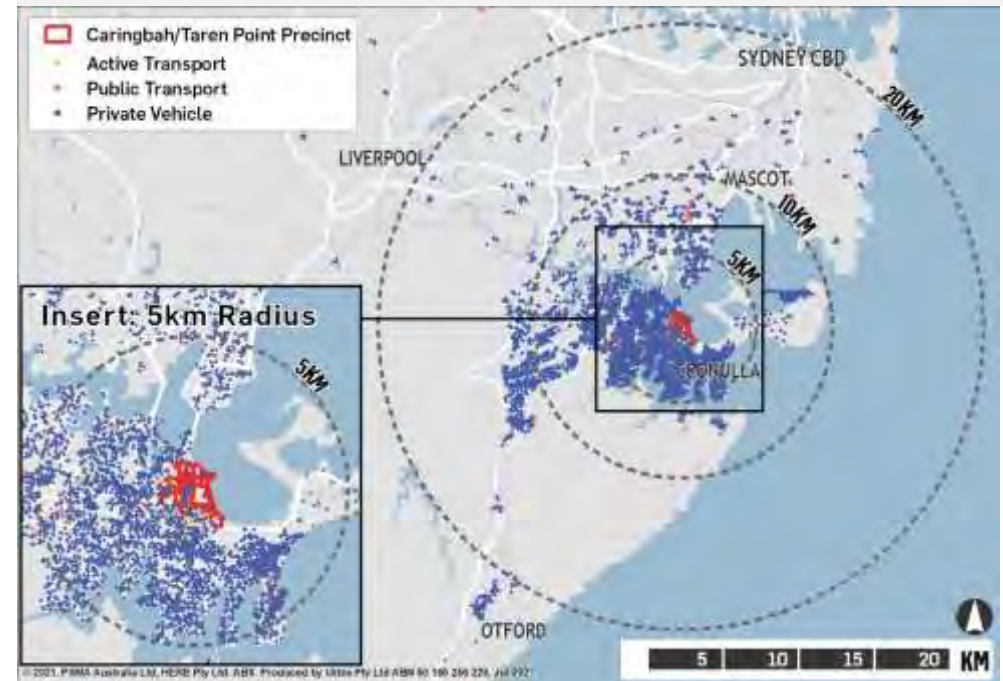
EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

Map 5.3 shows the place of residence of those who work in the Caringbah/Taren Point Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car, public transport or active transport (e.g. walking or cycling).

Precinct workers' residences are highly localised, with around 56% of workers residing within 5 km of the Precinct and a further 26% living within 5-10 km of the Precinct. Precinct workers generally reside to the south and west of the Precinct. Majority of workers travel to work via private vehicles.

Where do Precinct Workers Live, 2016

Map 5.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

Uses within this Precinct are consistent with an IN1 General Industrial, IN4 Working Waterfront, B5 Business Development and B7 Business Park zonings. Map 5.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct.

Taren Point Road and the west of Parraweena Road predominantly feature bulky goods and retail uses. These businesses, which typically comprise homeware stores and trade centres, benefit from high exposure to passing traffic.

Parraweena Road also features several two-storey buildings to the west of Taren Point Road, which house recreational facilities such as a child play centre and gym, as well as automotive showrooms and a veterinary hospital.

To the northeast of the Precinct is an IN4 Working Waterfront zone, which features marine-related uses, including boat rental services, a boat dealer and marine engineering. These sites have small, high-clearance warehouses but mostly feature open yards for boat storage.

Woodfield Boulevard and Cawarra Road mostly feature small, densely clustered standalone warehouses. Several marine-related uses can be found along these roads, including boat dealers and repairers.

Between Willarong Road and Woodfield Boulevard lies a low-density residential area. Industrial sites along Willarong Road are largely bulky goods or strata office/warehouse complexes featuring low-impact industrial uses and therefore do not pose a severe conflict of land use with residential neighbours. However, several warehouses along Woodfield Road are not well-maintained, which may pose interface issues with neighbouring low density residential dwellings.

To the south of the Precinct, Wurrook Circuit features much of the Precinct's recent development activity. The Circuit features a large distribution facility with ancillary office, in addition to several smaller warehouses and strata warehouse complexes. Additionally, the Circuit features Locus, a small three-storey commercial development, which comprise professional service uses such as legal, therapists and property consultants.

The Precinct is well-buffered from the low-density residential dwellings to the south. Captain Cook Drive, a wide, six-lane major arterial road, separates the two zones, while natural vegetation along the street fronts act as an additional barrier. Captain Cook Drive and Taren Point Road tend to experience congestion issues, particularly during peak hour traffic.



A boat hoist situated within the IN4 Working Waterfront zone.



The Precinct features some modern developments, including this strata office/warehouse (Map 1.4C).



The Precinct features high bay warehouses with ancillary office uses (Map 1.4C).

ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 5.1 illustrates the type of uses (determined by property type and business function) that currently occupy the Caringbah/Taren Point Precinct. The data was collected by Urbis in May 2021 and included a combination of:

- Physical inspection of properties within the Precinct
- Geographic information system analysis
- Interviews with various tenants.

As at May 2021, Urbis estimates that the Precinct has around 855,143 sq.m of industrial floorspace on approximately 1490,161 sq.m of developed land area. The Precinct serves a mixed role.

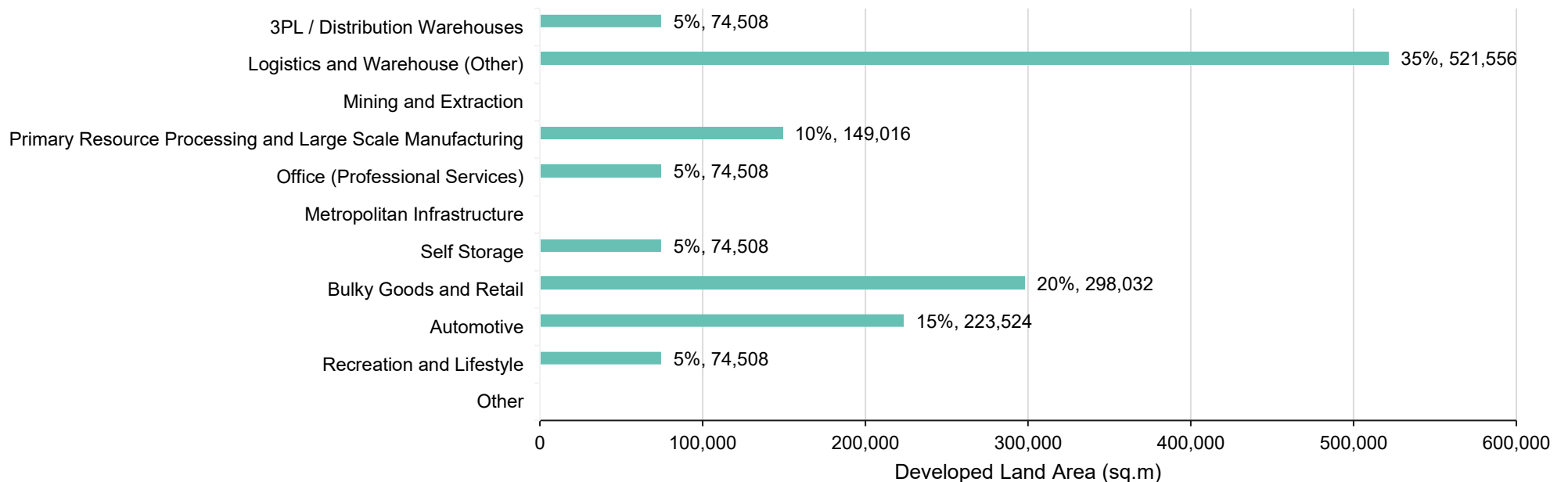
The most prevalent buildings within the Precinct are Logistics and Warehouse (Other), accounting for around 35% of total developed land area. These uses are found dispersed throughout the Precinct.

There is approximately 20% of developed land being used for Bulky Goods and Retail purposes, concentrated along Taren Point Road. A further 15% is attributed to Automotive uses, which are largely found south of Bay Road.

Other uses found within the Precinct include 3PL / Distribution Warehouses, Primary Resource Processing, Office (Professional Services), Self Storage and Recreation and Lifestyle.

Developed Land Area by Typology, Caringbah/Taren Point Precinct

Chart 5.1



Source: Urbis

MAP 5.4: ROLE AND FUNCTION - WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the typology of current developed land area in the Caringbah/Taren Point Precinct and examples of tenants are detailed in Table 5.2.

Logistics and Warehouse (Other) accounts for around 35% of total developed land use. This ranges from construction-related businesses (e.g. timber, plastering) as well as a cluster of marine-related uses (e.g. marine engineer, marine rigging services, fishing accessories).

Bulky goods and retail comprise around 20% of total developed land, which are concentrated along Taren Point Road.

Automotive uses account for around 15% of developed land area, which comprise vehicle servicing centres, showrooms and repairs, as well as a cluster of boat dealers.

The Precinct features a diverse mix of land uses, featuring almost all land typologies studied.

Developed Land Area Distribution by Typology, Caringbah/Taren Point Precinct

Table 5.2

	Distribution	Example Tenants
3PL / Distribution Warehouses	5%	Kerry Logistics (3PL), Dyson (distribution centre), Daikin (air conditioning distribution centre), Shimano (cycling and fishing supplies distributor)
Logistics and Warehouse (Other)	35%	Vega Australia (sensor technology equipment), Dyson (service repair centre), Teachers 4 Teachers (educational resource publication), Allied Pinnacle (food distributor), HiCraft Workwear and Safety, DisplayWise (retail and point of sale displays), Snippers Lawn Mowing (lawn and garden management), North Shore Timber (timber supplier), Shimano (fishing accessories), Onboard Engineering (marine engineer), JAR Aerospace (drone supplier), RAW Fitness Equipment (gym equipment supplier), Infinity Rigging (marine rigging services), Plastamasta Centre (plastering supplier)
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing	10%	APP Manufacturing Plant (PVS profile manufacturing), Boral Concrete (concrete plant), Hanson (concrete plant), Remondis (recycling), Alumac (metal fabrication), Sekisui Foam Australia (foam manufacturer)
Office (Professional Services)	5%	All Star Property Group, McCabe Partners (lawyers), Arcadia Projects and Design (home builders), Kayder (automation and security systems), NAB Business Banking Centre, Synergy IT Group (computer support services)
Metropolitan Infrastructure		
Self Storage	5%	Kennards Self Storage, The Lock Up, Hunter Self Storage, Rent a Space, Shires Self Storage
Bulky Goods and Retail	20%	Officeworks, Repco, Whitworths Marine and Leisure, Baby Bunting, The Good Guys, Amart Furniture, Jaycar, Weber, Billy Hyde, Dulux Trade Centre, Winning Appliances, Repco, Harvey Norman Commercial Division (commercial trade centre), Liquor Stax
Automotive	15%	Bob Jane T Mart, RSEA Safety (workwear and safety equipment), BMW (service centre), Tesla (showroom), Singleton Motors (vehicle repairs), Hino (vehicle sales), Hertz (car rental), Motorserve (car servicing), Isuzu Ute (service centre), Camec (caravan and RV supply store), Marina Bayside (boat dealer), JD's Boatshed (boat dealer), Sirocco Marine South (boat dealers), Marine Co (boat dealer)
Recreation and Lifestyle	5%	Tribe Social Fitness (gym), Kung Fu Academy, Spin Studio (fitness), Rhino Fitness, Flipout (trampoline centre), Vision PT (fitness), East Coast City Church, Revitalise Church, PlayCave (children's play centre), Live Athletics (gym), Ninja Warrior Sydney (children's play centre), X-Golf (indoor golf simulator), Warrior Performance (fitness)
Other	<1%	Artisan: Pepe Saya Buttery (artisan cultured butter), Hairyman Brewery, Three Pence Roasters, Australian Roasted Coffee Co
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 5.3 shows the quantum of zoned industrial land within the Caringbah/Taren Point Precinct.

As at December 2020, there was a total of 143.2 hectares of zoned industrial land in the Caringbah/Taren Point Precinct, of which 140.8 hectares has been developed and 2.4 hectares (1.7%) remained undeveloped.

Between 2016 and 2020, the Precinct has experienced negligible growth, recording an average land take-up rate of -0.3 hectares per annum. However, supporting future growth within the Precinct are 16 projects with an estimated value of \$53.4 million. This includes an industrial units and self storage facility (~\$18.1 million), and a multipurpose indoor recreation facility and childcare centre (~\$5.5 million).

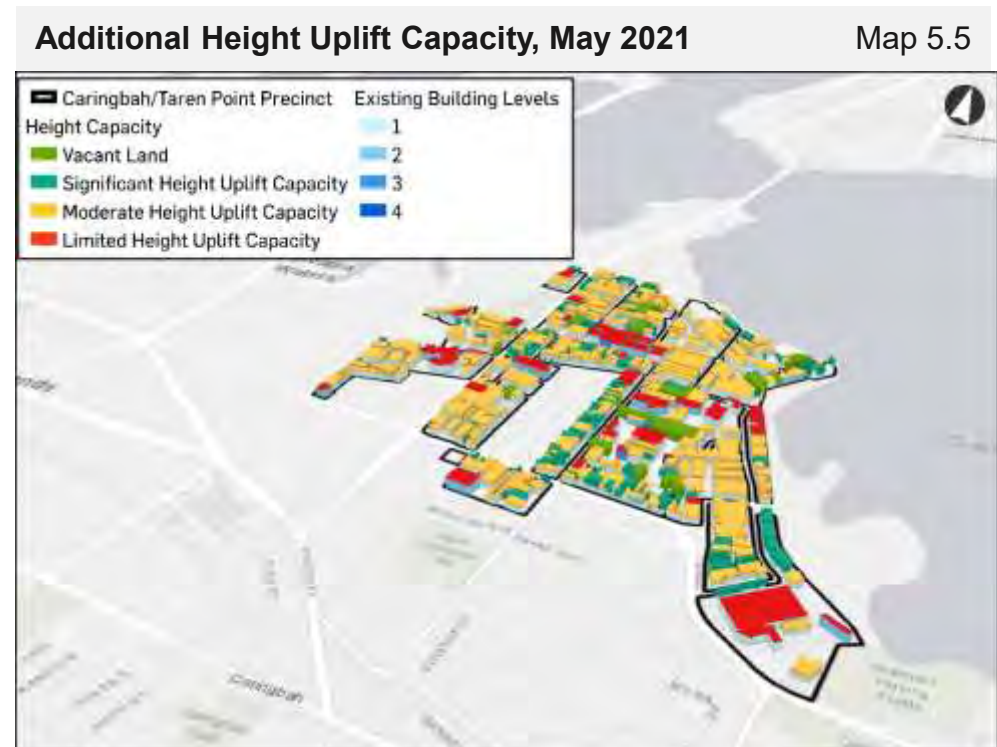
As at 2021, total employment in the precinct is estimated to be 12,253 jobs. Of the 143.2 hectares of developed industrial land, there is approximately 855,143 sq.m of Gross Floor Area. This equates to an average land area of 114.9 sq.m per employee or floorspace of 69.8 sq.m per employee.

Map 5.5 indicates the Precinct's potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

Approximately 63% of total site area contains buildings with moderate height uplift capacity, while a further 21% have significant capacity for additional height.

Factor	Value
Total Employment, 2021 projection	12,253 jobs
Total Developed Land Area, 2020	140.8 ha
Total Undeveloped Land Area, 2020	2.4 ha
Future Pipeline and Estimated Value	16 projects, ~\$53.4m
Average Annual Land Take-Up (2016 – 2020)	-0.3 ha
Total Floorspace, 2021 (Gross Floor Area)	855,143 sq.m
Average Land Area per Employee	114.9 sq.m
Average Gross Floor Area per Employee	69.8 sq.m

Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 5.4, the Caringbah/Taren Point Precinct comprises of 543 lots, of which 18 are vacant. Vacant sites vary in size, comprising 45% of sites 2,000 sq.m or smaller, 28% between 2,001 sq.m and 4,000 sq.m and 28% larger than 5,000 sq.m.

Of developed sites, 6% of sites are between 501 sq.m and 2,000 sq.m in size.

Average site coverage is fairly uniform within the Precinct, averaging between 47% to 60% across the site ranges.

Distribution of Sites by Lot Size, Caringbah/Taren Point Precinct

Table 5.4

Size	Vacant Sites*		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	1	6%	4	1%	56%	5	1%
501 - 1,000 sq.m	4	22%	228	43%	60%	232	43%
1,001 - 2,000 sq.m	3	17%	128	24%	56%	131	24%
2,001 - 3,000 sq.m	3	17%	49	9%	55%	52	10%
3,001 - 4,000 sq.m	2	11%	28	5%	54%	30	6%
4,001 - 5,000 sq.m	0	0%	25	5%	60%	25	5%
More than 5,000 sq.m	5	28%	63	12%	47%	68	13%
Total	18	100%	525	100%	51%	543	100%

Note: Figures are based on land areas as at May 2021 and may differ from ELDM 2020 developed and undeveloped area estimates.

*A site is considered vacant if the total building area on the site is less than 10% of the site area.

Source: Geoscape Australia; Urbis

6. CONDELL PARK

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

Condell Park Precinct Overview

Condell Park Industrial Precinct (Map 6.1) is located around 19.7 kilometres southwest of the Sydney CBD. The Precinct is adjacent to Bankstown Airport.

As at January 2020, the Precinct covered an area of approximately 29.1 hectares, of which none was recorded as vacant.

The Precinct's major access route connections are the M5 Motorway, Milperra Road and Henry Lawson Drive.

A summary of the locational characteristics of the Precinct is provided in Table 6.1.

Location and Key Transport Infrastructure

Map 6.1



Location Characteristics

Table 6.1

Characteristic	Detail
Distance to nearest train station	3.8 kilometres east (Bankstown Station)
Distance to nearest motorway	4.5 kilometres southeast (M5 Motorway)
B-Double truck access	No
Surrounding land uses	<ul style="list-style-type: none"> Low density residential in Georges Hall and Crest Sporting Complex to the north Low density residential in Condell Park and Condell Park High School to the east Bankstown Airport and Bankstown Aerodrome to the south and west

Strengths

1. Proximity to Bankstown Airport
2. Good connections to M5 Motorway and Milperra Road

Weaknesses

1. Little aviation-related synergies in existing uses to Bankstown Airport despite proximity
2. Some older warehouses not well maintained
3. Potential interface issues - proximity to residential and schools

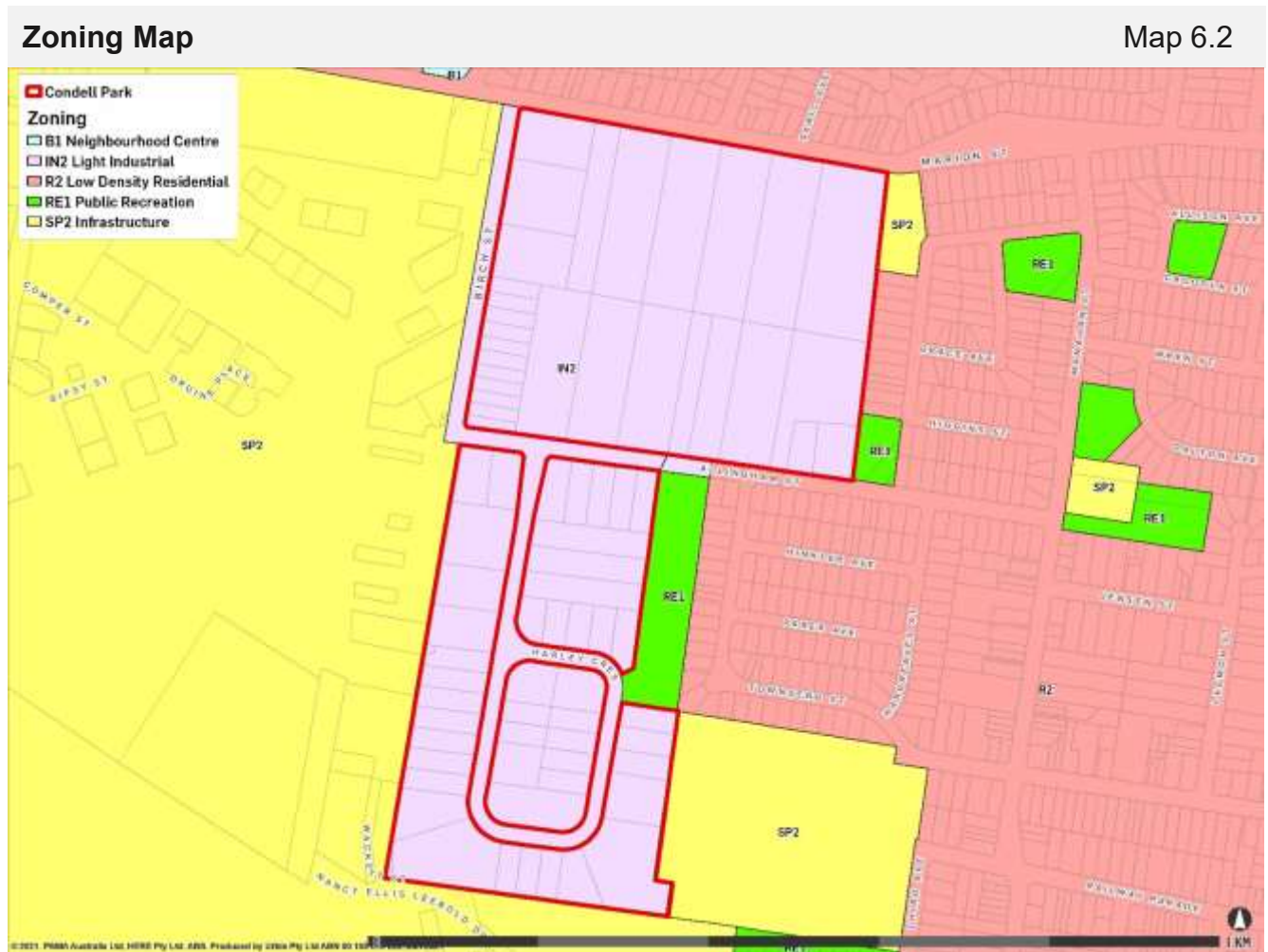
PLANNING - WHAT IS THE ZONING MIX?

Map 6.2 opposite provides a summary of the relevant planning instruments and controls for the Precinct.

The IN2 Light Industrial zoning of the Precinct typically encourages small warehouse (standalone and strata) with ancillary office uses.

The Precinct is surrounded by R2 Low Density Residential to the north and east, as well as SP2 Infrastructure to the south and west. This SP2 zone is due to the presence of Bankstown Airport and also features several aviation-related businesses fronting Birch Street. However, aviation-related business uses are limited within the Precinct itself.

There are no height limit restrictions in planning controls within this Precinct.



EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

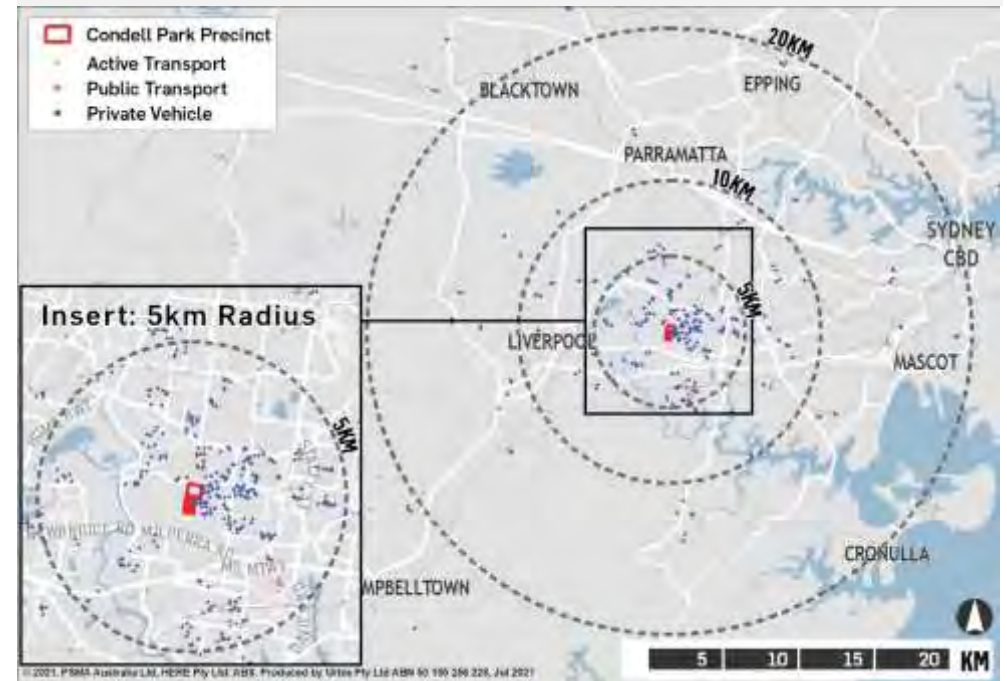
Map 6.3 shows the place of residence of those who work in the Condell Park Industrial Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car, public transport or active transport (e.g. walking or cycling).

The Condell Park Precinct serves a highly localised catchment of workers, with around 53% of workers residing within 5 km of the Precinct and 75% of workers residing within 10 km of the Precinct. This reflects the large proportion of small businesses that the Precinct supports, looking to locate their business close to home.

The majority of workers travel to work by private vehicles, with very little taking active or public transport. Workers travelling via public transport are likely to reside southeast of the Precinct.

Where do Precinct Workers Live, 2016

Map 6.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

The current tenants within this Precinct are consistent with the permitted uses for IN2 Light Industrial zoning. Map 6.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct.

The Precinct is dominated by 1-storey, older-style standalone warehouses and strata warehouse units, both with ancillary office uses. These buildings house typical industrial uses, such as manufacturing (e.g. packaging) and machinery suppliers (e.g. food processing equipment, electrical equipment). These are typically seen along Harley Crescent, Allingham Street and Birch Street. These streets are located behind the main road, Marion Street, and therefore do not benefit from high exposure to passing traffic. There is one standalone office warehouse building currently under construction along Allingham Street, with plans for an additional 32 strata warehouse office units to be built onsite.

Recent and upcoming investment in the Precinct is also evident along Marion Street, which captures large volumes of passing traffic, particularly during peak hour. However, entry and exit onto Marion Street may be difficult when traffic is heavy.

Marion Industrial Estate is a new strata warehouse complex with ancillary offices fronting Marion Street, which was completed in 2017. These strata units contain a variety of “clean” industrial businesses in well-maintained buildings with ample onsite parking. 406 Marion Street is a strata warehouse complex adjacent to Marion Industrial Estate that is currently under construction.

Sites neighbouring residential dwellings to the north and west of the Precinct are moderately buffered by natural vegetation, including pockets of open space. However, there may be potential interface issues, given that truck access to Milperra Road must pass through low-density residential areas along Allingham Street through to Edgar Street. Edgar Street is the closest roadway intersection with traffic lights that allows for eastbound (for access to the M5 Motorway) and westbound (for access to The Horsley Drive) connections onto Milperra Road.

Despite the Precinct’s proximity to Bankstown Airport, there appears to be minimal aviation-based businesses located within the Precinct. Much of this industry is situated within the adjacent Bankstown Aerodrome.



The Precinct is attracting moderate investment, with the recent completion of Marion Industrial Estate (above) and the current construction of 406 Marion Street (below).



CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?



Packaging manufacturing is present within the Precinct.



Older warehouses typically seen within the Precinct.



An old newspaper factory site that is being redeveloped. A standalone office warehouse is currently under construction (pictured in the distance) and there plans to build an additional 32 industrial strata units.



A newer warehouse with ancillary office along Birch Street that appears to be vacant.

ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 6.1 illustrates the type of uses (determined by property type and business function) that currently occupy the Precinct. The data was collected by Urbis in May 2021 and included a combination of:

- Physical inspection of properties within the Precinct
- Geographic information system analysis
- Interviews with various tenants.

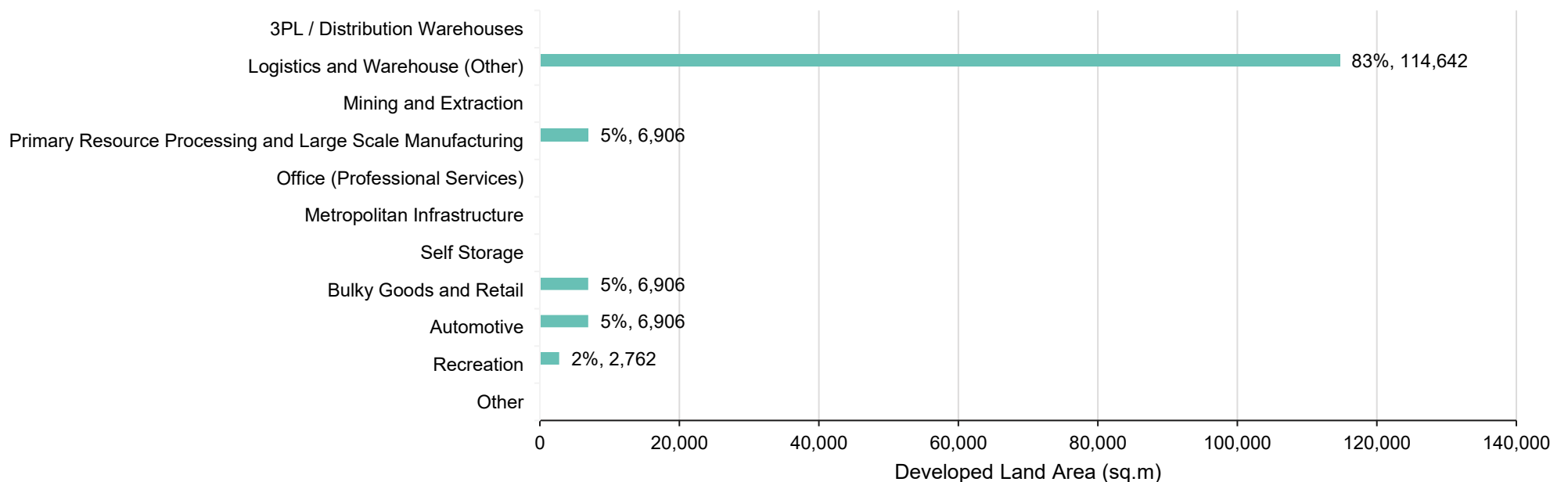
As at May 2021, Urbis estimates that the Precinct has around 156,964 sq.m of industrial floorspace on approximately 279,279 sq.m of developed land area. The Precinct primarily serves a metropolitan role.

The most prevalent use within the Precinct is Logistics and Warehouse (Other) spaces, which account for approximately 83% of developed land area. They are largely present in the form of standalone warehouses or strata warehouse units co-located with ancillary office uses.

The Precinct also features around 5% of land area dedicated to manufacturing, due to the presence of Cormack Packaging and Zip Water manufacturing facilities. Other uses present in the Precinct include Bulky Goods and Retail, Automotive and Recreation and Lifestyle.

Property Use Type, Condell Park Precinct by Gross Floor Area

Chart 6.1



Source: Urbis

MAP 6.4: ROLE AND FUNCTION - WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the typology of current occupied floorspace in the Precinct and examples of tenants are detailed in Table 6.2.

Logistics and Warehouse (Other) uses dominate the industrial land typology within the Precinct. The mix of business uses varies widely, from equipment and machinery suppliers to meat distribution and printing businesses.

Other land typologies present within the Precinct include Large Scale Manufacturing, Bulky Goods and Retail, Automotive and a small proportion of Recreation and Lifestyle and Office (Professional Services).

Industrial Land Typology, Flemington

Table 6.2

	Distribution	Example Tenants
3PL / Distribution Warehouses		
Logistics and Warehouse (Other)	83%	Fallsdell Machinery (food and pharmaceutical machinery), Conveyancing & Hoisting Solutions (rental hoisting equipment), Atech Aluminium (windows and door supplier), Australis Engineering (material handling equipment supplier), In Press Printing (printing services), Sn@p Printing (printing services), Johnston Packaging (cardboard packaging), Art & Soul Creations (creative design agency), BarnCo (food processing equipment), Echo Boards and Products (electrical equipment supplier), Star Group Warehouse (electrical, communications and data services), C&C Chicken (poultry wholesaler), Homebush Export Meat (meat distributors) Marion Industrial Estate: Thermal Energy Solutions (water heating technology), Selectrical Service Australia (electrician), Melissa Sassine Cosmetics (online cosmetics sales), Ruby's Prop Hire & Events (furniture and decor hire), Creative Upholstery Works (upholstery), Statewide Building & Restorations (building, restoration and cleaning services), Lagrange One Design (signage fabrication), Big Boys Construction Group (remedial construction services), Xclusive Apparel (apparel supplier)
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing	5%	Cormack Packaging (packaging manufacturing), Zip Water (water filter taps manufacturing), Delta Plastic (recycling)
Office (Professional Services)	<1%	Star Group Head Office (electrical, communications and data services)
Metropolitan Infrastructure		
Self Storage		
Bulky Goods and Retail	5%	Auction World (auction house)
Automotive	5%	Panel Pit Smash Repairs (repairs), Street Element (auto parts store), R&B Auto Repairs (repairs), Georges Hall Mechanical Repairs (repairs), HashTag Car Hire (wedding car hire)
Recreation and Lifestyle	2%	Blue Water Swim School (swim school), The Higher Flyer Bistro and Hotel (pub and hotel), Condell Park Indoor Firearms Range (firing range and firearm supplier)
Other		
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 6.3 shows the quantum of zoned industrial land within the Condell Park Precinct.

As at December 2020, there was a total of 29.1 hectares of zoned industrial land in the Condell Park Precinct, of which none remained undeveloped.

Between 2016 and 2020, the Precinct recorded no changes in average annual land take-up, although take-up is anticipated to have increased since, given development in 2021.

As at 2021, total employment in the precinct is estimated to be 2,121 jobs. Of the 29.1 hectares of zoned industrial land, there is approximately 156,964 sq.m of Gross Floor Area. This equates to an average land area of 137.2 sq.m per

employee or floorspace of 74.0 sq.m per employee.

Map 6.5 indicates the Precinct's potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

There are no maximum height limits specified for the Condell Park Precinct and so all existing buildings have significant scope for additional height. However, the Precinct may also be affected by floorspace ratios and other controls (particularly given its proximity to Bankstown Airport), which impact development potential.

Factor	Value
Total Employment, 2021 projection	2,121 jobs
Total Developed Land Area, 2020	29.1 ha
Total Undeveloped Land Area, 2020	0 ha
Future Pipeline and Estimated Value	2 projects, ~\$6.4m
Average Annual Land Take-Up (2018 – 2020)	0 ha
Total Floorspace, 2021 (Gross Floor Area)	156,964 sq.m
Average Land Area per Employee	137.2 sq.m
Average Gross Floor Area per Employee	74.0 sq.m

Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 6.4, the Condell Park Precinct comprise of 77 sites, one of which is vacant along Allingham Street.

The Precinct has 45% of sites between 1,001 sq.m and 2,000 sq.m in size with an average site coverage of around 64%. This is due to the dense cluster of standalone warehouses with ancillary office uses, particularly along Harley

Crescent.

Approximately 29% of all lots are over 4,000 sq.m in size. This is mostly attributed to the strata office warehouse sites and larger warehouse sites, particularly to the north of Allingham Street. Given the large areas of at-grade car parking, these sites have a relatively low average site coverage of 49% to 56%.

Distribution of Sites by Lot Size, Condell Park Precinct

Table 6.4

Size	Vacant Sites		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	0	0%	0	0%	13%	1	1%
501 - 1,000 sq.m	0	0%	6	8%	69%	6	8%
1,001 - 2,000 sq.m	0	0%	34	46%	64%	34	45%
2,001 - 3,000 sq.m	0	0%	7	9%	63%	7	9%
3,001 - 4,000 sq.m	0	0%	5	7%	58%	5	7%
4,001 - 5,000 sq.m	0	0%	4	5%	56%	4	5%
More than 5,000 sq.m	1	100%	18	24%	49%	19	25%
Total	1	100%	75	100%	55%	76	100%

7. EASTERN CREEK

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

Eastern Creek Precinct Overview

Eastern Creek Industrial Precinct (Map 7.1) is located around 34.6 kilometres west of the Sydney CBD and 16.3 kilometres northeast of the future Western Sydney International Airport.

As at January 2020, the Eastern Creek Precinct covered an area of approximately 531.6 hectares, accommodating mostly Third Party Logistics and large distribution warehouses. Approximately 212.3 hectares (40%) remained undeveloped.

The Precinct's major access route connections are the M4 Motorway, the M7 Motorway, Wallgrove Road and Old Wallgrove Road.

A summary of the locational characteristics of the Precinct is provided in Table 7.1.

Location and Key Transport Infrastructure

Map 7.1



Location Characteristics

Table 7.1

Characteristic	Detail
Distance to nearest train station	4.6 kilometres north (Mount Druitt Station)
Distance to nearest motorway	1.7 metres northeast (M4 and M7 Motorways)
B-Double truck access	Yes
Surrounding land uses	<ul style="list-style-type: none"> • Large distribution warehouses, Pine Grove Memorial Park and low density residential dwellings in Minchinbury to the north • Western Sydney Parklands, Sydney Motorsport Park and primary resource processing uses to the east • Transgrid Substation to the south • Vacant land to the west

Strengths

1. Proximity to key motorways
2. Wide roads for ease of B-double access
3. Proximity to retail including Eastern Creek Quarter Shopping Centre and Erskine Park Shopping Centre
4. Distance from resi – close to employment population but far enough to not be noisy

Weaknesses

1. Limited public transport accessibility

PLANNING - WHAT IS THE ZONING MIX?

Map 7.2 opposite provides a summary of the relevant planning instruments and controls for the Eastern Creek Precinct.

The IN1 General Industrial zoning of the Precinct typically encourages 3PL and distribution warehouse uses.

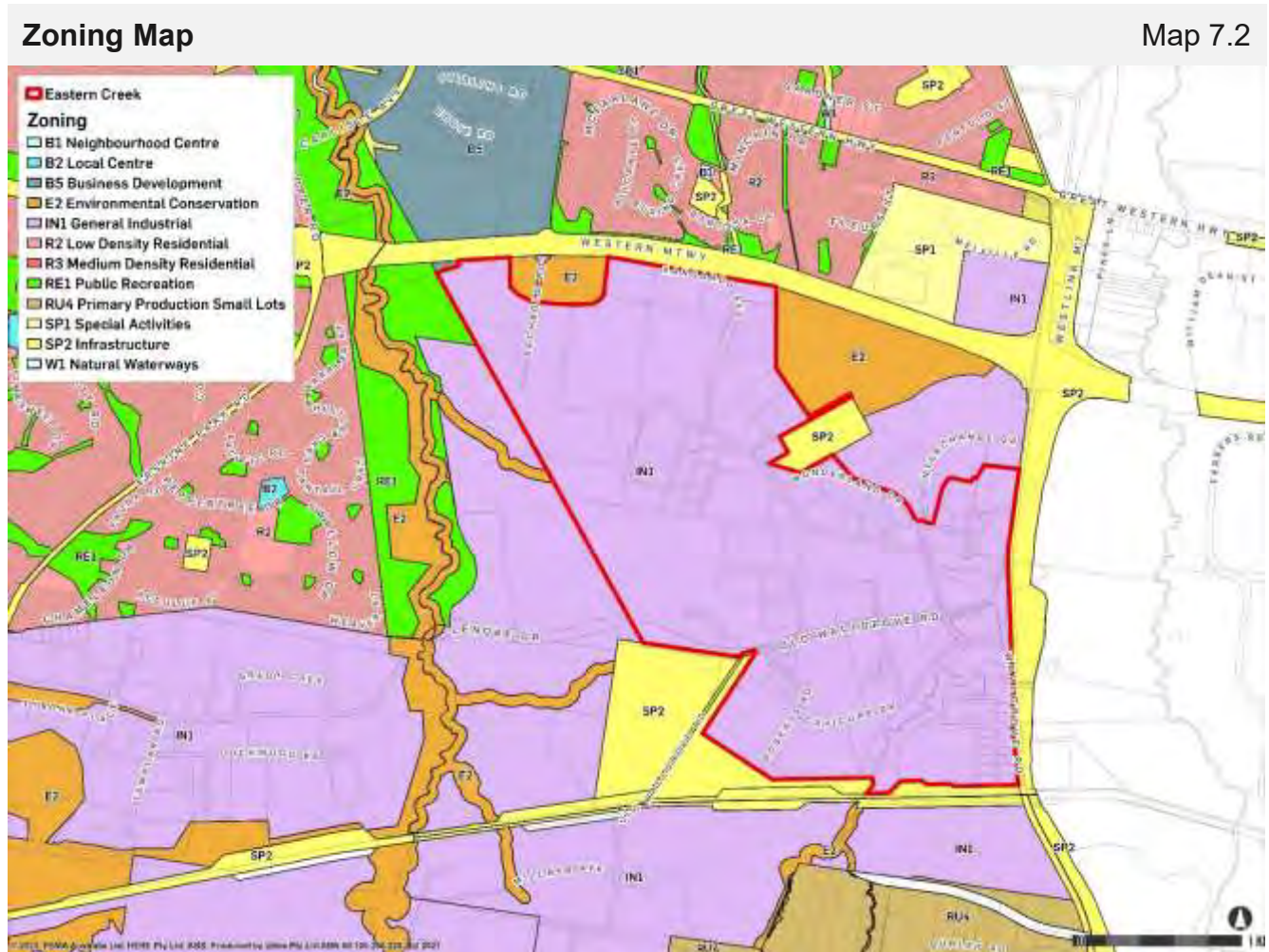
The Precinct lies adjacent to some pockets of E2 Environmental Conservation lands and the M4 Western Motorway to the north. The motorway creates a buffer between the Precinct and low density residential dwellings in Minchinbury.

To the east of the Precinct lies Western Sydney Parklands.

To the south lies SP2 Infrastructure zone, dedicated to the construction of Transgrid's Eastern Creek Substation.

There is additional IN1 General Industrial land to the west, although this land is currently vacant.

There are no height limits under planning controls for this Precinct.



EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

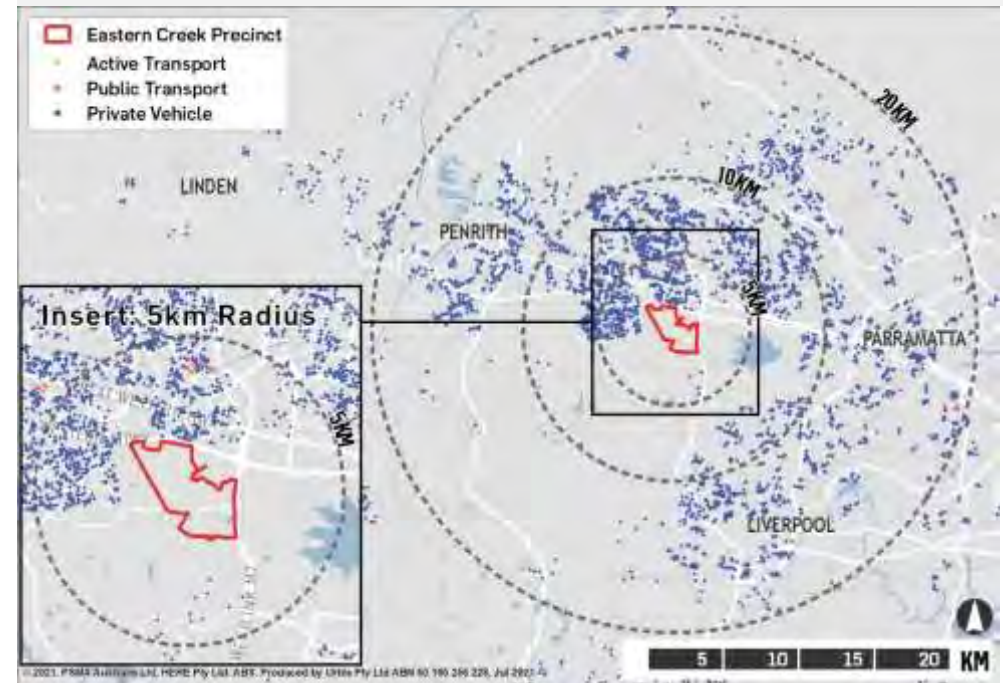
Map 7.3 shows the place of residence of those who work in the Eastern Creek Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car, public transport or active transport (e.g. walking or cycling).

Workers' residences are widely dispersed throughout western Sydney, however higher densities occur within 10 km to the north and west of the Precinct. Approximately 39% of precinct workers live within 10 km of the Precinct. The remaining 61% reside beyond the 10 km radius, particularly around key centres such as Penrith, Parramatta and Liverpool.

Almost all workers (99%) travel to work by private vehicles, likely due to the convenience of the M4 and M7 Motorways and ample on-site and street car parking within the Precinct. There are also limited public transport routes servicing the Precinct, with the closest train station 5 km north of the Precinct (Mount Druitt Station).

Where do Precinct Workers Live, 2016

Map 7.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

Uses within this Precinct are consistent with an IN1 General Industrial zoning. Map 7.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct.

The Precinct is characterised by modern, 1-level, high-bay warehouses with ancillary office uses. Most of the Precinct has been completed over the past decade. Businesses within the Precinct predominantly have a logistics / freight forwarding role or is a distribution centre servicing the region.

The Precinct features wide roads for B-double accessibility. The Precinct is well presented, with high quality streetscaping as well as landscaping within individual sites.

Eastern Creek Business Park by Frasers Property comprises most sites in the north of the Precinct, along Interchange, Wonderland and Honeycomb Drives. To the west of the business park is a large recycling warehouse and landfill park.

The Precinct features Goodman's M7 Business Hub, situated south of Old Wallgrove Road. The business park comprises several strata unit estates,

featuring large strata warehouses with ancillary office, and standalone distribution facilities for major logistics users., Located within the M7 Business Hub is Southridge Plaza built around the heritage Southridge Homestead. The Plaza includes a medical centre, a childcare, a gym and cafes.

There are several warehouses located within the southeastern pocket of the Precinct, below Mini Link Road. This pocket is separated from the rest of the Precinct via Reedy Creek and natural vegetation. These warehouses are relatively smaller than those found across the rest of the Precinct. There is only one point of entry / exit into the precinct via Wallgrove Road, accessible by both northbound and southbound traffic.

The Precinct also contains CDC's data centre development, Eastern Creek Campus, which lies south of the M7 Business Hub. The Campus contains three recently completed data centres providing 48Mw of data centre capacity and one currently being constructed. When complete, the Campus will feature six data centres with a total of 120Mw capacity. Another data centre development (developer undisclosed) has begun construction at 10 Eastern Creek Drive.



Data centre currently under construction at 10 Eastern Creek Drive (Map 1.4A).



High quality landscaping can be found throughout the Precinct (Map 1.4B).



The Precinct features high bay warehouses for logistics and distribution centres (Map 1.4C).

ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 7.1 illustrates the type of uses (determined by property type and business function) that currently occupy the Precinct. The data was collected by Urbis in May 2021 and included a combination of:

- Physical inspection of properties within the Precinct
- Geographic information system analysis
- Interviews with various tenants.

As at May 2021, Urbis estimates that the Precinct has around 1,237,542 sq.m of industrial floorspace on approximately 2,457,478 sq.m of developed land area. The Precinct almost entirely serves a metropolitan role.

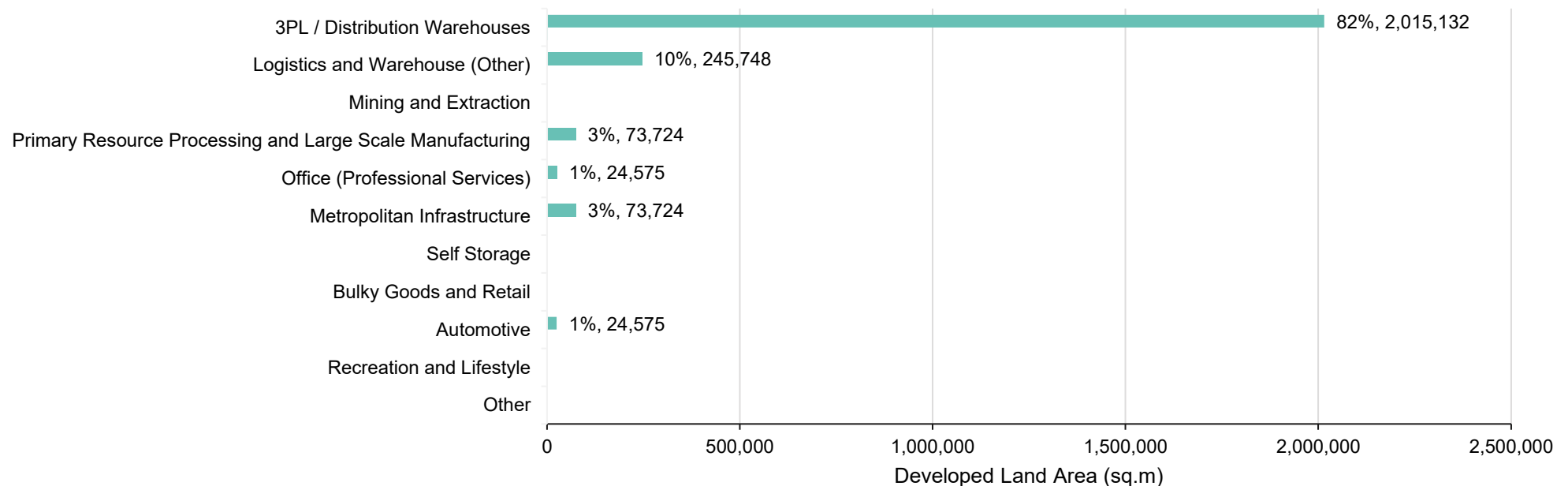
The most prevalent buildings within the Precinct are 3PL / Distribution Warehouses co-located with ancillary office, which account for approximately 82% of total developed land area. A clear cluster of logistics functions is evident in the Precinct.

Primary Resource Processing accounts for approximately 3% of total developed land area, attributed to the Bingo and Cleanaway recycling facilities. Metropolitan Infrastructure accounts for a further 3%, given the presence of CDC's Eastern Creek Campus data centres.

There is also a small presence of Office (Professional Service) and Automotive uses.

Developed Land Area by Typology, Eastern Creek Precinct

Chart 7.1



Source: Urbis

MAP 7.4: ROLE AND FUNCTION - WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the typology of current developed land area in the Eastern Creek Precinct and examples of tenants are detailed in Table 7.2.

3PL / Distribution Warehouses dominate the industrial land typology within the Precinct, accounting for around 82% of total land use.

Other logistics and warehouse uses are generally located with the pocket of

smaller warehouses below Mini Link Road, accounting for around 10% of the developed land area.

There is a small amount of Primary Resource Processing, due to the presence of recycling facilities and landfill, as well as Metropolitan Infrastructure, attributed to the data centres. Office (Professional Services) and Automotive uses account for around 1% of total developed land area each.

Developed Land Area Distribution by Typology, Eastern Creek Precinct

Table 7.2

	Distribution	Example Tenants
3PL / Distribution Warehouses	82%	Clifford Hallam Healthcare (pharmaceuticals distributor), H&M (distribution centre), Fujitsu (head office and distribution centre), Toll (3PL), Land Transport (3PL), XL Express (3PL), Kuehne + Nagel (freight forwarding), DB Schenker (global logistics), Best & Less (distribution centre), Lite n' Easy (distribution centre), Kmart (distribution centre), Rhino Rack (roof rack supplier, distribution centre), Coles (distribution centre), Red Rich Fruits (distribution centre), Cahill Transport (3PL), Coca Cola Amatil (distribution centre), Coles (distribution centre), QLS Logistics (3PL), Techtronic Industries (power tools distribution centre), Fisher & Paykel (home appliances distribution centre), FDM (3PL), Collins Adelaide (logistics), Icehouse Logistics (3PL), Silk Contracts Logistics (3PL), QLS E-Cycle (brown and white goods logistics and warehousing)
Logistics and Warehouse (Other)	10%	Hobson Engineering (fastener suppliers), Garmin (office and warehouse), Agreko (construction equipment supplier), Layher (scaffolding suppliers), Alemlube (industrial equipment supplier), LAPP (cable and connection technology supplier), PremiAir Hire (industrial equipment hire), Tesa (adhesive tape suppliers), Alfagomma (hose supplier), CR Laurence (construction supplier)
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing	3%	Bingo Recycling Ecology Park and Landfill (recycling, landfill), Cleanaway Solids Waste Services (recycling),
Office (Professional Services)	1%	Regal Recruitment (recruitment agency), Sharp and Carter Specialist Recruitment
Metropolitan Infrastructure	3%	CDC Eastern Creek Campus (EC1, EC2, EC3)
Self Storage		
Bulky Goods and Retail		
Automotive	1%	Vawdrey Truck Body (truck parts), Bridgestone Truck Centre (tyres)
Recreation and Lifestyle	<1%	Southridge Plaza: Plus Fitness, Little Grace's Child Care Centre
Other		
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 7.3 shows the quantum of zoned industrial land within the Eastern Creek Precinct.

As at December 2020, there was a total of 531.6 hectares of zoned industrial land in the Eastern Creek Precinct, of which 319.3 hectares has been developed and 212.3 hectares (39.9%) remained undeveloped.

Between 2016 and 2020, the Precinct has experienced significant growth, recording an average land take-up rate of 23.3 hectares per annum. Sustaining this growth into the future are an additional 26 projects with an estimated value of around \$1.8 billion. This includes an energy from waste electricity generation plant and supporting infrastructure, which has an estimated value of \$1.2 billion.

Nature of Employment and Land Table 7.3

Factor	Value
Total Employment, 2021 projection	7,097 jobs
Total Developed Land Area, 2020	319.3 ha
Total Undeveloped Land Area, 2020	212.3 ha
Future Pipeline and Estimated Value	26 projects, ~\$1.8b
Average Annual Land Take-Up (2016 – 2020)	23.3 ha
Total Floorspace, 2021 (Gross Floor Area)	1,237,542 sq.m
Average Land Area per Employee	449.9 sq.m
Average Gross Floor Area per Employee	174.4 sq.m

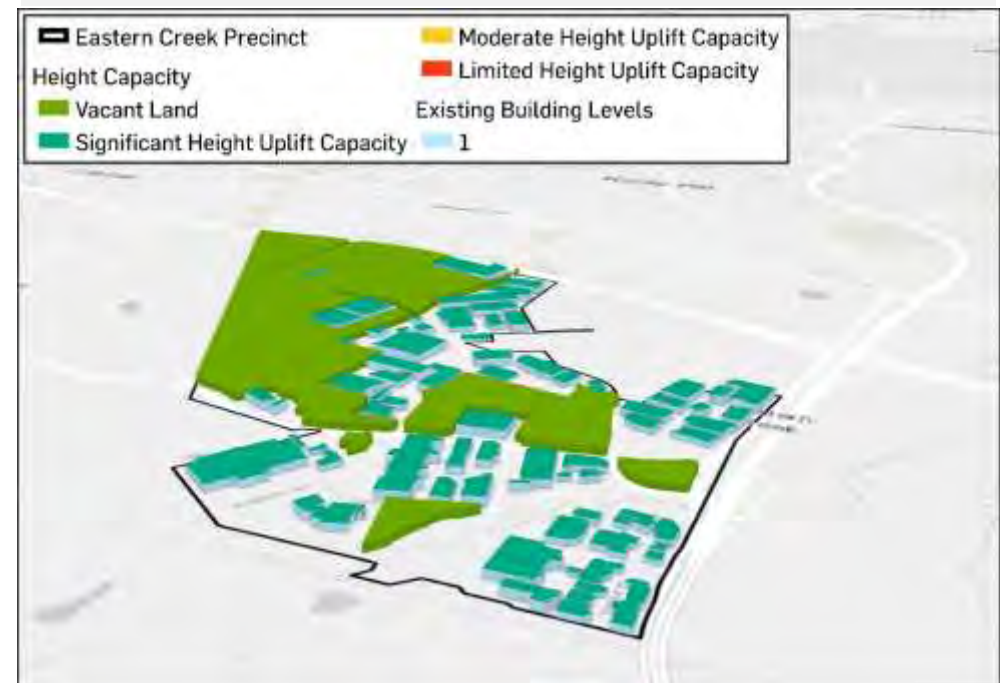
Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis

As at 2021, total employment in the precinct is estimated to be 7,097 jobs. Of the 319.3 hectares of developed industrial land, there is approximately 1,237,542 sq.m of Gross Floor Area. This equates to an average land area of 449.9 sq.m per employee or floorspace of 174.4 sq.m per employee.

Map 7.5 indicates the Precinct's potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

There are no maximum height limits specified for the Eastern Creek Precinct and so all existing buildings have significant scope for additional height. However, the Precinct may also be affected by floorspace ratios and other controls, which impact development potential.

Additional Height Uplift Capacity, May 2021 Map 7.5



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 7.4, the Eastern Creek Precinct comprises of 105 lots, of which 26 are vacant. All vacant sites are more than 5,000 sq.m in size.

Of the developed sites, there are only two developed sites that are between 1,001 sq.m and 3,000 sq.m, attributed to the Southridge Plaza. The Southridge Plaza site has an average site coverage of between 51% to 64%.

The remaining developed sites are more than 5,000 sq.m in size and have an average site coverage of 49%. Given the site utilisation rates for these lots, there maybe potential for further densification on existing sites, subject to other constraints.

Distribution of Sites by Lot Size, Eastern Creek Precinct

Table 7.4

Size	Vacant Sites*		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	0	0%	0	0%	0%	0	0%
501 - 1,000 sq.m	0	0%	0	0%	0%	0	0%
1,001 - 2,000 sq.m	0	0%	1	1%	51%	1	1%
2,001 - 3,000 sq.m	0	0%	1	1%	64%	1	1%
3,001 - 4,000 sq.m	0	0%	0	0%	0%	0	0%
4,001 - 5,000 sq.m	0	0%	0	0%	0%	0	0%
More than 5,000 sq.m	26	100%	77	97%	49%	103	98%
Total	26	100%	79	100%	49%	105	100%

Note: Figures are based on land areas as at May 2021 and may differ from ELDM 2020 developed and undeveloped area estimates.

*A site is considered vacant if the total building area on the site is less than 10% of the site area.

Source: Geoscape Australia; Urbis

8. ERSKINE PARK

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

Erskine Park Precinct Overview

Erskine Park Industrial Precinct (Map 8.1) is located around 38.9 kilometres west of the Sydney CBD and 11.2 kilometres northeast of the future Western Sydney International Airport.

As at January 2020, the Erskine Park Precinct covered an area of approximately 363.7 hectares, of which approximately 84.8 hectares (23.3%) remained undeveloped.

The Precinct's major access route connections are Mamre Road and Erskine Park Road, for connections to the M4 Motorway as well as Lenore Drive, for connections to the M7 Motorway.

A summary of the locational characteristics of the Precinct is provided in Table 8.1.

Location and Key Transport Infrastructure

Map 8.1



Location Characteristics

Table 8.1

Characteristic	Detail
Distance to nearest train station	6.2 kilometres north (Mount Druitt Station)
Distance to nearest motorway	3.5 metres northeast (M4 Motorway)
B-Double truck access	Yes
Surrounding land uses	<ul style="list-style-type: none"> • Low density residential dwellings in St Clair and Erskine Park to the north • Vacant industrial land to the east • Retirement and education uses as well as vacant industrial land to the south • Mamre West Industrial Precinct and vacant rural land to the west

Strengths

1. Wide roads for ease of B-double access

Weaknesses

1. Lack of public transport routes servicing the Precinct

PLANNING - WHAT IS THE ZONING MIX?

Map 8.2 opposite provides a summary of the relevant planning instruments and controls for the Erskine Park Precinct.

The IN1 General Industrial zoning of the Precinct typically encourages 3PL and distribution warehouse uses.

There are pockets of E2 Environmental Conservation lands running through the Precinct.

To the north of the Precinct lies low density residential dwellings.

The Precinct is largely surrounded by vacant industrial land to the east and south.

To the west of the Precinct lies IN1 General Industrial land that forms Mamre West Industrial Precinct. There is also vacant R2 Rural Landscape zoned areas.

There are no height limits under planning controls for this Precinct.



EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

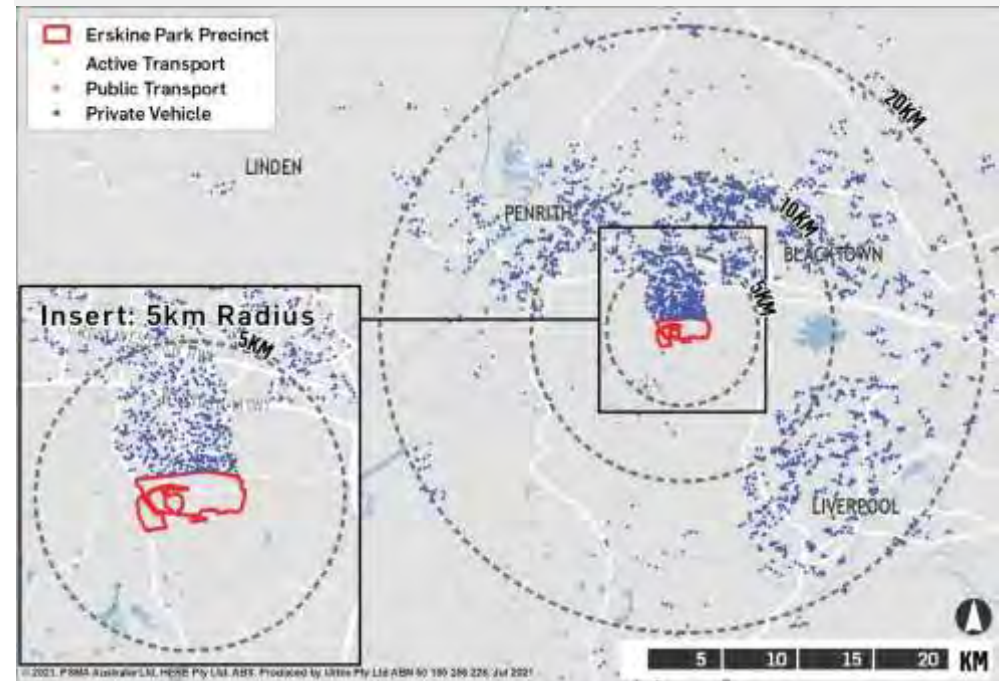
Map 8.3 shows the place of residence of those who work in the Erskine Park Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car, public transport or active transport (e.g. walking or cycling).

Workers' residences are concentrated within western Sydney, with high densities of around 41% occurring within 10 km of the Precinct. These workers are concentrated in the residential areas of St Clair through to St Marys to the north of the Precinct. Beyond the 10 km radius, precinct workers are found in key centres such as Penrith, Blacktown and Liverpool.

Almost all precinct workers travel to work by private vehicles, likely due to the limited public transport routes servicing the Precinct and ample on-site and street car parking options within the Precinct.

Where do Precinct Workers Live, 2016

Map 8.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

Uses within this Precinct are consistent with an IN1 General Industrial zoning. Map 8.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct.

The Precinct is characterised by modern, high-bay warehouses with ancillary office uses. All warehouses are 1-storey and are relatively large in nature, while ancillary office components are generally 2-storeys but comprise a much smaller building area.

The Precinct features wide roads for B-double accessibility. The Precinct is well presented, with high quality streetscaping as well as landscaping within individual sites.

The Precinct features several industrial estates, including Goodman's Westpark Industrial Estate and Erskine Park Industrial Estate to the northwest and GPT's Connect @ Erskine Park near the centre of the Precinct. These estates feature awnings for all-weather loading and wide driveways for ease of B-double access.

Businesses within the Precinct predominantly serve a logistics / freight forwarding role or are distribution centres to service the western Sydney region. However, the Precinct also features various logistics uses that do not operate in just a

typical warehouse setting. To the northeast of the precinct lies a site containing automotive logistics uses, where majority of the site is used as outdoor undercover sheltering for vehicle storage.

Additionally, on the corner of Lenore Drive and John Morphett Place lies an intermodal facility. Majority of the site is used to store large shipping containers that are transported from Port Botany at night, before delivering to customers in western Sydney during the day. This enables trucks to avoid Sydney's daytime traffic congestion, allowing for more efficient deliveries to customers.

There are two Digital Realty data centres located along Templar Road, one of which is 2-storeys. Digital Realty have two additional facilities proposed along Lockwood Road, one of which is currently under construction.

Most of the Precinct's vacant land is situated to the east of the Precinct.

Erskine Park Industrial Estate is located to the east of the Precinct, north of Quarry Road. Goodman's Westpark Industrial Estate lies to the north of Erskine Park Road in the northwest of the Precinct. The estate features a range of warehouse and distribution uses.



One of Digital Realty's existing data centres located along Templar Road (Map 1.4B).



Construction of an additional Digital Realty data centre along Lockwood Road (Map 1.4B).



The Precinct features an intermodal facility where large shipping containers are transported and stored overnight (Map 1.4C).

ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 8.1 illustrates the type of uses (determined by property type and business function) that currently occupy the Erskine Park Precinct. The data was collected by Urbis in May 2021 and included a combination of:

- Physical inspection of properties within the Precinct
- Geographic information system analysis
- Interviews with various tenants.

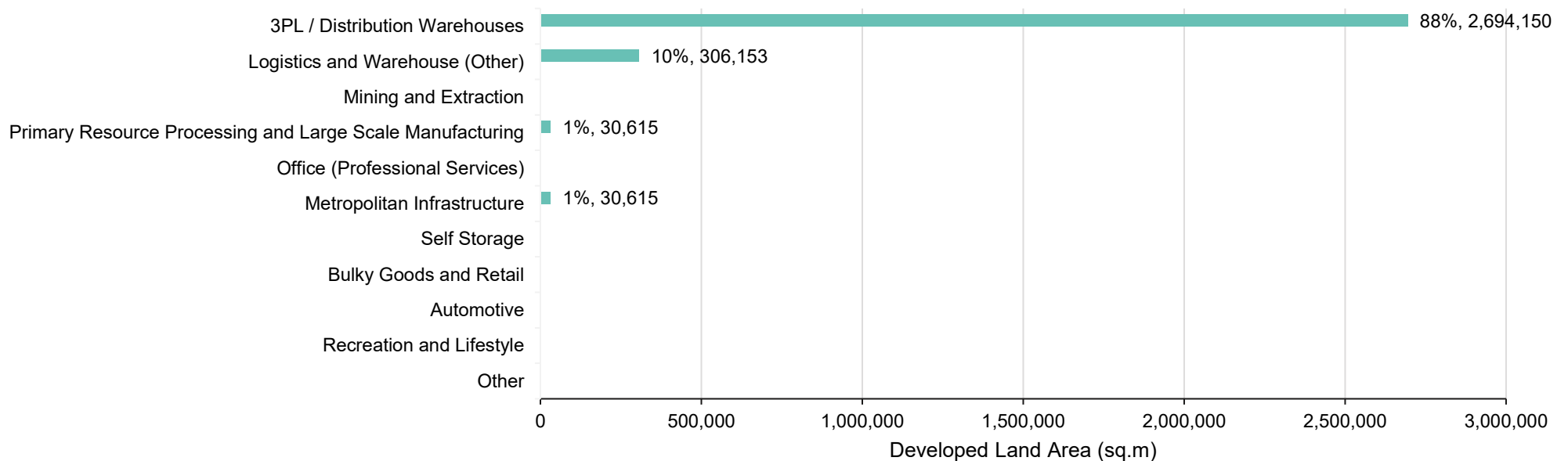
As at May 2021, Urbis estimates that the Precinct has around 1,227,757 sq.m of industrial floorspace on approximately 3,061,534 sq.m of developed land area. The Precinct almost entirely serves a metropolitan role.

The most prevalent buildings within the Precinct are 3PL / Distribution Warehouses co-located with ancillary office, which account for approximately 88% of total developed land area. A clear cluster of logistics functions is evident in the Precinct.

Logistics and Warehouse (Other) account for approximately 10% of developed land area. There is a small presence of Primary Resource Processing and Large Scale Manufacturing and Metropolitan infrastructure.

Developed Land Area by Typology, Erskine Park Precinct

Chart 8.1



Source: Urbis

MAP 8.4: ROLE AND FUNCTION - WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the typology of current developed land area in the Erskine Park Precinct and examples of tenants are detailed in Table 8.2.

3PL / Distribution Warehouses dominate the industrial land typology within the Precinct, accounting for around 88% of total land use. Business uses vary widely from niche 3PL uses (e.g. automotive and hazardous goods logistics) to building materials and retail goods distribution.

Other logistics and warehouse uses account for approximately 10% of developed

land area. These businesses primarily support the 3PL and distribution centre cluster present within the Precinct, featuring several pallet pooling and construction equipment businesses. There is one Automotive business which also supports this cluster, as it focuses on heavy vehicle and machinery repairs.

There is a small presence of Primary Resource Processing (solid waste landfill) and Large Scale Manufacturing (steel manufacturing) as well as Metropolitan Infrastructure (data centre).

Developed Land Area Distribution by Typology, Erskine Park Precinct

Table 8.2

	Distribution	Example Tenants
3PL / Distribution Warehouses	88%	3PL: Toll, Linfox, Loscam, Silk Contract Logistics, Scott's Refrigerated Logistics (cold storage and refrigerated logistics), Icehouse Logistics, AutoNexus (automotive logistics), DHL, Blue Star Global Logistics, VISA Global Logistics (intermodal facility), Fedex, Linfox, Chemcouriers (hazardous goods logistics), Mainfreight, Mann & Noble, Stramit, Lindsay Transport Distribution Centres: Woolworths, Bunzl Safety (safety equipment), Packcentre (POS warehousing and distribution), Coles Retail Ready Operations, Goodman Fielder (food products), ORAFOL Australia (tape products), Dincel Construction Systems (construction materials), Tyremax (tyre distributor), IVE (print communications and marketing services), Flower Power, Super Retail Group (auto, sport and leisure products), Sennheiser (fulfillment centre), Capral Aluminium (aluminium distributor), Mann & Noble (retail goods distributor), Stramit (steel building products), Strandbags, Winc Westpark Industrial Estate: Sony DADC (entertainment), Bollor Logistics, Silk Logistics, ACR Supply Partners, DHL, Capral Aluminium
Logistics and Warehouse (Other)	10%	Coates Hire, Tutt Bryant Hire (equipment rental), Loscam (pallet pooling depot), Chep (pallet solutions), Liebherr (earthmoving machine warehouse and service centre), Mulgoa Quarries (excavating contractors), Viscount Pooling Systems (crate pooling services), ZircoDATA (records storage facility)
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing	1%	Bluescope Western Sydney Service Centre (steel manufacturing), Cleanaway (solid waste landfill), Goodman Fielder (food production)
Office (Professional Services)		
Metropolitan Infrastructure	1%	Digital Realty (data centre)
Self Storage		
Bulky Goods and Retail		
Automotive	<1%	K & C Auto Electrics (heavy vehicle and machinery repairs)
Recreation and Lifestyle		
Other		
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 8.3 shows the quantum of zoned industrial land within the Erskine Park Precinct.

As at December 2020, there was a total of 363.7 hectares of zoned industrial land in the Erskine Park Precinct, of which 278.9 hectares has been developed and 84.8 hectares (23.3%) remain undeveloped.

Between 2016 and 2020, the Precinct experienced significant growth, recording an average land take-up rate of 7.3 hectares per annum. Sustaining this growth into the future are an additional 12 projects with an estimated value of around \$416.5 million. This includes two data centre developments and several roadwork projects to improve connections between the Precinct and the M4 Motorway.

Nature of Employment and Land Table 8.3

Factor	Value
Total Employment, 2021 projection	6,480 jobs
Total Developed Land Area, 2020	278.9 ha
Total Undeveloped Land Area, 2020	84.8 ha
Future Pipeline and Estimated Value	12 projects, ~\$416.5m
Average Annual Land Take-Up (2016 – 2020)	7.3 ha
Total Floorspace, 2021 (Gross Floor Area)	1,227,757 sq.m
Average Land Area per Employee	296.1
Average Gross Floor Area per Employee	146.2 sq.m

Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis

As at 2021, total employment in the precinct is estimated to be 6,480 jobs. Of the 278.9 hectares of developed industrial land, there is approximately 1,227,757 sq.m of Gross Floor Area. This equates to an average land area of 430.4 sq.m per employee or floorspace of 189.5 sq.m per employee.

Map 8.5 indicates the Precinct's potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

There are no maximum height limits specified for the Erskine Park Precinct and so all existing buildings have significant scope for additional height. However, the Precinct may also be affected by floorspace ratios and other controls, which impact development potential. There are large vacant parcels to the east of the Precinct.

Additional Height Uplift Capacity, May 2021 Map 8.5



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 8.4, the Erskine Park Precinct comprises of 53 lots, of which three are vacant. All vacant sites are more than 5,000 sq.m in size, with particularly large parcels present in the east of the Precinct, as shown previously in Map x.

All but one developed site are larger than 5,000 sq.m in size. Sites within the

Precinct have low average site coverage of 28% to 40%. Given the site utilisation rates for these lots, there maybe potential for further densification on existing sites, subject to constraints.

Distribution of Sites by Lot Size, Erskine Park Precinct

Table 8.4

Size	Vacant Sites*		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	0	0%	0	0%	0%	0	0%
501 - 1,000 sq.m	0	0%	0	0%	0%	0	0%
1,001 - 2,000 sq.m	0	0%	0	0%	0%	0	0%
2,001 - 3,000 sq.m	0	0%	1	2%	28%	1	2%
3,001 - 4,000 sq.m	0	0%	0	0%	0%	0	0%
4,001 - 5,000 sq.m	0	0%	0	0%	0%	0	0%
More than 5,000 sq.m	3	100%	49	98%	40%	52	98%
Total	3	100%	50	100%	40%	53	100%

Note: Figures are based on land areas as at May 2021 and may differ from ELDM 2020 developed and undeveloped area estimates.

*A site is considered vacant if the total building area on the site is less than 10% of the site area.

Source: Geoscape Australia; Urbis

9. FLEMINGTON

LOCATION – WHAT ARE THE KEY ATTRIBUTES?

Flemington Precinct Overview

Flemington Industrial Precinct (Map 9.1), which includes Homebush West Industrial Precinct, is located around 13.1 kilometres west of the Sydney CBD. The Homebush West Precinct comprise of the two western Sub-Precincts. Part of the precinct is subject to the Parramatta Road Urban Transformation Strategy 2016 as shown on the map.

As at January 2020, the Flemington Precinct covers an area of approximately 53.5 hectares, accommodating a range of businesses, including a number involved in food-related services. Only 3.2 hectares (6%) remained undeveloped.

The Precinct's major access route connections are Parramatta Road, Centenary Drive, Underwood Crescent and the M4 Western Motorway (WestConnex).

A summary of the locational characteristics of the Precinct is provided in Table 9.1.

Location and Key Transport Infrastructure

Map 9.1



Location Characteristics

Table 9.1

Characteristic	Detail
Distance to nearest train station	500 metres east (Flemington train station)
Distance to nearest motorway	400 metres north (M4 Western motorway)
B-Double truck access	No
Surrounding land uses	<ul style="list-style-type: none"> • Sydney Olympic Park and Bicentennial and Bressington Parks to the north • Residential dwellings, Homebush West public School and Sydney Markets to the east • Hudson Park Golf Course and Rookwood Cemetery to the south • Business Park and warehouses to the west

Strengths

1. Proximity to Sydney Markets supports food-related business cluster
2. Proximity to M4 Motorway
3. Good connections to retail, including DFO Homebush in the north, Flemington Town Centre to the south and Lidcombe Shopping Centre to the west
4. Close to Sydney Olympic Park's recreation and entertainment precinct

Weaknesses

1. Congestion on local roads as feeder roads to M4 Motorway
2. Fragmented precinct that is lacking cohesiveness
3. Distance to Flemington Station for businesses located north of Parramatta Road
4. Old and poorly presented buildings in the Arthur Street Precinct

PLANNING – WHAT IS THE ZONING MIX?

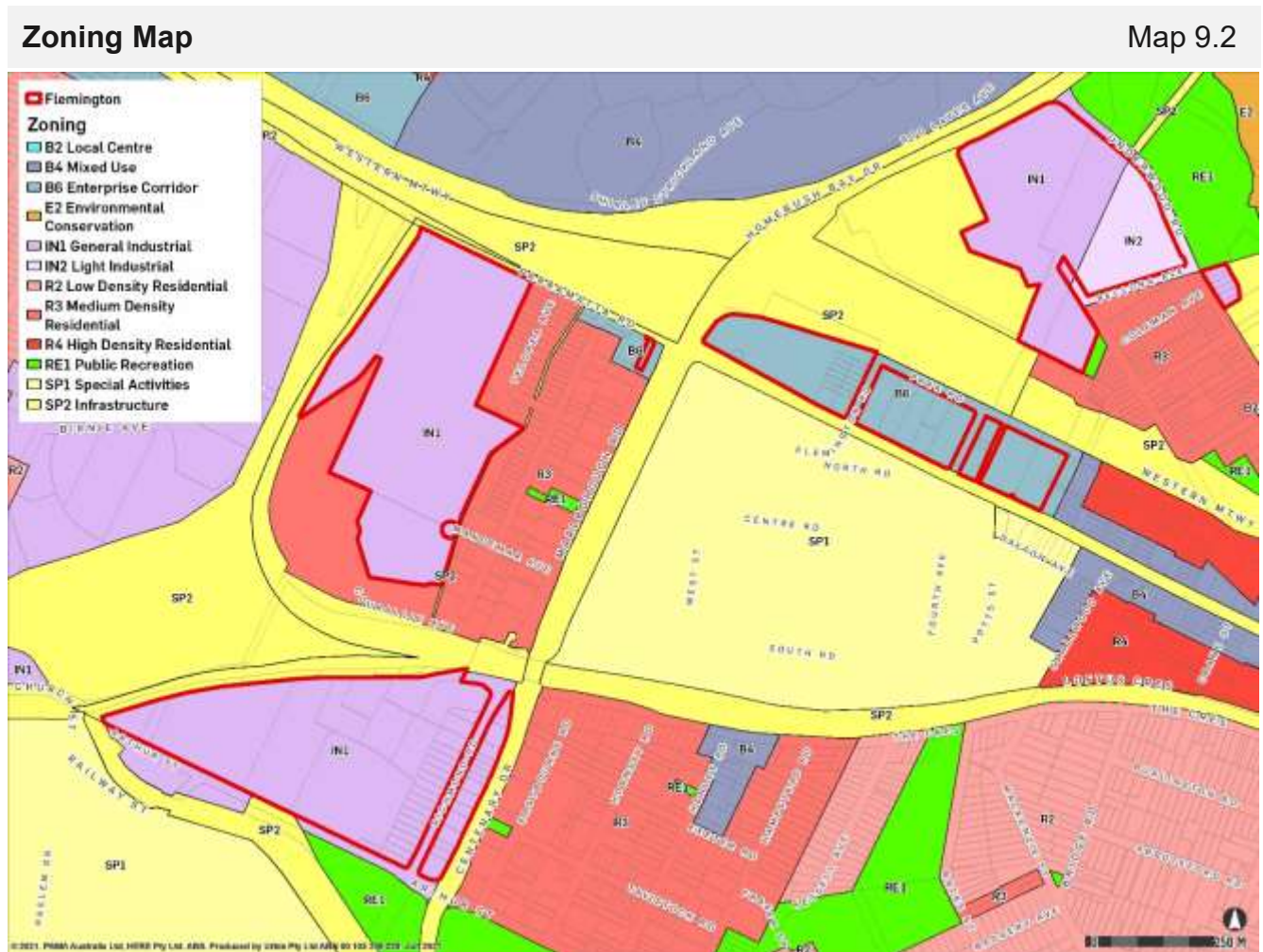
Map 9.2 opposite provides a summary of the relevant planning instruments and controls for the Precinct.

The zoning of the Precinct typically encourages traditional industrial land uses with the IN1 General Industrial and B6 Enterprise Corridor zoning. DFO Homebush is also located within the IN1 zone. The IN2 zoning comprises small-scale warehouse and business park uses.

The zoning surrounding the Precinct largely encourages medium density residential and business park, with some mixed-use zoning to the north of Parramatta Road and the M4 Motorway. The SP1 zone has the Sydney Markets, which encourages the warehouse and distribution of fresh produce.

Height limits currently exist within this Precinct.

Strathfield Council is currently reviewing the *Strathfield LEP 2012* and preparing a *draft LEP 2021* to align with the vision and priorities of the *Strathfield 2040 Local Strategic Planning Statement*.



Note: Homebush West is comprised of the two Sub-Precincts west of Centenary Drive

EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

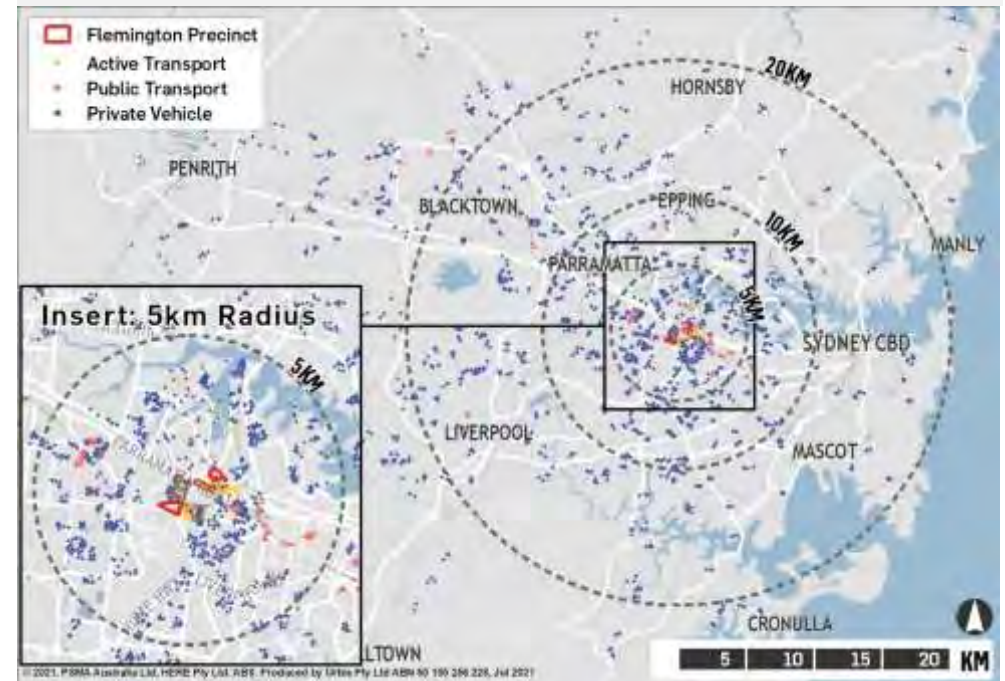
Map 9.3 shows the place of residence of those who work in the Flemington Industrial Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car, public transport or active transport (e.g. walking or cycling).

It is evident that the workers' residences are widely distributed, however higher densities occur closer to the Precinct. Around 54% of workers reside within 10 km of the Precinct. Workers are more likely to travel in from the north western and south western suburbs, and very few located in the eastern and northern suburbs.

The majority of workers travel to work by private motor vehicles, despite the Flemington train station located 500 metres to the east of the Precinct. This creates traffic pressures due to the demand for on-street parking where there is no dedicated on-site parking. Workers who take an active mode of transport to work generally reside within 1 km of the Precinct.

Where do Precinct Workers Live, 2016

Map 9.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

Uses within this Precinct are consistent with an IN1 General Industrial zoning. Map 9.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct. The building levels of the Precinct are dominated by single level buildings, with the exception of DFO Homebush (3 storeys) in the Mason Park Sub-Precinct and Harvey Norman offices (2-3 storeys) in the Arthur Street Sub-Precinct.

The Flemington Precinct is divided into four distinct Sub-Precincts, due to the separate location and boundaries between these areas:

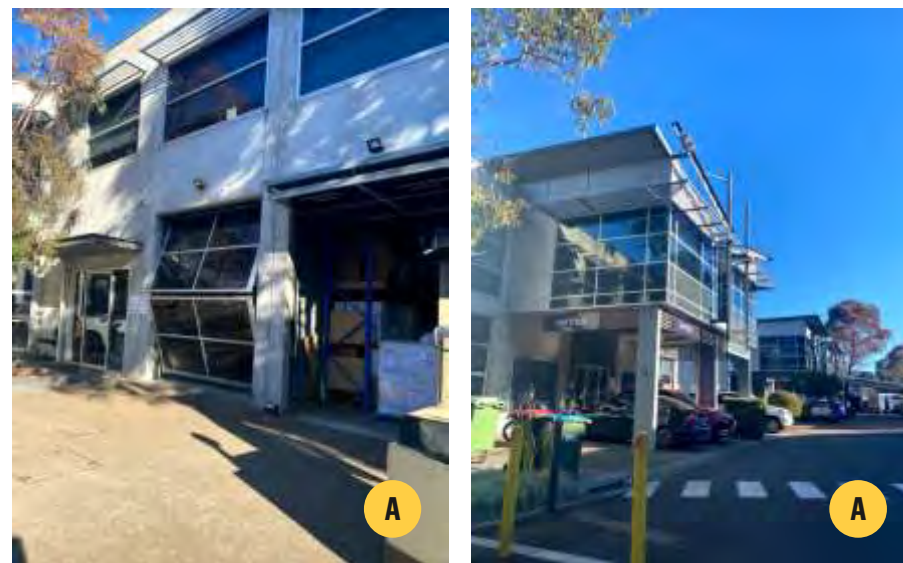
- Homebush Business Park
- Mason Park
- Arthur Street
- Parramatta Road.

HOMEBUSH BUSINESS PARK

- The area bounded by the train line to the south and west, the Great Western Highway to the north, and residential dwellings to the east.
- The Sub-Precinct is moderately buffered from the Homebush West residential area via natural vegetation. The new warehouse building to the east of the Sub-Precinct also means that there is minimal industrial activity close to these residential areas.
- The Sub-Precinct is characterised by relatively new developments within Goodman's Campus Business Park, encompassing over 90% of this area. The Campus Business Park features high quality warehouse, office and showroom space and well-designed landscaping.
- There is strong access to / from the Business Park, with accessibility onto Parramatta Road / Great Western Highway both east and westbound.
- In the west of the Homebush Business Park Sub-Precinct is a narrow strip of well-maintained older-style small strata units (warehouse with ancillary office space). There are access issues within this strata unit complex, where entry/exit is limited to only traffic travelling west-bound along Parramatta Road. The driveway to Homebush Business Park is relatively narrow, limiting the size of trucks able to enter the area.

MASON PARK

- The area located in the north, bounded by Homebush Bay Drive to the west, Underwood Road to the north, residential dwellings to the east and the M4 Motorway to the south. The Sub-Precinct also includes a small strip of residential dwellings south of Mason Park.
- The Sub-Precinct is surrounded by park and recreation uses to the north. There is minimal industrial activity close to residential areas, with natural vegetation acting as a buffer.
- The west of the Sub-Precinct features DFO Homebush, a retail factory outlet, and a large warehouse with ancillary office fronting Underwood Road. Homebush Business Village, which comprises strata offices, is situated to the east of the Sub-Precinct and an old warehouse with ancillary office is located to the south.
- There is strong access to / from the Sub-Precinct via Underwood Road and Homebush Bay Drive. Excluding Homebush Business Village, entry/exit along Underwood Road is limited to traffic travelling west-bound.



Strata warehouse units with ancillary office in Homebush Business Village (Map 3.A)

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

ARTHUR STREET

- The area located to the south of the Precinct, bounded by the train line to the north and east, Arthur Street to the south and Centenary Drive to the east.
- This Sub-Precinct is well buffered from residential uses to the east via the major arterial road, Centenary Drive.
- The majority of local business premises are located along Richmond Road in older office warehouses. Although Richmond Road is not a major arterial road, this access route experiences high traffic volumes that these businesses have high exposure to.
- The centre of the Sub-Precinct is characterised by larger office warehouse buildings within Dexus' Flemington Business Park and small strata units (co-located office warehouse spaces) in Interlink Business Park. Access to these business parks are constrained, as Arthur Street is a narrow roadway that experiences large traffic volumes.
- The west end of the Sub-Precinct has one large site with manufacturing and warehouse facilities and a strata unit complex (BIZ Homebush) currently under construction. The development is anticipated for completion in late 2021 and will feature individual office warehouse spaces of up to 280 sq.m.



PARRAMATTA ROAD

- The area bounded by the M4 Motorway to the north, Parramatta Road to the south and residential dwellings to the east.
- The Sub-Precinct is partially buffered from the residential uses via natural vegetation. However, a rear access lane along Kanoona Avenue encroaches on surrounding residential dwellings.
- The Sub-Precinct is largely characterised by older warehouses with ancillary office uses fronting Parramatta Road. Several warehouses in the centre of the Sub-Precinct are largely rundown and seem to be vacant.
- A block of residential dwellings is situated between Welfare Street and Flemington Road.
- The western portion of the Sub-Precinct features a large vacant site, with plans to develop Homebush Logistics Centre, a 'last mile' industrial precinct comprising warehouse and ancillary office spaces.



Left: BIZ Homebush strata units currently under construction (Map 3.B)

Top: Older warehouses with ancillary office typically seen across the Arthur Street and Parramatta Road sub-precincts (Map 3.C)

ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 9.1 illustrates the type of uses (determined by property type and business function) that currently occupy the Flemington Precinct. The data was collected by Urbis in May 2021 and included a combination of:

- Physical inspection of properties within the Precinct
- Geographic information system analysis
- Interviews with various tenants.

As at May 2021, Urbis estimates that the Precinct has around 324,020 sq.m of industrial floorspace on approximately 483,411 sq.m of developed land area. The Precinct largely serves a metropolitan role, with some local functions.

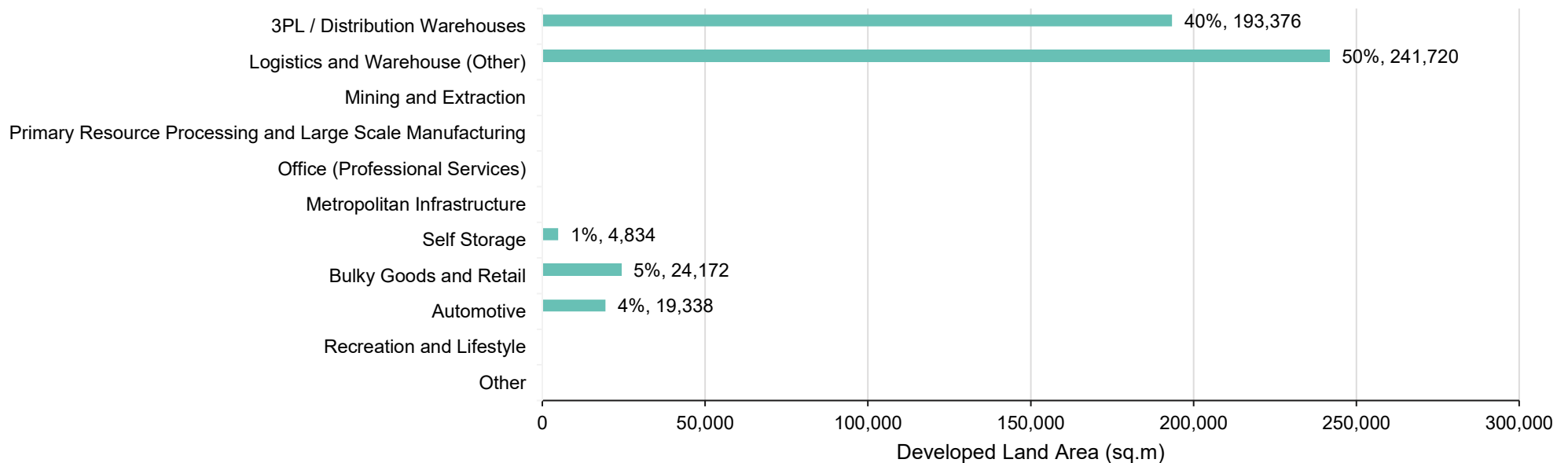
The most prevalent buildings within the Precinct are logistics and warehouse spaces, co-located with ancillary office, which account for approximately 85% of total floorspace.

The 3PL / distribution warehouse spaces are concentrated in Campus Business Park, situated within the Homebush Business Park Sub-Precinct. Other logistics and warehouses are found dispersed throughout the other Sub-Precincts, which are typically older strata warehouse units with ancillary office spaces.

Local functions account for around 15% of total floorspace, which comprise a mix of bulky goods and retail, business premises, automotive uses and a self storage facility.

Developed Land Area by Typology, Flemington Precinct

Chart 9.1



Source: Urbis

MAP 9.4: ROLE AND FUNCTION – WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the typology of current developed land area in the Precinct and examples of tenants are detailed in Table 9.2.

Small Logistics and Warehouse uses dominate the industrial land typology within the Arthur Street, Mason Park and Parramatta Road Sub-Precincts, while Large Logistics and Warehouses are the predominant use within Homebush Business Park Sub-Precinct.

In terms of local functions, the Mason Park Sub-Precinct mainly has Bulky Goods and Retail, Office (Professional Services) and Business Premises. The Arthur Street Sub-Precinct includes uses such as Local Storage Warehouses and Automotive while the Parramatta Road Sub-Precinct also includes some Recreation (local pub).

Developed Land Area Distribution by Typology

Table 9.2

	Distribution	Example Tenants
3PL / Distribution Warehouses	40%	Campus Business Park: DHL (distribution service), Acer Computer (head office), IVE (head office), Barbecues Galore (head office), Wormald (head office), S & R Cool Logistics (distribution), SG Fleet (office) Other: Harvey Norman (head office), The Market Grocer (grocery wholesaler and distribution)
Logistics and Warehouse (Other)	50%	Campus Business Park: PCA Electrical Supplies (electrical accessories wholesaler), Westcon Constructions (construction company), Trusted Print (printing services) Arthur Street: Axiflow (HVAC distribution), Flick Anticimex (pest control, Sydney office), Indra (technology systems company) Mason Park: Burton (Civil Engineering), Nex Print (printing services), Optus Business Centre (business support centre), Gymnastics NSW (state office), Equestrian Australia (head office), Medreich (pharmaceutical company) Parramatta Road: Katoomba Trading (food distribution), The Original Organic Co (food distribution), Bonfect Snackfood Services (food distribution), Ricky Richards (fabric wholesaler)
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing		
Office (Professional Services)		
Metropolitan Infrastructure		
Self Storage	1%	Arthur Street: Storage King
Bulky Goods and Retail	5%	Mason Park: DFO (retail centre)
Automotive	4%	Arthur Street: Mick's Autoparts (car parts), Primus Auto (car showroom), Scooterino Motorino (car and motorbike showroom)
Recreation and Lifestyle	<1%	Parramatta Road: Wentworth Hotel (pub)
Other		
Total	100%	

POTENTIAL – WHAT IS THE CAPACITY FOR GROWTH?

Table 9.3 shows the quantum of zoned industrial land within the Flemington Precinct, in which the Homebush West Industrial Precinct forms the majority.

As at December 2020, there was a total of 53.5 hectares of zoned industrial land in the Flemington Precinct, of which 50.4 hectares has been developed and 3.2 hectares (6%) remained undeveloped.

Between 2016 and 2020, land take-up in the Precinct declined by an average of 0.6 ha annually, as several old warehouses have been demolished on redevelopment sites. This includes Homebush Logistics Centre (Parramatta Road Sub-Precinct) and BIZ Homebush (Arthur Street Sub-Precinct).

As at 2021, total employment in the Precinct is estimated to be 6,079 jobs. Of the 50.4 hectares of developed industrial land, there is approximately 324,020 sq.m of Gross Floor Area. This equates to an average land area of 82.9 sq.m per employee or floorspace of 53.3 sq.m per employee.

Map 9.5 indicates the Precinct’s potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

Around 51% of site area within the Flemington Precinct has limited height uplift capacity, concentrated in the Homebush Business Park and Mason Park Sub-Precincts.

The Arthur Street Sub-Precinct has a large proportion of sites with moderate height uplift capacity. The Parramatta Road Sub-Precinct has moderate to significant height uplift capacity within its existing building and also contains a large vacant site. A total of 43% of site area within the Precinct contains buildings with moderate to significant capacity for additional height.

Factor	Value
Total Employment, 2021 projection	6,079 jobs
Total Developed Land Area, 2020	50.4 ha
Total Undeveloped Land Area, 2020	3.2 ha
Future Pipeline and Estimated Value	2 projects, ~\$35m
Average Annual Land Take-Up (2016 – 2020)	-0.6 ha
Total Floorspace, 2021 (Gross Floor Area)	324,020 sq.m
Average Occupied Land Area per Employee	82.9 sq.m
Average Gross Floor Area per Employee	53.3 sq.m

Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis

Additional Height Uplift Capacity, May 2021 Map 9.5



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 9.4, there are a total of 82 lots within the Flemington Precinct, of which five are vacant sites, highlighting that the Precinct is an established market. Vacant sites are mostly 2,000 sq.m or smaller in size.

Of sites that have been developed, 17% are less than 500 sq.m in size, largely due to the block of residential dwellings within the Parramatta Road Sub-Precinct. These lots recorded low average site coverage of just 44%.

Lots between 501 sq.m and 2,000 sq.m in size accounted for 49% of total lots. This is largely due to the smaller standalone warehouses within the Arthur Street

and Parramatta Road Sub-Precincts. Site coverage for these lots averages around 60%.

Approximately 29% of all sites are over 4,000 sq.m in size. This is attributed to the large warehouse and distribution centres located within the Homebush Park Sub-Precinct as well as the DFO retail outlet and Homebush Business Village within the Mason Park Sub-Precinct. Lots between 4,001 sq.m to 5,000 sq.m recorded an average site coverage of 62%. This decreased to an average of 52% for lots greater than 5,000 sq.m in size.

Distribution of Sites by Lot Size, Flemington Precinct

Table 9.4

Size	Vacant Sites		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	1	20%	13	17%	44%	14	17%
501 - 1,000 sq.m	2	40%	25	32%	60%	27	33%
1,001 - 2,000 sq.m	1	20%	13	17%	59%	14	17%
2,001 - 3,000 sq.m	0	0%	4	5%	51%	4	5%
3,001 - 4,000 sq.m	0	0%	0	0%	0%	0	0%
4,001 - 5,000 sq.m	0	0%	3	4%	62%	3	4%
More than 5,000 sq.m	1	20%	19	25%	52%	20	24%
Total	5	100%	77	100%	53%	82	100%

10. GREYSTANES

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

Greystanes Precinct Overview

Greystanes Industrial Precinct (Map 10.1) is located around 27.1 kilometres west of the Sydney CBD.

As at January 2020, the Greystanes Precinct covered an area of approximately 201.3 hectares, of which approximately 57.4 hectares (28.5%) remained undeveloped.

The Precinct's major access route connections are Prospect Highway, Great Western Highway and M4 Western Motorway.

A summary of the locational characteristics of the Precinct is provided in Table 10.1.

Location and Key Transport Infrastructure

Map 10.1



Location Characteristics

Table 10.1

Characteristic	Detail
Distance to nearest train station	4 kilometres northeast (Pendle Hill Station)
Distance to nearest motorway	1.7 kilometres north (M4 Motorway)
B-Double truck access	Yes
Surrounding land uses	<ul style="list-style-type: none"> • Open space to the north • Medium to high density residential dwellings in Pemulwuy to the east • Wetherill Park Industrial Precinct to the south • Prospect Reservoir, Andrew Campbell Reserve and Raging Waters Sydney to the west

Strengths

1. Proximity to M4 Motorway
2. Ample areas of open public recreation spaces surrounding the Precinct

Weaknesses

1. Potential traffic congestion along Prospect Highway (the only major road servicing the Precinct)
2. Western areas of the Precinct along Picrite Close only accessible via Reservoir Road

PLANNING - WHAT IS THE ZONING MIX?

Map 10.2 opposite provides a summary of the relevant planning instruments and controls for the Greystanes Precinct.

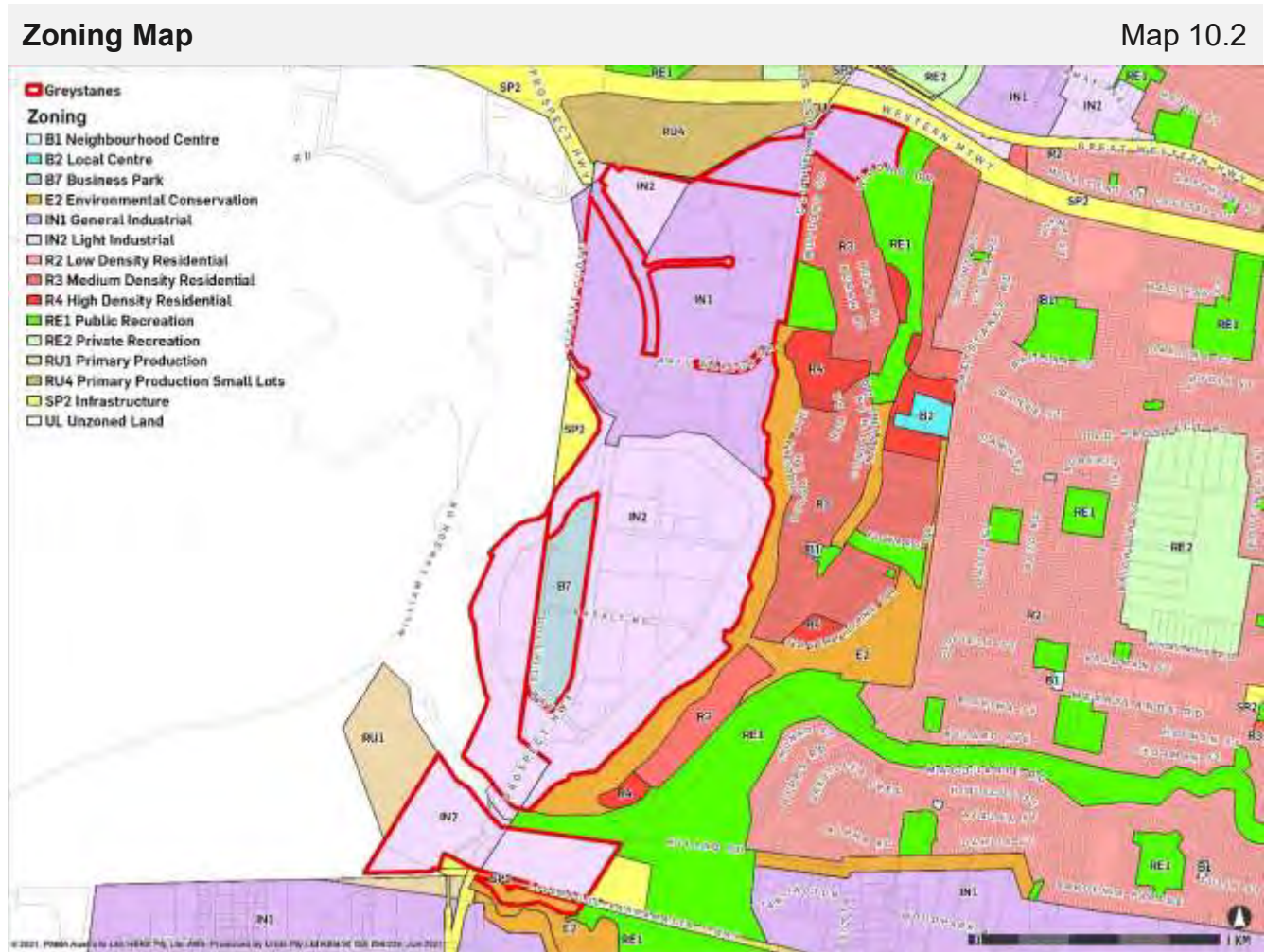
The precinct generally contains IN1 General Industrial zones to the north and IN2 Light Industrial zones to the south. Both zones typically encourage 3PL and distribution warehouse uses. There is a B7 Business Park zone that does not form part of the Precinct.

To the north of the Precinct lies an RU4 Primary Production Small Lots zone, which is currently vacant open space.

To the east of the Precinct lies largely medium density residential dwellings, with pockets of high density dispersed throughout. The residential areas are well buffered from the Precinct via natural vegetation in the E2 Environmental Conservation zoned areas.

To the west of the Precinct lies large areas of open space and Prospect Reservoir.

There are no maximum height limits specified for the Greystanes Precinct.



EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

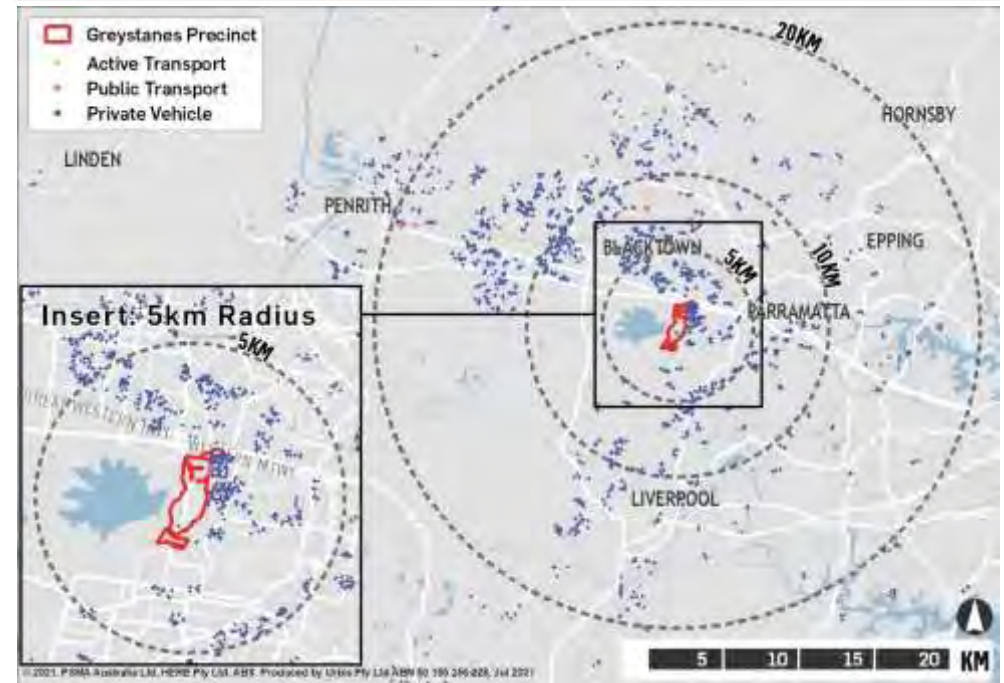
Map 10.3 shows the place of residence of those who work in the Greystanes Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car, public transport or active transport (e.g. walking or cycling).

Workers' residences are generally concentrated toward northwest Sydney. The Precinct has a relatively low proportion of local resident workers living within 5 km of the Precinct, given the non-residential uses that largely surround the catchment. Approximately 56% of precinct workers reside beyond a 10 km radius of the Precinct.

Almost all workers (98%) travel to work by private vehicles, likely due to the convenience of the M4 Motorway and ample on-site and street car parking within the Precinct. There are also limited public transport routes servicing the Precinct, with the closest train station 4 km northeast of the Precinct (Pendle Hill Station) and no bus routes to the Precinct.

Where do Precinct Workers Live, 2016

Map 10.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

Uses within the Greystanes Precinct are consistent with an IN1 General Industrial and IN2 Light Industrial zonings. Map 10.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct.

The Precinct is characterised by modern, 1-level, high-bay warehouses with ancillary office uses. Businesses within the Precinct predominantly have a logistics / freight forwarding role or is a distribution centre servicing the region.

The Precinct features wide roads for B-double accessibility. The Precinct is well presented, with high quality streetscaping as well as landscaping within individual sites.

Quarry Industrial Estate by Dexu comprises majority of the southern half of the Precinct. Construction of the estate began in 2010 and was developed on the decommissioned Prospect Quarry. The estate comprises modern warehouse spaces with high internal clearance, corporate office spaces and hardstand areas covered by canopies. The Precinct features wide roads for ease of B-double access.

Goodman's Greystanes Park East and West lie within the north of the Precinct. Greystanes Park east contains large storage warehouses, while Greystanes Park West comprises logistics warehouses. Access to Greystanes Park West is limited to Picrite Close (off Reservoir Road).

To the very north of the Precinct lies 2-4 Picrite Close, a strata complex comprising small warehouses with ancillary office. The complex features Logistics and Warehouse (Other) uses. Access to the complex is limited to Picrite Close (off Reservoir Road).

To the very south of the Precinct lies a small pocket containing a recycling facility. There is northbound and southbound access to this pocket via Prospect Highway. Trucks accessing this facility often cause traffic congestion issues along Prospect Highway.

The Precinct lies adjacent to low to medium density residential dwellings to the east, well buffered via natural vegetation (Prospect Hill Pine Forest) and the high quarry walls.



Quarry Industrial Estate was developed on an old quarry, which now forms part of the unique landscape (Map 1.4B).



Most sites feature large warehouses with outdoor awnings for all-weather access (Map 1.4B).



The features modern offices with warehouse space to the rear (Map 1.4C).

ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 10.1 illustrates the type of uses (determined by property type and business function) that currently occupy the Greystanes Precinct. The data was collected by Urbis in May 2021 and included a combination of:

- Physical inspection of properties within the Precinct
- Geographic information system analysis
- Interviews with various tenants.

As at May 2021, Urbis estimates that the Precinct has around 710,631 sq.m of industrial floorspace on approximately 1,392,991 sq.m of developed land area. The Precinct purely serves a metropolitan role.

The most prevalent buildings within the Precinct are 3PL / Distribution Warehouses, which account for approximately 92% of total developed land area. A clear cluster of logistics functions is evident in the Precinct.

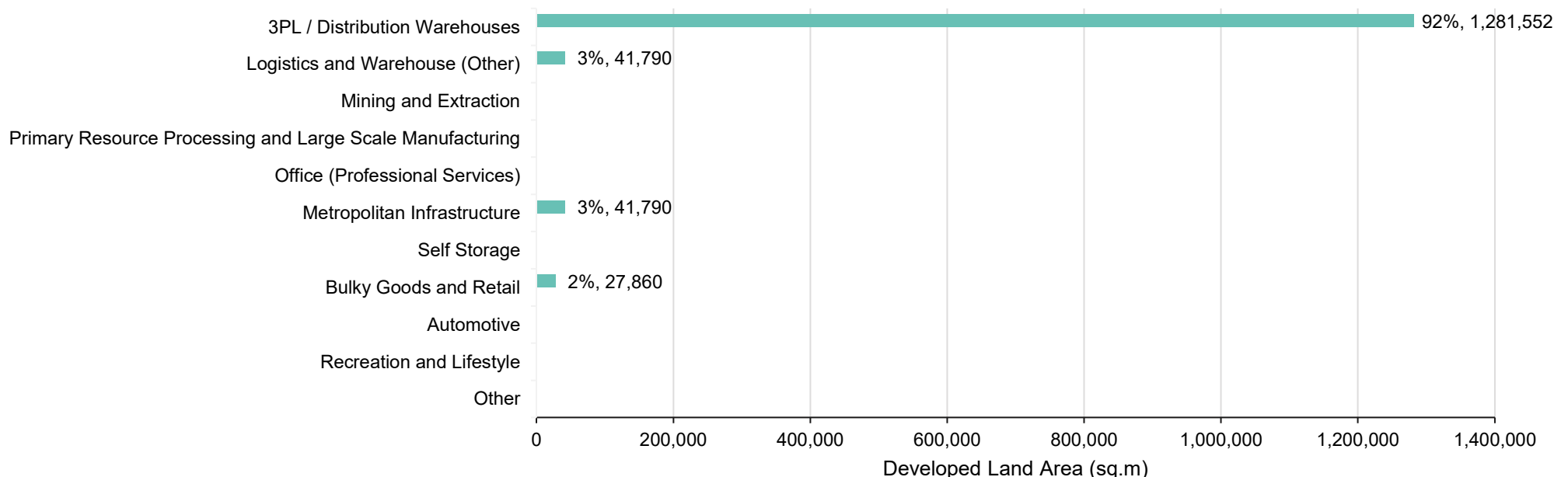
Logistics and Warehouse (Other) accounts for approximately 3% of total developed land area, largely attributed to the strata warehouse unit complex located at 2-4 Picrite Close to the north of the Precinct.

Metropolitan Infrastructure accounts for a further 3%, given the presence of Fujitsu’s Western Sydney Data Centre.

There is also a small presence of Bulky Goods and Retail uses, attributed to the trade centres and showrooms.

Developed Land Area by Typology, Greystanes Precinct

Chart 10.1



Source: Urbis

MAP 10.4: ROLE AND FUNCTION - WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the typology of current developed land area in the Greystanes Precinct and examples of tenants are detailed in Table 10.2.

3PL / Distribution Warehouses dominate the industrial land typology within the Precinct, accounting for around 92% of total land use. Business types vary from medical uses (e.g. pharmaceuticals, medical equipment) to construction uses (construction equipment, power tools).

Other logistics and warehouse uses are generally located in the pocket of strata warehouses in the north of the Precinct, accounting for around 3% of the developed land area.

Other businesses present in the Precinct include a data centre, trade centres and truck parts supplies. These trade centres and automotive uses typically service businesses.

Developed Land Area Distribution by Typology, Greystanes Precinct

Table 10.2

	Distribution	Example Tenants
3PL / Distribution Warehouses	92%	Quarry Industrial Estate: Yusen Logistics, Brady (safety equipment suppliers), Makita (power tools), , Glen Cameron Group (3PL), Symbion (pharmaceuticals), Performance Health ANZ (medical equipment supplier), Blackwoods (industrial supplies) Other: DHL, 3M Logistics Centre (industrial, safety and consumer goods) Asahi (beverage company), Laminex (building materials) Hitachi (construction equipment), Americold (cold storage and logistics)
Logistics and Warehouse (Other)	3%	Quarry Industrial Estate: Hally Labels (label printing), Jemena (gas company), 2-4 Picrite Close: Coco88 (chocolate supplier), Tubeclamp Solid Dynamics (steel and aluminium product supplier), Kirby Pemulwuy (HVAC and refrigeration equipment supplier), Triflex (industrial automation equipment supplier)
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing		
Office (Professional Services)		
Metropolitan Infrastructure	3%	Quarry Industrial Estate: Fujitsu Western Sydney Data Centre Greystanes Park East: Iron Mountain (records storage) Other: Boral Recycling (concrete, brick and asphalt recycling)
Self Storage		
Bulky Goods and Retail	2%	Quarry Industrial Estate: Bunning's Trade Centre, Reece's Civil, Wilson & Bradley (kitchen furniture), Blackwoods Trade Store (industrial supplies),
Automotive	<1%	Quarry Industrial Estate: Multispares (truck parts supplier)
Recreation and Lifestyle	<1%	2-4 Picrite Close: Berry Patch Early Learning, DRC Family Martial Arts and Fitness Centre,
Other		
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 10.3 shows the quantum of zoned industrial land within the Greystanes Precinct.

As at December 2020, there was a total of 201.3 hectares of zoned industrial land in the Eastern Creek Precinct, of which 143.9 hectares has been developed and 57.4 hectares (28.5%) remained undeveloped.

Between 2016 and 2020, the Precinct experienced moderate growth, recording an average land take-up rate of 2.9 hectares per annum. In the future pipeline are two projects with an estimated value of \$1.8 million. This includes the demolition of the former Boral House administration building to the Precinct's northeast and driveway widening at 8-16 Picrite Close to facilitate B-double truck access and improve on-site traffic circulation.

143.9 hectares of developed industrial land, there is approximately 710,631 sq.m of Gross Floor Area. This equates to an average land area of 296.1 sq.m per employee or floorspace of 146.2 sq.m per employee.

Map 10.5 indicates the Precinct's potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

There are no maximum height limits specified for the Greystanes Precinct and so all existing buildings have significant scope for additional height. However, the Precinct may also be affected by floorspace ratios and other controls, which impact development potential.

Factor	Value
Total Employment, 2021 projection	4,860 jobs
Total Developed Land Area, 2020	143.9 ha
Total Undeveloped Land Area, 2020	57.4 ha
Future Pipeline and Estimated Value	2 projects, ~\$1.8m
Average Annual Land Take-Up (2016 – 2020)	2.9 ha
Total Floorspace, 2021 (Gross Floor Area)	710,631 sq.m
Average Land Area per Employee	296.1 sq.m
Average Gross Floor Area per Employee	146.2 sq.m

Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 10.4, the Greystanes Precinct comprises of 39 lots, of which five are vacant. All vacant sites are more than 5,000 sq.m in size.

Of the developed sites, there is only one site between 4,001 sq.m and 5,000 sq.m, attributed to a small warehouse located on the corner of Bellevue Circuit and Litton Close.

The remaining developed sites are more than 5,000 sq.m in size and have an average site coverage of 50%. Given the site utilisation rates for these lots, there maybe potential for further densification on existing sites, subject to any constraints.

Distribution of Sites by Lot Size, Greystanes Precinct

Table 10.4

Size	Vacant Sites*		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	0	0%	0	0%	0%	0	0%
501 - 1,000 sq.m	0	0%	0	0%	0%	0	0%
1,001 - 2,000 sq.m	0	0%	0	0%	0%	0	0%
2,001 - 3,000 sq.m	0	0%	0	0%	0%	0	0%
3,001 - 4,000 sq.m	0	0%	0	0%	0%	0	0%
4,001 - 5,000 sq.m	0	0%	1	3%	43%	1	3%
More than 5,000 sq.m	5	100%	33	97%	50%	38	97%
Total	5	100%	34	100%	50%	39	100%

Note: Figures are based on land areas as at May 2021 and may differ from ELDM 2020 developed and undeveloped area estimates.

*A site is considered vacant if the total building area on the site is less than 10% of the site area.

Source: Geoscape Australia; Urbis

11. LANE COVE WEST

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

Lane Cove West Precinct Overview

Lane Cove West Industrial Precinct (Map 11.1) is located around 7.9 kilometres northwest of the Sydney CBD. As at January 2020, the Lane Cove West Precinct covered an area of approximately 54 hectares, of which approximately 2 hectares (3.7%) remained undeveloped.

The Precinct's major access route connections are Epping Road to The Hills M2 and M1 Gore Hill Freeway.

A summary of the locational characteristics of the Precinct is provided in Table 11.1.

Location and Key Transport Infrastructure

Map 11.1



Location Characteristics

Table 11.1

Characteristic	Detail
Distance to nearest train station	2.2 kilometres northwest (Metro Station)
Distance to nearest motorway	1.5 kilometres east (M2 Motorways)
B-Double truck access	No
Surrounding land uses	<ul style="list-style-type: none"> • Wide nature strip (Mowbray Park) to the north. Lane Cove River and Lane Cove Tunnel / M2 Hills Motorway beyond • Low density residential dwellings in Lane Cove West and Stringy Bark Creek to the east • Natural vegetation and open space recreation to the south • Wide nature strip and Lane Cove River to the west

Strengths

1. Proximity to M2 Motorway
2. Precinct is adjacent to parklands and open space recreation

Weaknesses

1. Traffic congestion issues between Sam Johnson Way and Epping Road
2. Precinct is not contiguous, with certain pockets separated from most of the Precinct
3. Lack of public transport routes servicing the Precinct
4. No retail amenity within walking distance

PLANNING - WHAT IS THE ZONING MIX?

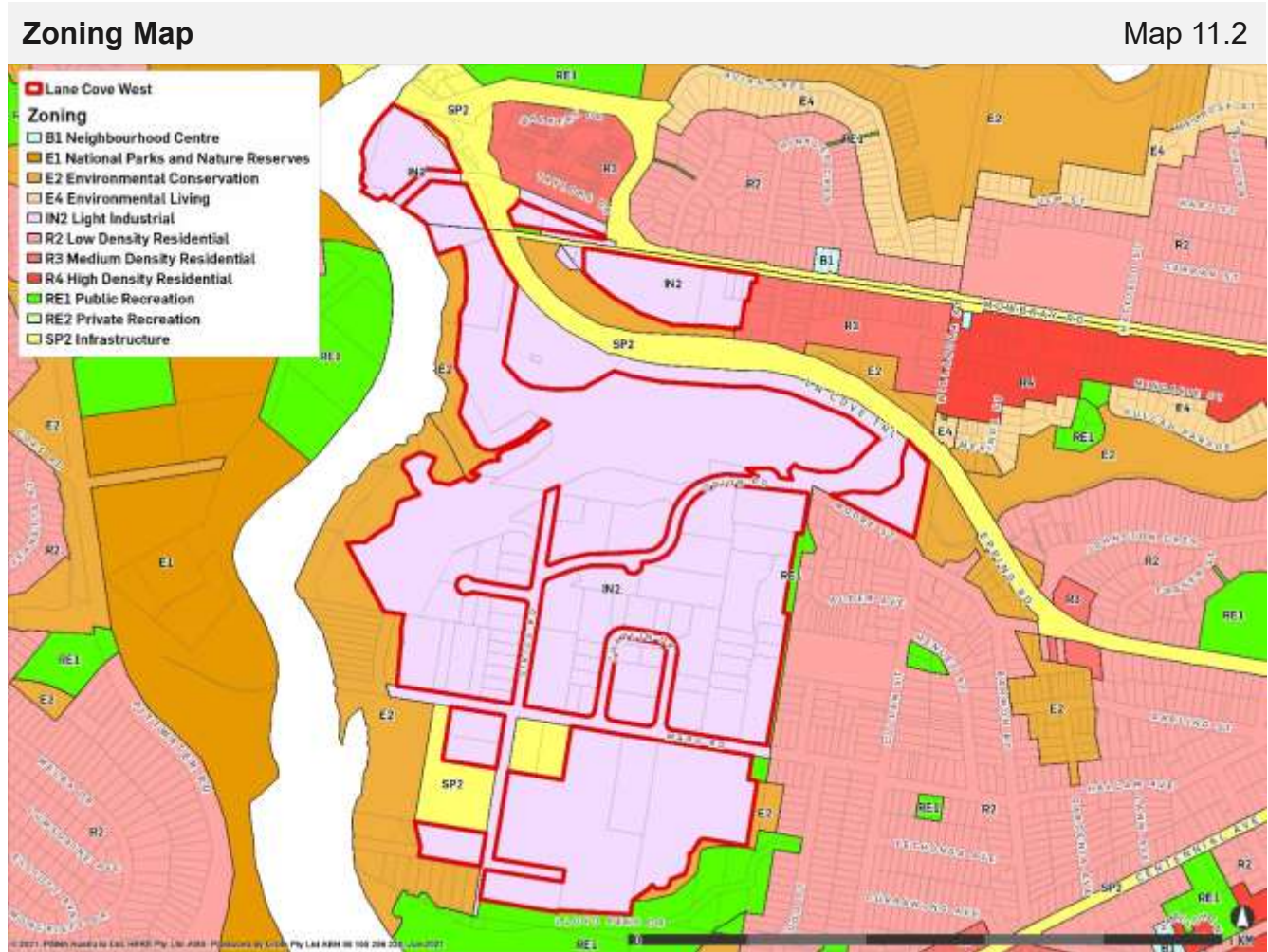
Map 11.2 opposite provides a summary of the relevant planning instruments and controls for the Lane Cove West Precinct.

The Precinct is used solely for the purpose of a light industrial and is zoned accordingly.

Land to the north and east of the Precinct is zoned and used for residential purposes.

The Precinct is surrounded by open space in the RE1 Public Recreation zone to the south and natural vegetation in the E2 Environmental Conservation zone to the west. The Lane Cove River runs alongside this bushland.

There are height limits under planning controls for this Precinct.



EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

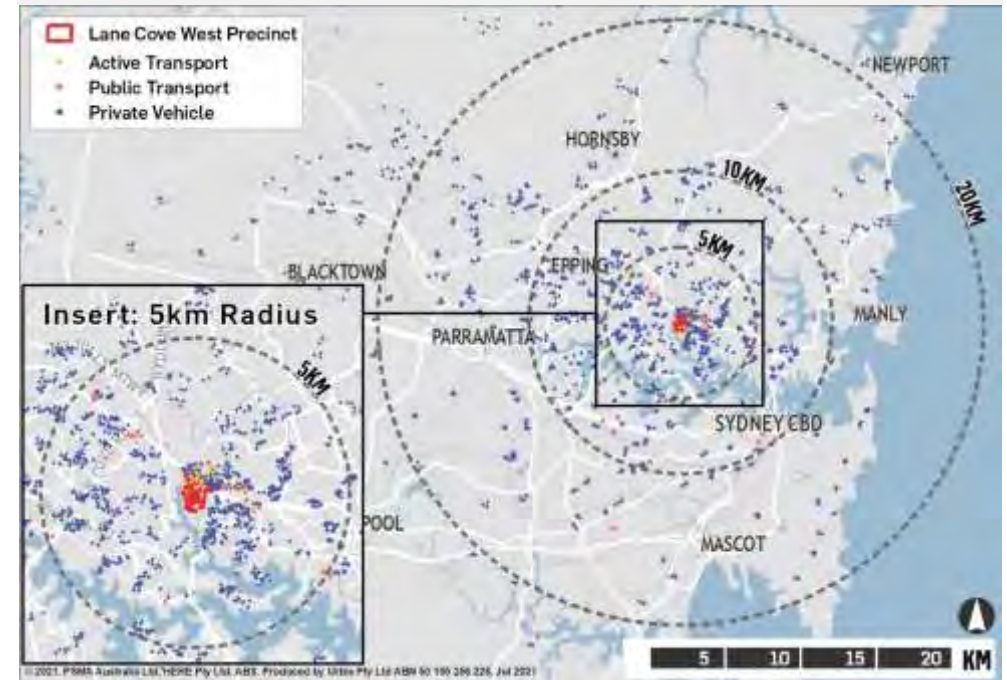
Map 11.3 shows the place of residence of those who work in the Lane Cove West Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car, public transport or active transport (e.g. walking or cycling).

Workers' residences are widely dispersed throughout Sydney, particularly north and north-western suburbs. Around 33% reside within 5km of the Precinct, particularly to the southeast and west of the Precinct. Approximately 27% of precinct workers reside within 5-10 km of the Precinct.

Approximately 94% of precinct workers travel to work by private vehicles, likely due to the limited public transport routes servicing the Precinct. Bus routes are limited to services between the Precinct and Lane Cove West, Epping and the Sydney CBD. The opening of the Sydney Metro (stopping at North Ryde) may have impacted public transport use since its opening in 2019, however access to the station from the Precinct is difficult.

Where do Precinct Workers Live, 2016

Map 11.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

Uses within this Precinct are consistent with an IN2 Light Industrial zoning. Map 11.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct.

The Precinct is characterized by mainly new or well-maintained building stock, typically between one to three storeys.

The Precinct has been divided into two distinct Sub-Precincts, due to the separate location and boundaries (i.e. Stringybark Creek and Epping Road) between the two areas: the Core Sub-Precinct and the Periphery Sub-Precinct.

CORE SUB-PRECINCT

The Core comprises land to the south of Epping Road and accommodates the main industrial/commercial activities of the Precinct.

The Sub-Precinct largely contains strata warehouse/office units along Chaplin Drive and Mars Road and standalone office/warehouses along Apollo Place and Sirius Road. However, unlike other precincts, Lane Cove's Core buildings contain a relatively large proportion of office floorspace to warehouse area, particularly those along Apollo Place and Orion Road.

This may be attributed to the cluster of medical-related uses within the Core that accommodate white collar workers within the professional industry. Medical-related uses present in the Precinct include laboratories, medical equipment suppliers and pharmaceuticals manufacturing.

The Precinct features one building with a solely commercial use – ESR's 18-20 Orion Road. This commercial office building is 9-storeys, making it the tallest building within the Precinct.

This Sub-Precinct is well buffered from the residential neighbourhood of Lane Cove West through natural vegetation to the south and east. Entry into the Sub-Precinct is limited to Sam Johnson Way via Epping Road, which faces traffic congestion issues, particularly during peak hours.

PERIPHERY SUB-PRECINCT

The Periphery comprises parcels of industrial land to the north and west of Epping Road. The western parcel contains a former corn mill facility (currently vacant) while the northern parcel features several media-related businesses within Media & Technology Park. This technology park contains office uses fronting Mowbray Road West (three storeys) with warehouse uses to the rear.

This Sub-Precinct is inferior to the Core due to:

- Relatively old building stock
- Access constraints, as access via Epping Road is limited to traffic travelling eastbound
- Conflicting land uses, as low density residential dwellings are located directly north (along Mowbray Road) and directly east.



Compass Business Park features commercial office fronting Mars Road and warehousing to the rear.

ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 11.1 illustrates the type of uses (determined by property type and business function) that currently occupy the Lane Cove West Precinct. The data was collected by Urbis in May 2021 and included a combination of:

- Physical inspection of properties within the Precinct
- Geographic information system analysis
- Interviews with various tenants.

As at May 2021, Urbis estimates that the Precinct has around 306,806 sq.m of industrial floorspace on approximately 406,036 sq.m of developed land area. The Precinct almost entirely serves a metropolitan role.

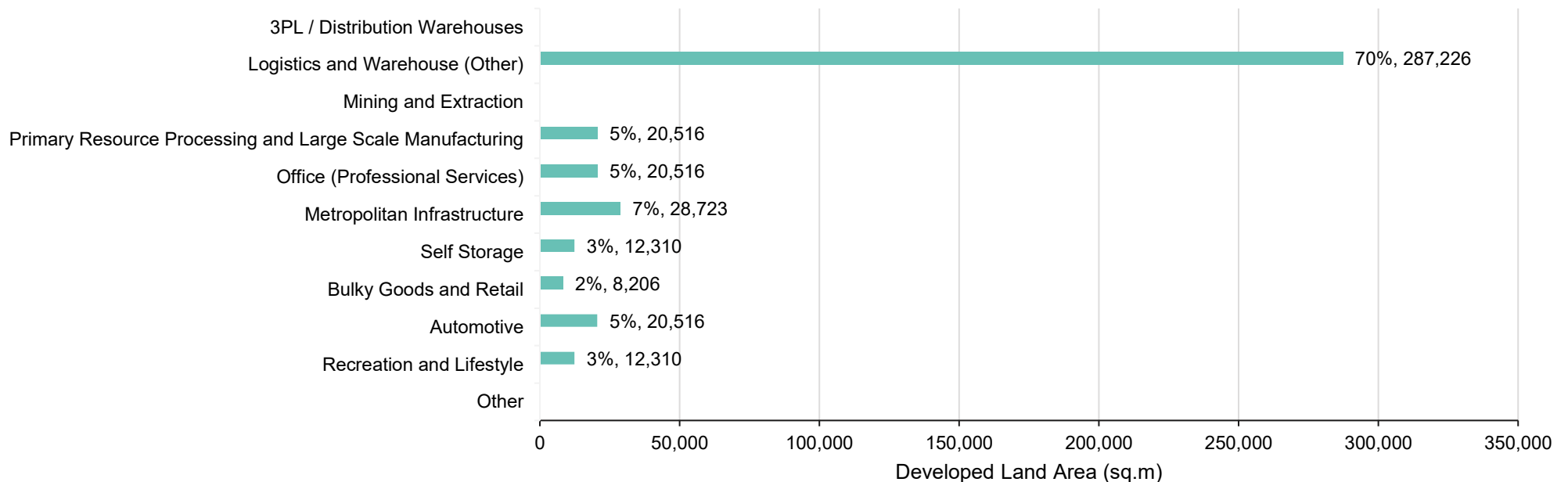
The most prevalent buildings within the Precinct are Logistics and Warehouse (Other), accounting for around 75% of total developed land area. This is mainly present in the form of strata warehouse unit complexes.

Around 7% of developed land area is attributed to Metropolitan Infrastructure, given AirTrunk’s large data centre site. Approximately 5% of developed land area contains Office (Professional Services), due to the ESR commercial building. Automotive uses and Primary Resource Processing and Large Scale Manufacturing each account for around 5% of developed land area.

Other uses present within the Precinct include Large Scale Manufacturing, Metropolitan Infrastructure, Self Storage, Bulky Goods and Retail and Recreation and Lifestyle.

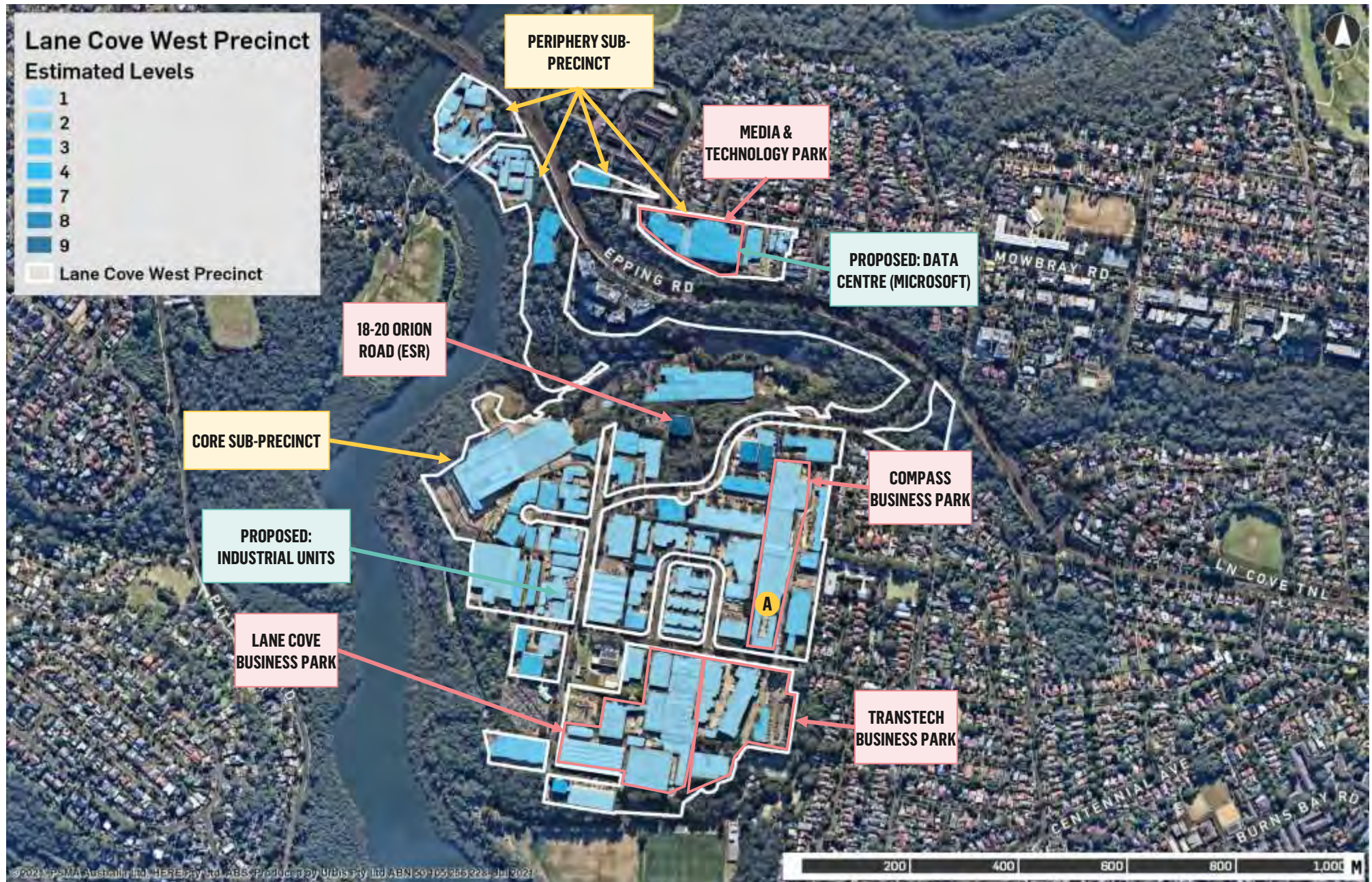
Developed Land Area by Typology, Lane Cove West Precinct

Chart 1.1



Source: Urbis

MAP 11.4: ROLE AND FUNCTION - WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the typology of current developed land area in the Lane Cove West Precinct and examples of tenants are detailed in Table 1.3.

Logistics and Warehouse (Other) dominate the industrial land typology within the Precinct, accounting for around 75% of total land use. A large medical and technology cluster is found within this land use category, including laboratory testing services and medical equipment suppliers. There is also a dominance of media-related uses within the Periphery Sub-Precinct, which includes several

commercial office building. Most office tenants are medical- or technology-related.

A few manufacturers are located in the Precinct, include packaging and pharmaceutical manufacturing, as well as Automotive businesses, each typology accounting for around 5% of developed land area.

Developed Land Area Distribution by Typology, Lane Cove West Precinct

Table 11.2

	Distribution	Example Tenants
3PL / Distribution Warehouses		
Logistics and Warehouse (Other)	70%	Cochlear (medical device supplier), Nanosonics (automation technology), NAPA Centre (paediatric therapy services), Plus ES (high power testing station), Fast Fuel Meals (food supplier), Heyday Group (electrical contractor), KLEEMANN Elevators (spare parts warehouse), Symbio Laboratories (laboratory service provider), Multimedia Technology (IT distributors) Lane Cove Business Park: Medacta (orthopaedics technology), JFC (food supplier), Microbiogen (industrial biotechnology), Rockfast International (payroll software company, JB Hi-Fi Solutions (insurance), The Buckner Group (marketing services), Rockwell Automotation, Eurofins (environment testing laboratory) Compass Business Park: ATI (telecommunication equipment provider), Sandyprints (hand printing and digital printing) Transtech Business Park: Immij (digital printing), Pentel (office supplies), Implant Direct (dental implant supplier), In Vitro Technologies (medical equipment supplier), Independent Living Specialists (homecare mobility equipment supplier), Collins Aerospace (aerospace technology), Novis (clinical healthcare products), Jenoptik (traffic safety technology) Media & Technology Park: Panavision (media equipment supplier), ARRI Australia (audio visual equipment, sales and service), Vintage and Vine (wine suppliers)
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing	5%	Plastic Tooling Manufacturing (packaging), SC Johnson, Return & Earn, Phebra (pharmaceuticals manufacturing plant)
Office (Professional Services)	5%	Nanosonics Head Office (automation technology), Phenomenex (laboratory equipment supplier), Harley Davidson Head Office Orion Business Park: Newflow Solutions (software company), NanoMed (nanobiotechnology) ESR (18-20 Orion Road): Bupa Dental, Amplitude (surgical technology, sales and marketing), Carestream Dental (dental equipment sales), International Flavours & Fragrances (raw material suppliers, sales office), Allegra Orthopaedics (orthopaedic products, corporate office), Call Design (contact centre technology solutions), School Bytes (school administration software)
Metropolitan Infrastructure	7%	Transurban Site, AirTrunk SYD2 Data Centre
Self Storage	3%	Storage King, Global Self Storage
Bulky Goods and Retail	2%	Reece's Plumbing
Automotive	5%	Capital SMART Repairs, Alto Hyundai (service centre), Concept Wraps (vehicle wrapping), MJ Mods (car parts)
Recreation and Lifestyle	3%	9 Degrees Boulderling Gym, Carlile Swimming, MindChamps Early Learning, T Kids Academy, Nicky's Kids Town
Other		
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 11.3 shows the quantum of zoned industrial land within the Lane Cove West Precinct.

As at December 2020, there was a total of 54 hectares of zoned industrial land in the Lane Cove West Precinct, of which 52 hectares has been developed and 2 hectares (3.7%) remained undeveloped.

Between 2016 and 2020, the Precinct experienced slow growth, recording an average land take-up rate of 0.8 hectares per annum. There are a further 4 projects in the future pipeline with an estimated value of around \$350 million. This includes two data centre developments with a combined estimated value of \$345.5 million.

Nature of Employment and Land Table 11.3

Factor	Value
Total Employment, 2021 projection	5,895 jobs
Total Developed Land Area, 2020	52.0 ha
Total Undeveloped Land Area, 2020	2.0 ha
Future Pipeline and Estimated Value	4 projects, ~\$350m
Average Annual Land Take-Up (2016 – 2020)	0.8 ha
Total Floorspace, 2021 (Gross Floor Area)	306,806 sq.m
Average Land Area per Employee	88.2 sq.m
Average Gross Floor Area per Employee	52.0 sq.m

Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis

52 hectares of developed industrial land, there is approximately 306,806 sq.m of Gross Floor Area. This equates to an average land area of 88.2 sq.m per employee or floorspace of 52.0 sq.m per employee.

Map 11.5 indicates the Precinct's potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

Approximately 59% of total land area within the Precinct has moderate to significant height uplift capacity, largely concentrated along Chaplin Drive through the centre of the Precinct. There is vacant land to the north of the Core Sub-Precinct, although natural constraints onsite (Stringybark Creek) may affect development potential on the site.

Additional Height Uplift Capacity, May 2021 Map 11.5



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 11.4, the Lane Cove West Precinct comprises of 80 lots, of which five are vacant. Three vacant sites are between 501 sq.m and 2,000 sq.m in size, while the remaining two vacant sites are more than 5,000 sq.m.

Of the developed sites, there is only one site that is 1,000 sq.m or less. Sites between 1,001 and 3,000 sq.m account for around 50% of sites, while sites over

4,000 sq.m account for 44%. Average site coverage is relatively low within the Precinct, averaging 45% to 57% across the size ranges. There is potential for further densification on developed sites, subject to any site and planning constraints.

Distribution of Sites by Lot Size, Lane Cove West Precinct

Table 11.4

Size	Vacant Sites*		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	0	0%	0	0%	0%	0	0%
501 - 1,000 sq.m	1	20%	3	4%	48%	4	5%
1,001 - 2,000 sq.m	2	40%	29	39%	57%	31	39%
2,001 - 3,000 sq.m	0	0%	8	11%	55%	8	10%
3,001 - 4,000 sq.m	0	0%	2	3%	50%	2	3%
4,001 - 5,000 sq.m	0	0%	9	12%	45%	9	11%
More than 5,000 sq.m	2	40%	24	32%	48%	26	33%
Total	5	100%	75	100%	49%	80	100%

Note: Figures are based on land areas as at May 2021 and may differ from ELDM 2020 developed and undeveloped area estimates.

*A site is considered vacant if the total building area on the site is less than 10% of the site area.

Source: Geoscape Australia; Urbis

12. MAMRE WEST

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

Mamre West Precinct Overview

Mamre West Industrial Precinct (Map 12.1) is located around 39.8 kilometres west of the Sydney CBD and 9.8 kilometres northwest of the future Western Sydney International Airport.

Construction of the precinct, also known as First Estate, began in mid-2017 and, as at January 2020, covered an area of approximately 42.6 hectares, of which 7.1 hectares was undeveloped.

The Precinct's major access route connections are Mamre Road and Luddenham Road, which the M4 Motorway and the M7 Motorway.

A summary of the locational characteristics of the precinct is provided in Table 12.1.

Location and Key Transport Infrastructure

Map 12.1



Location Characteristics

Table 12.1

Characteristic	Detail
Distance to nearest train station	7.3 kilometres north (St Marys Station)
Distance to nearest motorway	4.7 kilometres north (M4 Western motorway)
B-Double truck access	Yes
Surrounding land uses	<ul style="list-style-type: none"> • Large distribution warehouses to the east (Erskine Park Industrial Precinct) • Vacant land directly to the north, south and west • Several residential dwellings and a childcare centre lie approximately 300 metres to 500 metres north and west of the precinct

Strengths

1. Proximity to the future Western Sydney International Airport, surrounding Aerotropolis and Erskine Park Industrial Precinct allows for potential synergies with suppliers and customers along the distribution chain
2. Proximity to M4 Motorway and M7 Motorway
3. Good connections to Erskine Park Shopping Centre

Weaknesses

1. Only one entry/exit point connecting the Precinct to Mamre Road
2. Lacks diversity of uses – heavily dominated by 3PL/Distribution

PLANNING - WHAT IS THE ZONING MIX?

Map 12.2 opposite provides a summary of the relevant planning instruments and controls for the Precinct.

The zoning of the Mamre West precinct leverages off its proximity to the future Western Sydney Airport and emerging greenfield areas that will support future population and job growth in the Western Sydney region.

The precinct is zoned used solely for the purpose of general industrial and is zoned IN1 accordingly.

Vacant land to the west is zoned RU2 Rural Landscape, with some areas identified as environmental protection areas. Vacant land to the north and south are zoned IN1 General Industrial. To the east of the precinct are several warehouse and distribution centres that form part of Erskine Park Industrial Precinct.

There are no height limits within planning controls for this Precinct.



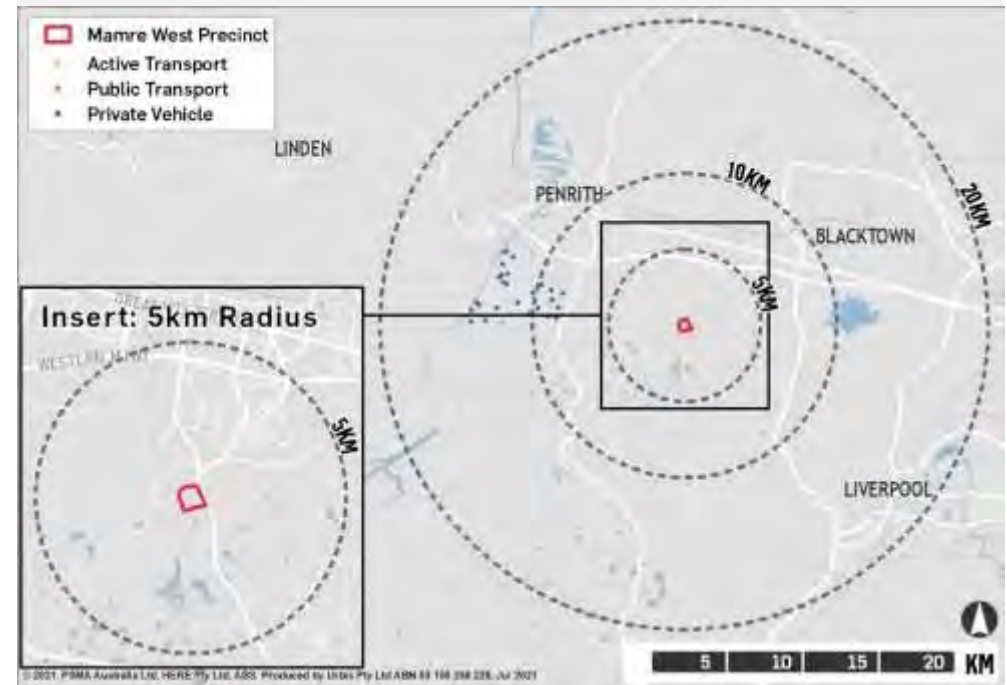
EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

Map 12.3 shows the place of residence of those who work in the Mamre West Industrial Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car, public transport or active transport (e.g. walking or cycling).

Given that the Precinct has only emerged over the past 4 years, the ABS Census 2016 does provide a holistic picture of precinct workers today. However, it is likely that workers' residences are concentrated within western Sydney suburbs and, given the lack of public transportation surrounding the Precinct, that most travel to work via private vehicle.

Where do Precinct Workers Live, 2016

Map 12.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

The current tenants within this precinct are consistent with the permitted uses for IN1 General Industrial. Map 12.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct.

The building levels of the precinct are dominated by 1-storey high bay warehouses, with the exception of the Fire and Rescue NSW Emergency Services Academy. Fire and Rescue features a five-storey academy building, among other ancillary training facilities.

The precinct contains a cluster of large, modern warehouses, most of which contain ancillary office uses. The precinct is serviced by a single wide road, Distribution Drive, which currently features only one point of entry and exit. There is easy access for both northbound and southbound traffic along Mamre Road onto Distribution Drive.

The precinct is largely surrounded by vacant land, with the nearest rural residential dwellings located approximately 300m to 500m away.

There are two strata warehouse units currently under construction in the northeast of the precinct. These units are relatively small compared to the remaining warehouses within the precinct.



The N&A fruit distribution facility features a high bay warehouse (Map x.B)



The Fire and Rescue NSW's training facility (Map x.C)



Warehouse units with ancillary office under construction to the northwest of the precinct (Map x.A)

ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 12.1 illustrates the type of uses (determined by property type and business function) that currently occupy the Mamre West Precinct. The data was collected by Urbis in May 2021 and included a combination of:

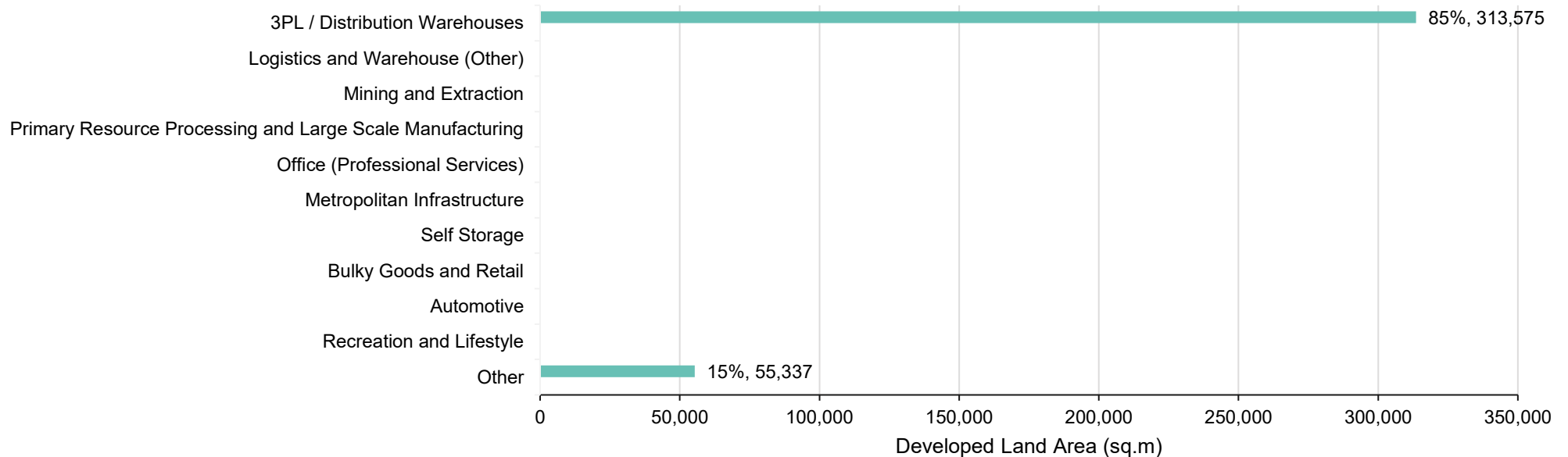
- Physical inspection of properties within the precinct
- Geographic information system analysis
- Interviews with various tenants.

As at May 2021, Urbis estimates that the precinct supports 165,653 sq.m of industrial floorspace on approximately 368,912 sq.m of developed land area. The precinct serves a metropolitan role.

The most prevalent building type within the precinct are 3PL and distribution centres that are generally co-located with ancillary office, accounting for around 95% of the total land area. Other uses accounts for a further 5% of total land area, attributed to the Fire and Rescue training facility.

Developed Land Area by Typology, Mamre West Precinct

Chart 12.1



Source: Urbis

MAP 12.4: ROLE AND FUNCTION - WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the share of typologies reflected in the Mamre West Precinct and examples of tenants are detailed in Table 12.2.

3PL and distribution warehouse uses dominate the industrial land typology within the Precinct. A small proportion of the Precinct is dedicated to other metro uses, due to the presence of the Fire and Rescue training academy. The precinct plays a metro role.

While the precinct predominantly accommodates 3PL and distribution centres, there are a wide array of industries being serviced. This includes:

- Food industry (snack and fruit distribution)
- Construction industry (construction materials and steel-based technology)
- Packaging industry (renewable packaging and packaging solutions)
- Logistics industry (contract logistics and freight management).

Developed Land Area Distribution by Typology, Mamre West Precinct

Table 12.2

	Distribution	Example Tenants
3PL / Distribution Warehouses	95%	Snackbrands (snack distribution), Ron Crouch Transport (logistics service), IMCD (chemical distribution), N&A Group (fruit distribution), ACR Supply Partners (contract warehousing and logistics), Voestalpine (steel-based technology), Knauf (construction materials distribution), Opal Specialty Packaging (renewable packaging), Ceva Logistics (contract logistics and freight management), Dats (office supply and paper wholesaler), Orora (packaging solutions)
Logistics and Warehouse (Other)		
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing		
Office (Professional Services)		
Metropolitan Infrastructure		
Self Storage		
Bulky Goods and Retail		
Automotive		
Recreation and Lifestyle		
Other	5%	Fire and Rescue NSW Emergency Services Academy (training facility)
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 12.3 shows the quantum of zoned industrial land within the Mamre West Precinct, in which the Homebush West Industrial Precinct forms the majority.

As at December 2020, there was a total of 42.6 hectares of zoned industrial land in the Mamre West Precinct, of which 35.5 hectares has been developed and 7.1 hectares (17%) remained undeveloped.

Between 2018 and 2020, the Precinct experienced an average industrial land take-up rate of 11.8 hectares per annum. The Precinct has experienced rapid growth since development began in mid-2017. There are an additional four projects in the development pipeline with an estimated value of over \$73 million. This includes a Snackbrands manufacturing facility adjoining the existing warehouse and distribution facility and the construction of six industrial units with ancillary offices.

Nature of Employment and Land		Table 12.3
Factor	Value	
Total Employment, 2021 projection	505 jobs	
Total Developed Land Area, 2020	35.5 ha	
Total Undeveloped Land Area, 2020	7.1 ha	
Future Pipeline and Estimated Value	4 projects, ~\$73.3m	
Average Annual Land Take-Up* (2018 – 2020)	11.8 ha	
Total Floorspace, 2021 (Gross Floor Area)	185,215 sq.m	
Average Land Area per Employee	703.1 sq.m	
Average Gross Floor Area per Employee	366.8 sq.m	

Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis

As at 2021, total employment in the precinct is estimated to be 505 jobs. Of the 35.5 hectares of developed industrial land, there is approximately 185,215 sq.m of Gross Floor Area. This equates to an average land area of 703.1 sq.m per employee or floorspace of 366.8 sq.m per employee.

Map 12.5 indicates the Precinct’s potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

There are no maximum height limits specified for the Mamre West Precinct and so all existing buildings have significant scope for additional height. However, the Precinct may also be affected by floorspace ratios and other controls, which impact development potential. Additionally, given that these are recently completed buildings, redevelopment is unlikely in the near future.

Additional Height Uplift Capacity, May 2021

Map 12.5



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 12.4, the Mamre West Precinct comprises of 8 sites, of which 2 are vacant. However, one of these vacant sites lies in an E2 Environmental Conservation zone and so there is only one vacant and developable site in the northeast corner of the Precinct.

All vacant and developed sites are over 5,000 sq.m in size. Of the developed lots, site coverage averages around 49%. This low site coverage is due to the Fire and

Rescue Training Academy Facility, which contains large areas for outdoor training. Most developed warehouse sites within the Precinct achieve a site coverage of around 60%. Given the site utilisation rates for these lots, there may be potential for further densification on existing sites, subject to other constraints.

Distribution of Sites by Lot Size, Mamre West

Table 12.4

Size	Vacant Sites		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	0	0%	0	0%	0%	0	0%
501 - 1,000 sq.m	0	0%	0	0%	0%	0	0%
1,001 - 2,000 sq.m	0	0%	0	0%	0%	0	0%
2,001 - 3,000 sq.m	0	0%	0	0%	0%	0	0%
3,001 - 4,000 sq.m	0	0%	0	0%	0%	0	0%
4,001 - 5,000 sq.m	0	0%	0	0%	0%	0	0%
More than 5,000 sq.m	2	100%	6	100%	49%	8	100%
Total	2	100%	6	100%	49%	8	100%

13. MANLY VALE

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

Manly Vale Precinct Overview

Manly Vale Industrial Precinct (Map 13.1) is located around 10.4 kilometres northeast of the Sydney CBD. As at January 2020, the Manly Vale Precinct covered an area of approximately 10.1 hectares, of which approximately 0.2 hectares (2%) remained undeveloped.

The Precinct's major access route connections are Condamine Street, for connections to Manly Road, and Balgowlah Road.

A summary of the locational characteristics of the Precinct is provided in Table 13.1.

Location and Key Transport Infrastructure

Map 13.1



Location Characteristics

Table 13.1

Characteristic	Detail
Distance to nearest train station	11.5 kilometres southwest (North Sydney Station)
Distance to nearest motorway	6.4 kilometres southwest (M1 Motorway)
B-Double truck access	No
Surrounding land uses	<ul style="list-style-type: none"> • Low density residential dwellings in Manly Vale to the north • Open space recreation areas (Manly West Park and Manly Golf Club) to the east • Low density residential dwellings in Balgowlah to the south • Condamine Street and bulky good retailing area to the west

Strengths

1. Attracts a large residential catchment, given the strong presence of retail within the Precinct
2. Easy visibility and access into the Precinct off Condamine Street, a major arterial road

Weaknesses

1. The Precinct is small and has attracted minimal investment activity over recent years
2. Limited public transport routes and nearby motorways servicing the Precinct

PLANNING - WHAT IS THE ZONING MIX?

Map 13.2 opposite provides a summary of the relevant planning instruments and controls for the Manly Vale Precinct.

The B6 Enterprise Corridor zoning of the Precinct encourages commercial development as opposed to more traditional land uses.

Low to medium residential areas surround the Precinct on most frontages, except for the eastern boundary, which is zoned RE1 Public Recreation and contains Manly West Park.

There are height limits under planning controls for this Precinct.



EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

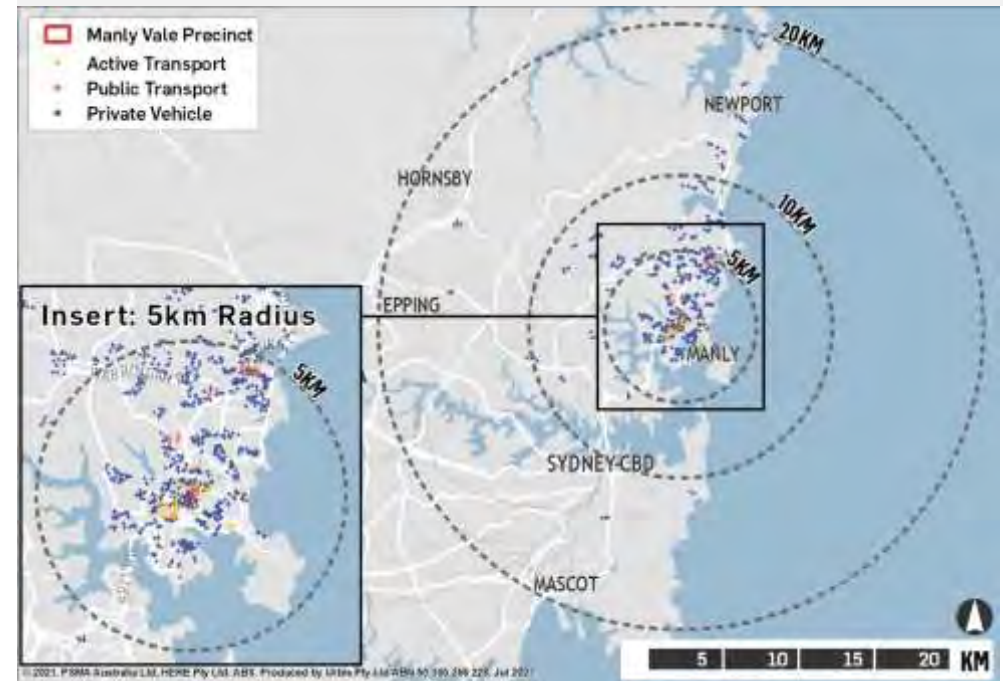
Map 13.3 shows the place of residence of those who work in the Manly Vale Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car, public transport or active transport (e.g. walking or cycling).

Workers' residences are highly localised, with 74% living within 5 km of the Precinct and an additional 19% living within 5 to 10 km of the Precinct. The place of residence of most precinct workers extends northward along the coastline.

Most workers (86%) travel to work by private vehicles. However, given the localised nature of the Precinct, it also has a relatively high proportion of workers who take active modes of transport (11%).

Where do Precinct Workers Live, 2016

Map 13.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

Uses within this Precinct are consistent with an B6 Enterprise Corridor zoning. Map 13.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct.

The Precinct is very active, with business uses focused on serving the local market.

The Precinct's non-bulky good retail buildings are characterised by mainly older style, well-maintained building stock. These are typically one level and located east of Roseberry Street.

The area west of Roseberry Street is characterised by new building stock and is dominated by bulky goods retailers. These tenants are ideally positioned in prominent locations on Condamine Street, a major arterial road. There is adequate car parking provision on-site (both at-grade and rooftop) and an easily accessible resident market. These retailers likely serve a large trade area population, given the low number of nearby bulky goods and retail centres.

The Precinct's south has minimal conflict with the low-density residential areas of

Balgowlah, along Balgowlah Road, due to the nature of uses being mainly café retailing and office-based activities. Café retailing is also present along Roseberry Street and along Kenneth Road.

The Precinct is also well-buffered from residential uses to the east by natural vegetation and Manly West Park, and to the west by a major arterial road (Condamine Street).

Traffic movements along the eastern edge of the Precinct (Quirk Road) are obstructed due to the pedestrian pathway through Manly West Park.



Café retailing can be found along Roseberry Street.



The Precinct features older-style, well-maintained building stock.



Balgowlah Business Park features offices fronting Roseberry Street and warehousing to the rear.

ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 13.1 illustrates the type of uses (determined by property type and business function) that currently occupy the Manly Vale Precinct. The data was collected by Urbis in May 2021 and included a combination of:

- Physical inspection of properties within the Precinct
- Geographic information system analysis
- Interviews with various tenants.

As at May 2021, Urbis estimates that the Precinct has around 63,051 sq.m of industrial floorspace on approximately 99,729 sq.m of developed land area. The Precinct predominantly serves a local role with some metropolitan functions.

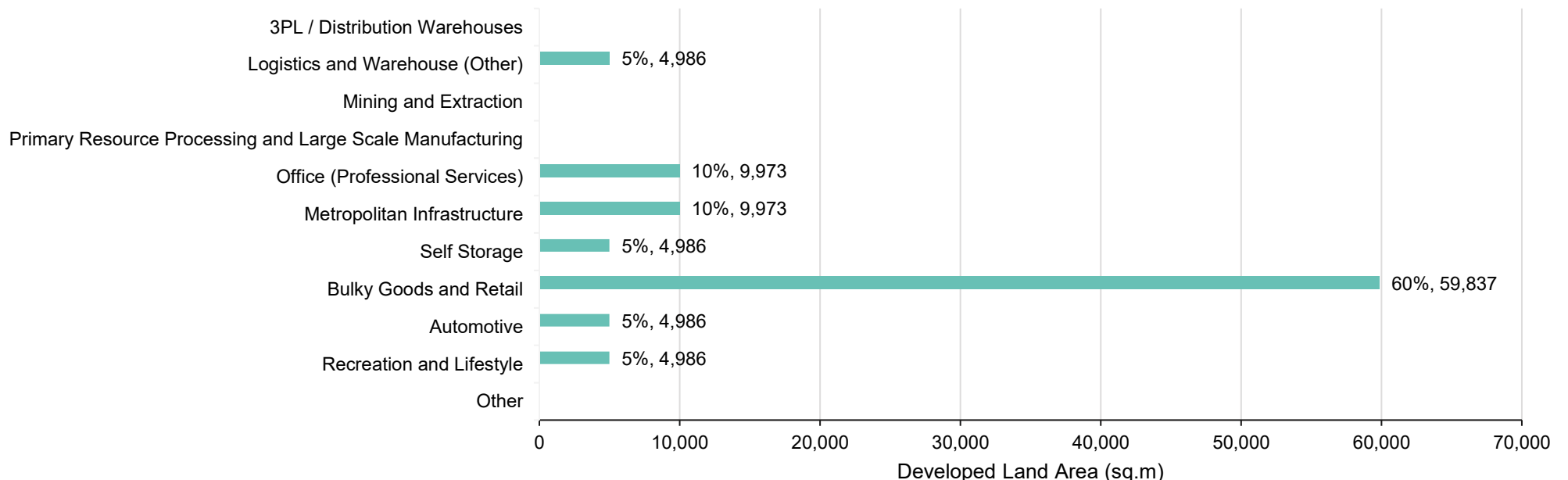
The most prevalent buildings within the Precinct are Bulky Goods and Retail, accounting for around 60% of developed land area. These are generally standalone retail sites along Rosebery and Condamine Streets.

Office (Professional Services), largely along Balgowlah Road and Metropolitan Infrastructure along Quirk Road account for around 10% of developed land area each.

There is also a small presence of Logistics and Warehouse (Other), Self Storage, Automotive and Recreation and Lifestyle uses.

Developed Land Area by Typology, Manly Vale Precinct

Chart 13.1



Source: Urbis

MAP 13.4: ROLE AND FUNCTION - WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the typology of current developed land area in the Manly Vale Precinct and examples of tenants are detailed in Table 13.2.

Bulky Goods and Retail account for approximately 60% of developed land area, attributed to the supermarkets, homemaker stores and cafés, largely to the west of Rosebery Street.

Office (Professional Services) accounts for an additional 10% of developed land area, with business uses varying from graphic designers to insurance brokers.

There is a small presence of Logistics and Warehouse (Other), with uses also varying widely from a coffee roaster and garment printers to fragrance and flavours distributors.

The Precinct also features around 10% of Metropolitan land use, attribute to the Council Depot and Manly SES. Other uses within the Precinct include Self Storage, Automotive and Recreation and Lifestyle.

Developed Land Area Distribution by Typology, Manly Vale Precinct

Table 13.2

	Distribution	Example Tenants
3PL / Distribution Warehouses		
Logistics and Warehouse (Other)	5%	Kent Paper (packaging supplier), Seven Miles Coffee Roasters, Firmenich (fragrance and flavours distributor), Invita (food and life science ingredient distributor), Oliver Hire (party equipment hire), North Shore Cement and Sand (building and landscape supplies), Manly Freezer (cold storage) Balgowlah Business Park: Raisalift Group (access lifts supplier), Adam Hill Design (artist), Remsafe (locks supplier), McCarthy and McCoy (garment printers)
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing		
Office (Professional Services)	10%	Firmenich (fragrance and flavours distributor, state office), Spicy Broccoli Media (graphic designer), Pevonia Botanica (skin care supplier), Brookvale Insurance Brokers, Volcom (apparel, head office), Thinktime Speech Pathology (medical)
Metropolitan Infrastructure	10%	Northern Beaches Council Depot, Manly SES
Self Storage	5%	Security Self Storage
Bulky Goods and Retail	60%	Aldi, Woolworths, Bing Lee, Bunnings, Harvey Norman, Roseberry Street Café, Richard's Meats, Ray's Pizza, Choices Flooring, Petstock, The Grow Centre (plant nursery), Artifex (interior design showroom), Bing Lee, Snooze, Petstock
Automotive	5%	PT Precision Automotive (mechanic), Manly Care & Truck Rental, Mega Trucks (truck dealer), Blazini & Davis Mechanical Repairs
Recreation and Lifestyle	5%	Two by Two Veterinary Hospital, Code 5 Fitness, Plus Fitness, Bulldog Gym (boxing gym), Holixir (wellness centre)
Other		
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 13.3 shows the quantum of zoned industrial land within the Manly Vale Precinct.

As at December 2020, there was a total of 10.1 hectares of zoned industrial land in the Manly Vale Precinct, of which 9.9 hectares has been developed and only 0.2 hectares (2%) remained undeveloped.

Between 2016 and 2020, the Precinct experienced no changes in the quantity of industrial land. There is one project in the future development pipeline with an estimated total value of \$2.2 million, comprising a conversion of an existing buildings into two furniture showrooms.

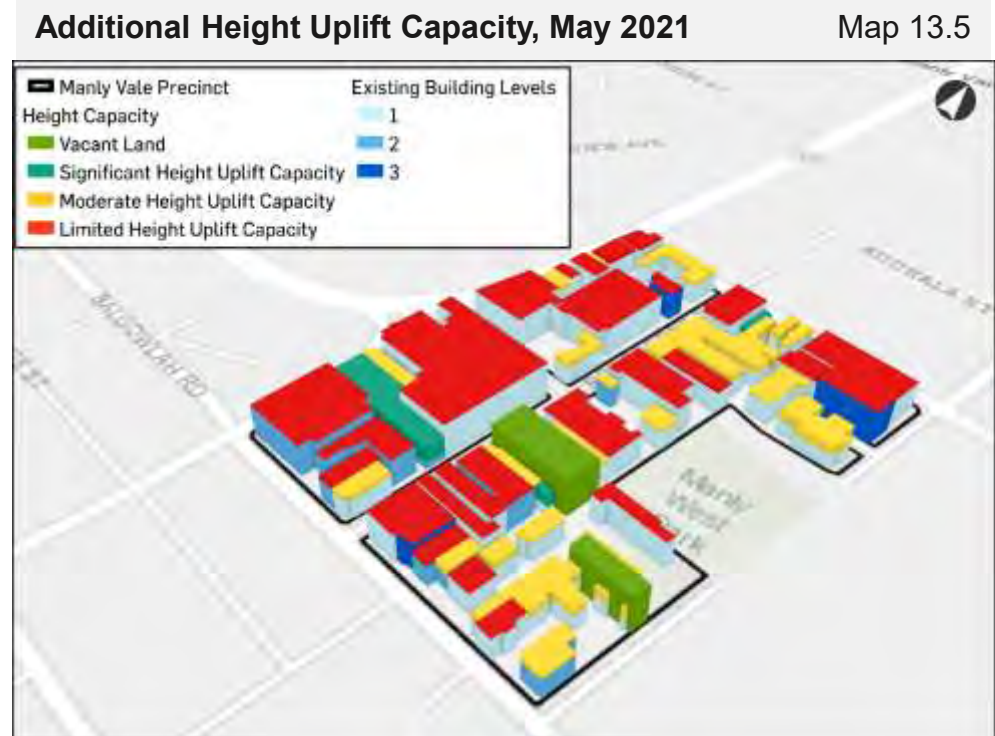
As at 2021, total employment in the precinct is estimated to be 1,573 jobs. Of the 9.9 hectares of developed industrial land, there is approximately 63,051 sq.m of Gross Floor Area. This equates to an average land area of 62.9 sq.m per employee or floorspace of 40.1 sq.m per employee.

Map 13.5 indicates the Precinct's potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

Approximately 61% of total land area within the Precinct contain sites with limited capacity for additional height uplift, while 38% have moderate to significant flexibility for height uplift. There is one vacant site located to the southeast of the Precinct.

Nature of Employment and Land		Table 13.3
Factor		Value
Total Employment, 2021 projection		1,573 jobs
Total Developed Land Area, 2020		9.9 ha
Total Undeveloped Land Area, 2020		0.2 ha
Future Pipeline and Estimated Value		1 project, ~\$2.2m
Average Annual Land Take-Up (2016 – 2020)		0.0 ha
Total Floorspace, 2021 (Gross Floor Area)		63,051 sq.m
Average Land Area per Employee		62.9 sq.m
Average Gross Floor Area per Employee		40.1 sq.m

Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 13.4, the Manly Vale Precinct comprises of 67 lots, of which one is a vacant between 501 and 1,000 sq.m.

Majority of developed sites are 2,000 sq.m or less in size, accounting for 78% of total developed lots. These sites achieve a relatively high site coverage ratio, averaging around 67% to 79%.

The remaining larger lots are generally located through the centre of Roseberry Street. Average site coverage varies but is generally lower than ratios achieved by smaller lots, largely due to the provision of at-grade onsite parking on larger lots.

Distribution of Sites by Lot Size, Manly Vale Precinct

Table 13.4

Size	Vacant Sites*		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	0	0%	12	18%	79%	12	18%
501 - 1,000 sq.m	1	100%	26	39%	67%	27	40%
1,001 - 2,000 sq.m	0	0%	14	21%	69%	14	21%
2,001 - 3,000 sq.m	0	0%	5	8%	49%	5	7%
3,001 - 4,000 sq.m	0	0%	5	8%	63%	5	7%
4,001 - 5,000 sq.m	0	0%	1	2%	80%	1	1%
More than 5,000 sq.m	0	0%	3	5%	61%	3	4%
Total	1	100%	66	100%	64%	67	100%

Note: Figures are based on land areas as at May 2021 and may differ from ELDM 2020 developed and undeveloped area estimates.

*A site is considered vacant if the total building area on the site is less than 10% of the site area.

Source: Geoscape Australia; Urbis

14. MARRICKVILLE

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

Marrickville Precinct Overview

Marrickville Industrial Precinct (Map 14.1) is located around 6 kilometres southwest of the Sydney CBD and 2.5 kilometres northwest of Sydney Airport.

As at January 2020, the Marrickville Precinct covered an area of approximately 61.8 hectares, of which only 0.1 hectares (0.2%) remained undeveloped.

The Precinct's major access route connections are Victoria Road, Sydenham Road and Marrickville Road.

A summary of the locational characteristics of the Precinct is provided in Table 14.1.

Location and Key Transport Infrastructure

Map 14.1



Location Characteristics

Table 14.1

Characteristic	Detail
Distance to nearest train station	Directly south (Sydenham Station)
Distance to nearest motorway	4.3 kilometres south (M5 Motorway)
B-Double truck access	No
Surrounding land uses	<ul style="list-style-type: none"> Marrickville Metro and low density residential dwellings in Marrickville to the northeast Industrial warehouses and low density residential in St Peters to the southeast Fraser Park sports complex and the railway line to the south Marrickville Town Centre retail strip and low density residential to the west

Strengths

1. Proximity to Sydenham Station for workers and visitors
2. Proximity to retail in Marrickville Metro and Marrickville Town Centre
3. Unique cluster of artisan uses, creating a destination offering

Weaknesses

1. Traffic congestion issues, particularly along main roads such as Victoria Road

PLANNING - WHAT IS THE ZONING MIX?

Map 14.2 opposite provides a summary of the relevant planning instruments and controls for the Marrickville Precinct.

The zoning throughout the Precinct typically encourages traditional industrial uses across all zones (IN1 General Industrial, IN2 Light Industrial and B5 Business Development).

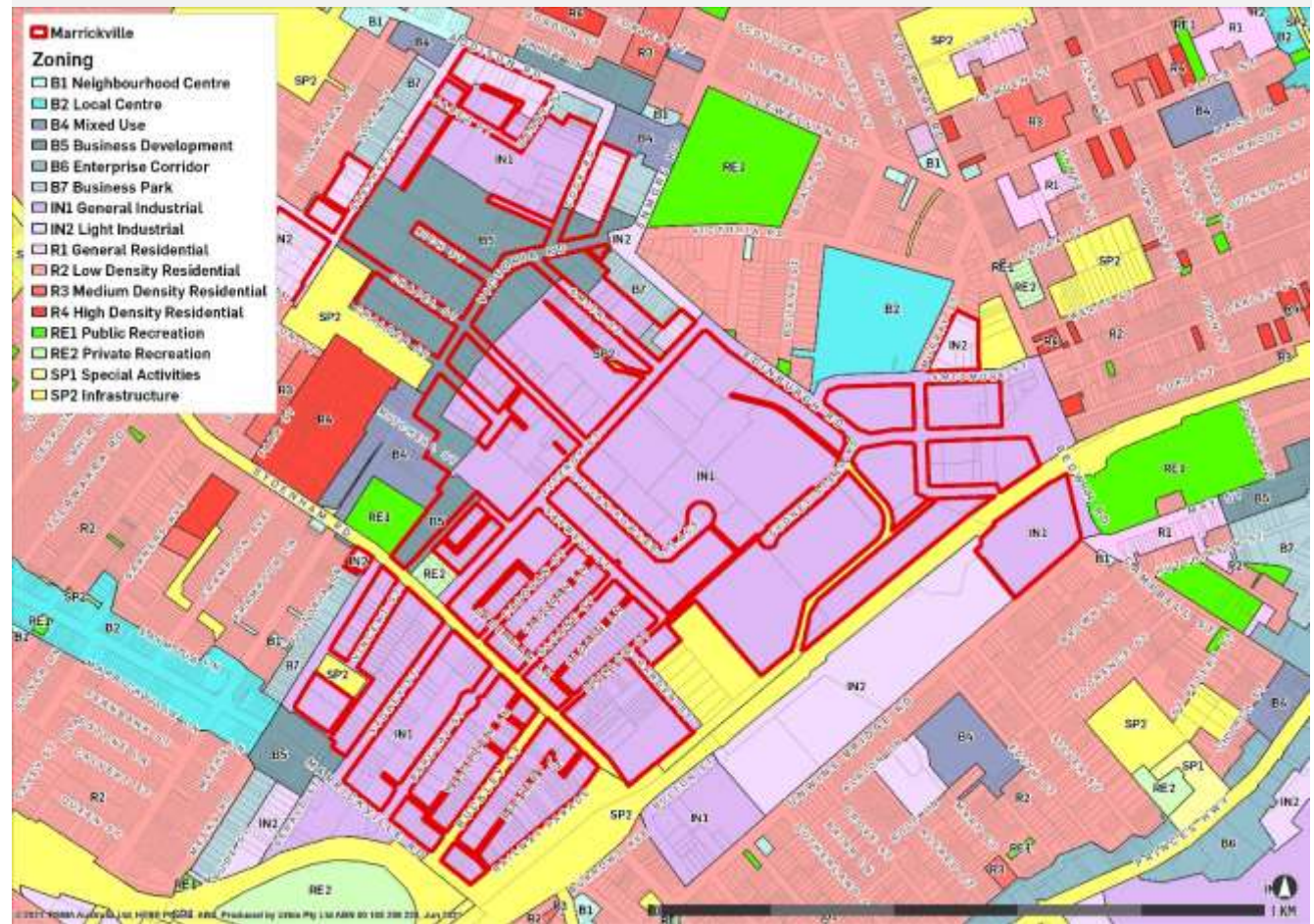
The Precinct is primarily surrounded by low density residential dwellings

Marrickville Public School lies adjacent to the Precinct's B5 Business Development zone, which currently comprises old warehouses. Land to the south of the school has been identified for R4 High Density Residential development, although currently contains old warehouses.

Height limits are in place for B5 Business Development zoned lands but not for IN1 General Industrial and IN2 Light Industrial.

Zoning Map

Map 14.2



EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

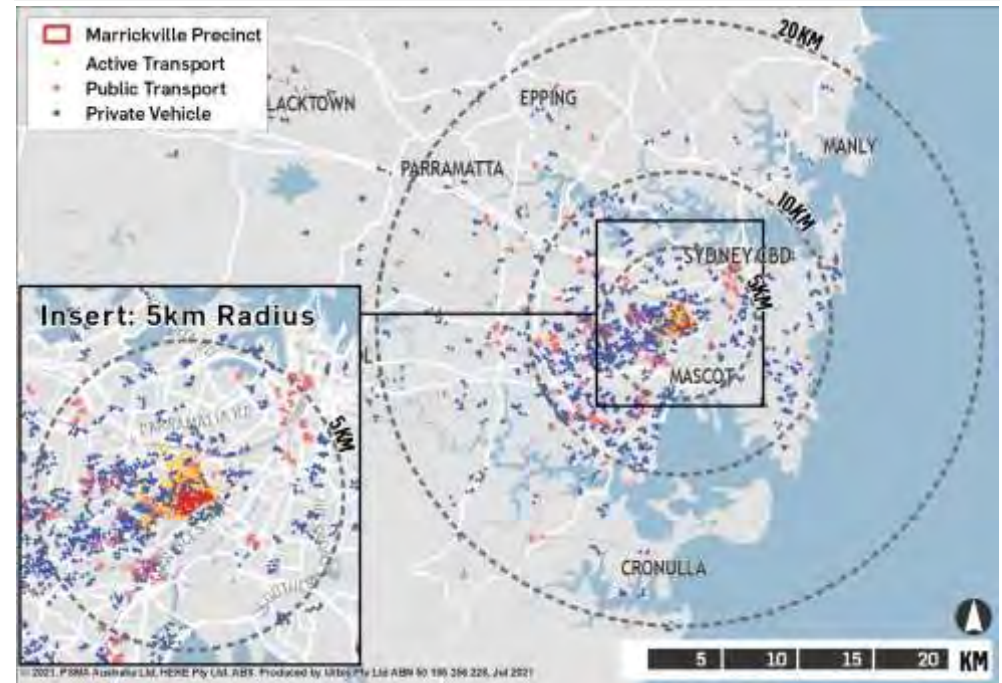
Map 14.3 shows the place of residence of those who work in the Marrickville Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car, public transport or active transport (e.g. walking or cycling).

Approximately 76% of workers' residences are situated within 10 km of the Precinct, with high concentrations towards the southwest. Very few live in western Sydney and the northern suburbs.

The majority of workers travel to work by private vehicles, particularly those residing in the eastern and inner west suburbs that are not serviced by the train line. Public transport use is more frequent along the train lines, due to the convenience of Sydenham Station. Active modes of transport are commonly used by workers residing within 2 km of the Precinct, particularly to the north and west.

Where do Precinct Workers Live, 2016

Map 14.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

Uses within this Precinct are consistent with an IN1 General Industrial, IN2 Light Industrial and B5 Business Development zonings. Map 14.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct.

The Precinct is characterised by mainly old building stock, typically between one to two levels. Standalone warehouses are the most prominent building typology seen throughout the Precinct, with smaller warehouses more prominent in the south of the Precinct and relatively larger warehouses typical in the north. Several warehouses within the Precinct, particularly those to the north of Victoria Road do not appear well maintained.

While the Precinct is dominated by standalone warehouses, strata warehouse units can be found along Lilian Fowler Place, in the Precinct's northeast.

The Precinct has seen recent development along Edinburgh Road, with the completion of a strata warehouse unit complex at 76B Edinburgh Road in 2018 and The Borough commercial office building (5-storeys) at 76A Edinburgh Road in 2021. This appears to be the only existing pure commercial office building within the Precinct.

There is a small pocket of IN1 General Industrial uses to the south of the railway line, which features Greenway Banks Estate. The estate comprises several old, high-clearance warehouses that are currently being used for indoor recreation and an old commercial office building. Unlike the rest of the Precinct, the estate is well maintained with quality landscaping.

The Marrickville Precinct features a unique clustering of artisan uses, creating a destination-type offering. These are largely food-related uses including breweries, coffee roasters and bakeries. The Precinct has also seen the emergence of café culture, arising from its strong food-related foundation. These uses are widely dispersed throughout the Precinct and are typically found in old, converted warehouse buildings.

The dense clustering of buildings means that it is a very active precinct, with large flows of traffic movement Precinct and not solely along the main roads (Victoria Road, Sydenham Street within the and Marrickville Road). There appears to be limited onsite parking, which creates traffic pressures due to the demand for on-street parking.

The Precinct is largely surrounded by low density residential to the northeast and northwest, generally well buffered via natural vegetation.



The Precinct largely comprise of old, standalone warehouses (Map 3.A).



New strata warehouse unit complex at 76B Edinburgh Road (Map 3.B).



An industrial warehouse conversion for use as a gin distillery and bar (Map 3.C).

ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 14.1 illustrates the type of uses (determined by property type and business function) that currently occupy the Marrickville Precinct. The data was collected by Urbis in May 2021 and included a combination of:

- Physical inspection of properties within the Precinct
- Geographic information system analysis
- Interviews with various tenants.

As at May 2021, Urbis estimates that the Precinct has around 523,818 sq.m of industrial floorspace on approximately 563,941 sq.m of developed land area. The Precinct largely serves a metropolitan role, with some local functions.

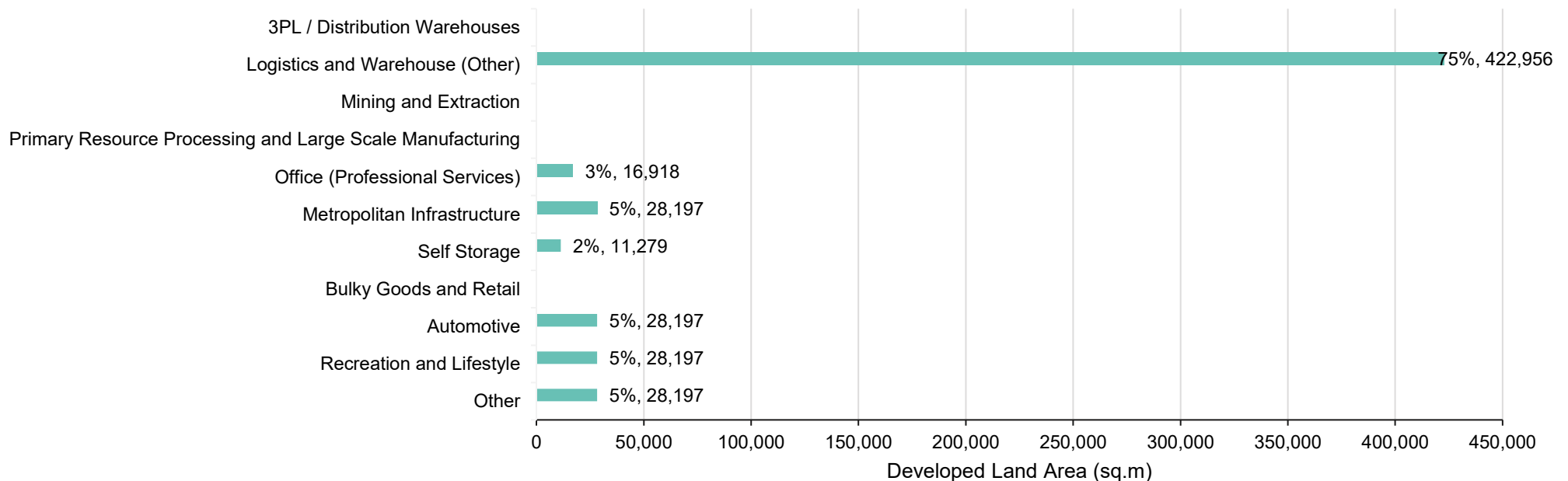
The most prevalent buildings within the Precinct are standalone warehouses, co-located with ancillary office, which account for approximately 80% of total floorspace.

Metropolitan Infrastructure account for around 5% of total developed land area, attributed to the Sydney Metro Dive Site adjacent to the train line. Automotive and Recreation and Lifestyle uses also account for an additional 5% each, which are dispersed throughout the Precinct. There is a small proportion of “Other” uses, attributed to the artisan cluster, comprising breweries, distilleries, coffee roasters and bakeries.

There is also a small presence of Office (Professional Services) and Self Storage facilities.

Developed Land Area by Typology, Marrickville Precinct

Chart 14.1



Source: Urbis

MAP 14.4: ROLE AND FUNCTION - WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the typology of current developed land area in the Marrickville Precinct and examples of tenants are detailed in Table 14.2.

Other Logistics and Warehouse uses dominate the industrial land typology within the Precinct. These are most commonly food-related businesses, which includes a unique cluster of artisan businesses such as breweries, coffee roasters and artisan bakeries.

Automotive and Recreation/Lifestyle uses are dispersed throughout the Precinct. Automotive uses are typically vehicle repairs and servicing, while Recreation and Lifestyle uses vary from live entertainment venues to bouldering and trapeze schools.

There is a small presence of Office (Professional Service), largely situated in the pocket of IN1 General Industrial land along Unwins Bridge Road to the south of the railway line.

Developed Developed Land Area Distribution by Typology, Marrickville Precinct

Table 14.2

	Distribution	Example Tenants
3PL / Distribution Warehouses	<1%	Johnston Transport Industries (logistics)
Logistics and Warehouse (Other)	75%	Food-related uses: Two Providores (artisan dry-store produce suppliers), Faros Seafood Marrickville (seafood wholesaler), Vanella Cheese (cheese wholesaler), Juice and Co (wholesale juice distributor), Napoli Food & Wines (food wholesaler), Black Forest Smokehouse (meat wholesaler), M & J Chickens (poultry supplier), Hong Tai Food Company (food products suppliers), Birch & Waite (food supplier) Non-food related uses: Palloys (jewellery maker), Confeta (packaging manufacturing), Chempower Australia (chemical manufacturer), Blueprint Digital (digital printing), John Fisher Printing (printing services), Euro Marble (stone supplier), Espresso Connect (coffee machine sales), CHIlli PiP Furniture (custom furniture maker), Alpha Food Packaging (packaging supplier), Soundworks Studios (recording studio), Signwave Newtown (signwriters), Arthouse Co (art and furniture gallery), Edco Sydney (cleaning products suppliers), Byrne Creative (casting and creative agency)
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing		
Office (Professional Services)	2%	GBR (real estate agency), Temple & Webster Head Office (furniture and homewares supplier), Level One Co Working, The Borough
Metropolitan Infrastructure	5%	Sydney Metro Marrickville Dive Site
Self Storage	2%	Cheap Sydney Storage, Kennards Self Storage, National Storage
Bulky Goods and Retail	<1%	Reece's Plumbing
Automotive	5%	JAX Tyres & Auto, King Street Autos (vehicle servicing), Meher Auto Service Centre (vehicle repairs), Tunehouse (vehicle servicing), Mastertouch Automotive (vehicle repairs), Percy Jack's Motorcycles (motorcycle repairs), Auto Fit Marrickville (vehicle repairs)
Recreation and Lifestyle	5%	BlocHaus Bouldering, KX Pilates, The Factory Theatre (live entertainment venue), BK's Gymnastics, City Strength HQ (fitness), Sydney Trapeze School, Sydney Indoor Climbing
Other	5%	Breweries/Distilleries: Poor Toms Gin Hall, Stockade Brew Co, Batch Brew Company, Wildflower Brewing & Blending, Sauce Brewing Co, The Grifter Brewing Co, Moonshiner Distillery Coffee Roasters: Roastville, The Wood Roaster, Fat Poppy Coffee Roasters, Black Market Coffee Roasters, Zest Artisan bakeries: Bourke Street Bakery, The Bread and Butter Project (bakery), Brickfields Bakery
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 14.3 shows the quantum of zoned industrial land within the Marrickville Precinct.

As at December 2020, there was a total of 69.5 hectares of zoned industrial land in the Mascot Precinct, of which 0.1 hectares (0.2%) remained undeveloped.

Between 2016 and 2020, average land take-up within the Precinct declined by 0.8 hectares per year, attributed to the demolition of several old warehouses for the Metro construction.

As at 2021, total employment in the precinct is estimated to be 8,177 jobs. Of the 69.5 hectares of developed industrial land, there is approximately 523,818 sq.m of Gross Floor Area. This equates to an average land area of 75.5 sq.m per employee or floorspace of 64.1 sq.m per employee.

Nature of Employment and Land Table 14.3

Factor	Value
Total Employment, 2021 projection	8,177 jobs
Total Developed Land Area, 2020	69.5 ha
Total Undeveloped Land Area, 2020	1.1 ha
Future Pipeline and Estimated Value	21 projects, ~\$254.6 m
Average Annual Land Take-Up (2016 – 2020)	-0.8 ha
Total Floorspace, 2021 (Gross Floor Area)	523,818 sq.m
Average Land Area per Employee	75.5 sq.m
Average Gross Floor Area per Employee	64.1 sq.m

Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis

Map 14.5 indicates the Precinct's potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

There are no maximum height limits specified for sites within the IN1 General Industrial and IN2 Light Industrial zones and so most sites with existing buildings (84%) have significant scope for additional height. However, these sites may also be affected by floorspace ratios and other controls, which impact development potential. Moderate height uplift capacity generally exists for existing buildings within the B5 Business Development zone.

Additional Height Uplift Capacity, May 2021 Map 14.5



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

Table 14.4 shows the distribution of vacant and developed land within the Marrickville Precinct as well as site coverage of developed sites, as at May 2021. The Marrickville Precinct comprise of 711 lots, of which 19 are vacant. Majority of these sites are 2,000 sq.m or smaller. These vacant sites include lots that comprise the Metro construction site to the east of the Precinct. Of the developed sites, 86% are 1,000 sq.m or smaller, as the Precinct is dominated by small standalone warehouses. Large lots of over 4,000 sq.m are

scarce, representing just 4% of total lots.

Average site coverage is high for the Precinct, averaging over 80% for lots that are 1,000 sq.m or smaller. This is due to the dense clustering of buildings seen throughout the Precinct. Average site coverage decreases to just over 60% for larger lots over 4,000 sq.m, although lots between 3,001 sqm and 4,000 sq.m average just 58%.

Distribution of Sites by Lot Size, Marrickville Precinct

Table 14.4

Size	Vacant Sites*		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	7	37%	506	73%	82%	513	72%
501 - 1,000 sq.m	4	21%	90	13%	81%	94	13%
1,001 - 2,000 sq.m	4	21%	53	8%	77%	57	8%
2,001 - 3,000 sq.m	1	5%	7	1%	74%	8	1%
3,001 - 4,000 sq.m	0	0%	12	2%	58%	12	2%
4,001 - 5,000 sq.m	1	5%	5	1%	64%	6	1%
More than 5,000 sq.m	2	11%	19	3%	63%	21	3%
Total	19	100%	692	100%	72%	711	100%

Note: Figures are based on land areas as at May 2021 and may differ from ELDM 2020 developed and undeveloped area estimates.

*A site is considered vacant if the total building area on the site is less than 10% of the site area.

Source: Geoscape Australia; Urbis

15. MASCOT

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

Mascot Precinct Overview

The Mascot Industrial Precinct (Map 15.1) is located around 6.6 kilometres south of the Sydney CBD.

As at January 2020, the Precinct covered an area of approximately 70.6 hectares and approximately 1.1 hectares (1.6%) remained undeveloped. The Precinct is the third largest industrial precinct in the Bayside LGA, following Banksmeadow and Port Botany.

The Precinct's major access route connections are Gardeners Road and Airport Drive, major arterial roads bordering the Precinct.

A summary of the locational characteristics of the Precinct is provided in Table 15.1.

Location and Key Transport Infrastructure

Map 15.1



Location Characteristics

Table 15.1

Characteristic	Detail
Distance to nearest train station	Directly northeast (Mascot Station)
Distance to nearest motorway	1.8 km metres southeast (M1 Motorway)
B-Double truck access	Yes
Surrounding land uses	<ul style="list-style-type: none"> • Medium to high density mixed use residential development to the northeast • Low density residential dwellings in Mascot to the east • Sydney Airport to the south • Alexandra Canal to the west

Strengths

1. Proximity to Sydney Airport (supports the Precinct's unique aviation-related industry) and Sydney CBD
2. Proximity to Mascot Station, Mascot Retail Precinct (Meriton)

Weaknesses

1. Traffic congestion, particularly along Gardeners Road, O'Riordan Street and Qantas Drive
2. Noise pollution from aircrafts overhead
3. Old and poorly presented buildings, particularly along Chalmers Crescent

PLANNING - WHAT IS THE ZONING MIX?

Map 15.2 opposite provides a summary of the relevant planning instruments and controls for the Mascot Precinct.

The Precinct contains a range of zonings, including B7 Business Park, IN1 General Industrial, IN2 Light Industrial and B5 Business Development zones. The varied land uses within the Precinct reflect its proximity to both the Sydney Airport and the Mascot Town Centre. The area has a strong focus on warehousing and logistical support, particularly for aviation-related businesses.

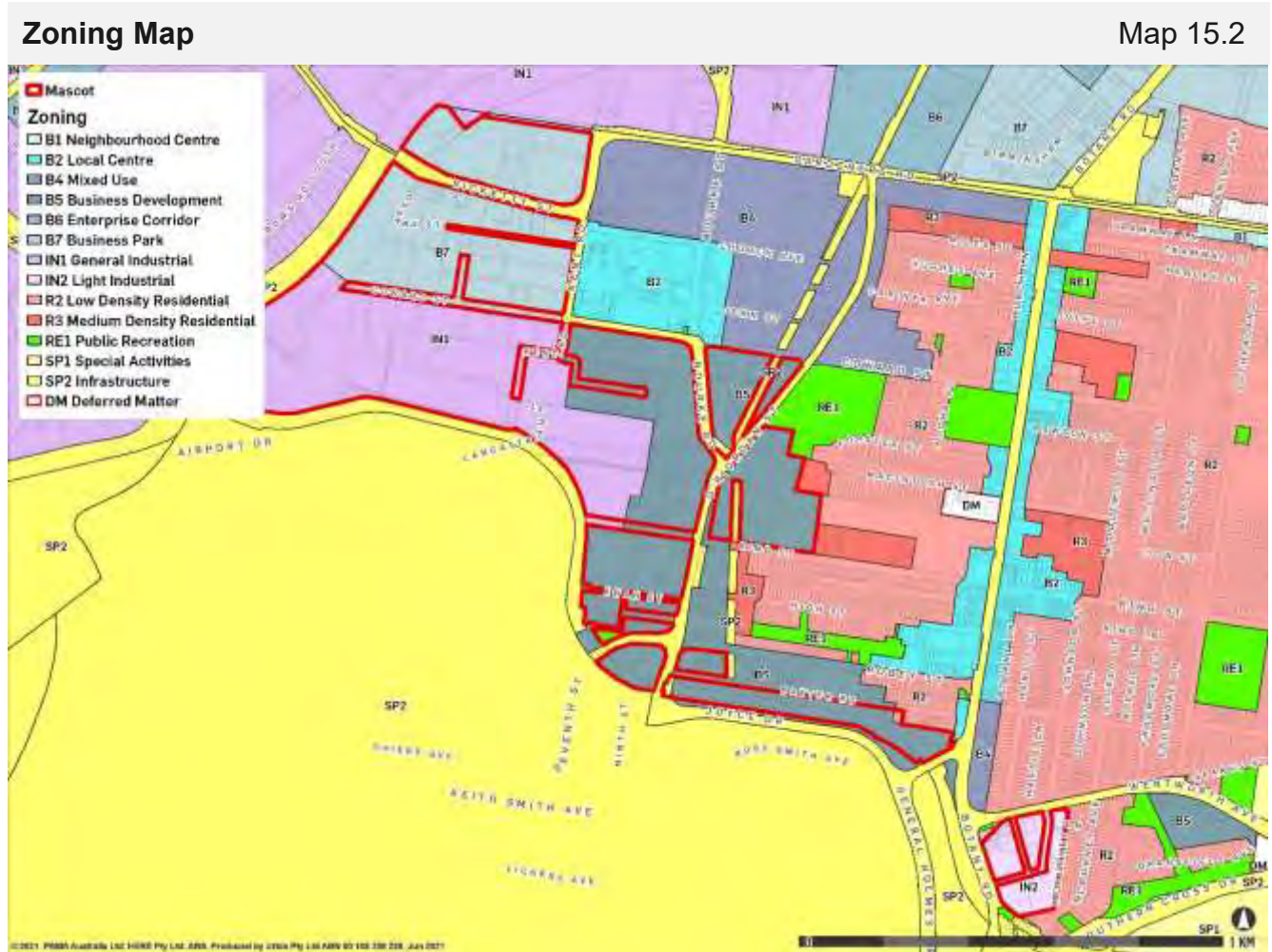
Commercial developments and hotels are focused along Bourke Road and O'Riordan Street.

The Precinct is surrounded by B2 Local Centre and B4 Mixed Use zones to the north, which largely comprise high rise mixed-used buildings (retail and residential apartments).

To the east are low density residential dwellings and a B2 Local Centre, comprising strip retail along Botany Road.

To the south is an SP2 Infrastructure zone dedicated to Sydney Airport. To the west are IN1 General Industrial zones, largely comprising traditional industrial uses.

Due to its proximity to the airport, there are height limits in the planning controls for the Precinct.



EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

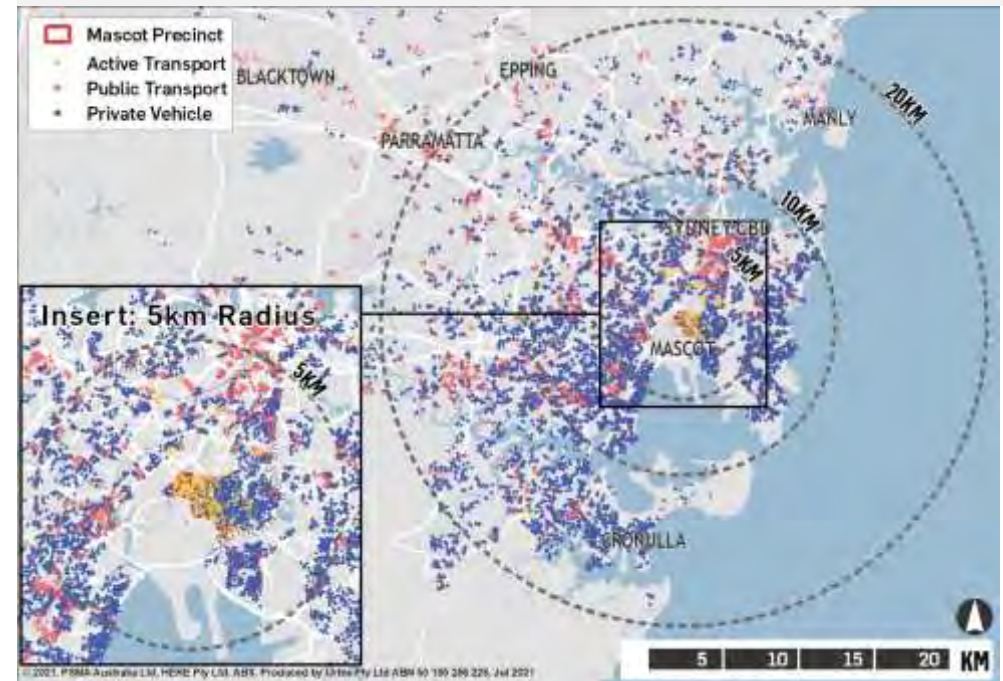
Map 15.3 shows the place of residence of those who work in the Mascot Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car, public transport or active transport (e.g. walking or cycling).

Workers' residences are widely distributed, however higher densities occur within 10 km of the Precinct. Around 56% of precinct workers live within 10km of the Mascot Precinct. Workers tend to reside in the inner city and eastern suburbs, as well as suburbs southwest of the Precinct. Very few live in the western and northern suburbs.

The majority of workers (72%) travel to work by private vehicles. An additional 24% travel to work via public transport, aided by the convenience of Mascot Train Station directly north of the Precinct. Workers who take active modes of transport are concentrated in the residential areas immediately surrounding the Precinct.

Where do Precinct Workers Live, 2016

Map 15.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

The current uses within the Mascot Precinct are consistent with permissible uses for IN1 General Industrial, IN2 Light Industrial, B5 Business Development and B7 Business Park zonings.

Map 15.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct. The map also identifies institution owned business parks.

Buildings throughout most of the Precinct are one-storey, although there are commercial and hotel buildings over 5 storeys concentrated along Bourke Road and O’Riordan Street. Several of these buildings are modern, having only been completed over the past decade.

The Precinct contains a large and unique cluster of industrial uses servicing the aviation industry, due to its proximity to Sydney Airport. Uses include:

- Air freight logistics e.g. IAS Logistics, Qantas Courier
- Airline food catering e.g. Dnata Catering, Gate Gourmet
- Aircraft spare parts e.g. Qantas Materials and Logistics
- Hotels e.g. Pullman, Travelodge
- Car rental services (e.g. Hertz, Avis)
- Multi-level car parking (e.g. Park on King – Airport Parking).

Aviation services are largely dispersed throughout the Precinct and air freight logistics are typically located within the northwest of the Precinct.

There are pockets of older style buildings located along narrow streets, particularly Chalmers Crescent and Ewan Street. Some of these buildings appear to be not well-maintained. There is a development site on Chalmers Crescent where site works have begun for the construction of a proposed commercial office development called One Chalmers.



Top: Chalmers Street features older style buildings (Map 2.4A).



Left: A unique cluster of hotels can be found within this Precinct, which leverage off its proximity to the Sydney Airport (Map 2.4B).

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Older style strata office/warehouse units are located within the southeast pocket of IN2 zoned land, along Bronti Street. The area is surrounded to the north, east and south by low density residential, with access only via Wentworth Avenue to the north and Botany Road (southbound traffic only) to the west.

Industrial-owned business parks are also spread throughout the Precinct and contain new / well-maintained buildings. This includes Heritage Business Park and Airgate Business Park, both owned by Goodman.

Airgate Business Park features high clearance warehouses and wide road that cater for several global freight and logistics companies. There is easy access along the west of Coward Street towards Goodman's Airgate Business Park. This is mainly owing to the relatively wide roadway and the availability of onsite parking on large established sites, which reduces car parking congestion along the road.

Residential interface issues exist toward the eastern area of the Precinct, along King Street. Other areas of the Precinct, however, are well buffered from adjacent uses.

There are high density residential buildings with ground floor commercial/retail surrounding Mascot Train Station, directly northeast of the Precinct. This does not seem to impede on business uses within the Precinct, due to:

- Relatively wider roadways between the residential zones and the Precinct
- Natural vegetation acting as a buffer
- Most business uses abutting the residential zones are commercial office, offering a seamless integration with the ground floor retail and commercial spaces established within the residential developments.



An example of older, yet well-maintained, strata office/warehouse units within the Precinct (Map 2.4C).



The Precinct features several at-grade parking lots (Map 2.4D).

ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 15.1 illustrates the type of uses (determined by property type and business function) that currently occupy the Mascot Precinct. The data was collected by Urbis in May 2021 and included a combination of:

- Physical inspection of properties within the Precinct
- Geographic information system analysis
- Interviews with various tenants.

As at May 2021, Urbis estimates that the Precinct has around 645,448 sq.m of industrial floorspace on approximately 613,746 sq.m of developed land area. The Precinct largely serves a metropolitan role, with some local functions.

The most prevalent buildings within the Precinct are 3PL/Distribution warehouses co-located with ancillary office, which account for approximately 40% of total developed land area. These uses are concentrated within and around Airgate Business Park.

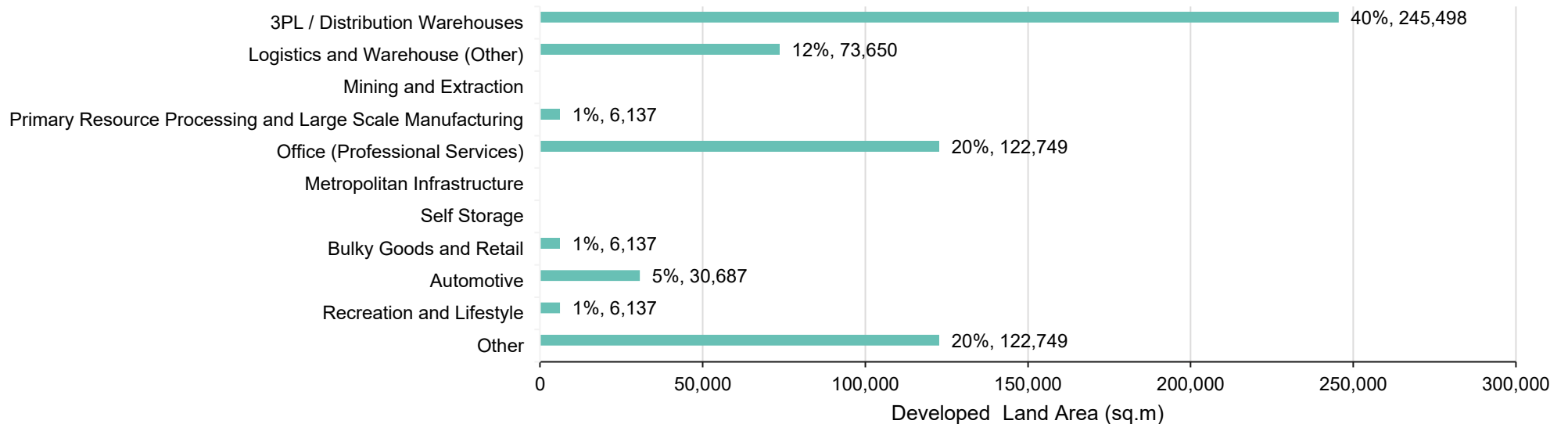
Office (Professional Services) and Other, which includes hotels and multi-level carparking, account for around 20% of developed land area each. These uses are concentrated along Bourke Road and O’Riordan Street.

Logistics and Warehouse (Other) are found dispersed throughout the Precinct and includes tenants within Heritage Business Park.

Other uses present dispersed throughout the Precinct include Automotive, Primary Resource Processing and Large Scale Manufacturing and Recreation and Lifestyle.

Developed Land Area by Typology, Mascot Precinct

Chart 15.1



Source: Urbis

MAP 15.4: CHARACTERISTICS OF PRECINCT



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the typology of current developed land area in the Mascot Precinct and examples of tenants are detailed in Table 15.2.

The Precinct contains a cluster of 3PL and distribution centres, due to its proximity to Sydney Airport. These uses are largely concentrated within and around Airgate Business Park.

There is also a large proportion of Office (Professional Services) and Other (short

stay accommodation and multi-level car parking) located along Bourke Road and O’Riordan Street. These uses account for around 20% of developed land area each.

Logistics and Warehouse (Other) are mainly present in the form of medium to large sized standalone warehouses as well as pockets of strata office/warehouse unit complexes. These uses are dispersed throughout the Precinct.

Developed Land Area Distribution by Typology, Mascot Precinct

Table 15.2

	Distribution	Example Tenants
3PL / Distribution Warehouses	40%	Fedex (3PL), Gate Gourmet (airline food catering logistics), Qantas Material & Logistics (distribution warehouse), Qantas Courier (air freight logistics), Toll (logistics), IAS Logistics (fine art logistics), SEKO Logistics (logistics), Dnata Catering (airline food catering logistics), UniAir Cargo (freight forwarding) Airgate Business Park: Hellman Worldwide Logistics (logistics), Nippon Express (logistics), DHL, Woolworths (dark store)
Logistics and Warehouse (Other)	12%	Vic's Meats (wholesale butcher), Blue Gas (gas supplier), Jands (stage lighting supplier), Procal Dairies (dairy products supplier), Pet Carriers International (pet moving service), Evolve Constructions (construction company), Factory One (signage), Eaton (power management), Farmer Joe's Chicken (poultry supplier) Heritage Business Park: A-dec (medical equipment suppliers), Gratex International (software company), Access Hardware (door hardware suppliers), MEDISCA (pharmaceutical products), Spencer Travel (corporate travel agents)
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing	1%	Mascot Steel, Creative Metal Fabrication, Meloz Manufacturing (furniture manufacturer)
Office (Professional Services)	20%	Corporate Office: AbbVie (pharmaceutical research and development), Kone (engineering), Qantas, Winc, Westinghouse (appliances), BlueScope (steel manufacturer), Jaguar Land Rover, TJX (Fashion Retailer), Millon Wines (wine producers)
Metropolitan Infrastructure		
Self Storage		
Bulky Goods and Retail	1%	Totally Workwear (apparel), Astec Paints Trade Centre (paint store), Alex Bowen Carpet Court
Automotive	5%	JUCY Car Rental and Campervan Hire, No Birds Car Hire, Enterprise Rent-A-Car, Southern Cross Automotive Repairs, Mascot Smash Repairs, Iberia Motor Repairs
Recreation and Lifestyle	1%	Toybox Early Learning, Story House Early Learning, Ice Zoo Sydney (ice skating rink)
Other	20%	Short Stay Accommodation: Adina Apartment Hotel, Pullman Hotel, Holiday Inn, Travelodge Hotel, Stamford Hotel Multi-level Carpark: Park on King Airport Parking,
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 15.3 shows the quantum of zoned industrial land within the Mascot Precinct.

As at December 2020, there was a total of 70.6 hectares of zoned industrial land, of which 69.5 has been developed and 1.1 hectares (1.6%) remained undeveloped.

Between 2016 and 2020, the Precinct has experienced a decline in the average land take-up, retracting by 0.8 hectares annually. The future development pipeline for the Precinct comprises 21 projects with an estimated value of almost \$872 million. Key projects include two office developments along Chalmers Street (including One Chalmers currently under construction) and a Qantas Flight Training Centre along King Street.

Nature of Employment and Land Table 15.3

Factor	Value
Total Employment, 2021 projection	23,055 jobs
Total Developed Land Area, 2020	69.5 ha
Total Undeveloped Land Area, 2020	1.1 ha
Future Pipeline and Estimated Value	21 projects, ~\$871.7 m
Average Annual Land Take-Up (2016 – 2020)	-0.8 ha
Total Floorspace, 2021 (Gross Floor Area)	645,448 sq.m
Average Land Area per Employee	30.1 sq.m
Average Gross Floor Area per Employee	28.0 sq.m

Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis

As at 2021, total employment in the precinct is estimated to be 23,055 jobs. Of the 69.5 hectares of developed industrial land, there is approximately 645,448 sq.m of Gross Floor Area. This equates to an average land area of 30.1 sq.m per employee or floorspace of 28.0 sq.m per employee.

Map 15.5 indicates the Precinct’s potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

Most sites within the Precinct have moderate to significant height uplift capacity, accounting for 89% of total site area. Several commercial office and hotel buildings have limited height uplift capacity, as well as the south-eastern pocket of IN2 Light Industrial land.

Additional Height Uplift Capacity, May 2021 Map 15.5



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 15.4, the Mascot Precinct comprises of 195 lots, of which 22 are vacant. Vacant sites are fairly distributed in size. Half of sites 2,000 sq.m or below in size while 41% are over 4,000 sq.m.

Over half of developed sites are 1,000 sq.m or less in size, due to the large presence of small standalone warehouses within the Precinct, particularly along Chalmers Crescent and Ewan Street.

Around 29% of all lots are over 4,000 sq.m in size. This is mostly attributed to the

large warehouse and distribution centres located within and around Airgate Business Park.

Lots that are 2,000 sq.m or less in size achieve an average site coverage of 59% to 70%. This falls to around 48% to 56% for lots over 2,000 sq.m, likely due to the large amounts of at-grade car parking available on bigger sites. These at-grade car parking lots provide an opportunity for future densification.

Distribution of Sites by Lot Size, Mascot Precinct

Table 15.4

Size	Vacant Sites*		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	3	14%	46	27%	59%	49	25%
501 - 1,000 sq.m	4	18%	43	25%	70%	47	24%
1,001 - 2,000 sq.m	3	14%	12	7%	65%	15	8%
2,001 - 3,000 sq.m	1	5%	19	11%	56%	20	10%
3,001 - 4,000 sq.m	2	9%	4	2%	56%	6	3%
4,001 - 5,000 sq.m	5	23%	15	9%	52%	20	10%
More than 5,000 sq.m	4	18%	34	20%	48%	38	19%
Total	22	100%	173	100%	51%	195	100%

Note: Figures are based on land areas as at May 2021 and may differ from ELDM 2020 developed and undeveloped area estimates.

*A site is considered vacant if the total building area on the site is less than 10% of the site area.

Source: Geoscape Australia; Urbis

16. MOOREBANK

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

Moorebank Precinct Overview

Moorebank Industrial Precinct (Map 16.1) is located around 27 kilometres southwest of the Sydney CBD. As at January 2020, the Moorebank Precinct covered an area of approximately 492.2 hectares, of which approximately 175.9 hectares (35.7%) remained undeveloped.

The Precinct's major access route connections are the M5 Motorway, Moorebank Avenue, Newbridge Road and Heathcote Road.

A summary of the locational characteristics of the Precinct is provided in Table 16.1.

Location and Key Transport Infrastructure

Map 16.1



Location Characteristics

Table 16.1

Characteristic	Detail
Distance to nearest train station	Directly northwest (Liverpool Station)
Distance to nearest motorway	Runs through the Precinct along Moorebank Ave (M5 Motorway)
B-Double truck access	Yes
Surrounding land uses	<ul style="list-style-type: none"> Georges River and Haigh Park to the north, with Liverpool CBD beyond Low density residential dwellings in Wattle Grove and Moorebank to the east Holsworthy Military Area to the south Georges River to the west and low density residential dwellings in Casula beyond

Strengths

1. Construction of the intermodal facility has brought significant investment into the Precinct and will provide efficient connections to Port Botany
2. Proximity to M5 Motorway, which runs directly through the Precinct

Weaknesses

1. Potential for conflicting land uses, given the low density residential zone located within the Precinct's north
2. Limited accessibility to Liverpool Station for most of the Precinct, given that it is isolated to the north

PLANNING - WHAT IS THE ZONING MIX?

Map 16.2 opposite provides a summary of the relevant planning instruments and controls for the Moorebank Precinct.

The IN1 General Industrial and IN2 Light Industrial zones of the Precinct typically encourage traditional industrial warehouse uses.

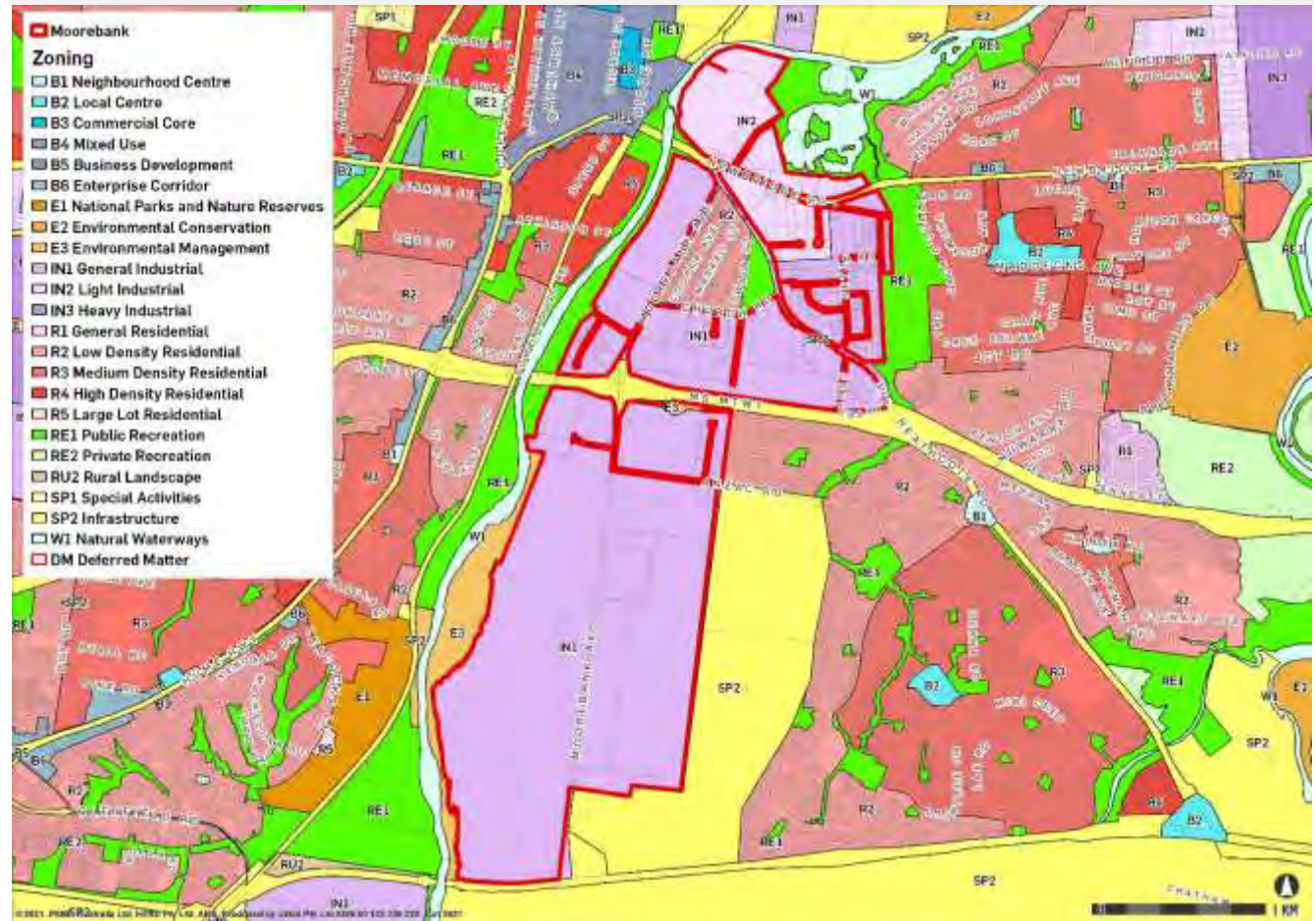
The Precinct largely borders Georges River to the north and west, complemented by pockets of environmental protection areas and public recreation spaces. To the east are areas zoned R2 Medium density Residential and R3 High Density Residential, although it predominantly contain low to medium density dwellings.

The SP2 Infrastructure zone to the south is dedicated to the Holsworthy Military Area.

There are height limits under planning controls for this Precinct.

Zoning Map

Map 16.2



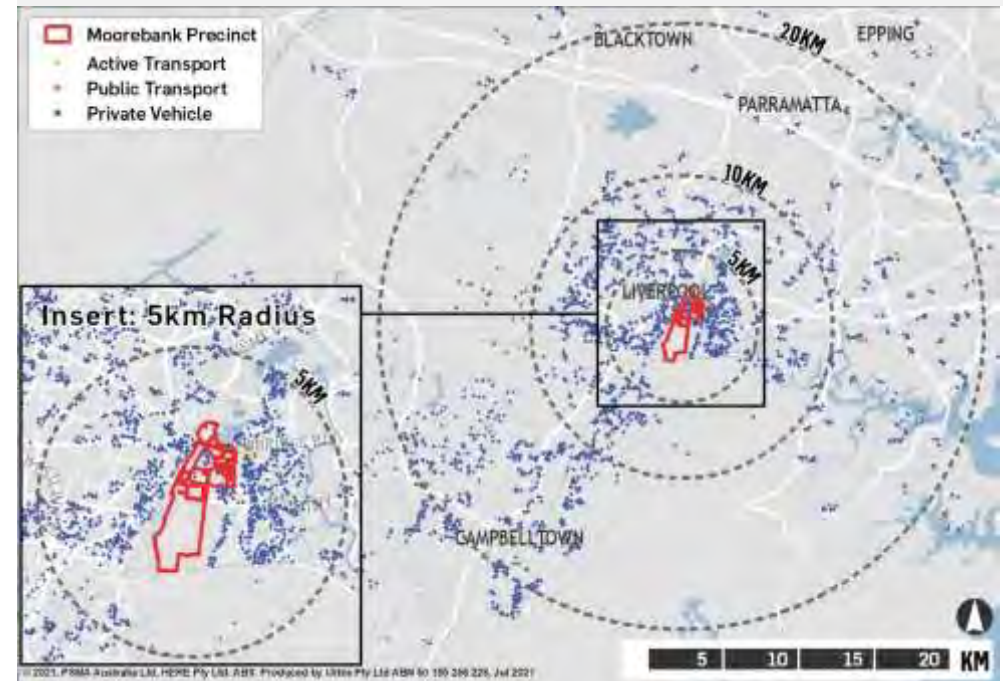
EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

Map 16.3 shows the place of residence of those who work in the Moorebank Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car, public transport or active transport (e.g. walking or cycling).

Workers' residences are largely concentrated in southwest Sydney. Approximately 51% of precinct workers live within 10 km of the Precinct, predominantly residing in the residential areas directly to the east and west of the Precinct. Beyond the 10 km radius, majority of precinct workers reside within the Campbelltown region. Private vehicles are the main mode of transport to work for precinct workers.

Where do Precinct Workers Live, 2016

Map 16.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

Uses within this Precinct are consistent with an IN1 General Industrial and IN2 Light Industrial zoning. Map 16.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct.

The Precinct is characterised by a mix of older, smaller warehouses to the northeast of the Precinct and relatively modern, large warehouses to the west and south. Buildings within the Precinct are one to two storeys.

To the east of Heathcote Road and north of Newbridge Road lies the more established parts of the Precinct. This area largely features older-style standalone warehouses that are densely clustered. Most of these warehouses are relatively small, although there are several manufacturing facilities housed in larger warehouses, including foam, plastic and concrete manufacturers, generally found to the north.

A few strata units can be found along Heathcote Road. Sites along Heathcote and Newbridge Roads have high visibility to passing traffic and relatively large setbacks from the road. Sites along the north of Newbridge Road are only accessible to eastbound traffic, while sites to the south are only accessible to westbound traffic. Congestion issues arise during peak hour at the intersection of Heathcote and Newbridge Roads, particularly for westbound traffic into the Liverpool CBD.

To the west of Heathcote Road and north of Anzac Road are larger warehouses, most of which lie within one of three industrial estates, all owned by Goodman. These are MFive Industry Park, Centenary Distribution Centre and Moorebank Business Park, which house the Precinct's 3PL and distribution centre uses. Much of the land to the south of Church Road is predominantly used for automotive auctions, as well as equipment hire and shipping container sales. These uses require large areas of outdoor space for vehicle, equipment and container storage. Also featured here are a large pharmaceuticals manufacturing and bread manufacturing facilities.

Bounded by Moorebank Avenue, Heathcote Road and Church Road is a low-density residential area in the Precinct's north. There is potential for conflict of uses, such as noise pollution issues, given that all three major roads allow for B-double access. However, these streets are moderately buffered from neighbouring industrial uses via natural vegetation or large setbacks from the road.

To the south of the Precinct lies much of the Precinct's current development activity, attributed to the development of an intermodal terminal and warehousing facilities at Moorebank Logistics Park. The industrial park comprises an eastern and western precinct, divided by Moorebank Avenue. Moorebank Precinct East currently contains several large distribution warehouses and the IMEX (import-export) terminal. This terminal allows for direct rail connections to Port Botany, providing an efficient mode of international container deliveries to and from western Sydney. Moorebank Precinct West has begun site preparation works for the construction of an interstate terminal with additional distribution warehouses.

The Precinct benefits from the centralised positioning of the M5 Motorway interchange along Moorebank Avenue, accessible to both northbound and southbound traffic.

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses



Moorebank Business Park features large, modern warehouses. (Map 1.4A).



The IMEX terminal in Moorebank Logistics Park's eastern precinct (Map 1.4A).



Amazon's fulfillment centre situated in Centenary Distribution Centre (Map 1.4C).



Older-style standalone warehouses are typically seen to the east of Heathcote Road (Map 1.4C).

ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 16.1 illustrates the type of uses (determined by property type and business function) that currently occupy the Moorebank Precinct. The data was collected by Urbis in May 2021 and included a combination of:

- Physical inspection of properties within the Precinct
- Geographic information system analysis
- Interviews with various tenants.

As at May 2021, Urbis estimates that the Precinct has around 1,229,247 sq.m of industrial floorspace on approximately 2,574,445 sq.m of developed land area. The Precinct predominantly serves a metropolitan role.

The most prevalent typology within the Precinct are 3PL / Distribution Warehouses, which account for approximately 55% of total developed land area. A clear cluster of logistics functions is evident in the Precinct, particularly east of Moorebank Avenue and south of the M5 Motorway.

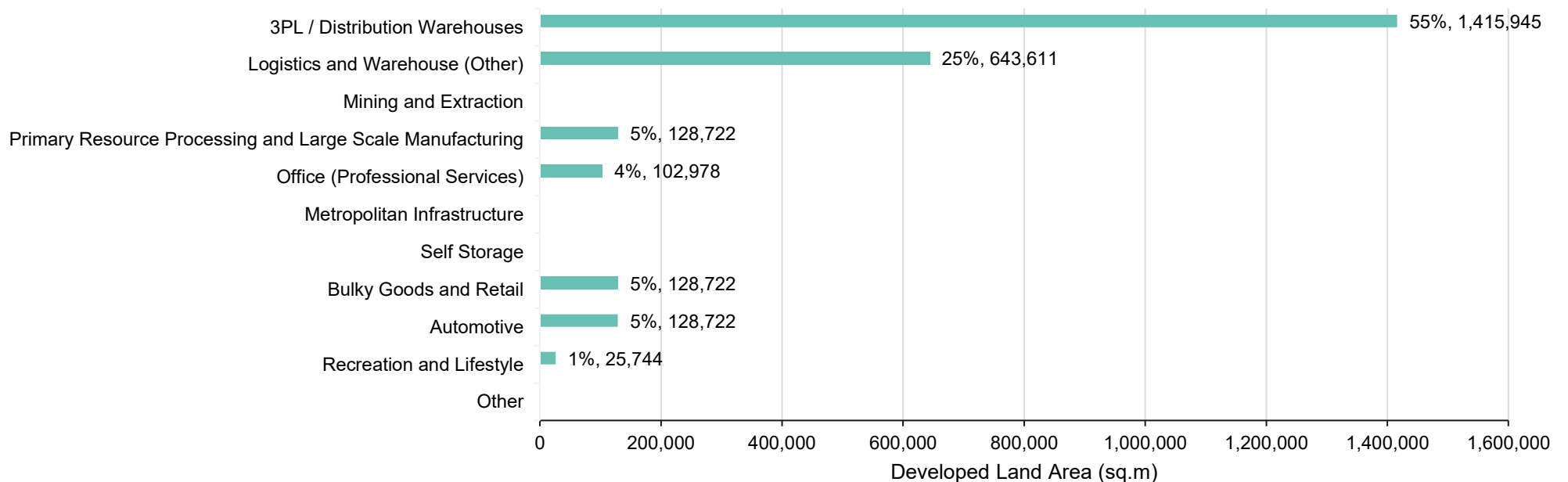
Logistics and Warehouse (Other) comprise around 25% of developed land use. These uses are largely concentrated to the east of Heathcote Road.

Approximately 5% of developed land area is attributed to Primary Resource Processing and Large Scale Manufacturing, particularly north of Newbridge Road and along Church Road.

There is also a small presence of Office (Professional Services), Bulky Goods and Retail, Automotive and Recreation and Lifestyle uses.

Developed Land Area by Typology, Moorebank Precinct

Chart 16.1



Source: Urbis

MAP 16.4: ROLE AND FUNCTION - WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the typology of current developed land area in the Moorebank Precinct and examples of tenants are detailed in Table 16.2. Although logistics and warehouse uses dominate the industrial land typology, business types operating within the Precinct are wide and varied.

3PL / Distribution Warehouses account for around 55% of developed land use, with businesses varying from records storage facilities to vehicle parts distribution. Logistics and Warehouse (Other) uses account for 25% of developed

land area and comprise several food products suppliers, construction materials suppliers and various equipment suppliers.

Automotive uses comprise an additional 5% of developed land area, which predominantly comprises large vehicle auction sites. There are also several manufacturing facilities, which range from foam and pharmaceutical products to food manufacturing.

Developed Land Area Distribution by Typology, Moorebank Precinct

Table 16.2

	Distribution	Example Tenants
3PL / Distribution Warehouses	55%	XL Express Logistics, Emo Trans, Toll, Dexion Shelving (intralogistics, pallet racking), Fimer (solar inverter distributor) MFive Industry Park: FUJIFILM Data Management Solutions (records storage facility), Cospex (concrete contractors), Aidacare (healthcare equipment), Simon National Carriers (3PL), Iron Mountain (records storage facility), Newbee Tyre (tyre distribution) Moorebank Business Park: Rohlig (3PL), SC Johnson Professional (household cleaning products), Mayo Hardware (outdoor lifestyle products), Invenco (3PL), BMW (spare parts facility), Toyota Material Handling (forklift distribution) Centenary Distribution Centre: Coates Hire (distribution centre), Amazon Fullfilment Centre
Logistics and Warehouse (Other)	25%	Toyota (materials handling), Aida Care (healthcare equipment), Allcott Hire (equipment hire), Coates Hire (equipment hire), Marrickville Freezers (food products supplier), Steel Supplies Moorebank (steel and aluminum supplier), Rapid Sheetmetal (sheet metal contractor), Moorebank Aerosol Fillers (chemicals supplier), Geofabrics (geosynthetics supplier), Warlord (army products and clothing), Nifty Foods (food products supplier), Thornado (water pump supplier), Food on the Move (food products supplier), Bear Designs (signwriters), Moblack Hydraulics (hydraulics manufacturer), Sammi Australia (food products supplier), Multipack (contract packaging supplier), Cooks Plumbing (plumbing services), Abbey Timber (timber decking suppliers), Enth (joinery), Vertex Allsands (quarry and landscape supplies), Sphere Healthcare (pharmaceuticals supplier), Amtek (custom vehicular solutions), Lynch Group (flowers and plants wholesaler)
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing	5%	Adbri (masonry production plant), , Holcim (concrete plant), Joyce Foam Products (manufacturing and distribution), Goodman Fielder Manufacturing Plant (bread manufacturing facility), Sphere Healthcare (pharmaceuticals manufacturing), TACCA Plastics, Civilmart BCP Precast (precast concrete manufacturing)
Office (Professional Services)	4%	Ultimate Security (electronic security and guard services), Sphere Healthcare (pharmaceuticals research and development, sales, marketing, customer support), Newbee Tyre Head Office
Metropolitan Infrastructure	<1%	Moorebank Zone Substation
Self Storage	<1%	Payless Self Storage
Bulky Goods and Retail	5%	Grays Online (auction house), Carpet Court (carpet store), BOC Gas & Gear (gas and welding equipment)
Automotive	5%	Lupica Motor Repairs, Andrew Smash Repair, Alliance Motor Auctions, Manheim (auto auction), Liverpool Exhaust (auto repairs)
Recreation and Lifestyle	1%	Altitude Gymnastics, Fernwood Fitness, Crossfit BFS (fitness), F45 Training (fitness), Iron Gym, Kings Academy of Martial Arts
Other	<1%	Toyota Australia Technical Training Centre (training facility)
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 16.3 shows the quantum of zoned industrial land within the Moorebank Precinct.

As at December 2020, there was a total of 492.2 hectares of zoned industrial land in the Moorebank Precinct, of which 316.3 hectares has been developed and 175.9 hectares (35.7%) remained undeveloped.

Between 2016 and 2020, total industrial demand has contracted significantly, recording an average decline of 1.6 hectares per annum. This was due to the demolition of buildings south of Anzac Road in the Precinct's south for the development of the Moorebank Intermodal Terminal Facility and Moorebank Logistics Park. These projects are currently under construction and have an estimated value of \$1.1 billion. There are an additional 17 projects in the future development pipeline with an estimated value of \$230.6 million.

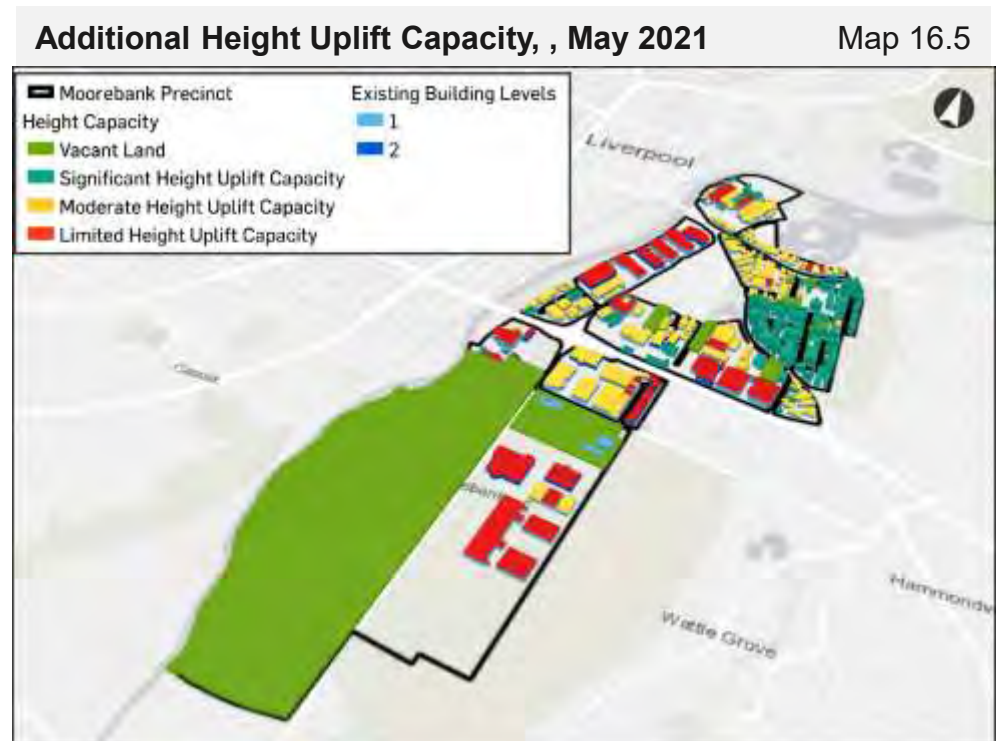
As at 2021, total employment in the precinct is estimated to be 10,335 jobs. Of the 316.3 hectares of developed industrial land, there is approximately 1,228,247 sq.m of Gross Floor Area. This equates to an average land area of 306.0 sq.m per employee or floorspace of 118.9 sq.m per employee.

Map 16.5 indicates the Precinct's potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

Approximately 44% of total land area within the Precinct contains existing buildings with moderate to significant height uplift potential, predominantly on sites east of Heathcote Road. Majority of vacant land is to the south of the M5 Motorway, where Moorebank Logistics Park and the Intermodal are currently being built.

Factor	Value
Total Employment, 2021 projection	10,335 jobs
Total Developed Land Area, 2020	316.3 ha
Total Undeveloped Land Area, 2020	175.9 ha
Future Pipeline and Estimated Value	19 projects, ~\$1.3b
Average Annual Land Take-Up (2016 – 2020)	-1.6 ha
Total Floorspace, 2021 (Gross Floor Area)	1,229,247 sq.m
Average Land Area per Employee	306.0 sq.m
Average Gross Floor Area per Employee	118.9 sq.m

Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 16.4, the Moorebank Precinct comprises of 269 lots, of which 14 are vacant. Most vacant sites larger than 5,000 sq.m are located to the south of the M5 Motorway, while smaller vacant sites are situated to the north.

Of developed sites, 48% are between 1,001 sq.m and 3,000 sq.m in size. Around 32% of sites are larger than 4,000 sq.m, while there are few sites that are

1,000 sq.m or smaller.

Average site coverage for the Precinct is relatively low. Average site coverage decreases as site size increases, falling from 58% for sites between 501 sq.m to 1,000 sq.m down to 40% for sites over 5,000 sq.m.

Distribution of Sites by Lot Size, Moorebank Precinct

Table 16.4

Size	Vacant Sites*		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	1	7%	0	0%	0%	1	0%
501 - 1,000 sq.m	1	7%	26	10%	58%	27	10%
1,001 - 2,000 sq.m	2	14%	69	27%	56%	71	26%
2,001 - 3,000 sq.m	0	0%	54	21%	54%	54	20%
3,001 - 4,000 sq.m	1	7%	25	10%	51%	26	10%
4,001 - 5,000 sq.m	0	0%	20	8%	48%	20	7%
More than 5,000 sq.m	9	64%	61	24%	40%	70	26%
Total	14	100%	255	100%	42%	269	100%

Note: Figures are based on land areas as at May 2021 and may differ from ELDM 2020 developed and undeveloped area estimates.

*A site is considered vacant if the total building area on the site is less than 10% of the site area.

Source: Geoscape Australia; Urbis

17. NORTH PENRITIH

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

North Penrith Precinct Overview

North Penrith Industrial Precinct (Map 17.1) is located around 49.8 kilometres west of the Sydney CBD and 16.6 kilometres north of the future Western Sydney International Airport.

As at January 2020, the North Penrith Precinct covered an area of approximately 256.9 hectares, of which approximately 75.4 hectares (29.3%) remained undeveloped.

The Precinct's major access route connections are Castlereagh Road, Great Western Highway and Mulgoa Road. The proposed Outer Sydney Orbital can potentially improve the accessibility and desirability of this precinct.

A summary of the locational characteristics of the Precinct is provided in Table 17.1.

Location and Key Transport Infrastructure

Map 17.1



Location Characteristics

Table 17.1

Characteristic	Detail
Distance to nearest train station	Directly south of the Precinct (Penrith Station)
Distance to nearest motorway	4.3 kilometres south (M4 Motorway)
B-Double truck access	Yes
Surrounding land uses	<ul style="list-style-type: none"> • Sydney International Regatta Centre and low-density residential dwellings in Cranebrook to the north • Low density residential dwellings in Penrith to the east • Penrith City Centre, including Westfield Penrith, and the railway line to the south • The Nepean River to the west

Strengths

1. Large pockets of vacant land with development potential dispersed throughout the Precinct
2. Proximity of southern half of the Precinct to Penrith Station

Weaknesses

1. Traffic congestion along Castlereagh Road during peak hour

PLANNING - WHAT IS THE ZONING MIX?

Map 17.2 opposite provides a summary of the relevant planning instruments and controls for the North Penrith Precinct.

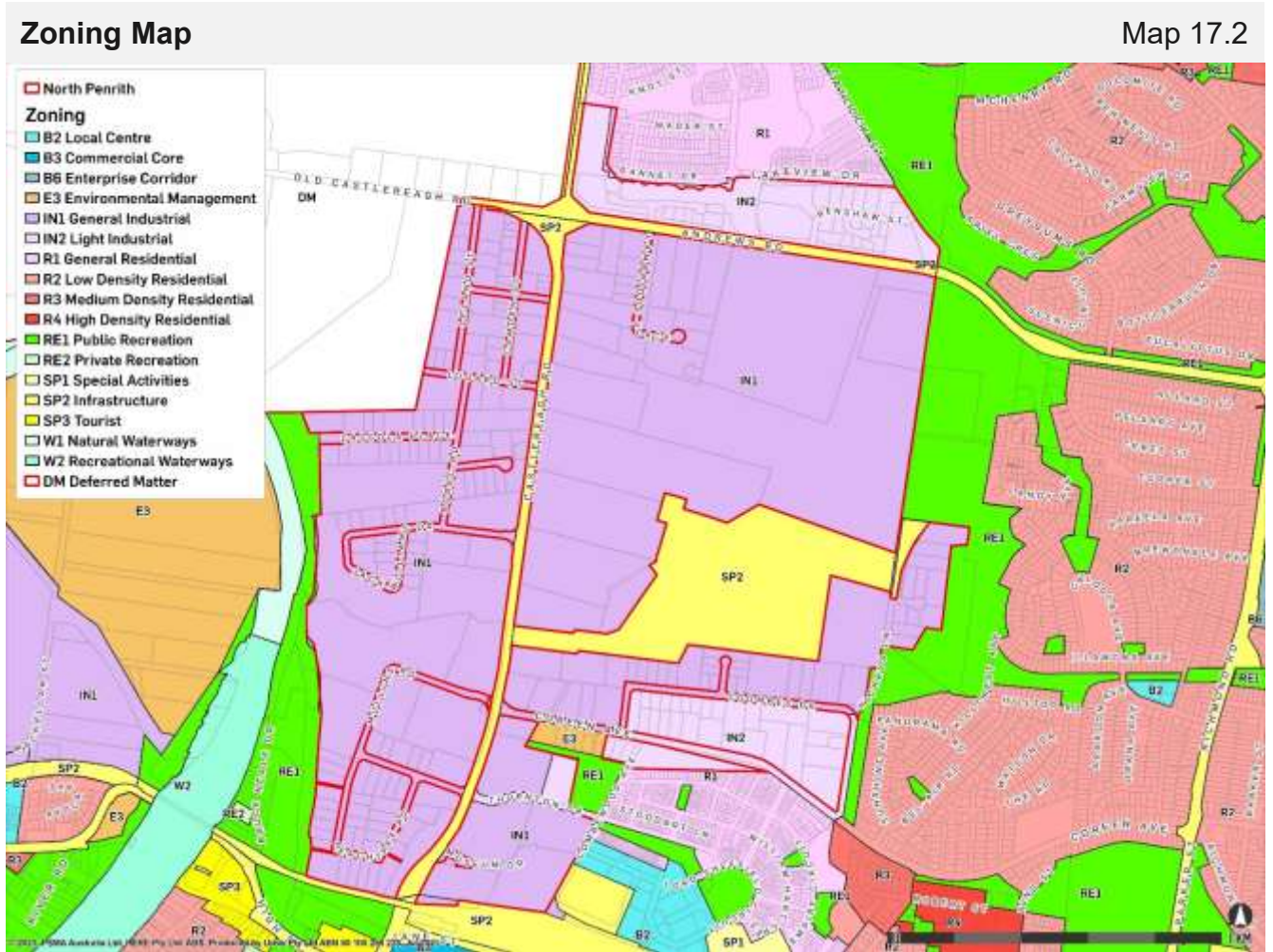
The Precinct largely comprises of IN1 General Industrial zones, with pockets of IN2 Light Industrial zones in the north and southeast. The zoning of the Precinct typically encourages traditional industrial uses.

The Precinct is largely surrounded by low density residential dwellings to the north and east. Residential areas to the east are well buffered from the Precinct via natural vegetation within the RE1 Public Recreation zone.

To the northwest lies a DM Deferred Matter zone, which comprises Sydney International Regatta and Penrith Lakes.

An SP2 Infrastructure zone is situated in the centre of the Precinct, which comprises Penrith Water Recycling Plant. This does not form part of the Precinct.

There are height limits in planning controls within this Precinct.



EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

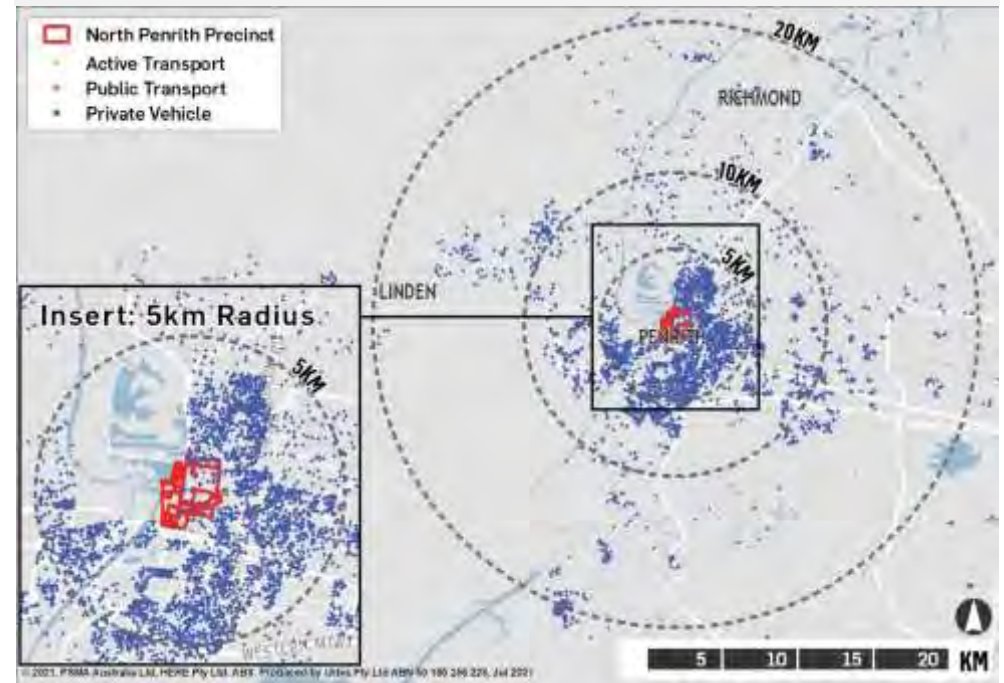
Map 17.3 shows the place of residence of those who work in the North Penrith Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car, public transport or active transport (e.g. walking or cycling).

The North Penrith Precinct has a large local worker population, with almost half (48%) of workers residing within 5 km of the Precinct. Local worker residences are largely concentrated to the east of the Nepean River. A further 25% of precinct workers live within a 5km to 10 km radius.

Almost all workers travel to work by private vehicles, despite Penrith Station located just south of the Precinct. This is likely due to the ample on-site and street parking available within the Precinct and proximity of majority of workers to the Precinct, whereby driving is the most viable option.

Where do Precinct Workers Live, 2016

Map 17.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

The current tenants within this Precinct are consistent with the permitted uses for IN1 General Industrial and IN2 Light Industrial. Map 17.4 shows the levels of each building and includes references to images in this section of the report, providing a snapshot of the Precinct.

The Precinct is characterised by a mix of modern building stock to the north and older building stock to the south, almost all of which are one level. Buildings are typically larger in nature, although a few smaller strata office/warehouses are evident particularly to the southeast and southwest of the Precinct. Roads within the Precinct are generally wide and most provide street parking, apart from Castlereagh and Andrews Roads.

The Precinct features a cluster of construction-related business uses, particularly building materials suppliers, construction equipment providers, construction companies and solar panel suppliers. These companies are housed in standalone or strata unit warehouses with ancillary offices and can be found dispersed throughout the Precinct.

Older, more established buildings can largely be found east of Castlereagh Road and along Coombes Drive. This includes Penrith Valley Industrial Centre, a large site containing seven blocks of old, yet well-maintained strata warehouse/office

units. A large number of units appeared vacant, particularly those furthest from the driveway entrance.

There are a number of car showrooms and bulky goods retail businesses concentrated along Castlereagh Road, which benefit from high traffic exposure. Given the larger sites within the Precinct, most vehicle sales businesses comprise at-grade car yards for vehicle display, in addition to the typical indoor showrooms seen in other precincts.

Situated along Lambridge Place is a modern recreation and lifestyle hub, featuring a fitness club, aquatic centre, childcare centre and a health foods café.

Along Salmon Close and Renshaw Streets in the north of the Precinct are newly established buildings. This includes Waterside Business Park along the west of Salmon Close, which was completed in early 2021. The business park features strata unit warehouse/offices of various sizes with unique architectural finishes fronting Andrews Road, providing maximum visibility to passing traffic. Additional strata warehouse units along Renshaw Street are currently under construction. An acoustic wall separates these streets from Stockland's adjacent Waterside residential estate to the north, providing a physical and acoustic buffer from the Precinct.



Older style strata warehouses with ancillary office uses found along Borec Road (Map 1.4A).



A recreational hub can be found along Lambridge Place to the Precinct's north (Map 1.4B).



New strata warehouse units in Waterside Business Park, situated to the north of the Precinct (Map x.C)

ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 17.1 illustrates the type of uses (determined by property type and business function) that currently occupy the North Penrith Precinct. The data was collected by Urbis in May 2021 and included a combination of:

- Physical inspection of properties within the Precinct
- Geographic information system analysis
- Interviews with various tenants.

As at May 2021, Urbis estimates that the Precinct has around 599,529 sq.m of industrial floorspace on approximately 1,873,018 sq.m of developed land area. The Precinct largely serves a metropolitan function.

The most prevalent uses within the Precinct are Logistics and Warehouse (Other), accounting for around 50% of total developed land area. These uses are typically housed within small warehouses and strata units, both with ancillary office uses, dispersed throughout the Precinct.

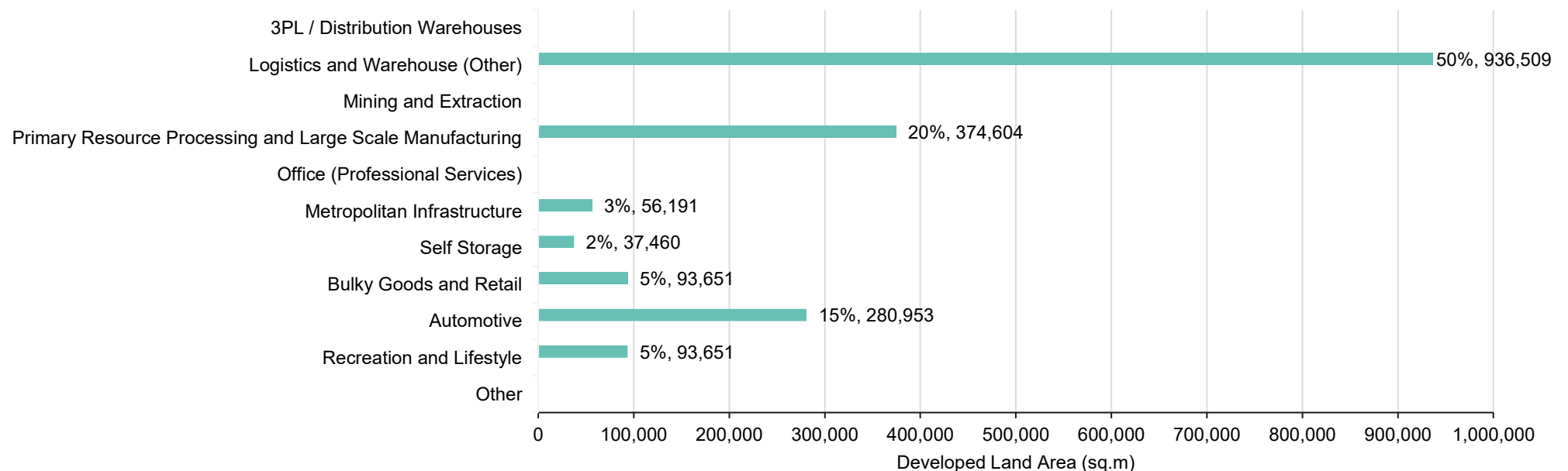
Primary Resource Processing and Large Scale Manufacturing accounts for approximately 20% of developed land area. These uses are typically found in larger warehouses throughout the Precinct.

Automotive uses comprise around 15% of developed land area and are largely concentrated along Castlereagh Road. These uses are generally small office or showroom buildings with large outdoor caryards.

Other uses present within the Precinct include Metropolitan Infrastructure, Self Storage facilities, Bulky Goods and Retail and Recreation and Lifestyle.

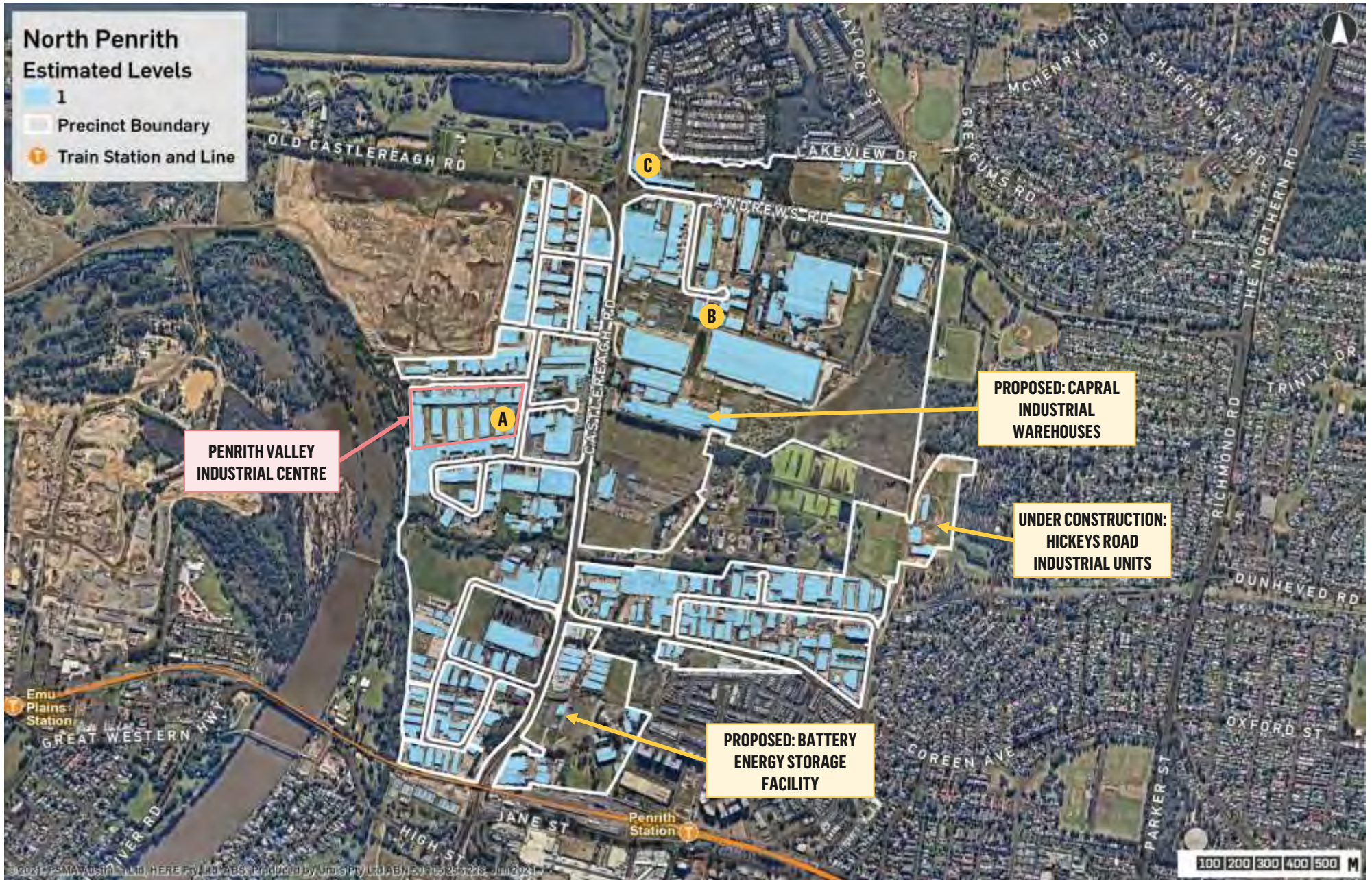
Developed Land Area by Typology, North Penrith Precinct

Chart 17.1



Source: Urbis

MAP 17.4: ROLE AND FUNCTION - WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the typology of current developed land area in the North Penrith Precinct and examples of tenants are detailed in Table 17.2.

Logistics and Warehouse (Other) uses dominate the industrial land typology within the Precinct, accounting for around 50% of total developed land area.

There is a large cluster of businesses servicing the construction industry, from supplying building materials and landscaping through to construction equipment.

There is a large Primary Resource Processing and Large Scale Manufacturing presence dispersed throughout the Precinct, accounting for around 20% of total developed land area. Businesses include recycling facilities, dairy plants and aluminum manufacturing.

Approximately 15% of total land area is attributed to Automotive uses, largely located along Castlereagh Road. These are typically vehicle sales that range from cars to campervans and trailers.

Developed Land Area Distribution by Typology, North Penrith Precinct

Table 17.2

	Distribution	Example Tenants
3PL / Distribution Warehouses	<1%	Food Boss (refrigerated logistics)
Logistics and Warehouse (Other)	50%	The Green Group (construction company), Mackays Furniture Transport, Full Strength Scaffolding (scaffolding rentals), Meyer Timber (timber wholesaler), Fantastic Furniture Warehouse, Underground Coffee Roasters, Interpak (plastic packaging), JK Williams (excavation contractors), Cormack Packaging (office and warehouse), Infrabuild Steel Centre (steel supplier), Westaflex (air conditioning systems), Nepean Boltmaster (fastening system supplier), Willowdene Constructions (construction company), DIY Kitchen (kitchen construction supplies), Rocksolid Stone (sandstone), Alpha Catering Equipment (commercial catering supplies), Nepean Landscape Supplies, Penrith Solar Centre (solar panels), Rusty Penny Brewing, Mabey (civil construction equipment hire)
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing	20%	Nature's Best Water (bottled water manufacturing), Western Suburbs Concrete (concrete plant), Styrofoam Industries (expanded polystyrene manufacturing), Currogated Carton Products (cardboard manufacturer), GEM Frame and Truss (truss manufacturer), Return & Earn (recycling), Bega Dairy and Drinks / Dairy Farmers (dairy plant), Capral Aluminium (aluminium manufacturing), Visy Glass (manufacturing), Visy Glass Recycling
Office (Professional Services)	<1%	Healthklinix (medical centre), Cranebrook Doctors (medical centre)
Metropolitan Infrastructure	3%	Endeavour Energy Penrith Substation, Busways Depot
Self Storage	2%	Kennards Storage, Storage King, Global Self Storage
Bulky Goods and Retail	5%	Bunnings Warehouse, Reece's Plumbing, Stratco, Total Tools, Petbarn, Beaumont Tiles, Tradelink
Automotive	15%	MG, Holden, RV vans, Subaru, Emu RV, Bridgestone Tyres, Hertz, Accident Repair Management, Tempe Tyre and Wheel Centre, Allied Equipment Sales, Ezytrail Campers, Custom Truck Accessories,
Recreation and Lifestyle	5%	Museum of Fire (museum), HVTC Sydney (apprenticeship and training provider), Productivity Bootcamp (construction industry training), Peachtree Hotel (pub), Atmosphere Health & Fitness Club, Nepean Aquatic Centre, Penrith Indoor Sports and Recreation, Wiggles and Giggie Early Learning
Other		
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 17.3 shows the quantum of zoned industrial land within the North Penrith Precinct.

As at December 2020, there was a total of 256.9 hectares of zoned industrial land in the North Penrith Precinct, of which 181.5 hectares has been developed and 75.4 hectares (29.3%) remained undeveloped.

Between 2016 and 2020, the Precinct has experienced moderate growth, recording an average land take-up rate of 4.6 hectares per annum. There are currently 21 projects in the future pipeline with an estimated value of \$166 million. This includes the construction of additional industrial buildings for Capral Aluminum and a 20MW Battery Energy Storage System within Endeavour Energy Penrith Substation.

Nature of Employment and Land Table 17.3

Factor	Value
Total Employment, 2021 projection	7,126 jobs
Total Developed Land Area, 2020	181.5 ha
Total Undeveloped Land Area, 2020	75.4 ha
Future Pipeline and Estimated Value	21 projects, ~\$166m
Average Annual Land Take-Up (2016 – 2020)	4.6 ha
Total Floorspace, 2021 (Gross Floor Area)	599,529 sq.m
Average Land Area per Employee	254.7 sq.m
Average Gross Floor Area per Employee	84.1 sq.m

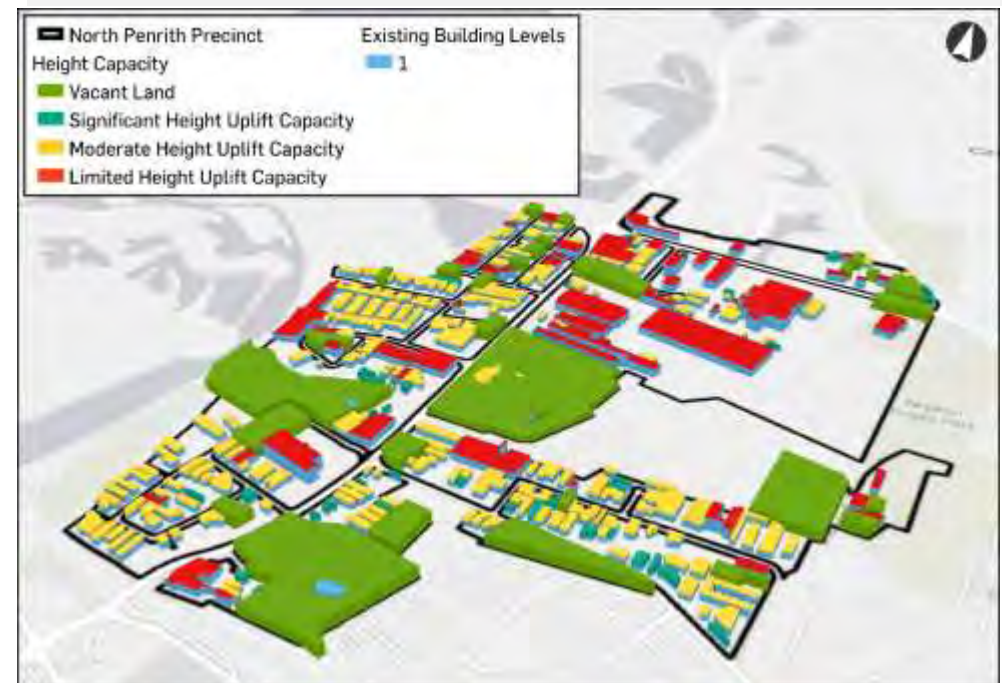
Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis

As at 2021, total employment in the precinct is estimated to be 7,126 jobs. Of the 181.5 hectares of developed industrial land, there is approximately 599,529 sq.m of Gross Floor Area. This equates to an average land area of 254.7 sq.m per employee or floorspace of 84.1 sq.m per employee.

Map 17.5 indicates the Precinct's potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

Approximately 37% of the Precinct's site area has existing buildings with moderate to significant capacity for additional height, while an additional 36% is considered vacant land.

Additional Height Uplift Capacity, May 2021 Map 17.5



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 17.4, the North Penrith Precinct comprises of 267 lots, of which 44 are vacant. Overall, sites within the Precinct tend to be skewed toward larger sites. There are no lots that are 500 sq.m or less and very few lots that are between 501 sq.m and 1,000 sq.m.

A majority 50% of vacant sites are over 5,000 sq.m in size while a further 23% are between 1,001 and 2000 sq.m. There is only one vacant site that is 1,000

sq.m or less.

Of the developed sites, 40% are between 2,001 sq.m and 3,000 sq.m in size while an additional 40% of sites are more than 4,000 sq.m.

Average site coverage decreases as size of site increases, ranging from 93% for sites between 501 sq.m and 1,000 sq.m down to 32% for sites over 5,000 sq.m.

Distribution of Sites by Lot Size, North Penrith Precinct

Table 17.4

Size	Vacant Sites*		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	0	0%	0	0%	0%	0	0%
501 - 1,000 sq.m	1	2%	3	1%	93%	4	1%
1,001 - 2,000 sq.m	11	25%	25	11%	59%	36	13%
2,001 - 3,000 sq.m	5	11%	90	40%	47%	95	36%
3,001 - 4,000 sq.m	3	7%	16	7%	47%	19	7%
4,001 - 5,000 sq.m	2	5%	25	11%	44%	27	10%
More than 5,000 sq.m	22	50%	64	29%	32%	86	32%
Total	44	100%	223	100%	35%	267	100%

Note: Figures are based on land areas as at May 2021 and may differ from ELDM 2020 developed and undeveloped area estimates.

*A site is considered vacant if the total building area on the site is less than 10% of the site area.

Source: Geoscape Australia; Urbis

18. SMEATON GRANGE

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

Smeaton Grange Precinct Overview

Smeaton Grange Industrial Precinct (Map 18.1) is located around 45.6 kilometres southwest of the Sydney CBD and 10 kilometres south of the future Western Sydney International Airport.

As at January 2020, the Smeaton Grange Precinct covered an area of approximately 198.9 hectares, of which 35.4 hectares (17.8%) remained undeveloped.

The Precinct's major access route connections are Camden Valley Way and Narellan Road, for connections to the Hume Motorway and Great Northern Road.

A summary of the locational characteristics of the Precinct is provided in Table 18.1.

Location and Key Transport Infrastructure

Map 18.1



Location Characteristics

Table 18.1

Characteristic	Detail
Distance to nearest train station	4 kilometres southeast (Campbelltown and Macarthur Stations)
Distance to nearest motorway	2 kilometres southeast (Hume Motorway)
B-Double truck access	Yes
Surrounding land uses	<ul style="list-style-type: none"> General Industrial and low density residential dwellings in Gregory Hills to the north Low density residential dwellings in Currans Hill to the east Narellan bulky goods and vehicle showroom precinct as well as additional low density residential dwellings in Narellan Vale to the south Low density residential dwellings in Harrington Park Estate to the west

Strengths

1. Proximity to Western Sydney Airport
2. Proximity to residential growth area and hence nearby workers and customers
3. Proximity to Australian Botanic Garden for recreation

Weaknesses

1. Lack of public transport servicing the area

PLANNING - WHAT IS THE ZONING MIX?

Map 18.2 opposite provides a summary of the relevant planning instruments and controls for the Precinct.

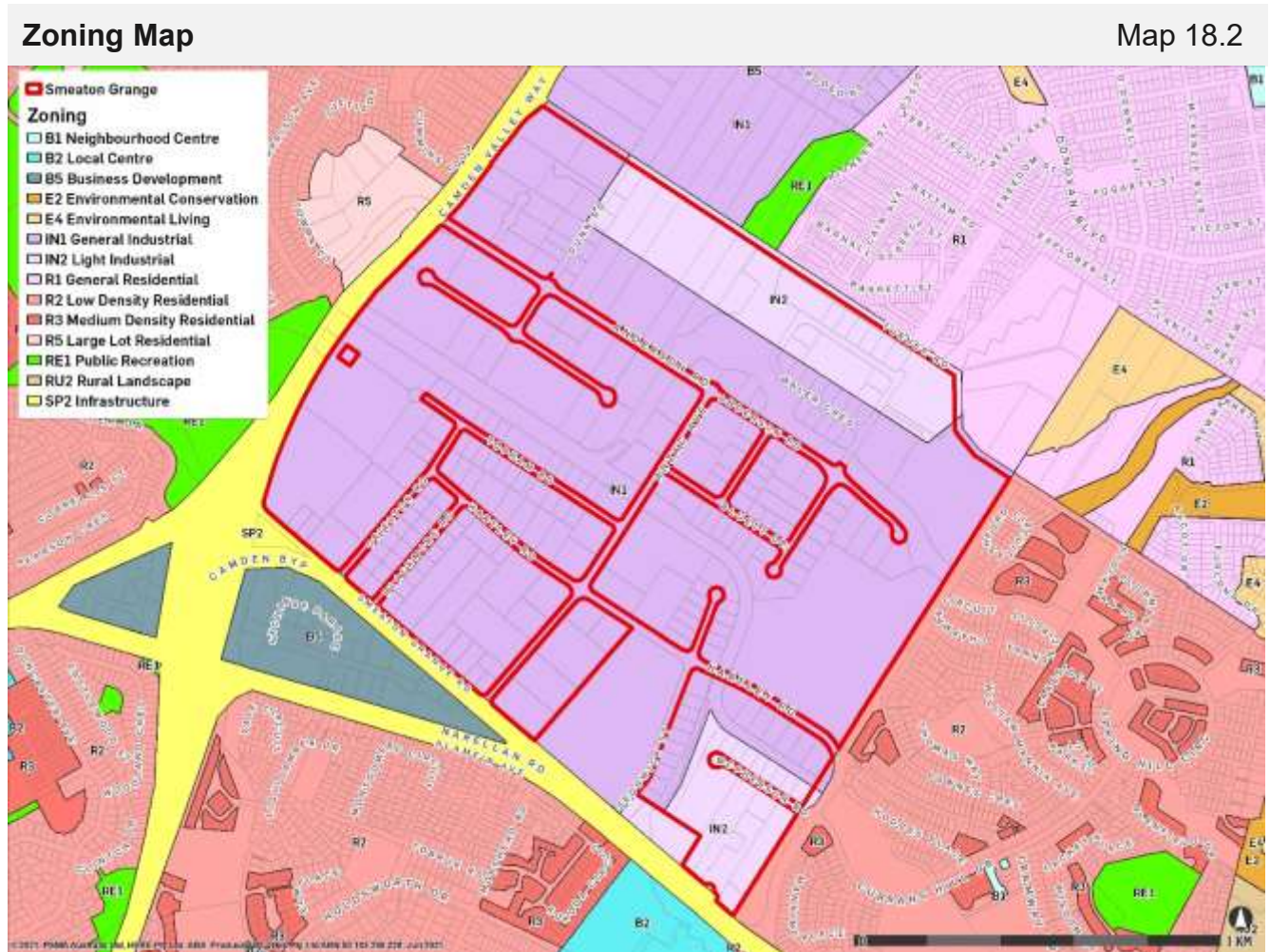
The Smeaton Grange Precinct is used for the purposes of general and light industrial uses and is zoned accordingly, although only a small proportion is zoned for light industrial.

Land to the east, south and west are primarily zoned and used for residential purposes. To the south is a small pocket of B5 Business Development zone, comprising largely bulky goods retailing and automotive showrooms.

Land to the north is zoned IN1 General Industrial and R1 General Residential.

Magdalene Catholic College is situated to the west of Sedgwick Street (south of Hartley Road), which lies outside of the Precinct.

There are height limits in planning controls within the Precinct.



EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

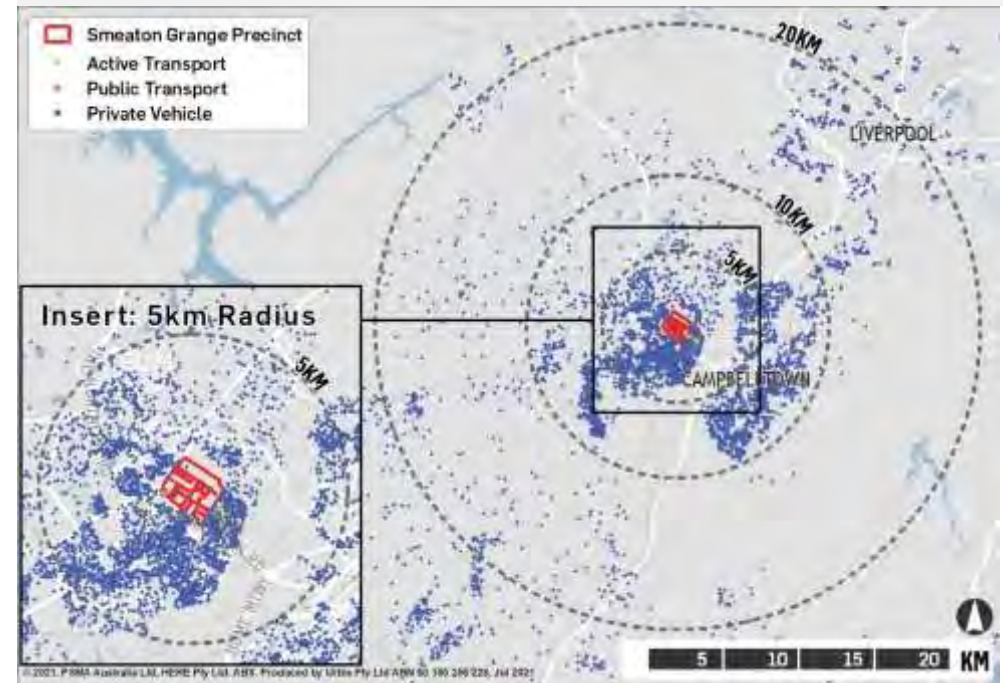
Map 18.3 shows the place of residence of those who work in the Smeaton Grange Industrial Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car or public transport.

Workers' residences are concentrated within the south west Sydney region, with much higher densities occur within 10 km of the Precinct. Around 66% of workers live within 10 km of the Precinct, predominantly in the suburbs of Narellan Vale and Currans Hill, directly to the east and south.

Almost all (99%) of precinct workers travel to work by private vehicles, likely due to the ample on-site and off-street car parking available and lack of public transport routes servicing the Precinct.

Where do Precinct Workers Live, 2016

Map 18.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

Uses within this Precinct are consistent with an IN1 General Industrial and IN2 Light Industrial zonings. Map 18.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct.

The building levels of the Precinct are almost entirely 1-storey buildings, generally comprised of standalone warehouses with ancillary office and strata office/warehouses. These warehouses are large, relative to most warehouses found in Inner to Central Sydney precincts (e.g. Flemington, Mascot).

South of Topham Road lies the more established portion of the Precinct, with relatively older buildings. This area generally features typical industrial uses, such as automotive repairs and servicing, construction-related businesses and concrete plants. However, several professional service businesses can also be found in Anzac Avenue Estate, including legal services, disability service providers and IT services.

To the north of Topham Road are generally newer buildings that have been completed over the past decade. This includes an Amazon Data Centre along Bluett Drive. Construction has commenced on a site along Turner Road, which is

set to comprise 36 strata warehouse units with ancillary office uses upon completion.

Buildings fronting Camden Valley Way, Anderson Road and Dunn Road in the north of the Precinct predominantly feature automotive uses, including vehicle showroom & sales, auto parts sales and auto repairs.

While gyms are found dispersed throughout the Precinct, there is a concentration of recreational uses at the T-intersection along Anderson Road and Anzac Avenue. This includes Revolutions Health and Fitness Centre (2-storeys), Allsports Indoor Sports Centre, Inflatable World Narellan (children's play centre) and several early learning centres.

Businesses located along Hartley Drive and Anderson Road benefit from high exposure to passing traffic, being the two main entrance / exit roads to the Precinct. The Precinct is well buffered from adjacent residential areas in Currans Hill via natural vegetation. Buildings along Turner Road are southward facing, allowing for minimal disturbance to neighbouring residential dwellings (which are largely northward facing).



Modern standalone warehouses are commonly present in the north of the Precinct. (Map 3.A)



The Precinct features relatively large strata office/warehouse units. (Map 3.A)



A concentration of recreational uses can be found along Anderson Road. (Map 3.A)

ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 18.1 illustrates the type of uses (determined by property type and business function) that currently occupy the Precinct. The data was collected by Urbis in May 2021 and included a combination of:

- Physical inspection of properties within the Precinct
- Geographic information system analysis
- Interviews with various tenants.

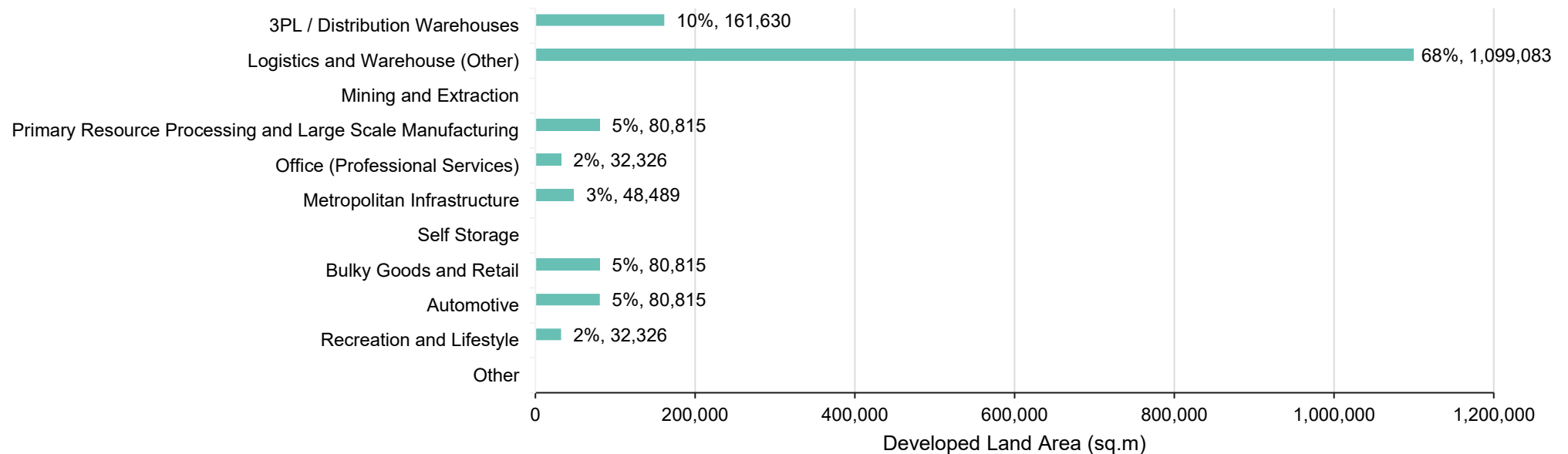
As at May 2021, Urbis estimates that the Precinct has around 724,814 sq.m of industrial floorspace on approximately 1,616,299 sq.m of developed land area. The Precinct predominantly serves a metropolitan role, with some local functions.

The most prevalent buildings within the Precinct are logistics and warehouse spaces, co-located with ancillary office, which account for approximately 68% of total developed land area. 3PL / Distribution Warehouses account for an additional 10% of land use.

The Precinct features a variety of other uses that are widely dispersed throughout. This includes metropolitan functions such as Primary Resource Processing and Large Scale Manufacturing, Metropolitan Infrastructure and more local functions such as Bulky Goods and Retail, Automotive and Recreation and Lifestyle uses.

Developed Land Area by Typology, Smeaton Grange Precinct

Chart 18.1



Source: Urbis

MAP 18.4: ROLE AND FUNCTION - WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the typology of current occupied floorspace in the Smeaton Grange Precinct and examples of tenants are detailed in Table 18.2.

Small Logistics and Warehouse uses dominate the industrial land typology within the Precinct, accounting for approximately 68% of total land area. The types of businesses operating within these warehouses are wide and varied but include equipment suppliers (e.g. chemical and medical equipment), construction

companies and metal suppliers.

There is also a small presence of 3PL/Distribution Warehouses, Office (Professional Services), Primary Resource Processing, Metropolitan Infrastructure, Bulky Goods and Retail, Automotive and Recreation and Lifestyle.

Developed Land Area Distribution by Typology, Smeaton Grange

Table 18.2

	Distribution	Example Tenants
3PL / Distribution Warehouses	10%	Gem Foods (fine foods distributor), Coles (regional distribution centre), General Carrying (logistics), Masterpet (pet products distributor)
Logistics and Warehouse (Other)	68%	Omni Tankers (chemical transportation equipment), Astir (physiotherapy and rehabilitation equipment), Gyprock Trade, Safe Directions Crash Barriers (road barriers and guardrails), BlueSky Modular (construction company), WGC Cranes (crane hire company), Ulrich Aluminium (aluminium suppliers), Cable Away (cable management products), Endeavour Energy (service centre), BioSeptic (sewerage treatment systems), Rise Above Drones (drone suppliers), Edgewater Homes (construction company), Laserbond (engineering company), Artisan Stone (stone suppliers), Australia Post (business centre), Vogelsang (agricultural, industry and wastewater equipment), Cubis (network access products), Easy Signs (signage), Macarthur Film Studios
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing	5%	Concrete plants: Boral Concrete Plant, Gunlake Concrete, Hy-Tec Metal fabrication: Metal Roofing and Building Supplies, True Blue Steel Frames, NJH Group, Lysaght
Office (Professional Services)	2%	Lifeline Office (mental health services), POL Property Group (real estate), Alpha IT Solutions (IT consultants), Maatouks Law Group Office (lawyers), Start Fresh Accounting (accountant), Redmans Accounting (accountant)
Metropolitan Infrastructure	3%	Amazon Data Centre, Narellan Zone Substation, Smeaton Grange Switching Substation
Self Storage		
Bulky Goods and Retail	5%	Tradelink (plumbing supplies), Stratco (home improvements store), 4WD Supa Centre (camping store)
Automotive	5%	Sydney Trucks and Machinery Centre (truck sales), Sloan Built (truck trailers), Bridgestone Tyres, Subaru (service centre), Bosch Car (service centre), MaxiTrans (trailer parts), Audi (sales and showroom), Adtrans Hino (truck sales)
Recreation and Lifestyle	2%	The Pit (martial arts), Commotion Performing Arts (dance studio), Narellan Pilates Studio, Squat Club (fitness), Young Academics Learning Centre, Max Skating (roller skating rink), Revolution Health and Fitness Centre, Gymbaroo (child play centre), Flipout (trampoline park), Atlantis Aquatic Centre
Other	<1%	Lady Macarthur Funerals
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 18.3 shows the quantum of zoned industrial land within the Smeaton Grange Precinct.

As at December 2020, there was a total of 198.9 hectares of zoned industrial land in the Smeaton Grange Precinct, of which 163.5 hectares has been developed and 35.4 hectares (17.8%) remained undeveloped.

Between 2016 and 2020, the Precinct experienced an average land take-up rate of 4.5 hectares per annum. This is due to significant development activity that has occurred north of Topham Road over the past five years. There are 5 projects in the future development pipeline with an estimated value of almost \$61 million. This includes a \$37.8 million data centre development adjacent to the recently completed Amazon Data Centre.

Nature of Employment and Land Table 18.3

Factor	Value
Total Employment, 2021 projection	8,125 jobs
Total Developed Land Area, 2020	163.5 ha
Total Undeveloped Land Area, 2020	35.4 ha
Future Pipeline and Estimated Value	5 projects, ~\$60.7m
Average Annual Land Take-Up (2016 – 2020)	4.5 ha
Total Floorspace, 2021 (Gross Floor Area)	724,814 sq.m
Average Land Area per Employee	201.2 sq.m
Average Gross Floor Area per Employee	89.2 sq.m

Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis

As at 2020, total employment in the Precinct is estimated to be 8,125 jobs. Of the 163.5 hectares of developed industrial land, there is approximately 724,814 sq.m of Gross Floor Area. This equates to an average land area of 201.2 sq.m per employee or floorspace of 89.2 sq.m per employee.

Map 18.5 indicates the Precinct’s potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls, as well as vacant sites that can be developed.

A majority 60% of site area within the Smeaton Grange Precinct have existing buildings with limited capacity for height uplift, while approximately 24% of precinct sites have buildings with moderate to significant height uplift capacity.

Additional Height Uplift Capacity, May 2021

Map 18.5



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 18.4, the Smeaton Grange Precinct comprises of 263 sites, of which 30 are vacant.

Almost 80% of vacant sites are more than 5,000 sq.m in size, while the remaining 20% are between 1,001 sq.m and 5,000 sq.m in size. There are no sites within the Precinct that are 1,000 sq.m or smaller.

Of the developed sites, a majority 52% are between 2,001 sq.m to 3,000 sq.m in size, while only 2% of sites are smaller than this. Lots greater than 5,000 sq.m

account for 29% of developed sites.

Average site coverage decreases as lot sizes increases. Lots ranging from 1,001 sq.m to 2,000 s.q.m recorded an average site coverage of 61% and this falls to 44% for lots that are more than 5,000 sq.m. Given the site utilisation rates for these lots, there maybe potential for further densification on existing sites, subject to any constraints.

Distribution of Sites by Lot Size, Smeaton Grange Precinct

Table 18.4

Size	Vacant Sites		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	0	0%	0	0%	0%	0	0%
501 - 1,000 sq.m	0	0%	0	0%	0%	0	0%
1,001 - 2,000 sq.m	1	3%	5	2%	61%	6	2%
2,001 - 3,000 sq.m	3	10%	121	52%	55%	124	47%
3,001 - 4,000 sq.m	1	3%	14	6%	55%	15	6%
4,001 - 5,000 sq.m	2	7%	25	11%	50%	27	10%
More than 5,000 sq.m	23	77%	68	29%	44%	91	35%
Total	30	100%	233	100%	46%	263	100%

19. ST PETERS, PRINCES HIGHWAY

LOCATION - WHAT ARE THE KEY ATTRIBUTES?

St Peters Precinct Overview

St Peters Industrial Precinct (Map 19.1) is located around 6 kilometres south of the Sydney CBD and 2.6 kilometres north of Sydney Airport.

As at January 2020, the St Peters Precinct covered an area of approximately 16.1 hectares, of which none remained undeveloped.

The Precinct's major access route connections are Princes Highway, Campbell Road and the M8 Motorway Tunnel (WestConnex). The M8 is anticipated to connect to future projects, including the M4-M5 Link, M6 Extension and Sydney Gateway to Sydney Airport and Port Botany.

A summary of the locational characteristics of the Precinct is provided in Table 19.1.

Location and Key Transport Infrastructure

Map 19.1



Location Characteristics

Table 19.1

Characteristic	Detail
Distance to nearest train station	950 metres north (St Peters Station)
Distance to nearest motorway	850 metres southeast (M8 Motorway)
B-Double truck access	No
Surrounding land uses	<ul style="list-style-type: none"> • Sydney Park and low to medium density residential along Crown Street to the north / northeast • WestConnex construction site to the southeast • Industrial uses to the southwest, including Maritime Container Services • St Peters Anglican Church, bulky goods and automotive retailing and low density residential dwellings in St Peters to the northwest

Strengths

1. Proximity to M8 Motorway, as well as the M4-M5 link once construction is complete
2. Proximity to Sydney Airport

Weaknesses

1. Low land utilisation for employment-generation industrial uses, given majority of the Precinct is metropolitan infrastructure

PLANNING - WHAT IS THE ZONING MIX?

Map 19.2 opposite provides a summary of the relevant planning instruments and controls for the St Peters Precinct.

The IN1 General Industrial zoning of the Precinct contains metropolitan infrastructure uses, due to the construction of WestConnex. The IN2 zoning encourages small scale strata warehouse uses.

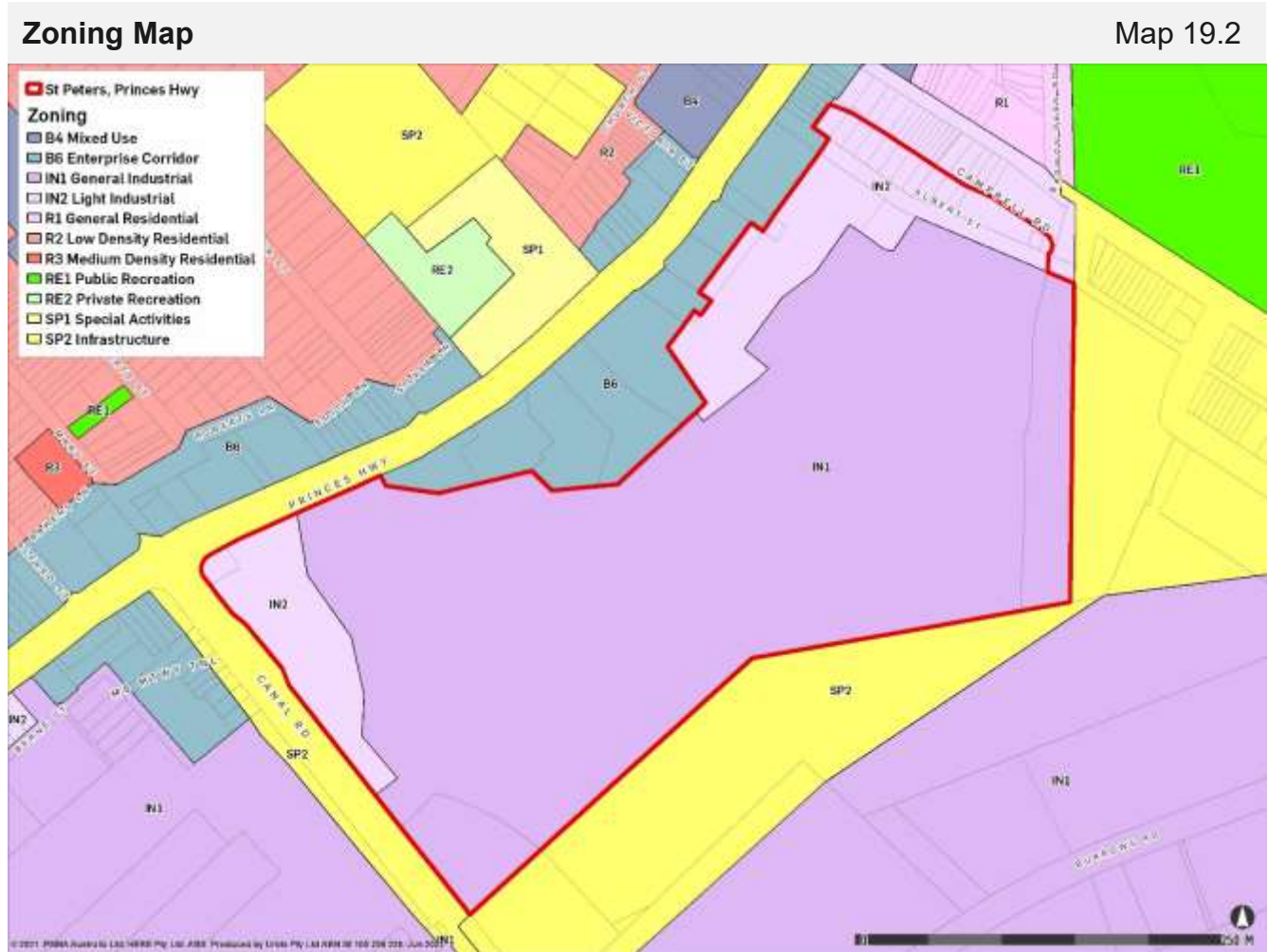
The IN1 General Industrial zoning of the Precinct typically encourages 3PL and distribution warehouse uses.

To the east of the Precinct lies an SP2 Infrastructure zone for additional uses supporting the WestConnex construction.

To the northwest of the Precinct lies a B6 Enterprise Corridor zone that contains a mix of automotive, food and non-food retailing, and hotel uses. These uses act as a buffer between the Precinct and the low density residential and schools to the west of Princes Highway.

To the southwest lies an IN1 General Industrial zone, most of which contains outdoor storage space to house shipping containers.

There are no height limits in planning controls within the Precinct.



EMPLOYMENT – WHERE DO WORKERS COME FROM AND HOW DO THEY GET TO WORK?

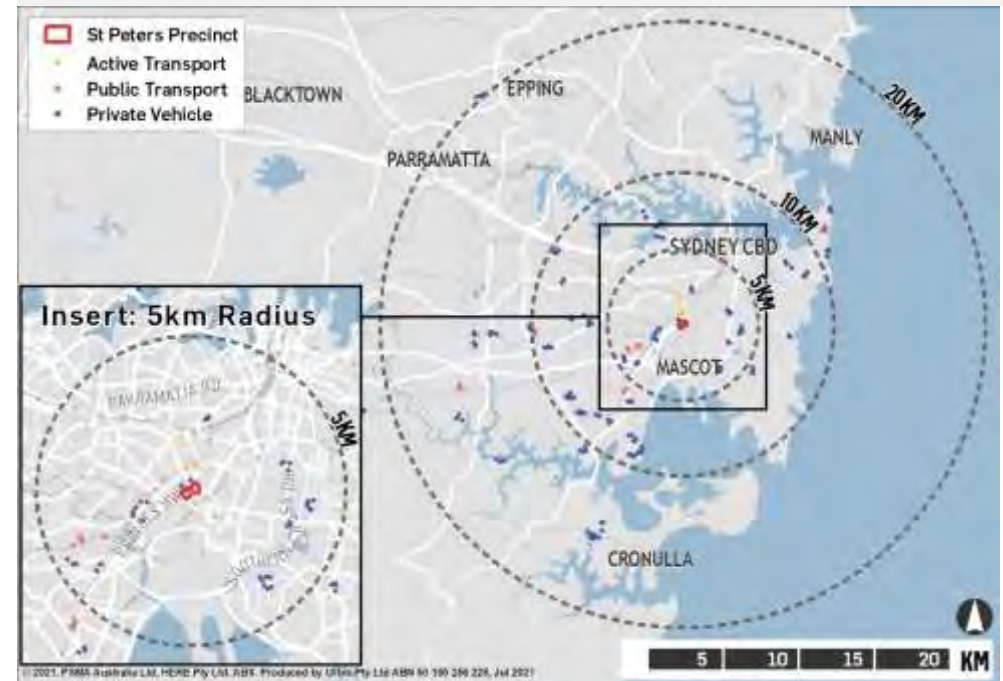
Map 19.3 shows the place of residence of those who work in the St Peters Precinct and how they travel to work. The dots represent where workers live, and the different colours show how they travel to work, either by car, public transport or active transport (e.g. walking or cycling).

The number of workers in the St Peters Precinct is low given that the Precinct features only a small proportion of industrial building area and that as of 2016, WestConnex construction had not yet commenced.

Of workers captured by the ABS Census 2016, approximately 67% reside within 10 km of the Precinct, predominantly to the southwest. Around 86% of precinct workers travelled to work by private vehicles.

Where do Precinct Workers Live, 2016

Map 19.3



Source: ABS Census 2016, Urbis

CHARACTER - WHAT IS THE NATURE OF THE PRECINCT?

Nature and Characteristics of Land Uses

Uses within this Precinct are consistent with an IN1 General Industrial and IN2 Light Industrial zonings. Map 19.4 shows the levels of each building and includes location references to images in this section of the report, providing a snapshot of the Precinct.

Majority of the Precinct's land is dedicated to the construction of WestConnex's St Peters Interchange. Once completed, the interchange will provide a tunnel linkage from Campbell Road, St Peters to both the M4 Motorway in the northwest and M5 Motorway to the southwest. Associated infrastructure include a ventilation facility that is currently being constructed along Campbell Road and the recently completed Motorway Operations Centre (MOC4) to the Precinct's west. Adjacent to the MOC4, on the corner of the Princes Highway and Canal Road, lies a vacant, heritage-listed warehouse.

The Precinct features a small proportion of additional built form in a pocket to the north. This comprises an older-style strata warehouse/office complex to the north at 2 Bishop Street. The complex features various business uses, including a recording studio, coffee machine repair store and kitchen supply store. The complex is accessible via three entry points along Princes Highway, although only the Bishop Street entrance is accessible to northbound traffic. At this entrance to the complex lies an old and small standalone warehouse that currently houses a furniture retailer.

To the west and south of this pocket lies automotive showrooms and bulky goods retail uses that do not form part of the Precinct. To the north and northeast of this pocket lies a small residential area, comprising Victorian terraces and residential flat buildings, as well as Sydney Park, a large public recreation space.



An old standalone warehouse can be found along Bishop Street.



2 Bishop Street strata warehouse/office units are old but well-maintained.

ROLE AND FUNCTION – WHAT IS THE NATURE OF THE LAND USES?

Chart 19.1 illustrates the type of uses (determined by property type and business function) that currently occupy the St Peters Precinct. The data was collected by Urbis in May 2021 and included a combination of:

- Physical inspection of properties within the Precinct
- Geographic information system analysis
- Interviews with various tenants.

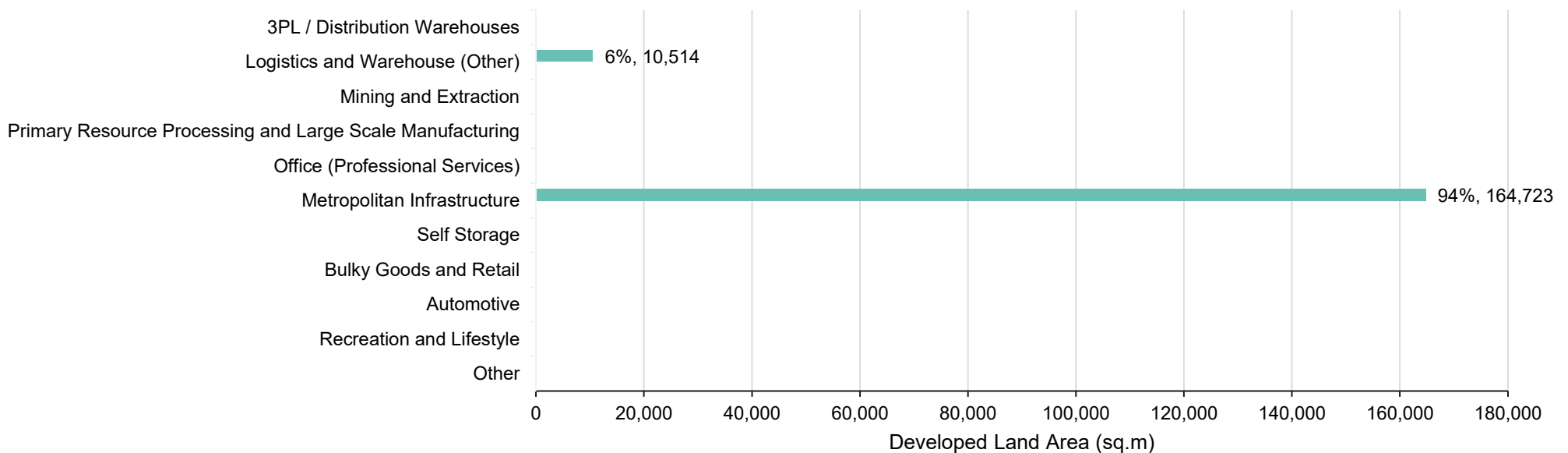
As at May 2021, Urbis estimates that the Precinct has around 8,480 sq.m of industrial floorspace on approximately 175,238 sq.m of developed land area. The Precinct almost entirely serves a metropolitan role.

Approximately 94% of land use comprises of Metropolitan Infrastructure, attributed to the WestConnex St Peters interchange. This includes the WestConnex substation building to the east. Although the WestConnex site does not have building structures, it is considered developed land, given the motorway being constructed will be part of the Precinct’s built form.

To the north of the Precinct lies a strata warehouse unit complex, accounting for the remaining 6% of total land use.

Developed Land Area by Typology, St Peters Precinct

Chart 19.1



Note: WestConnex site is included in developed land area, although it does not contain building structures.

Source: Urbis

MAP 19.4: ROLE AND FUNCTION - WHAT IS THE BUILT FORM?



ROLE AND FUNCTION - WHAT BUSINESSES OPERATE THERE?

A breakdown of the typology of current developed land area in the St Peters Precinct and examples of tenants are detailed in Table 19.2.

Metropolitan Infrastructure comprises 94% of developed land area, attributed to the construction of the WestConnex St Peters Interchange. In addition to motorway links, the site also features supporting infrastructure, notably the Motorway Operations Centre 4 to the west of the Precinct.

Logistics and Warehouse (Other) comprise the remaining 6% of land use distribution, accounting for a strata warehouse complex to the Precinct's north. The complex features a variety of small businesses, including recording studios, a coffee machine repairer and hardware supplier.

Developed Land Area Distribution by Typology, St Peters Precinct

Table 19.2

	Distribution	Example Tenants
3PL / Distribution Warehouses		
Logistics and Warehouse (Other)	6%	2 Bishop Street: Carrington Building (construction company), Scimita Ventures (agile technology development), Boardworld (sporting equipment), EOS Australia, Bravo Repair (coffee machine repairs), Knives and Stones (kitchenware supplier), Kiln Studios (recording studio), AKA Music (recording studio), Wichard Pacific (sailboat hardware supplier), Cute Cutting & Fusing Services (fabric cutting services), PAV Plumbing (plumbers)
Mining and Extraction		
Primary Resource Processing and Large Scale Manufacturing		
Office (Professional Services)		
Metropolitan Infrastructure	94%	WestConnex Motorway Operations Centre 4 (substation)
Self Storage		
Bulky Goods and Retail	<1%	Newtown Furniture Haven (furniture retailer)
Automotive		
Recreation and Lifestyle		
Other		
Total	100%	

POTENTIAL - WHAT IS THE CAPACITY FOR GROWTH?

Table 19.3 shows the quantum of zoned industrial land within the St Peters Precinct.

As at December 2020, there was a total of 143.2 hectares of zoned industrial land in the St Peters Precinct, of which 140.8 hectares has been developed and 2.4 hectares (1.7%) remain undeveloped.

Between 2016 and 2020, the Precinct has experienced negligible growth, recording an average land take-up rate of 0.1 hectares per annum, attributed to the construction of the MOC4 as supporting infrastructure for WestConnex. The future pipeline consists of the two stages of development for the WestConnex M4-M5 Link. To note, the estimated \$5 billion value comprises the entire M4-M5 Link project, which extends from St Peters to Haberfield and includes the St Peters Interchange.

As at 2021, total employment in the precinct is estimated to be 328 jobs. Of the

16.1 hectares of developed industrial land, there is approximately 8,480 sq.m of Gross Floor Area. This equates to an average land area of 490.6 sq.m per employee or floorspace of 25.8 sq.m per employee. The employee per floorspace figure overstates density as most employees do not work in buildings.

Map 19.5 indicates the Precinct's potential development capacity as at May 2021, by showing the additional height uplift that can be achieved on existing buildings under current planning controls.

There is limited height uplift capacity for majority of the Precinct, given the interchange development. There are no maximum height limits specified for the remainder of the Precinct and so all existing buildings have significant scope for additional height. However, the Precinct may also be affected by floorspace ratios and other controls, which impact development potential.

Nature of Employment and Land Table 19.3

Factor	Value
Total Employment, 2021 projection	328 jobs
Total Developed Land Area, 2020	16.1 ha
Total Undeveloped Land Area, 2020	0.0 ha
Future Pipeline and Estimated Value	1 project, ~\$5b
Average Annual Land Take-Up (2016 – 2020)	0.1 ha
Total Floorspace, 2021 (Gross Floor Area)	8,480 sq.m
Average Land Area per Employee	490.6 sq.m
Average Gross Floor Area per Employee	25.8 sq.m

Source: Cordell Connect, Employment Lands Development Monitor, NSW Department of Planning and Environment, Transport for NSW, LiDAR, Urbis

Additional Height Uplift Capacity, May 2021 Map 19.5



POTENTIAL – WHAT IS THE CAPACITY FOR DENSIFICATION?

As shown in Table 19.4, the St Peters Precinct only has 5 lots, of which none are vacant.

Of the developed sites, there are two sites that are 1,000 sq.m or less in size, comprising of two small warehouses.

The remaining three sites are over 5,000 sq.m in size. The low average site

coverage for these sites is due to the lack of buildings on the WestConnex site, despite it being considered developed land. When this site is removed, the remaining two buildings have an average site coverage of 43%.

Distribution of Sites by Lot Size, St Peters Precinct

Table 19.4

Size	Vacant Sites*		Developed Sites			Total Sites	
	Number of Sites	Distribution	Number of Sites	Distribution	Average Site Coverage	Number of Sites	Distribution
500 sq.m or less	0	0%	1	20%	56%	1	20%
501 - 1,000 sq.m	0	0%	1	20%	94%	1	20%
1,001 - 2,000 sq.m	0	0%	0	0%	0%	0	0%
2,001 - 3,000 sq.m	0	0%	0	0%	0%	0	0%
3,001 - 4,000 sq.m	0	0%	0	0%	0%	0	0%
4,001 - 5,000 sq.m	0	0%	0	0%	0%	0	0%
More than 5,000 sq.m	0	0%	3	60%	4%	3	60%
Total	0	0%	5	100%	5%	5	100%

Note: Figures are based on land areas as at May 2021 and may differ from ELDM 2020 developed and undeveloped area estimates.

*A site is considered vacant if the total building area on the site is less than 10% of the site area.

Source: Geoscape Australia; Urbis

