



Planning &
Infrastructure

ELDP

2012 UPDATE REPORT



Employment Lands Development Program



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Department of Planning and Infrastructure

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KEY FINDINGS AND TRENDS

Between January 2011 and January 2012 there was little change in overall zoned employment lands stock in the Sydney Region. Thirty per cent of this stock is still undeveloped, and a significant portion of this undeveloped stock is in Western Sydney and the Central Coast. There was a high level of rezoning activity, most likely due to the introduction of a number of Standard Instrument LEPs. Take-up of undeveloped land continues to decline, while the value (\$) of industrial approvals improved significantly.

In January 2012, there were 15,394 hectares of existing zoned employment lands, including both developed and undeveloped lands. This is a decrease of 189 hectares (1.2%) from January 2011, resulting from the net effect of rezoning to other uses and refinement of areas through data updates.

In January 2012, there were 4,620 hectares of undeveloped zoned employment lands, including lands which are serviced and not serviced. This is an increase of 77 hectares from January 2011, the result of land being rezoned.

In January 2012, there were 830 hectares of undeveloped zoned and serviced employment lands, which in certain cases may be able to be developed. This is a decrease of 62 hectares from January 2011.

In January 2012, there were 2,649 hectares of proposed employment lands identified in planning strategies, which have yet to be rezoned. This is a decrease of 688 hectares from January 2011, the result of land being rezoned.

During 2011, 415 ha of industrial land was rezoned for other purposes. The B5, B6 and B7 zones account for 66% of all rezoned industrial land. Whilst residential zones account for only 5% of all rezoned industrial land, the B1, B2 and B4 zones account for a further 10% of rezoned land and these zones include 'shop top housing' as a mandatory permissible use.

In 2010/11 a total of \$936 million of industrial building activity was approved in the Sydney Region. This is a significant increase (more than double) from the value of activity in the previous year in 2009/10, which was \$400 million.

In total, 120 hectares of employment land were taken up by industrial development in 2011, compared to 153 hectares in 2010, 205 hectares in 2009 and 264 hectares in 2008.

Even though take-up rates have been falling, it is important to plan for adequate supplies using both high and low take-up rates. At January 2012, the amount of undeveloped and serviced zoned land did not meet the supply standard benchmark of 5-7 years using a high take-up rate of 300 hectares per annum. This is a similar result to the past 2 years, and demonstrates that action is required to service more zoned land. This will be required to bring more land to the market to meet demand including the increased amount of industrial approval activity. Servicing more zoned land will facilitate development and enable increased take-up rates.

Figure 1 - Zoned Employment Lands Stock by Subregion (January 2012)

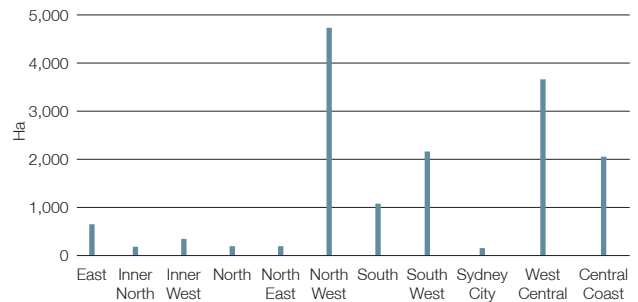


Figure 2 - Rezoning of Employment Lands to other zones

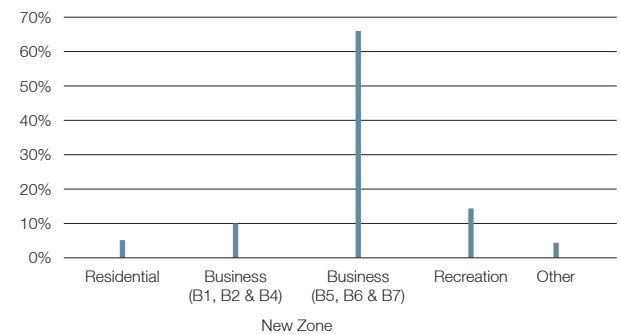


Figure 3 - Value (\$) of Industrial Approvals

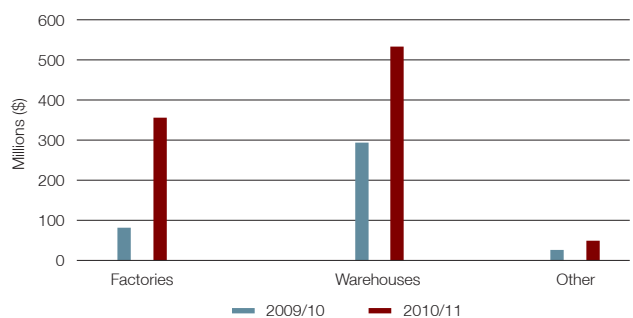
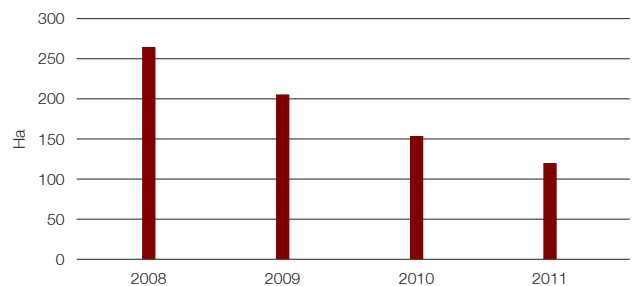


Figure 4 - Take-Up of Employment Lands



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INTRODUCTION

This report is an update of the Employment Lands Development Program (ELDP) 2011 Update Report. It provides information on total stocks of Employment Lands for the Sydney Region (including the Central Coast). The report contains development and servicing status data for Metropolitan Sydney, collected from Sydney Water, at January 2012. In the Central Coast Region, aerial photography¹ was used to determine development status as of January 2012 for both Wyong Shire and Gosford City Councils. In terms of servicing status, data received from Gosford City Council (July 2012) was used to determine servicing status in that Local Government Area (LGA). However, no servicing status data was available from Wyong Shire Council for that LGA. Updated data is also presented on industrial building activity for 2010/2011 and on take-up of employment lands from January 2011 to January 2012.

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

STATE OF PLAY 2012

Demand for Employment Lands

Property analysts report² that whilst demand for industrial space was significantly affected following the effects of the Global Financial Crisis (GFC), demand rebounded from late 2010, underpinned by the major retailers who had put warehouse plans prepared before the GFC on hold and also logistics operators who had secured new contracts and also required new facilities. However, demand weakened in the second half of 2011 as a result of persistent negative news regarding world economic growth, Europe's sovereign debt crisis and also national political issues.

Strong demand in 2011 has resulted in the first increase in the value (\$) of industrial development approvals since 2007/08. In 2010/11, there was a total of \$936 million of industrial building activity approved in the Sydney Region. This is more than double the total amount of industrial building activity recorded in 2009/10, which was only \$400 million. Warehouse building activity increased from \$294 million in 2009/10 to \$533 million in 2010/11, and factory building activity increased to \$355 million in 2010/11, which is more than four times the amount recorded in 2009/10, which was only \$81 million. This strong result was underpinned by Amcor's \$150 million paper recycling facility in Botany and Coca Cola Amatil's \$55 million preform and closure manufacturing facility at Eastern Creek³.

In 2010/11, the North West subregion experienced the highest amount of industrial building activity, with \$439 million of industrial development approved. This was followed by the East subregion, with \$165 million of industrial development approved. This high

figure for the East subregion is largely due to Amcor's recycled paper plant in Botany mentioned previously. The third highest subregion was the South West, with \$144 million worth of industrial development approved, followed by West Central with \$92 million worth of industrial development approved.

Despite the increase in the value (\$) of industrial development approvals in 2010/11, the amount of take-up has remained low compared to previous years and continued to drop. The amount of take-up recorded in 2011 was only 120 hectares, compared with 153 hectares in 2010, 205 hectares in 2009 and 264 hectares in 2008.

The majority of take-up (94%) occurred in Western Sydney, with the North West providing the major share (88 hectares), with a further 18 hectares in West Central and 7 hectares in the South West. The Central Coast only had 3 hectares of take-up in 2011, which was significantly less than the 34 hectares taken up in 2010. Take-up activity was concentrated in the precincts of Eastern Creek (32 hectares), Erskine Park (20 hectares), Former Wonderland (11 hectares), Huntingwood West (19 hectares) and South of Sydney Water Pipeline (10 hectares), which are all located in the Western Sydney Employment Area. Major new projects completed (or were due for completion) in this period in these precincts include a Kmart distribution centre (Eastern Creek), Metcash warehouse (Huntingwood West), Ingram Micro warehouse (Eastern Creek), Best & Less warehouse (Eastern Creek) and a DHL warehouse (South of Sydney Water Pipeline)⁴.

During 2011 nearly 479,000 sqm of industrial floor space was completed across metropolitan Sydney. Of this nearly 300,000 sqm occurred in the North West subregion (Blacktown, The Hills, Penrith and Hawkesbury LGAs)⁵. This is higher than the 361,000 sqm that was completed in 2010 and shows continued recovery of the industrial property market⁶.

Property analysts expect that industrial construction will remain moderate over the next 5 years, with the bulk of development activity expected to be pre-commitment driven and mostly located in the outer markets along the M7 motorway⁷.

Supply of Employment Lands

There was 15,394 ha of employment lands in the Sydney Region as at January 2012 (see Table 1). In terms of total land stocks, 2011 saw a modest reduction of 189 hectares (1.2%) of zoned employment lands in the Sydney Region. This was due to a net amount 150 hectares being added to the ELDP because of data refinement and updates, plus 76 hectares of new industrial zoned land, less 415 hectares lost due to rezoning, resulting in an overall net loss of 189 hectares (1.2%) to total stocks (see Table 5). It should be noted that the 76 hectares of new industrial zoned land were through additions to existing precincts, rather than through significant land releases.

¹ PhotoMaps by nearmap.com

² BIS Shrapnel, *Sydney Industrial Property – Market Forecasts and Strategies 2011-2021*, December 2011 (p vi)

³ BIS Shrapnel, *Sydney Industrial Property – Market Forecasts and Strategies 2011-2021*, December 2011 (p 27)

⁴ BIS Shrapnel, *Sydney Industrial Property – Market Forecasts and Strategies 2011-2021*, December 2011 (p 25)

⁵ CBRE, *Market View Sydney Industrial Property: Second Quarter 2012*, June 2012

⁶ CBRE, *Market View Sydney Industrial Property: Second Quarter 2011*, June 2011

⁷ BIS Shrapnel, *Sydney Industrial Property – Market Forecasts and Strategies 2011-2021*, December 2011 (pp 29-29)

During 2010 only 12 hectares of industrial land was lost due to rezoning. In 2011, 415 hectares of industrial land was lost due to rezoning, probably due to the introduction of a number of Standard Instrument LEPs⁸, with Councils looking to convert existing industrial zones into the new format.

Of the 415 hectares of industrial land lost due to rezoning, 66% (or 274 hectares) was rezoned to the B5 (Business Development), B6 (Enterprise Corridor) and B7 (Business Park) zones. Whilst only 5% (or 21 hectares) was rezoned to a residential zone, a further 10% (or 42 hectares) was rezoned to the B1 (Neighbourhood Centre), B2 (Local Centre) and B4 (Mixed Use) zones, which all include "shop top housing" as a mandatory permissible use. The zone to receive the most amount of rezoned industrial land was the B6 zone (34%), followed by the B7 zone (25%). Precincts which experienced the greatest amount of rezonings were at Cross Roads, Casula (24 hectares), Emu Heights (36 hectares), Frenchs Forest (57 hectares), Homebush Bay (28 hectares) and the Parramatta Road Corridor (84 hectares). The major new industrial zone additions were at Huntingwood (WSEH) (12 hectares) and Riverstone West (11 hectares). Whilst Yarrunga/ Prestons added 40 hectares in new industrial zoning, it lost 43 hectares to rezoning in other parts of the precinct, resulting in an overall net loss of 3 hectares.

The distribution of employment lands identified in previous years persists, with the vast majority of employment lands located in Western Sydney (10,562 hectares or 69%).

The net amount of undeveloped zoned land increased by 77 hectares in 2011, which is likely due to the effect of the new industrial zone additions to stocks. However, the amount of undeveloped and serviced zoned land (in terms of water and sewer connection) decreased by 62 hectares. Accounting for take-up (120 hectares), this would suggest that 58 hectares of undeveloped zoned land was serviced (with a water and sewer connection) as it was developed in 2011.

For 2012, there is expected to be a strong continued recovery in the supply of new industrial floor space (768,000 sqm forecast to be completed), due to a large number of projects currently under construction or expected to be completed by the end of the year. This includes pre-commitments from retailers and logistic providers, as well as a number of speculative developments in areas of more limited supply⁹.

The number of lots of undeveloped zoned land under 0.1 hectare in size also increased from 645 lots in 2011 to 1,314 lots in 2012, which would suggest high levels of industrial land subdivision in 2011, although the total amount of land in this size (ie. less than 0.1 hectare) still remains very low (1% of all undeveloped zoned land). The greatest amount of undeveloped zoned land still remains in lots over 10 hectares in size (58% of all undeveloped zoned land), although the number of lots in this larger size is still quite low (3% of total lots), consistent with the findings last year.

Whilst no additional potential employment lands were specifically identified in planning strategies in 2011, the Department has commenced work on preparing a new structure plan for the broader Western Sydney Employment Area (see Map 1). Though subject to extensive further investigations, this potential land may contribute significantly to stocks of undeveloped employment lands in the future.

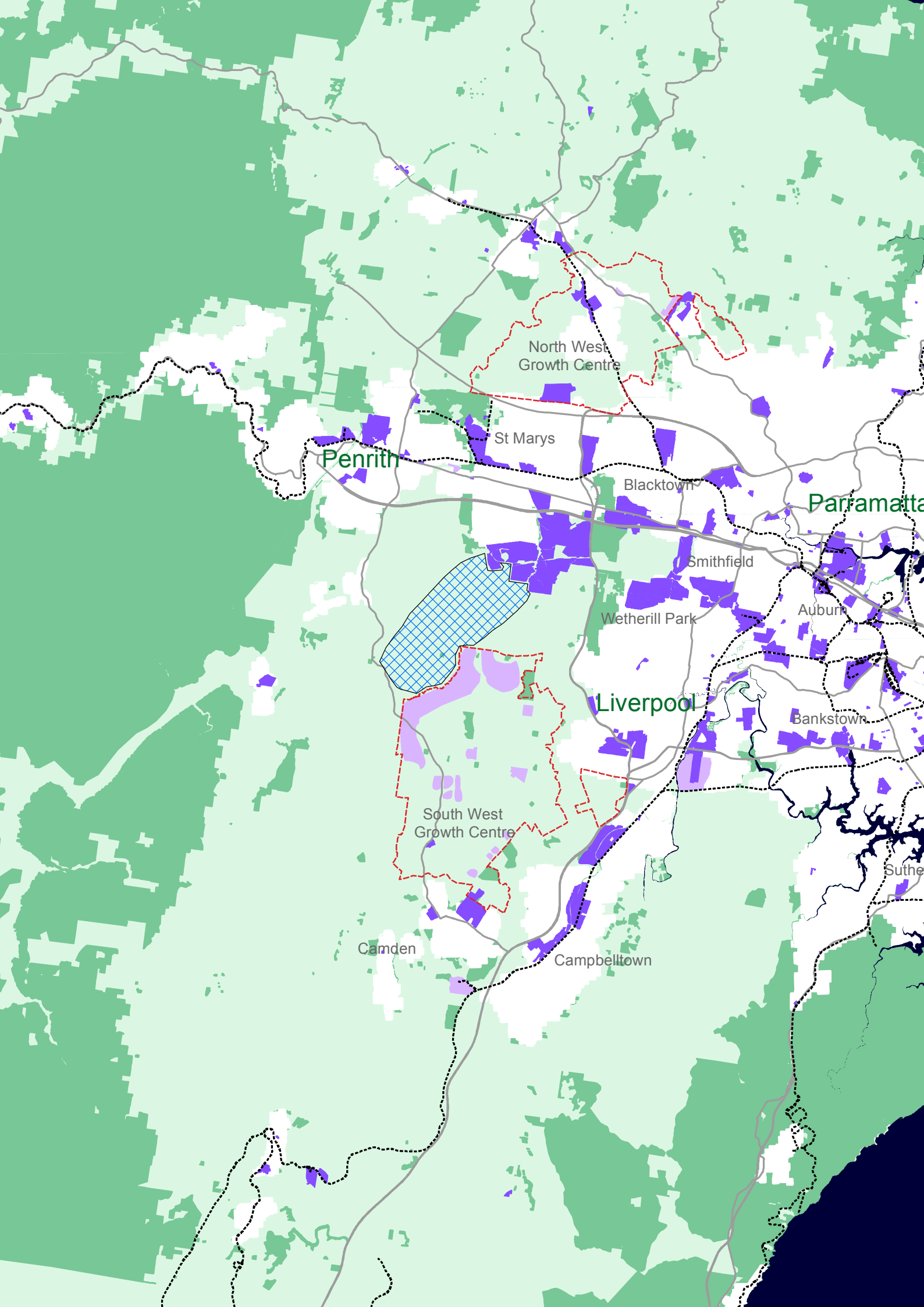
In terms of adequacy of stocks of employment lands at January 2012, the broad pattern was similar to that in the last 2 years. Based on a high take-up rate of 300 hectares per annum, there would be enough 'Strategy identified land' (ie. that which has already been identified in planning strategies for future zoning or currently zoned and undeveloped) to last 24 years (7,269 hectares). Of this total potential stock, there is 3,789 hectares of undeveloped zoned land, which is not serviced (water and sewer connection), providing up to 13 years of supply, using the same high take-up rate. Both of these amounts meet the supply standards for 'Strategy identified land' (20 years) and undeveloped zoned land which is not serviced (8-10 years supply) respectively.

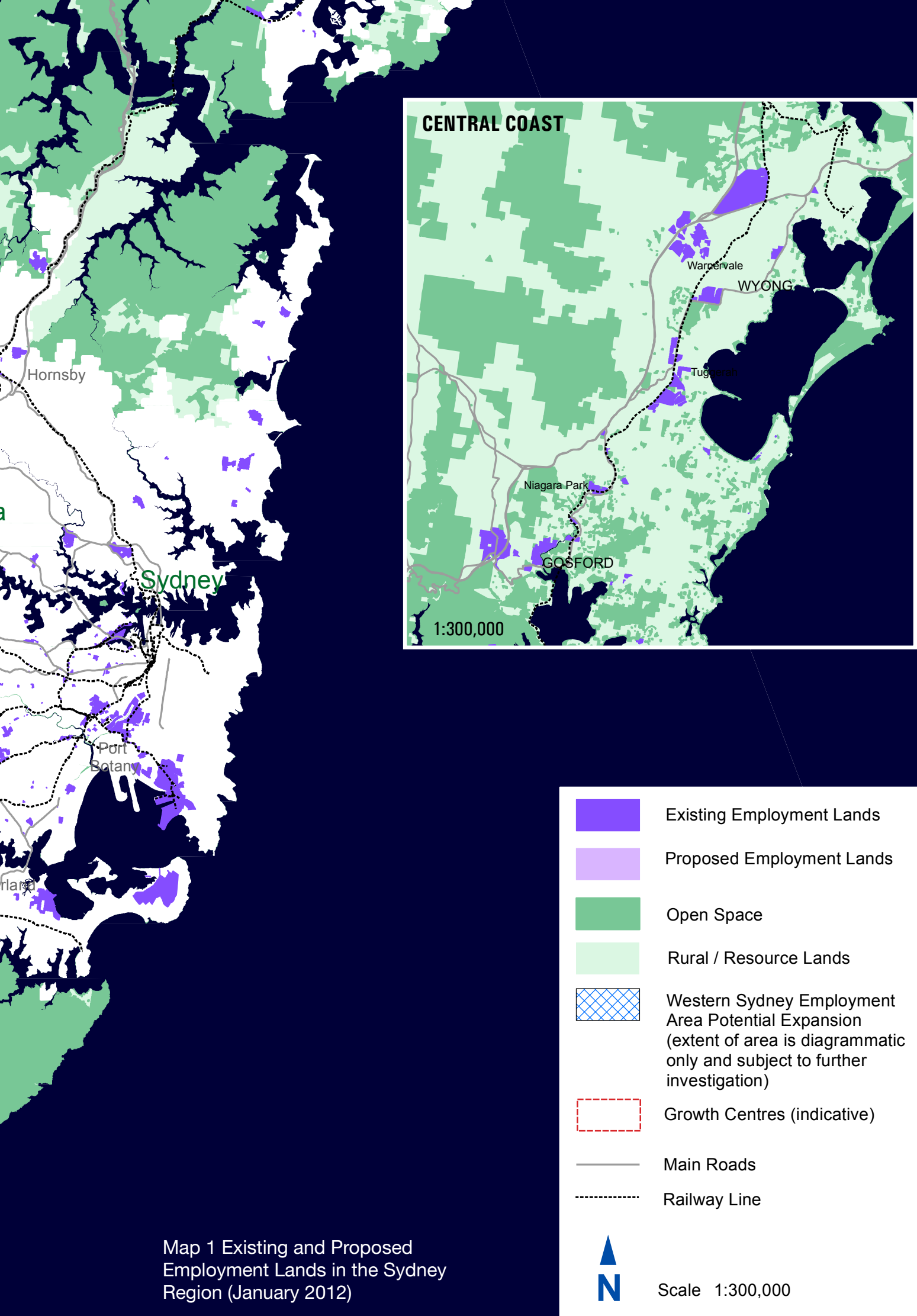
However, based on the high take-up rate of 300 hectares per annum, there is only 3 years supply (830 hectares) of undeveloped zoned land which is also serviced (water and sewer connection). This falls under the supply standard of 5-7 years supply.

This finding is similar to the results of the last 2 years and suggests that action should focus around servicing and enabling take-up of existing zoned land where this meets the current needs of industry. To address this issue, the Department is undertaking an audit of 20 key employment lands precincts that contain significant amounts of undeveloped zoned land to determine what may be some of the impediments to take-up of this land, including infrastructure and servicing issues and also environmental constraints.

⁸ Standard Instrument Local Environmental Plans (LEPs) prepared under the Standard Instrument (Local Environmental Plans) Order 2006

⁹ CBRE, *Market View Sydney Industrial Property: Second Quarter 2012*, June 2012





Map 1 Existing and Proposed Employment Lands in the Sydney Region (January 2012)

Table 1 - Zoned Employment Lands Stock by Subregion

The Employment Lands Stock table below compares total stocks, as well as split between developed and undeveloped, of employment lands between January 2010 and January 2012 by the 10 metropolitan Sydney subregions and Central Coast region.

Subregion	Jan-10			Jan-11			Jan-12			Total Change Jan-11 to Jan-12
	Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	
East	33.1	599.5	632.6	33.4	599.9	633.3	120.3	528.7	649.1	15.8
Inner North	6.3	184.5	190.7	6.6	181.4	188.0	12.1	170.9	183.0	-5.0
Inner West	33.5	310.4	343.9	33.2	312.4	345.6	36.0	310.6	346.5	1.0
North	30.0	156.9	186.9	27.7	158.7	186.4	30.6	162.8	193.4	7.0
North East	3.2	239.1	242.3	3.2	238.9	242.2	5.0	182.5	187.5	-54.7
North West	1,955.8	2,533.6	4,489.4	2,140.1	2,557.8	4,697.9	2,120.9	2,611.3	4,732.2	34.3
South	151.6	958.8	1,110.4	152.2	950.4	1,102.6	162.6	905.5	1,068.1	-34.5
South West	577.2	1,627.3	2,204.5	521.3	1,681.8	2,203.1	522.4	1,636.5	2,159.0	-44.1
Sydney City	2.6	151.5	154.1	2.6	151.5	154.1	8.2	147.8	156.0	1.9
West Central	523.9	3,284.4	3,808.4	502.1	3,298.8	3,800.9	462.1	3,208.4	3,670.5	-130.4
Central Coast	1,139.6	875.0	2,014.6	1,120.1	909.4	2,029.6	1,139.3	909.5	2,048.8	19.3
Sydney Region	4,456.9	10,921.0	15,377.9	4,542.5	11,041.0	15,583.5	4,619.6	10,774.5	15,394.2	-189.3

NB: Marginal increases in undeveloped zoned land from 2010 to 2012 for some precincts within the subregions are generally a result of data refinement and updates (see Table 2).

Table 2 - Zoned Employment Lands Stock by Precinct

This second Employment Lands Stock table below compares total stocks, as well as split between developed and undeveloped, of employment lands between January 2010 and January 2012 by LGA and individual employment lands precinct. Employment lands precincts are defined as contiguous areas of zoned industrial (or similar) land which form the basis of data collection for the ELDP and range from less than 0.1 hectare to over 500 hectares.

Subregion	LGA	Precinct	Jan-10			Jan-11			Jan-12			Net Change Jan-11 to Jan-12
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	
East	Botany Bay	Banksmeadow	15.7	220.8	236.5	15.7	221.1	236.8	23.9	207.2	231.1	-5.7
		Botany	1.2	65.2	66.4	1.3	65.2	66.4	4.3	63.1	67.4	1.0
		British American Tobacco Site		16.5	16.5		16.5	16.5		16.5	16.5	0.0
		Mascot	8.8	70.1	78.9	8.7	70.2	78.9	9.9	69.4	79.3	0.5
	Botany Bay Total	25.6	372.6	398.2	25.6	373.0	398.6	38.1	356.2	394.3	-4.2	
	Randwick	Port Botany	7.5	226.9	234.4	7.8	226.9	234.7	82.2	172.5	254.8	20.1
	Randwick Total	7.5	226.9	234.4	7.8	226.9	234.7	82.2	172.5	254.8	20.1	
East Total		33.1	599.5	632.6	33.4	599.9	633.3	120.3	528.7	649.1	15.8	
Inner North	Lane Cove	Burns Bay (Tuta Laboratories)	0.2	2.6	2.8							
		Gore Cove Terminal		7.8	7.8		7.8	7.8	0.0	7.8	7.9	0.0
		Lane Cove West	5.2	46.2	51.5	5.8	45.7	51.5	6.6	44.0	50.6	-0.9
		Lane Cove West (150 Epping Rd)		2.3	2.3		2.3	2.3		3.2	3.2	0.8
	Lane Cove Total	5.4	59.0	64.4	5.8	55.9	61.7	6.6	55.1	61.7	0.0	
	Ryde	Former ADI Site		1.6	1.6		1.6	1.6		1.6	1.6	0.0
		Gladesville	0.1	23.7	23.8	0.1	23.7	23.8	0.1	20.1	20.2	-3.6
		Macquarie Park, Delhi Road		0.6	0.6		0.6	0.6				-0.6
		West Ryde		5.9	5.9		5.9	5.9	0.1	6.0	6.1	0.2
		Macquarie Park, Talavera Road		0.0	0.0		0.0	0.0		0.0	0.0	0.0
	Ryde Total	0.1	31.8	31.9	0.1	31.8	31.9	0.2	27.7	28.0	-4.0	
	Willoughby	Artarmon	0.7	64.3	65.0	0.7	64.3	65.0	5.2	58.8	63.9	-1.1
		East Chatswood	0.0	26.3	26.3		26.3	26.3	0.0	26.4	26.4	0.1
Lane Cove West		0.1	3.0	3.0	0.1	3.0	3.0	0.1	3.0	3.0	0.0	
Willoughby Total	0.7	93.6	94.4	0.7	93.6	94.4	5.3	88.1	93.4	-1.0		
Inner North Total		6.3	184.5	190.7	6.6	181.4	188.0	12.1	170.9	183.0	-5.0	
Inner West	Ashfield	Canterbury Road, Hurlstone Park		0.3	0.3		0.3	0.3	0.0	0.3	0.3	0.0
		Carlton Cres		0.3	0.3		0.3	0.3	0.0	0.3	0.3	0.0
		Flour Mill Site	0.0	3.5	3.5	0.0	3.5	3.5	0.0	3.5	3.6	0.0
		Hordern Pde		0.1	0.1		0.1	0.1		0.1	0.1	0.0
		Milton St North		0.2	0.2		0.2	0.2	0.1	0.2	0.3	0.1
		Parramatta Rd, btw Liverpool and Slone Sts		1.1	1.1		1.1	1.1	0.0	1.1	1.1	0.0
		Parramatta Rd, Frederick St		2.1	2.1		2.1	2.1	0.0	2.1	2.1	0.0
		Parramatta Rd, Haig Ave		0.1	0.1		0.1	0.1		0.1	0.1	0.0
		West St		0.2	0.2		0.2	0.2		0.2	0.2	0.0
	Ashfield Total	0.0	7.9	7.9	0.0	7.9	7.9	0.1	7.9	8.0	0.2	
	Burwood	Tangarra St East		1.2	1.2		1.2	1.2		1.2	1.2	0.0
	Burwood Total	1.2	1.2	1.2	1.2	1.2	0.0	1.2	1.2	0.0		
	Canada Bay	Bibby St, Chiswick	0.6	0.6	0.6	0.6	0.6		0.6	0.6		
		Bushells Site, Burwood Rd	3.9	3.9	3.9	3.9	3.9		3.9	3.9	0.0	
		Concord West	7.6	7.6	7.6	7.6	7.6		7.6	7.6	0.0	
Harris Road, Five Dock		0.1	0.1	0.1	0.1	0.1		0.2	0.2	0.0		
Oulton Avenue		0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.1	0.0		
Parramatta Road/Queens Road		0.2	12.2	12.4	0.2	12.2	12.4	0.8	11.6	12.4	0.0	
Rhodes, Leeds Street	6.4	6.4	6.4	6.4	6.4	0.3	6.2	6.5	0.1			
Canada Bay Total	0.2	30.9	31.1	0.2	30.9	31.1	1.2	30.0	31.2	0.1		

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

Subregion	LGA	Precinct	Jan-10			Jan-11			Jan-12			Net Change Jan-11 to Jan-12	
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total		
Inner West	Leichhardt	Allen and Flood St		1.0	1.0		1.0	1.0		1.0	1.0	0.0	
		Balmain Road		1.4	1.4		1.4	1.4	0.0	1.3	1.4	0.0	
		Bays Precinct (Glebe Island/White Bay)	20.2	52.8	73.1	20.2	52.8	73.0	12.4	61.2	73.6	0.6	
		Lilyfield Rd		1.0	1.0		1.0	1.0	0.0	1.0	1.0	0.0	
		Lords Rd		1.1	1.1		1.1	1.1		1.1	1.1	0.0	
		Marion/Walter St	0.0	1.3	1.3	0.0	1.3	1.3	0.0	1.3	1.3	0.0	
		Moore St, Catherine St		5.9	5.9		5.9	5.9	0.2	5.6	5.9	0.0	
		Moore St, McKenzie St		1.0	1.0		1.0	1.0		1.1	1.1	0.0	
		Mort Bay	0.0	0.2	0.2	0.0	0.2	0.2	0.1	0.2	0.3	0.1	
		Parramatta Rd, Mallet St, Pymont Bridge Rd	0.0	7.0	7.0	0.0	7.0	7.0	0.0	7.0	7.0	0.0	
		Parramatta Rd/Tebutt St	0.0	5.2	5.2		5.2	5.2	0.0	5.2	5.2	0.0	
		Victoria Rd, Robert St (East of Mullens St)	0.1	3.0	3.1	0.1	3.0	3.1	0.2	3.0	3.1	0.0	
		Victoria Rd, Robert St (Former Martin Bright Steelworks)	0.0	2.2	2.2	0.0	2.2	2.2	0.0	2.2	2.2	0.0	
	Victoria Rd, Terry St/ Wellington St (Carrier Site)		3.2	3.2		3.2	3.2		3.2	3.2	0.0		
	Leichhardt Total		20.4	86.3	106.7	20.3	86.3	106.6	13.1	94.4	107.4	0.8	
	Strathfield	Chullora		0.3	0.3		0.3	1.7	2.0	1.0	0.4	1.4	-0.5
		Flemington (Arthur St, Homebush Business Park and Mason Park)	4.9	56.7	61.6	4.9	56.7	61.6	7.2	54.5	61.8	0.1	
		South Strathfield/Enfield	8.0	108.2	116.3	7.5	108.9	116.4	13.1	103.5	116.6	0.2	
		Strathfield Mail		13.6	13.6		13.6	13.6	0.1	13.6	13.7	0.1	
		Water Street	0.0	5.2	5.2	0.0	5.2	5.2	0.2	5.0	5.2	0.0	
Strathfield Total		12.9	184.1	197.0	12.6	186.1	198.7	21.6	177.0	198.6	-0.1		
Inner West Total		33.5	310.4	343.9	33.2	312.4	345.6	36.0	310.6	346.5	1.0		
North	Hornsby	Asquith	9.7	33.6	43.4	9.1	33.8	42.9	4.9	39.3	44.2	1.3	
		Dural Service Centre	3.1	33.6	36.6	3.3	33.3	36.6	4.3	32.5	36.7	0.1	
		Hornsby East	0.0	1.0	1.0	0.0	1.0	1.0	0.0	1.0	1.0	0.0	
		Hornsby Heights		1.3	1.3		1.3	1.3		1.3	1.3	0.0	
		Hornsby West		1.9	1.9		1.9	1.9	0.0	1.9	2.0	0.0	
		Mount Ku-ring-gai	15.4	50.3	65.8	13.6	52.2	65.8	18.7	52.0	70.7	4.9	
		Pennant Hills		1.4	1.4		1.4	1.4	0.0	1.4	1.4	0.0	
		Thornleigh	1.7	26.6	28.4	1.7	26.6	28.4	2.3	26.5	28.8	0.4	
	Waitara	0.0	7.2	7.2	0.0	7.2	7.2	0.4	7.0	7.4	0.2		
Hornsby Total		30.0	156.9	186.9	27.7	158.7	186.4	30.6	162.8	193.4	7.0		
North Total		30.0	156.9	186.9	27.7	158.7	186.4	30.6	162.8	193.4	7.0		
North East	Manly	Manly Vale	0.2	9.8	10.0	0.2	9.8	10.0	0.4	9.7	10.1	0.1	
	Manly Total		0.2	9.8	10.0	0.2	9.8	10.0	0.4	9.7	10.1	0.1	
	Pittwater	Mona Vale	0.1	22.4	22.5	0.1	22.4	22.5	0.2	22.5	22.6	0.1	
		North Narrabeen		2.5	2.5		2.5	2.5		2.5	2.5	0.0	
		Warriewood Valley	0.5	15.8	16.3	0.5	15.8	16.3	0.9	15.4	16.3	0.0	
	Pittwater Total		0.6	40.7	41.3	0.6	40.7	41.3	1.1	40.4	41.4	0.1	
	Warringah	Brookvale	0.3	85.1	85.4	0.3	85.0	85.3	2.8	84.0	86.7	1.4	
		Cromer	0.6	43.6	44.2	0.6	43.6	44.2	0.7	43.6	44.3	0.1	
		Forestville		2.2	2.2		2.2	2.2		2.2	2.2	0.0	
		Frenchs Forest	1.5	54.9	56.5	1.5	54.9	56.5				-56.5	
Harbord			2.7	2.7		2.7	2.7	0.0	2.7	2.7	0.0		
Warringah Total		2.5	188.5	191.0	2.5	188.4	190.9	3.5	132.4	136.0	-54.9		
North East Total		3.2	239.1	242.3	3.2	238.9	242.2	5.0	182.5	187.5	-54.7		

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

Subregion	LGA	Precinct	Jan-10			Jan-11			Jan-12			Net Change Jan-11 to Jan-12		
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total			
North West	Blacktown	Arndell Park	20.8	123.7	144.5	20.8	123.7	144.5	22.5	139.2	161.7	17.2		
		Blacktown Rd (St Martins)		6.0	6.0		6.0	6.0		6.0	6.0	0.0		
		Eastern Creek	419.1	143.2	562.3	407.6	154.6	562.2	375.9	177.9	553.8	-8.4		
		Former Wonderland	41.3	15.1	56.4	40.9	15.1	56.0	30.0	26.0	56.0			
		Glendenning	47.8	147.4	195.1	47.6	147.4	195.0	48.1	152.4	200.5	5.4		
		Greystanes	25.8	5.7	31.5	25.9	5.6	31.5	23.4	5.6	29.0	-2.5		
		Huntingwood	7.4	109.8	117.2	7.0	110.1	117.1	4.4	112.9	117.3	0.1		
		Huntingwood (WSEH)	49.7	21.3	71.0	47.8	23.2	71.0	66.3	16.4	82.6	11.6		
		Huntingwood West	59.8	1.4	61.1	59.8	1.4	61.1	41.4	20.4	61.7	0.6		
		Kings Park (Blacktown North)	2.8	211.2	214.0	2.1	211.6	213.7	3.0	211.0	214.0	0.3		
		Marsden Park				206.1		206.1	237.1		237.1	31.0		
		Minchinbury	20.5	98.2	118.7	20.5	98.2	118.7	22.9	96.2	119.1	0.3		
		Mount Druitt	6.7	40.8	47.5	6.7	40.8	47.5	6.3	41.2	47.5	0.0		
		North Dunheved	15.5		15.5	15.6		15.6	18.5	0.0	18.5	2.9		
		Prospect		35.2	35.2		35.2	35.2		35.2	35.2	0.0		
		Quarantine Station		21.8	21.8		21.9	21.9		21.9	21.9			
		Riverstone	3.7	42.8	46.4	3.7	42.7	46.4	5.8	40.8	46.5	0.1		
		Riverstone West	86.3	9.6	95.9	86.4	9.6	95.9	97.8	9.5	107.3	11.4		
		Ropes Creek	192.7		192.7	192.7		192.7	185.5	0.0	185.5	-7.2		
		Ropes Crossing	0.4	10.5	10.9	0.4	10.6	11.0	3.9	0.0	3.9	-7.1		
		Seven Hills (Blacktown LGA)	6.6	192.2	198.8	6.3	192.9	199.2	13.9	189.9	203.8	4.6		
		St Marys				2.9		2.9				-2.9		
		The Raceway Precinct	15.9	4.7	20.6	15.0	5.5	20.6	10.6	11.9	22.5	1.9		
	Prospect (Flushcombe Rd)							0.0	1.2	1.2	1.2			
	Blacktown Total			1,022.7	1,240.4	2,263.1	1,215.8	1,256.0	2,471.8	1,217.0	1,315.5	2,532.5	60.7	
	Blue Mountains	Blue Mountains	Blackheath	0.1	1.9	2.0	0.1	1.9	2.0	0.4	1.6	2.0	0.0	
			Blaxland		5.0	5.0		5.0	5.0	0.5	5.3	5.9	0.9	
			Blaxland (Great Western Hwy)		0.2	0.2		0.2	0.2	0.0	0.2	0.2	0.0	
			Glenbrook		0.2	0.2		0.2	0.2		0.2	0.2	0.0	
			Katoomba	17.6	28.2	45.8	17.3	28.5	45.8	16.5	30.2	46.7	0.9	
			Lawson	17.7	13.7	31.4	17.7	13.9	31.6	18.2	13.8	32.0	0.4	
			Valley Heights/Springwood	2.7	12.3	15.1	2.7	12.3	15.0	2.9	12.2	15.1	0.0	
			Wentworth Falls		0.1	0.1		0.1	0.1		0.1	0.1		
		Blue Mountains Total			38.1	61.5	99.6	37.8	62.1	99.9	38.5	63.6	102.1	2.2
		Hawkesbury	Hawkesbury	Mulgrave/Vineyard	14.2	59.8	74.0	15.1	58.0	73.0	15.9	57.0	72.9	-0.1
	North Richmond			3.2	10.3	13.6	3.2	10.3	13.6	3.8	10.2	13.9	0.4	
	Richmond			0.8	3.9	4.7	0.7	4.0	4.7	0.4	4.6	5.0	0.3	
	Richmond, Racecourse Rd				4.0	4.0		4.0	4.0	0.0	4.0	4.1	0.1	
	Wilberforce			1.5	7.7	9.2	1.5	7.7	9.2	1.8	7.5	9.3	0.1	
	Windsor/South Windsor			17.9	77.5	95.5	17.9	77.5	95.5	19.5	76.9	96.4	1.0	
	Hawkesbury Total			37.7	163.3	200.9	38.5	161.5	199.9	41.4	160.3	201.7	1.8	
	Penrith	Penrith	Emu Heights	36.1		36.1	36.1		36.1				-36.1	
			Emu Plains	25.9	105.2	131.1	24.1	107.0	131.1	23.8	107.3	131.1	0.0	
			Erskine Park	218.3	185.8	404.1	223.9	179.5	403.3	208.0	189.8	397.7	-5.6	
			Great Western Hwy, St Marys	0.2	1.7	1.9	0.2	1.7	1.9		1.9	1.9	0.0	
Jamisonstown			3.9	71.9	75.7	3.7	72.0	75.7	5.5	72.3	77.8	2.1		
Kingswood			1.5	15.3	16.8	1.5	15.3	16.8	1.5	19.8	21.3	4.5		
North Penrith			73.6	203.0	276.6	69.3	207.3	276.7	82.0	196.2	278.1	1.5		
South of Sydney Water Pipeline			334.4		334.4	337.2		337.2	348.1		348.1	10.9		
St Marys			54.1	187.4	241.5	50.5	191.0	241.5	48.9	193.4	242.3	0.8		
St Marys Leagues				10.3	10.3		10.3	10.3	3.1		3.1	-7.2		
St Marys North			2.1	54.8	56.8	2.1	54.8	56.8	2.4	54.5	56.9	0.1		
Llandilo			3.4		3.4	3.3		3.3	3.3		3.3	0.0		
The Northern Road, Llandilo	28.1		28.1	27.4		27.4	24.8	1.4	26.2	-1.2				
Penrith Total			781.5	835.4	1,616.9	779.3	839.0	1,618.2	751.3	836.6	1,587.9	-30.3		

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

Subregion	LGA	Precinct	Jan-10			Jan-11			Jan-12			Net Change Jan-11 to Jan-12	
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total		
North West	The Hills	Annangrove	66.8	50.2	117.0	59.8	56.3	116.1	60.0	56.7	116.7	0.6	
		Castle Hill	0.4	122.7	123.1	0.4	122.7	123.1	1.6	121.3	122.9	-0.2	
		Dural		0.2	0.2		0.2	0.2		0.2	0.2	0.0	
		North Rocks	7.5	37.0	44.5	7.5	37.0	44.5	6.9	37.0	43.9	-0.6	
		Northmead, James Rouse Drive		4.7	4.7		4.7	4.7	0.0	4.7	4.7	0.1	
		Rouse Hill	1.2	3.7	4.8	1.2	3.7	4.8	1.2	3.7	4.9	0.0	
		Winston Hills		14.7	14.7		14.7	14.7	3.1	11.6	14.7	0.0	
The Hills Total			75.8	233.1	308.9	68.8	239.3	308.1	72.8	235.2	308.0	-0.1	
North West Total			1,955.8	2,533.6	4,489.4	2,140.1	2,557.8	4,697.9	2,120.9	2,611.3	4,732.2	34.3	
South	Canterbury	Ashbury		3.1	3.1		3.1	3.1		3.1	3.1	0.0	
		Belmore	0.3	3.4	3.7	0.3	3.4	3.7	0.4	3.3	3.7	0.0	
		Burwood Rd, Belmore		5.4	5.4		5.4	5.4	0.2	5.2	5.4	0.0	
		Canterbury		4.9	4.9		1.5	1.5		1.7	1.7	0.2	
		Canterbury Road, Campsie		3.2	3.2		3.2	3.2		3.2	3.2	0.0	
		Chapel Street		7.3	7.3		7.3	7.3		7.3	7.3	0.0	
		Clemtown Park	1.2	23.4	24.5	1.2	23.4	24.5	1.5	23.2	24.7	0.2	
		Croydon Park		1.5	1.5		1.5	1.5	0.0	1.5	1.5	0.0	
		Kingsgrove North	0.0	35.6	35.7	0.0	35.7	35.7	0.0	35.7	35.7	0.0	
		Kingsgrove South		0.0	0.0								
		Lakemba	0.3	11.8	12.1	0.7	11.4	12.1	0.9	11.0	11.9	-0.2	
		Punchbowl, Wattle Street	0.0	15.3	15.3		15.3	15.3	0.0	11.7	11.8	-3.5	
		Riverwood	1.7	47.4	49.1	1.7	47.4	49.1	0.7	48.9	49.6	0.5	
		Viking St, Campsie		0.0	0.0		0.0	0.0		0.0	0.0	0.0	
		West Riverwood, Wiggs Road		6.0	6.0	0.1	5.9	6.0	0.1	5.9	6.0	0.0	
	Wiley Park		1.9	1.9		1.9	1.9	0.1	1.8	1.9	0.0		
	Canterbury Total			3.5	170.1	173.6	3.9	166.3	170.2	3.8	163.5	167.3	-2.9
	Hurstville	Beverley Hills		1.5	1.5		1.5	1.5		1.5	1.5		
		Hurstville		1.3	1.3		1.3	1.3		1.3	1.3		
		Kingsgrove South	0.0	25.9	25.9	0.0	25.1	25.1	0.2	25.0	25.2	0.1	
		Peakhurst, Boundary Rd		56.3	56.3	0.1	56.2	56.3	0.4	55.9	56.3	0.0	
		Penshurst		1.5	1.5		1.5	1.5		1.6	1.6	0.0	
	Hurstville Total			0.0	86.5	86.5	0.1	85.7	85.8	0.7	85.2	85.9	0.1
	Kogarah	Blakehurst	0.1	1.5	1.6	0.1	1.5	1.6	0.2	1.4	1.6	0.0	
		Carlton		9.8	9.8	0.1	9.7	9.8	0.1	9.8	9.8	0.0	
		Hurstville South		1.6	1.6		1.6	1.6	0.1	1.7	1.8	0.2	
		Kogarah, Gray Ave		0.7	0.7		0.7	0.7	0.0	0.7	0.7	0.0	
Kogarah Total			0.1	13.6	13.7	0.2	13.5	13.7	0.3	13.5	13.9	0.2	
Marrickville	Alice St, Newtown		0.8	0.8		0.8	0.8				-0.8		
	Camperdown		2.8	2.8		2.8	2.8	0.1	2.8	2.8	0.0		
	Dulwich Hill, Constitution Rd		0.0	0.0		0.0	0.0				0.0		
	Dulwich Hill, New Canterbury Rd		0.6	0.6		0.6	0.6		0.5	0.5	-0.1		
	Dulwich Hill, Terry Rd		0.6	0.6		0.6	0.6				-0.6		
	Lewisham, New Canterbury Rd		1.4	1.4		1.4	1.4	0.0	1.4	1.4	0.0		
	Lewisham, Old Canterbury Rd	0.4	2.7	3.1	0.4	2.7	3.1	0.6		0.6	-2.5		
	Lewisham, Parramatta Rd		0.8	0.8		0.8	0.8				-0.8		
	Marrickville	0.2	70.5	70.7	0.4	70.3	70.7	3.7	62.9	66.5	-4.2		
	Marrickville, Addison Rd		0.9	0.9		0.9	0.9				-0.9		
	Marrickville, Cowper St		0.9	0.9		0.9	0.9				-0.9		
	Marrickville, Meeks Rd	0.0	2.7	2.7	0.0	2.7	2.7		1.5	1.5	-1.1		
	Newtown, Gladstone St		0.9	0.9		0.9	0.9				-0.9		
	Petersham, Parramatta Rd		0.2	0.2		0.2	0.2				-0.2		
	Petersham, Trafalgar St		0.7	0.7		0.7	0.7				-0.7		
	Princes Hwy Frontages	1.2	12.5	13.7	1.2	12.5	13.7	0.8	7.4	8.1	-5.5		
	St Peters, Grove Street		2.8	2.8		2.0	2.0		2.0	2.0	0.0		
St Peters, King St	0.2	6.6	6.8	0.2	6.6	6.8				-6.8			
St Peters, Princes Hwy	0.4	11.7	12.1	0.4	11.7	12.1	1.3	13.4	14.7	2.6			
St Peters, Unwins Bridge Rd	0.1	4.4	4.5	0.1	4.4	4.5		4.5	4.5	0.0			

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

Subregion	LGA	Precinct	Jan-10			Jan-11			Jan-12			Net Change Jan-11 to Jan-12	
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total		
South	Marrickville	Stanmore, Bridge Rd West		0.5	0.5		0.5	0.5				-0.5	
		Stanmore, Bridge Rd East		1.6	1.6		1.6	1.6	0.0	1.7	1.7	0.0	
		Sydney Airport Environs	1.1	14.6	15.7	1.1	14.5	15.6	1.1	17.4	18.5	2.9	
		Tempe Rd, Bus Depot		0.2	0.2		0.2	0.2		2.4	2.4	2.2	
		Tempe, Carrington Rd	0.7	11.7	12.5	0.9	11.6	12.5	0.2	12.5	12.7	0.2	
		Tempe, Princes Hwy	2.2	8.2	10.5	2.2	8.2	10.5		3.7	3.7	-6.7	
	Marrickville Total			6.5	161.5	168.0	6.8	160.4	167.2	7.7	134.1	141.8	-25.4
	Rockdale	Bexley		2.1	2.1		2.1	2.1		2.1	2.1	0.0	
		Bexley, Queen Victoria St		0.3	0.3		0.3	0.3		0.3	0.3	0.0	
		Bonar Street	0.2	5.7	5.9	0.2	2.8	3.0				-3.0	
		Kogarah, Production Ave	0.1	8.8	8.9	0.1	8.8	8.9	0.1	8.8	8.9	0.0	
		Princes Highway, Waines Cres		0.9	0.9		0.8	0.9				-0.9	
		Rockdale, Garnet St		1.5	1.5		1.5	1.5		0.6	0.6	-0.9	
		Rockdale, West Botany St	0.4	21.5	21.9	0.1	21.8	21.9	0.2	22.6	22.8	0.9	
		Turrella	0.8	12.6	13.4	0.8	12.6	13.4	1.0	13.1	14.1	0.6	
		Turrella (former Streets Icecream site)	0.0	1.4	1.4	0.0	1.4	1.4				-1.4	
	Rockdale Total			1.5	62.0	63.5	1.3	59.4	60.6	1.3	48.9	50.1	-10.5
	Sutherland	Caringbah/Taren Point	1.3	142.6	143.9	1.3	142.6	143.9	2.7	142.0	144.8	0.8	
		Engadine (Princes Hwy)		0.6	0.6		0.6	0.6		0.6	0.6		
		Heathcote		0.5	0.5		0.5	0.5	0.0	0.5	0.5	0.0	
		Heathcote (Burns Rd)		3.7	3.7		3.7	3.7	0.1	3.6	3.7	0.0	
		Kirrawee	3.5	56.7	60.2	3.5	56.7	60.2	4.5	56.7	61.1	0.9	
		Kurnell	135.2	236.0	371.2	135.0	236.2	371.2	141.4	232.0	373.4	2.1	
		Menai		4.3	4.3		4.3	4.3	0.0	4.3	4.4	0.0	
		Miranda	0.1	8.2	8.3	0.1	8.2	8.3	0.1	8.2	8.4	0.1	
	Sutherland Total			140.1	465.0	605.1	139.9	465.1	605.1	148.8	460.3	609.0	4.0
	South Total			151.6	958.8	1,110.4	152.2	950.4	1,102.6	162.6	905.5	1,068.1	-34.5
South West	Camden	Little Street, Camden	0.0	1.4	1.4	0.0	1.4	1.4	0.1	5.4	5.4	4.0	
		Narellan	5.7	28.7	34.4	6.2	28.2	34.4	6.5	28.4	34.9	0.5	
		Smeaton Grange	96.6	112.1	208.8	86.9	121.1	208.0	88.6	110.2	198.8	-9.2	
		Turner Road	43.3		43.3	43.3		43.3	42.5	0.1	42.6	-0.6	
		Oran Park	18.6		18.6	18.5		18.5			18.5	0.0	
	Camden Total			164.2	142.2	306.4	155.0	150.7	305.7	156.1	144.1	300.2	-5.5
	Campbelltown	Campbelltown, Blaxland Road	53.6	84.8	138.5	53.5	85.1	138.4	56.6	83.4	140.1	1.6	
		Ingleburn	38.5	279.0	317.5	39.2	278.3	317.5	38.7	279.5	318.2	0.7	
		Leumeah	2.2	16.5	18.7	2.2	16.5	18.7	2.7	16.5	19.2	0.4	
		Macquarie Fields		1.4	1.4		1.4	1.4		1.4	1.4	0.0	
	Campbelltown Total			135.1	596.2	731.3	129.4	601.8	731.2	135.1	600.9	736.0	4.7
	Liverpool	Cecil Park		1.6	1.6		1.6	1.6	0.0	1.6	1.6	0.0	
		Chipping Norton	4.9	96.2	101.1	5.0	96.1	101.1	5.2	95.9	101.1	0.0	
		Cross Roads, Casula	6.1	37.2	43.3	6.1	37.2	43.3	7.4	10.8	18.2	-25.0	
		Hoxton Park Airport	40.6	0.7	41.3	1.5	39.9	41.3	7.6	33.4	40.9	-0.4	
		Moorebank	22.8	312.7	335.5	22.2	313.3	335.5	23.5	314.1	337.7	2.1	
		Orange Grove	4.4	36.3	40.6	4.4	36.3	40.6		21.6	21.6	-19.1	
		Priddle/Scrivener St	0.0	23.2	23.2	0.0	23.2	23.2	0.1	23.2	23.2	0.0	
		Sappho Road	1.2	16.3	17.5	1.2	16.3	17.5	1.2	16.3	17.5	0.0	
	Liverpool Total			184.8	776.9	961.7	143.6	817.6	961.1	138.9	777.0	915.9	-45.2
	Wollondilly	Appin	2.7	7.6	10.3	2.7	7.6	10.2	2.7	8.6	11.3	1.1	
		Bargo	0.3	1.5	1.8	0.2	1.6	1.8		0.7	0.7	-1.2	
		Maldon	56.0	46.2	102.2	56.0	46.2	102.2	55.9	46.4	102.3	0.1	
		Picton	3.2	24.1	27.3	2.6	24.7	27.3	2.7	26.3	29.0	1.7	
		Picton (Coull St)	2.1		2.1	2.1		2.1	2.1		2.1	0.0	
	Wollondilly Total			28.7	32.6	61.3	29.7	31.6	61.3	28.9	32.6	61.5	0.1
	Wollondilly Total			93.1	112.0	205.1	93.3	111.7	205.0	92.4	114.5	206.9	1.8
South West Total			577.2	1,627.3	2,204.5	521.3	1,681.8	2,203.1	522.4	1,636.5	2,159.0	-44.1	

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

Subregion	LGA	Precinct	Jan-10			Jan-11			Jan-12			Net Change Jan-11 to Jan-12
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total	
Sydney City	Sydney	Alexandria	1.2	133.8	135.0	1.2	133.8	135.0	6.9	130.5	137.4	2.4
		Bays Precinct (Glebe Island/White Bay)	0.7	0.2	0.9	0.7	0.2	0.9	0.0	0.2	0.2	-0.7
		Blackwattle Bay	0.2	0.9	1.2	0.2	0.9	1.2	0.2	1.1	1.3	0.2
		Glebe (Lower Avon St)		0.1	0.1		0.1	0.1		0.1	0.1	0.0
		Glebe (Parramatta Rd/ Arundell St)	0.2	2.2	2.3	0.2	2.2	2.3	0.2	2.2	2.3	0.0
		Rosebery	0.3	13.8	14.2	0.3	13.8	14.2	0.9	13.3	14.2	0.0
		Wentworth Park		0.5	0.5		0.5	0.5		0.5	0.5	0.0
	Sydney Total		2.6	151.5	154.1	2.6	151.5	154.1	8.2	147.8	156.0	1.9
Sydney City Total			2.6	151.5	154.1	2.6	151.5	154.1	8.2	147.8	156.0	1.9
West Central	Auburn	Auburn (Cumberland Industries)		0.7	0.7		0.7	0.7		0.7	0.7	0.0
		Auburn (Queen St)		5.5	5.5		5.5	5.5		5.6	5.6	0.0
		Auburn West	0.0	6.7	6.8	0.0	6.7	6.8	0.2	6.6	6.8	0.0
		Chullora		3.2	3.2		1.5	1.5	1.9		1.9	0.4
		Church Street, Rookwood		1.8	1.8		1.8	1.8		1.8	1.8	0.0
		Clyburn	11.7	31.7	43.4	11.7	31.7	43.4	18.5	39.0	57.4	14.1
		Homebush Bay		49.3	49.3		49.3	49.3	0.2	21.1	21.2	-28.0
		Lidcome East		30.0	30.0	2.1	27.9	30.0	2.1	28.0	30.1	0.1
		Lidcome South	0.2	7.4	7.6	0.2	7.4	7.6	0.1	6.9	7.0	-0.5
		Lidcome West	0.0	51.3	51.3	0.0	51.3	51.3		41.8	41.8	-9.6
		New Street West		0.4	0.4		0.4	0.4	0.0	0.4	0.4	0.0
		Parramatta Road, Corridor	11.6	86.6	98.2	11.7	86.3	98.0				-98.0
		Railway Street, Rookwood		0.6	0.6		0.6	0.6		0.9	0.9	0.3
		Regents Park	5.6	73.1	78.7	4.4	74.1	78.5	3.7	75.1	78.8	0.3
		Silverwater	3.2	147.8	150.9	3.2	147.8	150.9	5.8	145.9	151.7	0.8
		Auburn Total		32.3	496.3	528.6	34.9	491.6	526.5	32.5	373.7	406.2
	Bankstown	Chullora	19.6	190.5	210.1	19.5	190.5	210.0	27.1	183.0	210.0	0.0
Condell Park			29.1	29.1		29.1	29.1	0.2	28.9	29.1	0.0	
Edward Dunlop Paper			2.9	2.9		2.9	2.9	0.1	2.8	2.9	0.0	
Greenacre Bowls		0.0	4.2	4.2		4.2	4.2	1.0	3.2	4.2	0.0	
Leightonfield Station		1.2	162.3	163.5	1.2	162.3	163.5	5.9	157.8	163.6	0.1	
Milperra		0.4	103.2	103.7	0.4	103.2	103.7	1.5	102.2	103.7	0.0	
Padstow North		2.3	92.3	94.7	2.3	92.3	94.7	3.0	91.5	94.5	-0.1	
Padstow South		2.0	42.6	44.5	2.0	42.5	44.5	4.9	42.5	47.5	3.0	
Punchbowl			2.9	2.9		2.9	2.9		2.9	2.9	0.0	
Revesby		2.7	130.9	133.6	2.7	130.9	133.6	3.3	130.4	133.7	0.1	
Sefton	1.0	30.3	31.3	0.9	30.4	31.3	0.5	30.8	31.3	0.0		
Bankstown Total			29.3	791.1	820.4	29.2	791.2	820.6	47.4	775.9	823.3	2.7
Fairfield	Bonnyrigg Plaza	1.8	8.3	10.1	2.1	8.0	10.1	1.1	9.0	10.1	0.0	
	Cabramatta CBD	0.3	1.0	1.3	0.3	1.0	1.3	0.4	1.0	1.4	0.0	
	Council Depot		2.4	2.4		2.4	2.4	0.0	2.5	2.5	0.0	
	Fairfield		4.7	4.7		4.7	4.7		5.0	5.0	0.3	
	Fairfield East	0.2	99.2	99.4	0.2	99.2	99.4	1.2	98.3	99.5	0.2	
	Greystanes	14.1	0.0	14.1	14.0	0.0	14.0	13.7		13.7	-0.3	
	Lansvale	0.4	56.6	57.0	0.4	56.6	57.0	0.9	56.8	57.7	0.7	
	Railway Parade, Cabramatta		1.9	1.9		1.9	1.9		4.1	4.1	2.2	
	Smithfield, South	0.6	41.5	42.1	0.9	41.3	42.2	1.3	42.2	43.5	1.3	
	South of Sydney Water Pipeline	252.1		252.1	252.1	0.0	252.1	160.5	96.3	256.8	4.6	
Wetherill Park	33.3	522.0	555.3	33.6	522.0	555.6	51.6	511.0	562.6	6.9		
Fairfield Total			302.8	737.7	1,040.4	303.7	737.1	1,040.8	230.6	826.1	1,056.7	16.0
Holroyd	Bonds Spinning Mill		8.0	8.0		8.0	8.0		8.0	8.0	0.0	
	Girraween	0.3	83.0	83.3	0.3	83.0	83.3	1.0	82.3	83.3	0.0	
	Greystanes	109.6	68.9	178.5	87.1	85.7	172.8	83.3	84.5	167.7	-5.1	
	Smithfield, North	20.6	328.6	349.2	20.4	328.7	349.0	21.4	328.9	350.3	1.2	
	South Parramatta	0.4	15.3	15.7	0.4	15.3	15.7	1.0	15.0	16.0	0.3	
	South Wentworthville		5.5	5.5		5.5	5.5	0.2	5.3	5.5	0.0	
Yennora (Holroyd)	0.6	187.5	188.1	0.6	187.5	188.1	5.6	182.4	188.0	-0.1		
Holroyd Total			131.4	696.8	828.2	110.3	712.1	822.4	112.4	706.4	818.8	-3.6

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

Subregion	LGA	Precinct	Jan-10			Jan-11			Jan-12			Net Change Jan-11 to Jan-12	
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total		
West Central	Parramatta	Alfred Street, Parramatta		0.2	0.2		0.2	0.2		0.2	0.2		
		Camellia/Rosehill	7.8	232.7	240.6	7.9	232.6	240.5	15.9	222.7	238.6	-1.9	
		Church St, North Parramatta	0.2	26.4	26.6	0.1	26.5	26.6	0.2	10.8	11.0	-15.6	
		Clyde	1.8	14.7	16.5	2.1	14.4	16.5	2.1	14.0	16.2	-0.4	
		Ermington	0.4	45.3	45.7	0.4	45.3	45.7	0.7	46.5	47.2	1.5	
		Granville	0.1	3.4	3.5	0.1	3.4	3.5				-3.5	
		Gregory Place, Harris Park		1.9	1.9		1.9	1.9		1.9	1.9	0.0	
		Guildford South		4.6	4.6		4.6	4.6		4.6	4.6		
		Guildford/Merrylands	0.6	5.3	5.9	0.6	5.4	6.0	1.5	4.6	6.2	0.2	
		Moreton St		4.0	4.0		4.0	4.0				-4.0	
		Old Windsor Road	0.1	9.0	9.1	0.1	9.0	9.1	0.1	9.0	9.1	0.0	
		Old Windsor Road, Northmead	2.6	23.8	26.4	1.8	24.7	26.4	2.7	23.8	26.5	0.0	
		Pendle Hill	3.6	14.8	18.4	3.5	14.9	18.4	2.4	16.0	18.4	0.0	
		Pharmacia		5.2	5.2		5.2	5.2		5.2	5.2	0.0	
		Regents Park				0.2		0.2		0.1	0.1	-0.1	
		River Road West, Parramatta		6.8	6.8		6.8	6.8	0.2	6.5	6.8	0.0	
		Rydalmere	9.7	93.8	103.5	9.7	93.8	103.5	12.0	91.8	103.7	0.3	
		Seven Hills (Parramatta LGA)		3.7	3.7		3.7	3.7		3.7	3.7	0.0	
		South Clyde	0.5	11.3	11.8	0.5	11.3	11.7	0.5	11.3	11.7	0.0	
		South Granville/ Chester Hill	0.8	52.4	53.1	0.8	52.4	53.1	0.9	50.3	51.2	-2.0	
Victoria Rd		3.3	3.3		3.3	3.3		3.3	3.3	0.0			
Parramatta Total			28.2	562.5	590.7	27.8	363.2	591.0	39.2	526.3	565.4	-25.5	
West Central Total			523.9	3,284.4	3,808.4	502.1	3,298.8	3,800.9	462.1	3,208.4	3,670.5	-130.4	
Central Coast	Gosford	Blackwal	1.5	1.6	3.1	1.5	1.6	3.1	1.5	1.6	3.1	0.0	
		Erina		10.7	10.7		10.7	10.7		10.5	10.5	-0.3	
		Gosford Industrial Area	3.1	8.0	11.1	3.1	8.0	11.1	3.1	8.0	11.1	0.0	
		Kincumber	0.2	8.5	8.7	0.2	8.5	8.7	0.2	8.5	8.7		
		Lisarow	6.0	56.3	62.4	6.0	56.3	62.4	6.5	55.9	62.4		
		North Gosford and Wyoming	3.5	20.6	24.1	3.5	20.6	24.1	3.5	20.6	24.1	0.0	
		Somersby	184.8	108.3	293.0	169.2	123.8	293.0	168.5	123.8	292.3	-0.7	
		West Gosford	12.2	105.3	117.4	12.2	105.3	117.4	11.8	105.7	117.4	0.0	
		Woy Woy		34.4	34.4		34.4	34.4		34.4	34.4	0.0	
		Woy Woy, Alma Ave		0.9	0.9		0.9	0.9		0.9	0.9		
		Woy Woy, Nagari Rd		1.8	1.8		1.8	1.8	0.0	1.8	1.8	0.0	
		Woy Woy, Rawson Rd		4.1	4.1		4.1	4.1		4.1	4.1		
	Kariong	11.4		11.4	11.4		11.4	11.4		11.4	0.0		
	Gosford Total			222.6	360.5	583.2	207.1	376.1	583.2	206.4	375.7	582.2	-1.0
	Wyong	Bateau Bay							0.4		0.4	0.4	
		Berkeley Vale		8.5	8.5		8.5	8.5	0.1	8.5	8.5	0.1	
		Bushells Ridge	543.8	88.5	632.4	543.8	88.5	632.4	543.7	88.5	632.3	-0.1	
		Charmhaven	6.1	30.2	36.3	6.1	30.2	36.3	6.1	30.2	36.3		
		Doyalson	3.9	7.8	11.7	3.9	7.8	11.7	3.9	7.8	11.7		
		Gwandalan	4.7	1.0	5.7	4.7	1.0	5.7	4.7	1.0	5.7		
Long Jetty			3.3	3.3		3.3	3.3	0.1	3.3	3.4	0.1		
Long Jetty/The Entrance			1.1	1.1		1.1	1.1		1.1	1.1			
North Wyong		37.4	82.0	119.4	37.4	82.0	119.4	46.7	82.2	128.9	9.5		
Ourimbah, Pacific Hwy		3.7	6.8	10.4	3.7	6.8	10.4	3.7	6.7	10.4	0.0		
Tuggerah	34.1	245.0	279.2	34.1	245.0	279.2	47.5	245.2	292.7	13.5			
Wyong	283.1	40.3	323.4	279.2	59.2	338.4	275.9	59.3	335.2	-3.2			
Wyong Total			916.9	514.5	1,431.4	913.1	533.4	1,446.4	932.9	533.8	1,466.7	20.3	
Central Coast Total			1,139.6	875.0	2,014.6	1,120.1	909.4	2,029.6	1,139.3	909.5	2,048.8	19.3	
Sydney Region Total			4,456.9	10,921.0	15,377.9	4,542.5	11,041.0	15,583.5	4,619.6	10,774.5	15,394.2	-189.3	

NB: Changes to precinct size from 2011 to 2012 are generally due to data refinement and updates, unless indicated as a zoning change shown in Table 5. Marginal increases in undeveloped or developed zoned land from 2011 to 2012 for some precincts are generally a result of data refinement and updates. Where no value is shown in a cell this indicates that the amount of land recorded is 0 hectares. Where '0.0' is shown in a cell, this means a value less than 0.05 hectares (ie. 500 m²) was recorded and then rounded to '0.0'.

Table 3 - Undeveloped and Serviced Zoned Land (January 2010 - January 2012)

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

Subregion	LGA	Precinct	Undeveloped & Serviced Zoned Land			Net change (Jan-11 - Jan-12)
			Jan -10	Jan - 11	Jan - 12	
North West	Penrith	Erskine Park	172.2	76.6	165.3	88.7
	Penrith	North Penrith	27.8	26.3	32.1	5.8
	Blacktown	Glendenning	31.2	30.8	31.4	0.6
	Blacktown	Former Wonderland	38.7	38.7	27.9	-10.8
	Blacktown	Minchinbury	15.0	15.0	15.0	0.0
	Blacktown	Arndell Park	13.6	13.6	14.4	0.8
	Blacktown	Marsden Park	0.0	10.3	12.1	1.8
	Penrith	Emu Plains	14.3	13.3	12.0	-1.3
	Penrith	St Marys	20.4	16.6	11.7	-4.9
	The Hills	Annangrove	0.0	11.3	11.3	0.0
	Blue Mountains	Lawson	11.1	11.1	11.1	0.0
	Blacktown	Eastern Creek^	178.1	164.1	9.5	-154.6
	Blue Mountains	Katoomba	9.4	7.8	8.3	0.5
	Blacktown	The Raceway Precinct	9.7	8.9	7.3	-1.6
	The Hills	North Rocks	7.5	7.5	6.9	-0.6
	Blacktown	Mount Druitt	6.6	6.6	6.1	-0.4
South West	Camden	Smeaton Grange	54.7	49.7	50.8	1.1
	Campbelltown	Ingleburn	37.7	36.9	34.3	-2.6
	Campbelltown	Minto	32.2	32.2	31.6	-0.6
	Campbelltown	Campbelltown, Blaxland Road	34.2	33.5	31.0	-2.5
	Camden	Oran Park	0.0	0.0	18.5	18.5
	Camden	Turner Road	0.0	0.0	17.1	17.1
	Liverpool	Moorebank	13.5	12.8	12.2	-0.6
	Liverpool	Yarrunga/Prestons	16.5	18.6	10.5	-8.1
	Liverpool	Casula, Cross Rds	6.1	6.1	6.1	0.0
	Liverpool	Hoxton Park Airport	0.0	0.0	5.9	5.9
West Central	Camden	Narellan	5.7	5.9	5.7	-0.2
	Fairfield	Wetherill Park	23.0	24.1	27.7	3.6
	Holroyd	Greystanes	56.0	38.3	24.8	-13.5
	Holroyd	Smithfield, North	20.3	20.1	19.7	-0.4
	Bankstown	Chullora	10.5	10.5	12.5	2.0
	Parramatta	Rydalmere	7.5	7.5	7.7	0.2
Auburn	Clyburn	6.5	6.5	6.1	-0.4	
East	Botany Bay	Banksmeadow	8.5	8.5	8.0	-0.5
Central Coast	Gosford	Somersby*	N/A	N/A	10.1	N/A
Sydney Region Total			1,012.0	892.0	830.2	-61.8

NB: Only showing those precincts with over 5 ha of undeveloped and serviced zoned land in January 2012.

^ Significant drop at Eastern Creek due to refinement of Sydney Water asset attribute data.

* Servicing data for Somersby only available for July 2012 from Gosford City Council.

Table 4 - Sydney Region - Area of Undeveloped Zoned Employment Lands by Lot Size (January 2011 - January 2012)

The table and figure below provides a breakdown of undeveloped zoned employment lands by lot sizes for January 2011 and January 2012. Lot sizes are grouped into 6 cohorts ranging from less than 0.1 hectare to more than 10 hectares. The data is presented on both the number of lots (No.) and total area (Ha) for each cohort.

Lot Sizes	Lots				Net Change		Total Area				Net Change	
	2011		2012		Lots (2011-2012)		2011		2012		Total Area (2011-2012)	
	No	%	No	%	No	%	Ha	%	Ha	%	Ha	%
<0.1 ha	645	28%	1,314	41%	669	13%	26	1%	45	1%	19	0%
0.1-0.5 ha	897	39%	1,026	32%	129	-7%	228	5%	262	6%	34	1%
0.5-1 ha	256	11%	290	9%	34	-2%	182	4%	206	4%	25	0%
1-5 ha	329	14%	378	12%	49	-2%	753	17%	847	18%	94	1%
5-10 ha	81	4%	84	3%	3	-1%	590	13%	595	13%	5	0%
>10 ha	88	4%	90	3%	2	-1%	2,765	61%	2,666	58%	-99	-3%
Sydney Region Total	2,296	100%	3,182	100%	886		4,543	100%	4,620	100%	77	

Figure 5 - Sydney Region - Area of Undeveloped Zoned Employment Lands by Lot Size (January 2011 - January 2012)

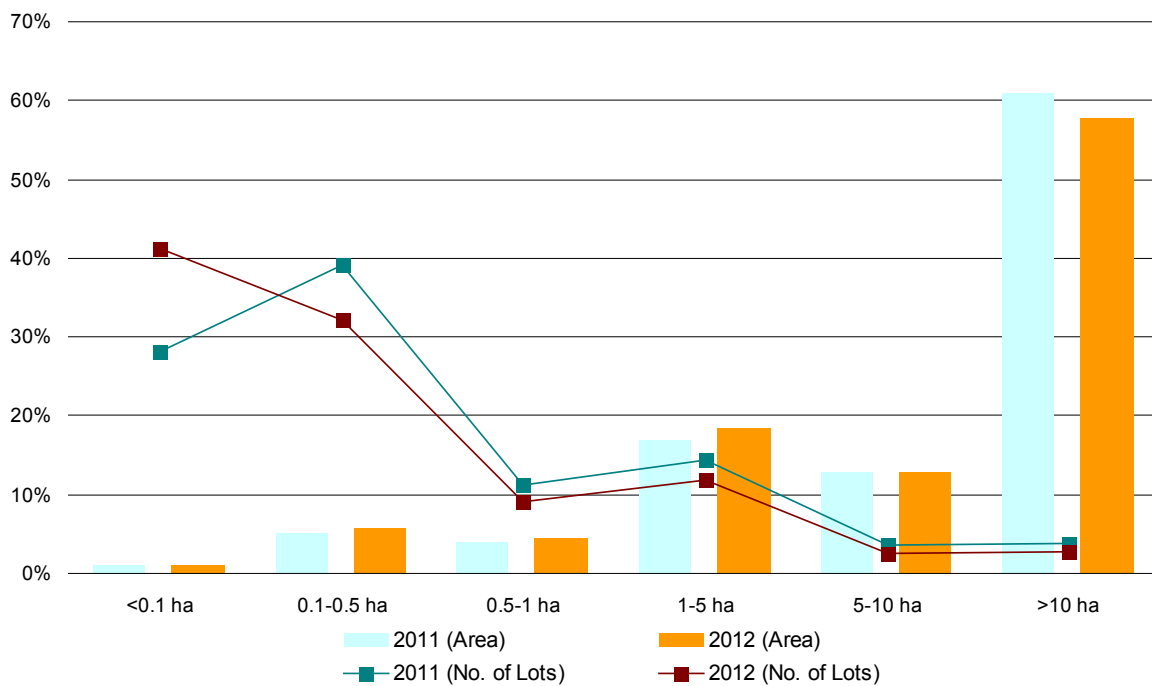


Table 5 - Record of Zoning Changes

This table provides details of all known zoning changes to employment lands precincts between January 2011 and January 2012, including new industrial zone additions, and also losses due to rezonings. The table also provides a detailed breakdown of all the various zones (under the Standard Instrument Local Environmental Plan) that were used when rezoning these precincts.

Precinct	LGA	2011	2012																	Total Rezoned Land	IN Zone Additions
		IN	IN	R1	R2	R3	R4	B1	B2	B4	B5	B6	B7	RE1	RE2	SP2	W1	E2			
Alice St, Newtown	Marrickville	0.8	0.0							0.8									0.8	0.0	
Artarmon	Willoughby	65.0	63.9							1.1									1.1	0.0	
Bonar St	Rockdale	3.0	0.0				3.0												3.0	0.0	
Camellia/Rosehill	Parramatta	240.5	238.6														1.9		1.9	0.0	
Church St, North Parramatta	Parramatta	26.6	11.0									15.1				0.2	0.1		15.3	0.0	
Clyde	Parramatta	16.5	16.2														0.3		0.3	0.0	
Cross Roads, Casula	Liverpool	43.3	18.2							24.1									24.1	0.0	
Dulwich Hill, New Canterbury Rd	Marrickville	0.6	0.5							0.1									0.1	0.0	
Dulwich Hill, Terry Rd	Marrickville	0.6	0.0				0.6												0.6	0.0	
Emu Heights	Penrith	36.1	0.0											36.1					36.1	0.0	
Frenchs Forest	Warringah	56.5	0.0											56.5					56.5	0.0	
Gladesville	Ryde	23.8	20.2		0.1					2.1		1.5							3.7	0.0	
Granville	Parramatta	3.5	0.0							2.6		0.8							3.4	0.0	
Greystanes ¹	Blacktown, Holroyd & Fairfield	218.4	210.4												13.3				13.3	5.3	
Homebush Bay	Auburn	49.3	21.2											28.1					28.1	0.0	
Huntingwood (WSEH) ²	Blacktown	71.0	82.6																0.0	11.6	
Lane Cove West	Lane Cove	51.5	50.6												0.1		0.9		0.9	0.0	
Lewisham, Old Canterbury Rd	Marrickville	3.1	0.6				1.3			0.6	0.5								2.4	0.0	
Lewisham, Parramatta Rd	Marrickville	0.8	0.0									0.8							0.8	0.0	
Lidcombe South ¹	Auburn	7.6	7.0				0.6			0.2									0.7	0.2	
Lidcombe West	Auburn	51.3	41.8									9.5							9.5	0.0	
Macquarie Park, Delhi Rd	Ryde	0.6	0.0											0.6					0.6	0.0	
Marrickville	Marrickville	70.7	66.5							0.8	0.4			2.5		0.2			3.8	0.0	
Marrickville, Addison Rd	Marrickville	0.9	0.0								0.9								0.9	0.0	
Marrickville, Cowper St	Marrickville	0.9	0.0		0.5	0.3				0.1									0.9	0.0	
Marrickville, Meeks Rd	Marrickville	2.7	1.5								0.4			0.8					1.1	0.0	
Moreton St	Parramatta	4.0	0.0				2.9			0.7									4.0	0.0	
Newtown, Gladstone St	Marrickville	0.9	0.0				0.2				0.4			0.3					0.9	0.0	
Orange Grove	Liverpool	40.6	21.6									19.1							19.1	0.0	
Parramatta Rd Corridor ³	Auburn	98.0	14.1										83.9						83.9	0.0	
Petersham, Parramatta Rd	Marrickville	0.2	0.0										0.2						0.2	0.0	
Petersham, Trafalgar St	Marrickville	0.7	0.0	0.1			0.6												0.7	0.0	
Princes Highway, Waines Cr	Rockdale	0.9	0.0							0.9									0.9	0.0	
Princes Hwy Frontages	Marrickville	13.7	8.1										5.5						5.5	0.0	
Punchbowl, Wattle St ⁴	Canterbury	15.3	11.8									3.6							3.6	0.0	
South Granville/ Chester Hill	Parramatta	53.1	51.2		0.2			1.8											2.0	0.0	
St Marys Leagues ¹	Penrith	10.3	3.1										1.7	1.5	2.1	8.1		2.2	10.3	3.1	
St Peters, King St	Marrickville	6.8	0.0	0.7	0.7														6.9	0.0	
St Peters, Princes Hwy ¹	Marrickville	12.1	14.7										1.6						1.6	4.2	
Stanmore Bridge Rd West	Marrickville	0.5	0.0							0.1	0.4								0.5	0.0	
Riverstone West ²	Blacktown	95.9	107.3																0.0	11.4	
Rockdale, Garnet St	Rockdale	1.5	0.6				0.9												0.9	0.0	
Ropes Crossing	Blacktown	11.0	3.9	7.1															7.1	0.0	
Tempe, Princes Hwy	Marrickville	10.5	3.7										6.7						6.7	0.0	
Turrella (former Streets Icecream site)	Rockdale	1.4	0.0				1.4												1.4	0.0	
Wolli Creek	Rockdale	7.3	1.5							5.8									5.8	0.0	
Yarrunga/Prestons ¹	Liverpool	357.0	354.1										15.1			15.2	12.9		43.2	40.3	
Total		1787.4	1446.6	7.9	1.5	0.3	11.4	1.8	0.9	39.1	27.3	142.2	104.2	36.6	23.3	14.2	2.3	2.2	415.1	76.2	
Net Difference 2011-12 IN Lands		-340.8																			
% of Total Rezoned Land				1.9%	0.4%	0.1%	2.7%	0.4%	0.2%	9.4%	6.6%	34.3%	25.1%	8.8%	5.6%	3.4%	0.5%	0.5%	100%		

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

1. Despite parts of these precincts being lost due to rezoning to other zones, new industrial zoning was also added to these precincts.
2. Increase in zoning boundary due to amendment to relevant SEPPs.
3. Part of the Parramatta Rd Corridor precinct (83.9 ha) was rezoned to B6, with the remaining 14.1 ha moved to the Clyburn precinct for the purposes of ELDP monitoring.
4. Rezoned amount of 3.6ha in the Punchbowl, Wattle St precinct was actually to 3(d), but has been included in B5, which is a comparable Standard Instrument LEP zone, for the purpose of this analysis.

Table 6 - Value (\$) of Industrial Approvals for 2010/11 by LGA and Subregion

The building activity table below shows the monetary value (\$) of all industrial Development Approvals for the financial year from July 2010 to June 2011 by LGA and Subregion for the Sydney Region. The data is derived from ABS non-residential building approvals data and covers 'warehouses', 'factories' and 'other industry'. This data includes new development, alterations and additions and is limited to DAs valued at over \$50,000.

LGA	Factories and other secondary production buildings	Warehouses (excluding produce storage)	Other Industry	Total Industry
Botany Bay	7,550,000	500,000	5,656,079	13,706,079
Randwick	150,000,000	423,000	159,500	150,582,500
Waverley	0	0	0	0
Woollahra	120,000	0	440,000	560,000
East Total	157,670,000	923,000	6,255,579	164,848,579
Sydney	0	29,470,386	0	29,470,386
Sydney City Total	0	29,470,386	0	29,470,386
Marrickville	415,000	1,430,000	100,000	1,945,000
Hurstville	920,000	3,600,000	60,000	4,580,000
Kogarah	0	80,000	0	80,000
Rockdale	90,000	350,000	0	440,000
Sutherland Shire	463,000	5,570,000	428,426	6,461,426
Canterbury	650,000	2,400,000	850,000	3,900,000
South Total	2,538,000	13,430,000	1,438,426	17,406,426
Bankstown	4,444,500	32,172,208	0	36,616,708
Fairfield	160,000	25,012,485	0	25,172,485
Auburn	620,000	4,724,134	2,093,897	7,438,031
Holroyd	590,000	8,732,098	280,000	9,602,098
Parramatta	3,663,000	9,058,052	443,440	13,164,492
West Central Total	9,477,500	79,698,977	2,817,337	91,993,814
Liverpool	1,250,000	27,632,430	4,287,400	33,169,830
Camden	6,305,000	10,578,400	1,450,000	18,333,400
Campbelltown	75,683,337	3,924,948	5,552,442	85,160,727
Wollondilly	350,000	450,000	6,500,000	7,300,000
South West Total	83,588,337	42,585,778	17,789,842	143,963,957
Leichhardt	0	0	4,280,540	4,280,540
Ashfield	0	0	0	0
Burwood	0	0	0	0
Canada Bay	297,000	0	120,000	417,000
Strathfield	0	3,330,000	2,347,862	5,677,862
Inner West Total	297,000	3,330,000	6,748,402	10,375,402
Blue Mountains	0	0	1,930,000	1,930,000
Hawkesbury	3,604,000	2,525,000	2,709,900	8,838,900
Penrith	9,602,500	55,255,119	2,960,000	67,817,619
Blacktown	68,027,000	291,680,809	133,000	359,840,809
Hunter's Hill	0	0	0	0
Baulkham Hills	0	0	144,500	144,500
North West Total	81,233,500	349,460,928	7,877,400	438,571,828
Lane Cove	0	1,972,000	180,000	2,152,000
Mosman	0	0	0	0
North Sydney	0	0	0	0
Ryde	0	385,000	0	385,000
Willoughby	18,000,000	299,000	0	18,299,000
Inner North Total	18,000,000	2,656,000	180,000	20,836,000
Hornsby	0	5,880,000	0	5,880,000
Ku-ring-gai	0	0	0	0
North Total	0	5,880,000	0	5,880,000
Manly	0	0	0	0
Pittwater	200,000	0	0	200,000
Warringah	0	1,967,898	912,000	2,879,898
North East Total	200,000	1,967,898	912,000	3,079,898
Gosford	735,000	0	2,691,000	3,426,000
Wyong	1,547,500	3,400,000	1,310,000	6,257,500
Central Coast Total	2,282,500	3,400,000	4,001,000	9,683,500
Sydney Region Total	355,286,837	532,802,967	48,019,986	936,109,790

Figure 6 - Sydney Region - Value (\$) of Industrial Approvals (2002/03 to 2010/11)

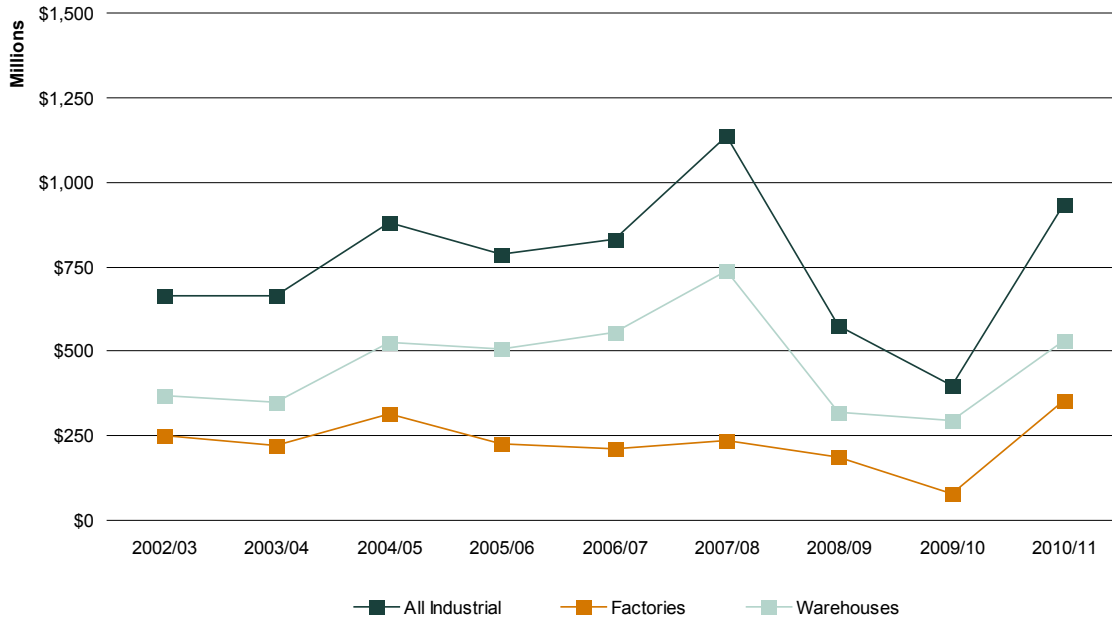


Figure 7 - Value (\$) of Industrial Approvals for 2010/11 by Subregion

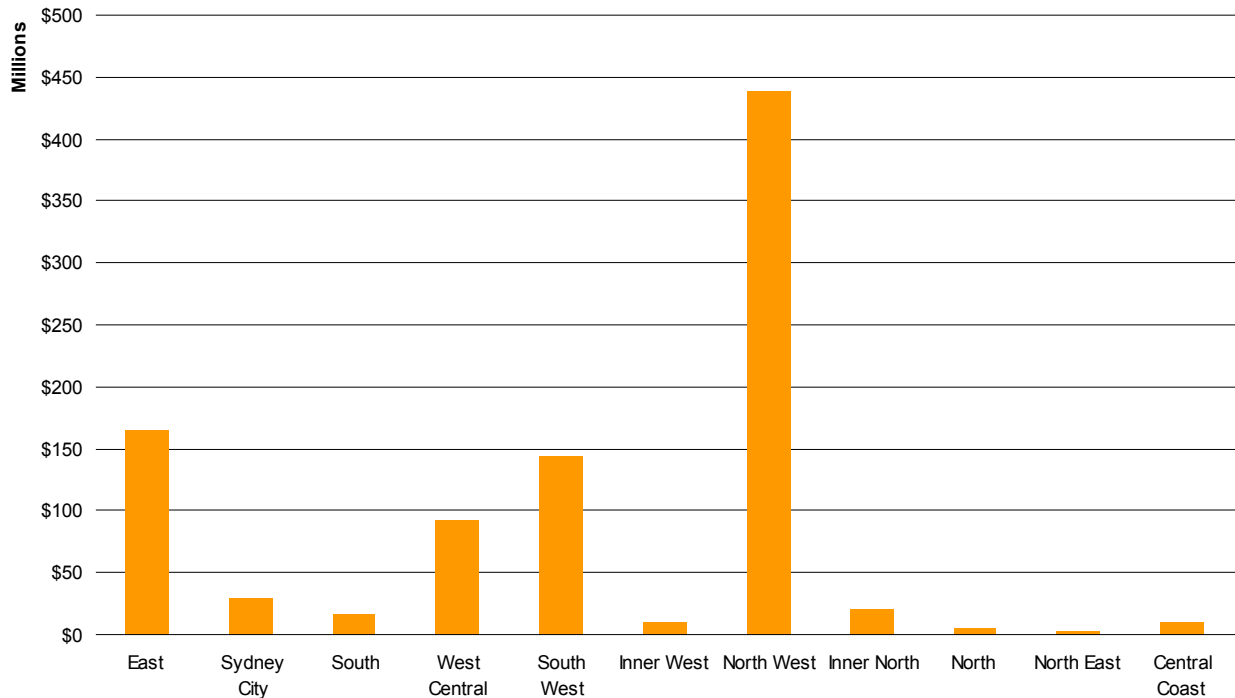


Table 7 - Take-up of Employment Lands by Key Precincts (January 2008 - January 2012)

The table below summarises take-up of employment lands over the 4 consecutive calendar years 2008, 2009, 2010 and 2011. Take-up is defined as land that has been consumed by industrial development (i.e. vacant employment lands which have been developed over a 12 month period). Only those precincts which experienced take-up of 5 or more hectares in one or more of the years is shown in the table. However, the subregion totals shown in the table also include all the smaller cases of take-up. For Metropolitan Sydney, Sydney Water data was used to identify a change in development status from undeveloped to developed. In the Central Coast, where this data is not available, aerial photography* was used to identify take-up of land, but only for the January 2010 - January 2011 and January 2011 - January 2012 years.

Subregion	Precinct	Jan 08 - Jan 09 (Ha)	Jan 09 - Jan 10 (Ha)	Jan 10 - Jan 11 (Ha)	Jan 11 - Jan 12 (Ha)	Total Ha
East	Port Botany	1.3	5.3	0.1	0.5	7.2
East Total		3.6	11.9	0.3	0.5	16.3
North West	Eastern Creek	25.5	4.3	11.4	32.3	73.5
	Annangrove	0.0	0.0	6.0	0.0	6.0
	Erskine Park	28.3	50.6	0.0	19.9	98.9
	Former Wonderland	0.0	9.5	0.0	10.7	20.2
	Glendenning	10.4	5.7	0.2	0.8	17.0
	Huntingwood West	0.0	0.0	0.0	18.8	18.8
	Minchinbury	6.5	0.0	0.0	0.0	6.5
	North Penrith	0.9	7.2	4.3	0.4	12.8
Ropes Crossing	0.0	10.5	0.0	0.0	10.5	
Seven Hills (Blacktown LGA)	7.9	3.0	0.4	0.1	11.4	
North West Total		115.6	94.7	33.9	87.5	331.7
South	Kurnell	1.8	22.4	0.2	0.0	24.4
South Total		9.3	27.5	0.4	2.8	40.0
South West	Ingleburn	14.9	4.8	0.3	0.4	20.3
	Minto	3.4	0.5	6.1	0.5	10.5
	Smeaton Grange	19.6	3.3	9.0	0.7	32.6
	Hoxton Park	0.0	0.0	38.1	0.0	38.1
	Yarrunga/Prestons	15.6	22.5	5.3	1.4	44.8
South West Total		71.2	38.0	61.2	7.2	177.6
West Central	Regents Park	8.8	1.4	1.2	0.8	12.2
	Greystanes	0.0	0.0	16.8	0.0	16.8
	Chullora	2.0	0.3	0.1	5.1	7.4
	South of Sydney Water Pipeline	0.0	0.0	0.0	10.0	10.0
	Wetherill Park	12.2	6.2	0.0	0.0	18.5
West Central Total		45.6	16.8	19.7	17.8	99.9
Sydney Region Subtotal (excl Central Coast)		264.4	205.0	118.6	116.9	704.9
Central Coast	Somersby	N/A	N/A	15.5	0.0	15.5
	Wyong	N/A	N/A	18.9	0.5	19.4
Central Coast Total		N/A	N/A	34.4	3.0	37.4
Sydney Region Total		264[^]	205[^]	153	120	742[^]

NB: Table 7 shows only the precincts where in one or more of the years there was take-up of 5 hectares or more.

* Source: PhotoMaps by nearmap.com

[^] The Sydney Region Totals for 'Jan 08 - Jan 09' and 'Jan 09 - Jan 10' do not include Central Coast and therefore the 'Total Ha' column does not include Central Coast data for those 2 years.

Table 8 - Status of Employment Lands at January 2011 and January 2012

The table and figure below compares employment lands stock at different stages of the development pipeline between January 2011 and January 2012. This shows all currently identified land (i.e. both zoned and unzoned/proposed) referred to as 'Strategy Identified', as well as how much of this total stock is undeveloped and zoned and of that, how much undeveloped zoned land is currently serviced (in terms of a water and sewer connection).

Status of Employment Lands	Jan 2011 (Ha)	Jan 2012 (Ha)	Net Change (Ha) 2011 - 2012
Strategy identified land	7,880	7,269	-611 [^]
Undeveloped zoned land:	4,543	4,620	77
- Undeveloped zoned land not serviced	3,651	3,789	139
- Undeveloped zoned land and serviced	892	830	-62

NB: 'Undeveloped zoned land' is a subset of 'Strategy identified land', and 'Undeveloped zoned land not serviced' and 'Undeveloped zoned land and serviced' are both subsets of 'Undeveloped zoned land'. 'Strategy identified land' includes land which is identified in published NSW Government or council documents as committed future or potential industrial lands as well as undeveloped zoned industrial land.

[^] Significant reduction due to removal of the entire 'Marsden Park Industrial Precinct' as identified in SEPP (Sydney Region Growth Centres) 2006 and also reductions in area of proposed employment lands at Box Hill and Austral/Leppington North in the North West and South West Growth Centres.

Figure 8 - Status of Employment Lands at January 2011 and January 2012

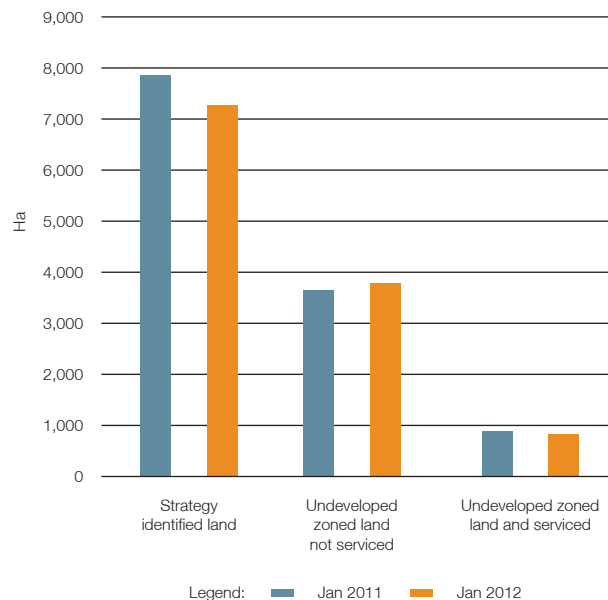


Table 9 - Assessment of the Adequacy of Employment Lands Supply at January 2012

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

Status of Employment Lands	Number of years estimated supply			Supply Standards
	Jan-12 (ha)	High take-up (300 ha pa)	Low take-up (80 ha pa)	
Strategy identified land	7,269	24	91	20 yrs [^]
Undeveloped zoned land not serviced	3,789	13	47	8-10 yrs
Undeveloped zoned land and serviced	830	3	10	5-7 yrs

[^] To ensure consistency with the 20 year timeframe of the new draft Metropolitan Strategy (currently being prepared at the time of printing), the supply standard for 'Strategy identified land' has been adjusted to 20 years accordingly, whereas in previous years a 15 year supply standard was used.

Glossary

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

Employment Lands Development Program (ELDP): This is the State Government's key program for managing supply of Employment Lands for the Sydney Region and assisting infrastructure coordination.

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

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

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

Industrial Building Approvals Activity: Derived from ABS non-residential building activity data, this monitors the value in AUS \$ of estimated building works from Development Applications for industrial buildings, including 'factories', 'warehouses' and 'other industry' (such as high-technology). Data includes both refurbishments and new builds and only includes DA's with an estimated value of over \$50,000.

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

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

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

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

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

Take-up: Quantity in hectares of zoned Employment Lands which has changed from 'undeveloped' (vacant) to 'developed' (occupied) over a 12 month period (eg between January 2011 and January 2012) based on Sydney Water data and confirmation by aerial photography and related information. It is defined as the point at which development has commenced on a site and the site is therefore no longer available for development.

Undeveloped and Serviced Employment Lands: Currently zoned Undeveloped Employment Lands which also have a water and sewer connection based on Sydney Water data or data received from Gosford City Council (for that LGA).

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

Data Sources

Aerial Photography: Source - PhotoMaps by nearmap.com

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

Industrial Building Approvals: Source - Australian Bureau of Statistics

Lot Sizes: Source - NSW Land and Property Information

Servicing Data: Source - Gosford City Council and Sydney Water

Zoning Data: Source - Department of Planning and Infrastructure



Planning &
Infrastructure



Employment Lands Development Program

