Goulburn Mulwaree Council

Goulburn Mulwaree Freight Investigation

Research Paper

July 2018

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1. Introduction

1.1 Purpose of this report

This report is a research paper that explores the drivers of freight and logistics hubs[1] in relation to the Goulburn Mulwaree area and particularly the city of Goulburn. The City is located in New South Wales, Australia between the State's capital, Sydney, and Australia's capital, Canberra. It has a strategic location along the Sydney-Melbourne Hume Highway in the national logistics network and the interstate rail network and therefore the potential for this type of economic activity.

Previous attempts to develop a logistics hub in the area have only been partially successful, although there have been major proposals that have come close to fruition. The report looks at what factors are likely to be necessary for this economic activity to grow and the potential role of Goulburn Mulwaree Council in promoting or supporting it. The Council is seeking to determine if there is value in continuing to pursue this objective, and what next steps or implementation plan may be appropriate.

1.2 Scope and limitations

This report has been prepared by GHD for Goulburn Mulwaree Council and may only be used and relied on by Goulburn Mulwaree Council for the purpose agreed between GHD and the Goulburn Mulwaree Council as set out in section 1.1 of this report.

GHD otherwise disclaims responsibility to any person other than Goulburn Mulwaree Council arising in connection with this report. GHD also excludes implied warranties and conditions, to the extent legally permissible.

The services undertaken by GHD in connection with preparing this report were limited to those specifically detailed in the report and are subject to the scope limitations set out in the report.

The opinions, conclusions and any recommendations in this report are based on conditions encountered and information reviewed at the date of preparation of the report. GHD has no responsibility or obligation to update this report to account for events or changes occurring subsequent to the date that the report was prepared.

The opinions, conclusions and any recommendations in this report are based on assumptions made by GHD described in this report. GHD disclaims liability arising from any of the assumptions being incorrect.

GHD has prepared this report on the basis of information provided by Goulburn Mulwaree Council and others who provided information to GHD (including Government authorities), which GHD has not independently verified or checked beyond the agreed scope of work. GHD does not accept liability in connection with such unverified information, including errors and omissions in the report, which were caused by errors, or omissions in that information.

[1] Freight hubs generally involve the storage, handling and transfer of freight between vehicles and modes, and logistics in this context refers to the systems involved in transport of freight including supporting infrastructure, supply chain management and associated IT systems. We have generally used the term freight distribution and logistics [hubs] to cover all relevant activity.

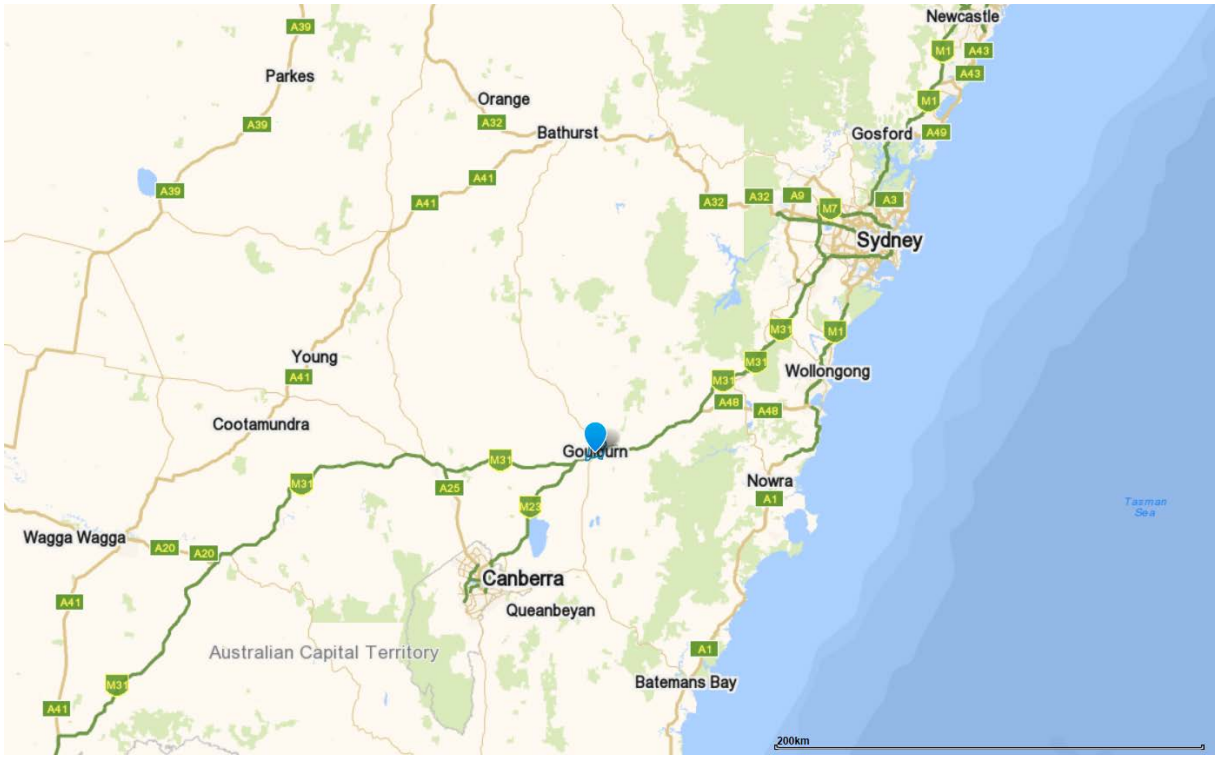
2. Context

This section outlines key characteristics of the Goulburn Mulwaree area and the city of Goulburn in terms of economic activity and location relative to freight flows, applicable local government area and state plans, and previously proposed transport and logistics projects.

2.1 Location

Goulburn is located in New South Wales, Australia, approximately 195 kilometres south of the State's capital, Sydney, and 95 kilometres north of Australia's capital, Canberra. It is located between major population centres and is served by, in particular, the key arterial transport infrastructure of the Main Southern Line and the Hume Highway. The Hume Highway is the main road corridor that runs past Goulburn north-south connecting Sydney and Melbourne and (along with the Pacific Motorway), carries the majority of interstate freight between Melbourne, Sydney and Brisbane. The Newell, Sturt and New England Highways also provide key freight links.

Figure 1 Goulburn Location[2]



2.2 Goulburn Mulwaree economic activity

Goulburn Mulwaree is developing into a regional centre for commerce and light industry in addition to its traditional agricultural, farming and mining sectors. The city of Goulburn possesses the full range of facilities expected in a large regional support centre and has the capacity to service a growing catchment. The percentages of the workforce involved in retail, health/social care and public service/safety are higher than the regional NSW average,

[2] Sourced from https://www.whereis.com/nsw/goulburn-2580

reflecting this regional support function and significant local employers, the New South Wales Police Force Academy and Goulburn Correctional Centre:

Table 1 Employment sectors[3]

Sector	% of workforce
Health & social care	16%
Retail trade	14%
Public service & safety	12%
Accommodation & food	9%
Education & training	9%
Manufacturing	7%
Construction	5%
Transport, post & storage	5%
Technical services	4%
Other services	4%
Rural production	3%
Other	12%
Total	**100%**

Significant freight categories generated in the regional catchment include agricultural products (such as stock, wool and cereals), timber, and quarry products. Very large volumes of general freight also move through the area as noted in the next section.

Freight distribution and logistics would be a good fit with this existing, diverse, economic activity because it would leverage current services such as accommodation and transport servicing while building critical mass for the city and region. Goulburn has the size to offer a full range of residential, retail, and entertainment options, along with a bucolic lifestyle, making it an attractive proposition for workers in these industries.

2.3 Freight flows

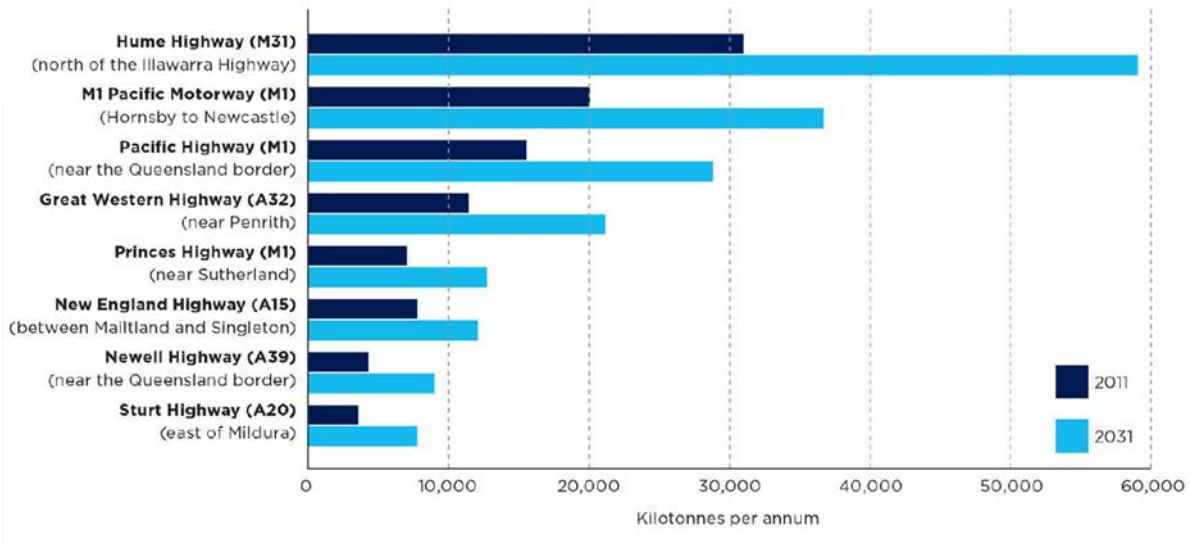
The overall freight movements in NSW can be categorised as follows:

- A third of freight remains within the region
- A third involves major north-south movements between regions
- A third involves major east-west movements between regions[4].

Figure 2 below illustrates the forecasted expansion of the freight industry on specific sections of each NSW transport route over the next 20 years.

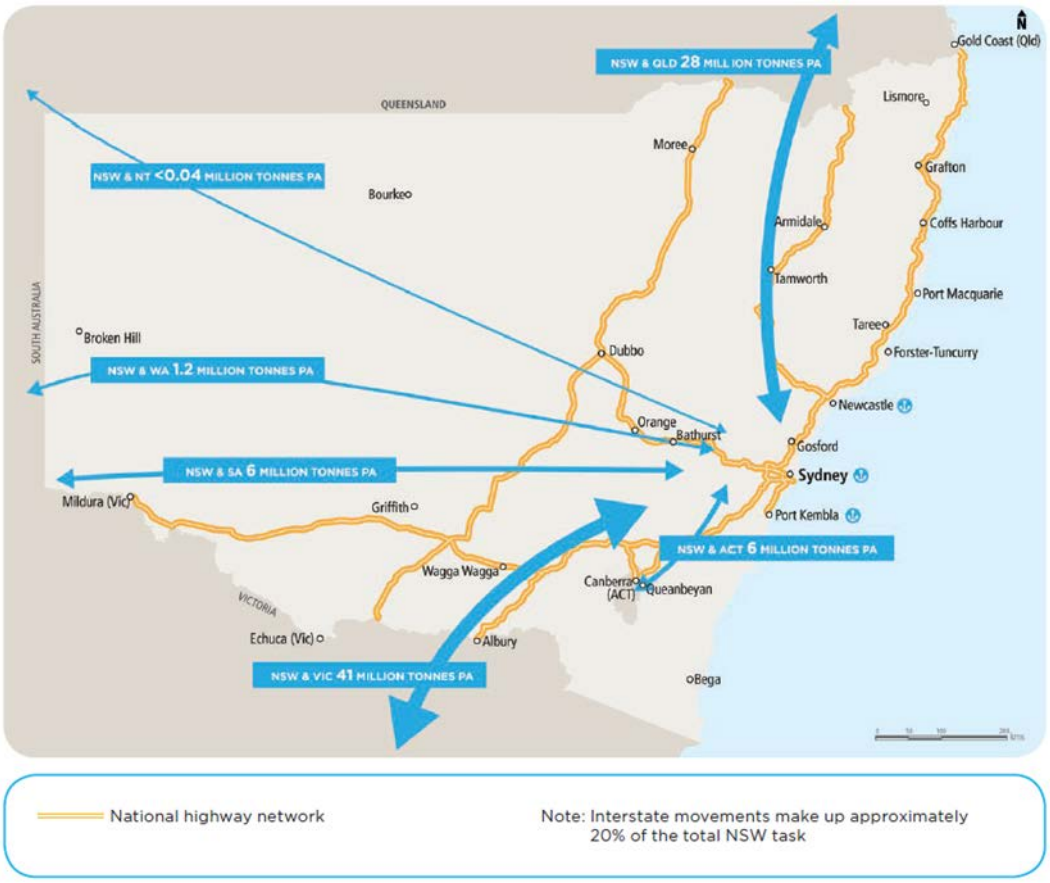
[3] An Economic Portrait of Goulburn Mulwaree compared with regional NSW, 2013, Goulburn Mulwaree Council.
[4] NSW Freight and Ports Strategy, Nov 2013

Figure 2 Current and Forecast Freight Task on Key Corridors



In 2011, NSW interstate freight volumes (20% of the state total) amounted to approximately 82 million tonnes. Approximately 92 per cent of freight was moved by road. Figure 3 shows the way in which the interstate freight task is distributed, with the largest freight movement being between NSW and Victoria at approximately 41 million tonnes of the total flow. It is important to note that the majority of flows between NSW and Victoria begin or end in Sydney.[5]

Figure 3 Interstate Freight Movements in 2011[6]



[5] Ibid.

[6] NSW Government, NSW Freight and Ports Strategy, Nov 2013

In terms of rail freight, the Goulburn Mulwaree Economic Development Plan states that over 100,000 tonnes are moved through the Goulburn Mulwaree region per day on the Great Southern rail route to Sydney, Melbourne, Brisbane and Adelaide[7].

A detailed analysis of candidate freight types for a transport and logistics hub is beyond the scope of this report because that requires an understanding of origin-destination, volumes, flows and freight characteristics for each type. Often the data for this type of analysis is difficult to obtain because there is no central database of freight movements so these must be derived from other statistics. For some bulk commodities the Department of Infrastructure, Regional Development and Cities has produced reports on freight flows to assist planning, such as:

- Rice (2018): https://bitre.gov.au/publications/2018/files/Freightline_06.pdf
- Cotton (2018): https://bitre.gov.au/publications/2018/files/Freightline_05.pdf
- Coal (2016): https://bitre.gov.au/publications/2016/files/Freightline_04.pdf
- Sugar (2015): https://bitre.gov.au/publications/2015/files/Freightline_03.pdf
- Iron ore (2014): https://bitre.gov.au/publications/2014/files/Freightline_02.pdf

It is noted that these are not necessarily complex goods that require consolidation, warehousing, handling, and distribution like consumer goods, automotive and other parts, manufactured primary products such as timber and textiles, equipment, recycling streams, and inventory and supply chain goods.

However, in the Goulburn Mulwaree situation, possible freight types may include:

- Bulky consumer goods for major population centres
- Equipment and parts distribution
- Manufactured primary products
- Recycling streams.

2.4 Guiding documents

The development of strategic freight hub locations will need to align with local, state and national plans and initiatives. Additionally, strategies will need to take into consideration joined-up-government aims, which are broader than transport. These aims incorporate State export targets, fringe urban planning for future industrial areas and greenhouse and congestion abatement strategies.

2.4.1 Goulburn Mulwaree LGA plans

Goulburn Mulwaree Economic Development Plan

In 2008, IRIS Research Ltd prepared the Goulburn Mulwaree Economic Development Plan (EDP). The EDP presented three Priority Areas for the community:

1. Growing and supporting the economy
2. Developing tourism
3. Shifting perceptions

One of the objectives identified to achieve Priority Area 1 was to develop as a logistics warehousing and transport hub of national significance. This objective was broken into the following strategies:

[7] Goulburn Mulwaree Economic Development Plan, Goulburn Mulwaree Council 2008

- Encourage development of a cluster of logistics, warehousing and transport businesses and support industries
- Build up strategic relationships between all levels of government and industry
- Undertake targeted marketing initiatives that highlight the location & infrastructure advantages of the region
- Encourage the enhancement of the Goulburn airport facility.

It states that introducing a strong logistics and transportation industry into the region will also encourage other value-added industries to build, such as servicing and warehousing. As Goulburn Mulwaree is also located on the Southern Rail Line, there is potential to integrate this infrastructure into the logistics industry. However, there was concern that a much larger volume of bulk freight, travelling distances greater than 200 km is needed to make this a viable option.[8]

The Goulburn Mulwaree Economic Development Plan states that a potential role for logistics and storage in the region is to mitigate the risks to the traditional sectors (e.g. agriculture) by broadening the economic base to include new economy sectors. Goulburn Mulwaree's location between Sydney, Canberra and other major regional centres, and the availability of affordable land makes it a potential region for industrial development.

Employment Land Strategy Goulburn Mulwaree

The Goulburn Employment Land Strategy was prepared in 2016 by HillPDA Consulting.

It included a stocktake of existing commercial and industrial land and compared that to projected growth in demand. It was estimated that approximately 2,416 ha of enterprise and industrial land was zoned and available for development – noting that not all of this was serviced with roads and other services. The Strategy recommended a programme of adjusting zoning to encourage a mix of best future use including where appropriate allowing smaller lot sizes and rezoning for amenity use and rural landscape.

The report also highlighted that the Goulburn Rail Freight Facility presents a specific opportunity for the handling and management of containerised freight by rail and that there may be opportunities for the handling of freight products such as processed meat, scrap metal, wool or grain products.

The Strategy states that issues around the additional annual operational costs of locating in a region can outweigh any land price benefits that the LGA could offer. As such, companies servicing Canberra, Western Sydney and other regional NSW centres should be the initial focus.[9]

2.4.2 New South Wales State plans

NSW Future Transport 2056 Regional Services and Infrastructure Strategy

The NSW Future Transport 2056 Regional Services and Infrastructure Strategy completed in October 2017 identified Canberra-Queanbeyan as a future Global Gateway City. It is served by the Federal and Barton Highways (which connects to Yass rather than Goulburn) and by rail (to a lesser extent), with Goulburn providing the local connectivity to Bathurst and Nowra, in addition to the national connections. This may provide opportunities to increase the attractiveness of the Goulburn Mulwaree area for logistics hubs and transportation support businesses.

[8] Goulburn Mulwaree Economic Development Plan, Goulburn Mulwaree Council 2008

[9] Employment Land Strategy Goulburn Mulwaree, 2016.

The Strategy identified agriculture, dairy product manufacturing and dairy cattle farming as Goulburn's key industry sectors in relation to freight. It was listed that the future transport response to these key industries is:

- Last Mile delivery routes
- Regional freight rail spurs
- Intermodal terminals
- Air freight facilities

The importance of connections to the closest regional city was highlighted in the strategy with the outcome to provide an integrated transport system that connects communities.

The document states that there will be a change in approach from a network that is focussed on servicing trips to Sydney, to providing more services and facilities in Regional Cities. Figure 4 below demonstrates the links between regional transport hubs, Satellite and Global Gateway Cities.

Canberra's city centre will be supported by a number of strategic centres within the metropolitan area such as Belconnen, a Regional City at Queanbeyan, and Regional Centres within the broader region such as Goulburn and Bega.

Figure 4 Regional Links to Gateway Cities[10]

New South Wales Draft Freight and Ports Plan

The Draft Plan was completed in 2017 and is the result of a consultation process which engaged over 500 industry stakeholders between May and August 2017. It examines the current state of freight in NSW including a broad range of freight and supply chain issues confronting the industry.

The Plan states that container trade at Port Botany for the 2016-17 financial year grew by 4.6% from the previous year to 2.43 million twenty-foot equivalent units (TEU's). Full container

[10]Future Transport Regional NSW Services and Infrastructure Plan, NSW Government, Oct 2017.

exports grew by 13% compared to the previous year, driven largely by cereals and grain, cotton and miscellaneous manufactured articles such as furniture and building materials. It also says that road and rail access constraints at Port Botany must be addressed and capacity must be improved to meet future needs.

Relevant key trends identified in the Plan include:

- Service expectations: An increased consumer expectation of product delivery to be quicker.
- Population growth: Increased consumer demand, in turn, increasing the freight task.
- Heavy vehicle regulations: There is increasing demand for the use of heavier and longer vehicle combinations.
- The decline in manufacturing: There is now a greater reliance on imports, reducing the freight task for locally manufactured goods but increasing the demand for containerised freight movements from the port to the warehouse facilities.
- Growth in agriculture demand: The increase in export demand for NSW agricultural products is increasing the freight access required between regional centres and gateway ports.
- Last mile challenges: Access to and from freight facilities such as intermodal terminals and particularly ports are becoming constrained by both road and rail. Congestion and constraints on the supporting land transport network can reduce the performance of ports and intermodal terminals.

The importance of intermodal terminals is highlighted in the transport of containerised and bulk freight, to facilitate improved productivity and efficiency across the network, and act as a key enabler for increasing rail share. Furthermore, there is an opportunity to alleviate capacity constraints at NSW ports and the surrounding road network resulting from growing containerised freight volumes. In regional areas, terminals have generally evolved around pre-existing rail infrastructure with few greenfield sites being developed.

2.4.3 ACT plans

ACT Freight Strategy

The ACT Freight Strategy was prepared in 2016 by the ACT Government.

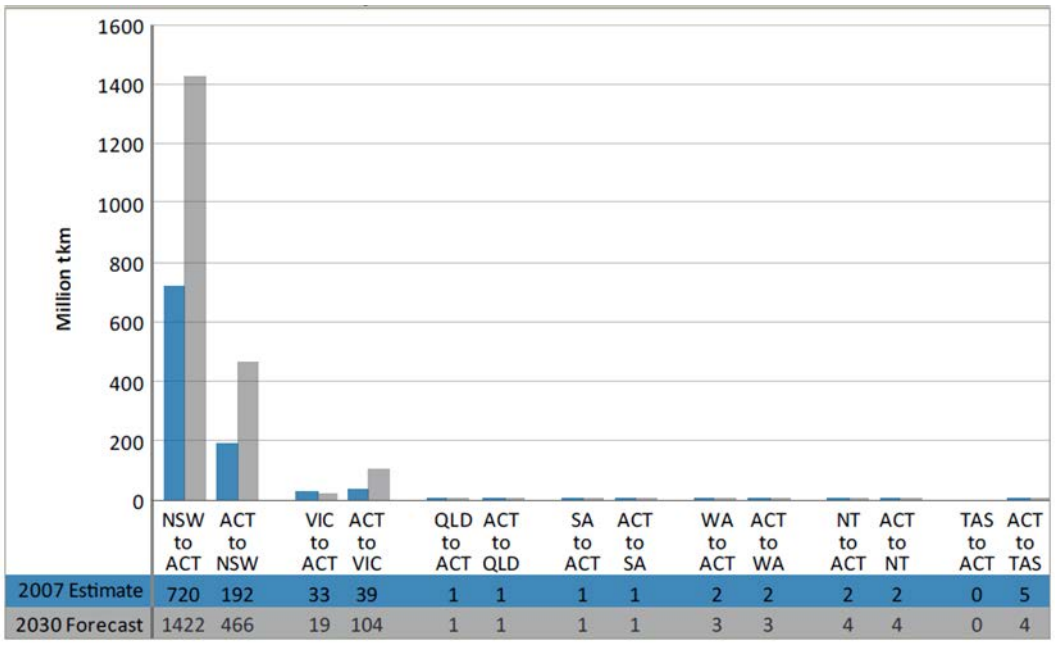
It states that nearly all freight into and out of the ACT is road based and that freight flows are primarily imports. According to Transport for NSW data, of the top nine regional freight flows into the ACT, five comprised manufactured goods, consumer goods or containers while the other four were building products, crude materials, fuel and food products. Road freight is likely to continue as the primary mode for freight delivery to, and distribution within, the ACT, rather than rail or air freight due to:

- the proximity of the Territory to Sydney, a major manufacturing, import, export and logistics centre
- the ongoing expansion of terminals and road-focussed distribution centres in south-west Sydney and Goulburn
    - estimates provided in the Freight strategy show that the South Eastern NSW freight flows into the Territory comprise of 63% consumer goods and 37% crude materials. Crude materials comprise construction materials, metal scrap, wood, pulp and paper and other products.

- interstate road freight usually offering a faster door-to-door service than a combination of road and rail service.

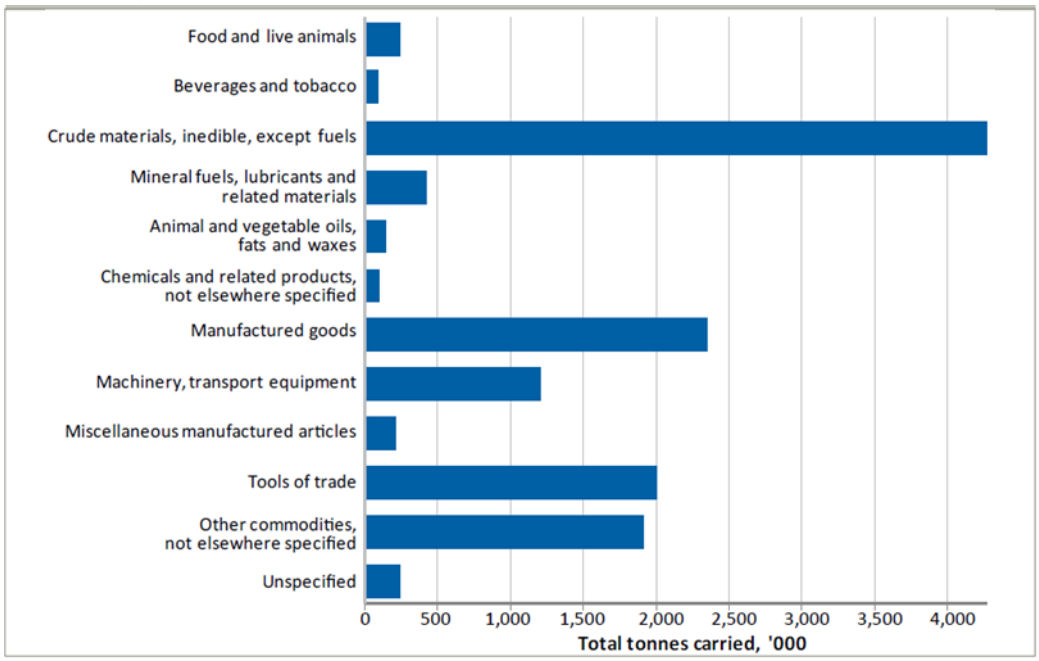
Figure 5 and Figure 6 below show freight volume forecasts through to 2030.

Figure 5 Interstate Freight Estimates and Forecasts to and from the ACT[11]



	NSW to ACT	ACT to NSW	VIC to ACT	ACT to VIC	QLD to ACT	ACT to QLD	SA to ACT	ACT to SA	WA to ACT	ACT to WA	NT to ACT	ACT to NT	TAS to ACT	ACT to TAS
2007 Estimate	720	192	33	39	1	1	1	1	2	2	2	2	0	5
2030 Forecast	1422	466	19	104	1	1	1	1	3	3	4	4	0	4

Figure 6 ACT Road Freight Tonnages[12]



Although road freight is likely to be the primary mode of transport, the freight strategy states that there is potential to further explore existing rail freight opportunities for low value and high volume commodities such as scrap metal.

In March 2015, the rail freight terminal at Kingston, adjoining Canberra Railway Station resumed its operations for Access Recycling. This includes a weekly freight train service transporting

11 Building an Integrated Transport Network- Freight: ACT Freight Strategy, ACT Government, 2016

12 Ibid.

1400 tonnes of processed scrap metal from Canberra to Sydney (Port Botany), to be exported to Asia for use in steel mills.

For the longer term, the Kingston terminal would be a part of the East Lake development, where future freight operations would be constrained due to a potential conflict of uses with the amenity of the new residents. Should a multi-modal terminal be required in the future, the feasibility of alternative locations along the rail corridor would need to be investigated.

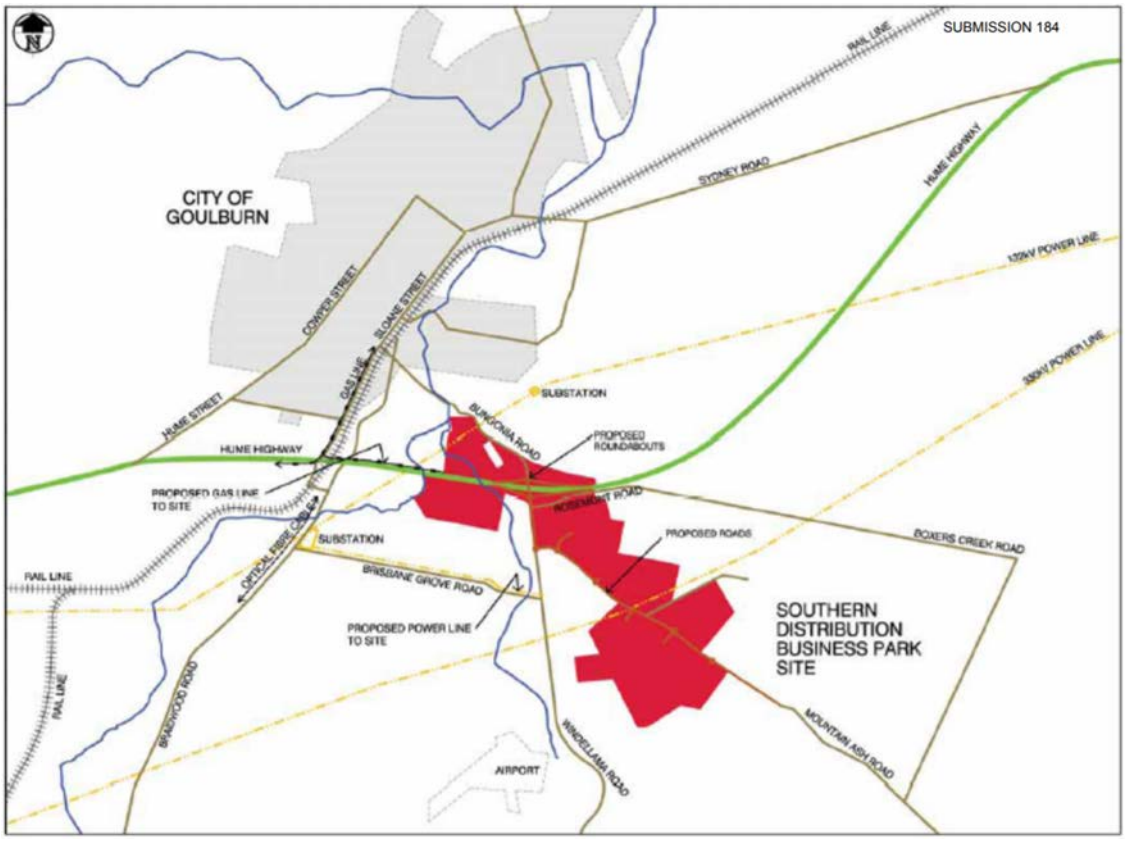
2.5 Previously proposed transport and logistics developments

There are two sites on the outskirts of the city (Murrays Flat and Windellama Road) which have previously been the subject of detailed transport and logistics development proposals.

Windellama Road (Southern Distribution Hub)

A major business park on Goulburn's outskirts called the Southern Distribution Hub was proposed in 2007, involving the development of 263 hectares of industrial land with an estimated investment value of approximately $1 billion (including a new motorway interchange). Although some approvals were secured, due to what was described as "low investor interest" the project did not proceed. Figure 7 shows the site for the proposed development. The land for the proposed site has since been sold to a property developer with plans to turn the land into residential lots.

Figure 7 Southern Distribution Hub Location[13]



Murrays Flat (Northern Hub)

The proposed 'Northern Hub' was to include a $200 million warehousing, distribution and logistics development. Eureka Funds Management lodged a development approval in 2007 to develop this project on land off the Hume Highway approximately 10 km north of Goulburn. The

[13] Sourced from www.aph.gov.au

site had access to the highway, a rail siding and a nearby gas pipeline. In 2012, the backing company for the project went into receivership and the proposed development did not proceed.

2.5.1 Goulburn Rail Hub

The Goulburn Rail Hub, which was consented in December 2015, transports up to 135,000 tonnes of treated timber logs and other products to port annually for companies. Currently, the hub is running two trains a week of treated timber and scrap metal. The transporter Crawford Freight Lines is also returning from Port Botany with imported goods for Canberra and other locations.[14]

The operator of the hub stated that he believed there was extra freight capacity on the line. However, it required a rail operator to find more customers and containers to carry bulk materials for export to port.

It has also been identified that there may be opportunities at the rail hub for the handling of freight products such as processed meat, scrap metal, wool or grain products.[15]

[14] Sourced from http://www.google.co.nz/url?sa=t&rct=j&q=&esrc=s&source=web&cd=4&ved=0ahUKEwjuj4H93vTbAhVP7WEKHfXrByoQFggzMAM&url=http%3A%2F%2Fwww.seats.org.au%2Fwp-content%2Fuploads%2F2014%2F11%2FSEATS_Newsletter_December_2015_1.pdf&usg=AOvVaw2w3yv3goiv2dx6nsjNsgM8, South East Australian Transport Strategy Inc. Seats Newsletter, Dec 2015

[15] Sourced from https://www.goulburnpost.com.au/story/5230608/rail-hub-explores-expansion-opportunities/ June 2018

3. Drivers of demand for freight distribution and logistics hubs

Distribution and logistics centres incorporate storage, handling, processing and delivery facilities. The creation of regional freight and logistics hubs with these features are typically driven by a range of demand-side factors as identified in Table 2. The working group discussed many of these drivers in the stakeholder workshop with relation to opportunities, constraints, and challenges.

Table 2 Drivers of Demand for Freight Distribution and Logistics Hubs

Drivers for Freight Distribution and Logistics Hubs	Description
Land area	Distribution and logistics centres are land intensive due to the need for storage, handling, and adequate truck or rail access. This generally means a large flat area ideally with scope for future expansion. In some cases, locations away from other land uses, especially residential, is desirable where factors such as noise, dust, and odour are an issue. Freight movements, in particular, can generate noise at any time of day.
Geographic location in relation to freight flows	Proximity to origin and destination of materials and goods. Ability to service multiple freight origins/destinations from one point. Location at an intersection of freight flows. Distance and location factors are affected by freight characteristics including perishability, weight/volume (which affects mode choices), timeliness required in relation to the supply chain, and value (freight costs as a percentage of total costs).
Investment attractiveness	Typically, an investor owns and manages a property for an operator, and this can include purpose-built facilities with long-term leases. The investor will weigh up the factors that make the investment attractive to them and the client, and this may involve trade-offs such as land cost in relation to proximity to the main centre.
Labour	Availability of local skilled labour to work at the distribution centre.
Services	Water, stormwater, wastewater, electricity, communications, good local streets.
Supporting infrastructure	Fuel, truck maintenance, engineering, food outlets, accommodation.
Critical mass	A significant core operator or group of operators create critical mass for supporting infrastructure and often encourages additional operators.
Access	This includes access to key road and rail corridors for timeliness and cost-effective delivery to consumers. Ideally, sites should be close to motorway off-ramps, not involve steep gradients, and have large turning radii.

Of these drivers, the key ones are land availability and comparatively competitive land price (distance from major freight origins and destinations). Clearly, land on the fringes of cities can increase significantly in value making uses such as freight hubs (that require significant areas) less economic. This is a significant issue for the areas around Sydney and Melbourne as these cities are growing rapidly.

4. The attractiveness of Goulburn Mulwaree for freight distribution and logistics

For ease of analysis, the assessment of Goulburn Mulwaree in the freight distribution and logistics chain has been separated by transport type, road and rail. Land, labour, services and investment factors are drivers that affect road and rail in a similar way and are therefore discussed collectively.

4.1 Land, labour and investment drivers

4.1.1 Land Area and Availability

The Goulburn Mulwaree area has large parcels of relatively affordable, flat, developable land, including many industrial properties located in areas such as the Bradfordville Industrial Area and South Goulburn Industrial Area. This land is zoned for light and general industrial use and is relatively affordable at approximately $50 to $60 per square metre[16]. The scale and layout of available land provide options to locate away from sensitive land uses, as noted in the Goulburn Mulwaree Land Strategy.

The summary below lists vacant enterprise and industrial land in the Goulburn Mulwaree local government area as at 2016[17]. A significant proportion of this is located at Tarago, but even in Goulburn itself, there is approximately 347 ha of zoned and vacant land. Considering the significant Coles Distribution Centre occupies a site of around 15 ha, land availability could not be considered a constraint.

Table 3 Vacant Land Zoned Enterprise and Industrial

Area	Zone	No. of lots	Area ha
EC1 South Goulburn	Enterprise	36	50
EC2 East Goulburn	Enterprise	31	84
EC3 Marulan	Enterprise	5	17
Tarago	Heavy Industrial	17	1,769
South Goulburn	General Industrial	12	23
North Goulburn	Light Industrial	7	2
Bradfordville Industrial Estate	General Industrial	13	20
Murrays Flat	General Industrial	3	168
Marulan	General & Light Industrial	9	259
Marulan South	General Industrial	1	24
Total		**134**	**2,416**

4.1.2 Labour, Services, and Supporting Infrastructure

The residential population of Goulburn Mulwaree was estimated at 30,150, in April 2016. In September 2017, there were approximately 17,587 people in the Goulburn Mulwaree labour

[16] Goulburn Mulwaree Statistical Snapshot, Goulburn Mulwaree Council 2017

[17] Employment Land Strategy Goulburn Mulwaree, 2016.

force, a decline of 199 workers from September 2016. In September 2017, the unemployment rate was 7.6%, which was higher than the state unemployment rate of 4.8% and the national unemployment rate of 5.5%.[18] [19]This information suggests that the Goulburn Mulwaree Local Government Area has a significant labour pool to support a larger industry in freight distribution.

Access to core services such as electricity, water and communications are available in Goulburn Mulwaree. For some sites, these are already installed and for others, they could be extended. Although the region has in the past faced constraints in terms of water supply, this was resolved some time ago and is no longer an issue due to the Highland Source Pipeline.

A good network of supporting infrastructures such as fuel and accommodation supply already exists because of Goulburn's size and role as a rural service town, and its location on the Hume Highway.

4.1.3 Critical Mass and Investment Attractiveness

Due to the good rail access available at Goulburn a rail hub has been in operation since 2015, consolidating timber from the surrounding regional area for export. Coles Myer operates a significant (44,000 m2 under cover) supermarket goods distribution centre[20]. There are a number of smaller operators concentrating on local freight. These activities do not appear to form a significant freight distribution and logistics hub per se but could encourage additional activity.

Over the past several years there have been a number of parties interested in setting up freight distribution and logistics hubs in Goulburn, but many of these projects have not eventuated. Please refer to the background information on the developments at Windellama Road (Southern Distribution Hub), and Murrays Flat (Northern Hub) in section 2.1.2. The old Coles Myer site at South Goulburn at the corner of Hume Street and Ducks Lane remained unoccupied for over six years before being leased out to a supermarket paper goods supplier and a proposed brewery.

It is difficult to draw conclusions about previous proposals that did not come to fruition as timing (particularly in relation to the 2007-08 Global Financial Crisis), the financial viability of participants, and availability of anchor clients could all have been factors.

4.2 Road

4.2.1 Geographic Location in Relation to Freight Flows

Goulburn is located on the Hume Highway, between the state and territory capitals of Sydney and Canberra and on the main freight route between Sydney and Melbourne. As noted above this route carries over 30 million tonnes of freight per annum with an expectation that this will double over the next 20 years. Truck travel by road takes approximately 1¼ hours to Canberra (95km), 2½ hours to Sydney (195km) and 8½ hours to Melbourne (684km). The overall travel time between Sydney and Melbourne (including breaks) of approximately 12-13 hours is feasible for overnight delivery. It is common for drivers to swap at the halfway point (Tarcutta) to avoid overnights away from home.

Close proximity to centres of activity like these drives the attractiveness of freight distribution hubs by reducing costs for road transfers in the supply chain. As the majority of freight flows between NSW and Victoria begin or end in Sydney, Goulburn would need to be a freight distribution and logistics hub servicing Greater Sydney. However, an issue exists in the 2-hour travel time by road between Goulburn and Sydney. As displayed in Figure 8 Goulburn is located

[18] Ibid.

[19] Sourced from http://www.abs.gov.au/ausstats/abs@.nsf/Previousproducts/6202.0Main%20Features2Sep%202017?opendocument&tabname=Summary&prodno=6202.0&issue=Sep%202017&num=&view=

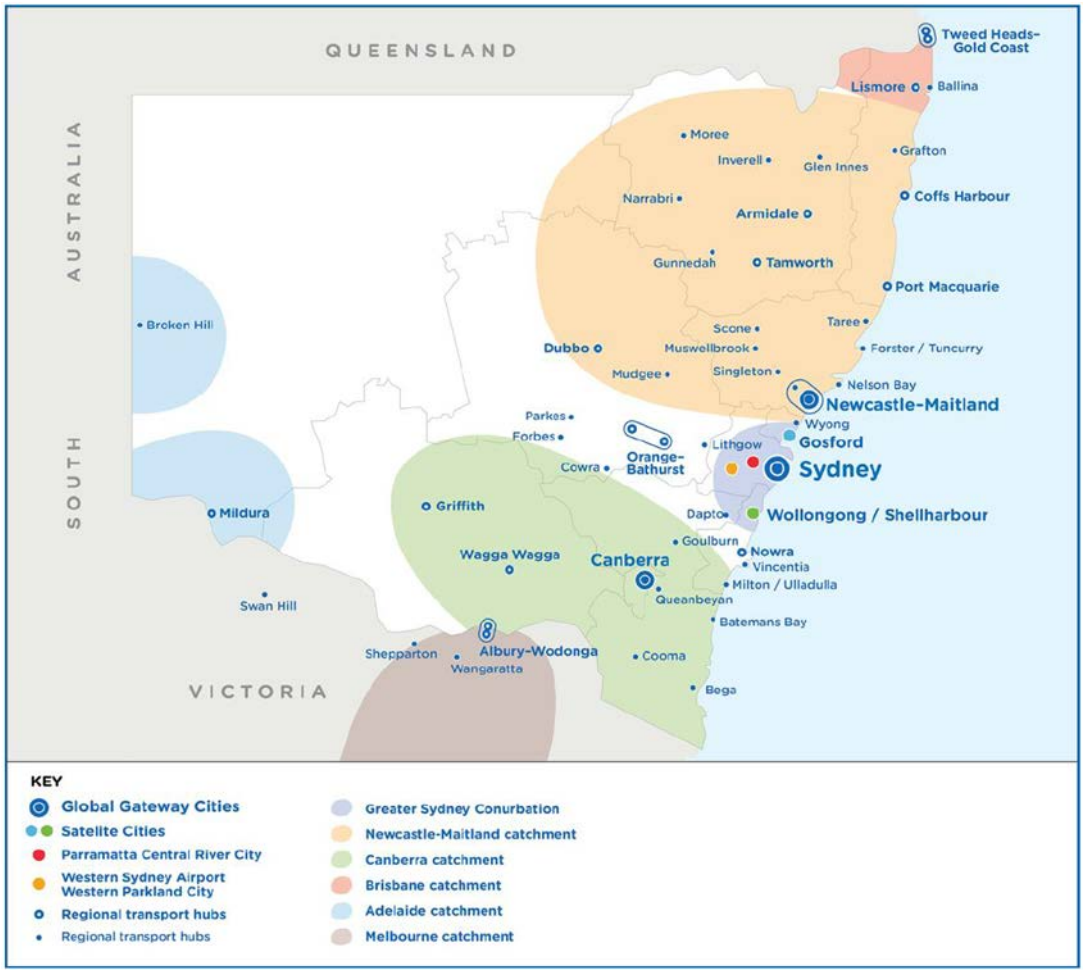
[20] Sourced from http://www.cordellconnect.com.au/public/project/ProjectDetails.aspx?uid=564423

outside of the Greater Sydney Conurbation area. This makes servicing Sydney more time consuming and costly than existing distribution centres within 50- 100 kilometres.

Goulburn is well placed to service Canberra as an intermediate point between the two major cities of Sydney and Melbourne, and to service smaller centres in the region.

There are no major freight flows identified between Goulburn and the south coast region. A major barrier is that there is no direct 19m to 25m B-double vehicle approved routes between Goulburn and the south coast region.

Figure 8 NSW/ ACT Major City Catchments[21]



4.2.2 Access

Access from Goulburn to the highway is achieved via a roundabout interchange at Hume Street (south of Goulburn), or via off-ramps at Sydney Road (to the north of Goulburn). These access points are of excellent quality and pose no significant barriers in terms of access. It is likely that specific sites closer to these interchanges would be more desirable to avoid having to travel through the Goulburn urban area, as evidenced by the Windellama Road proposal that included a new interchange between the two existing interchanges.

4.3 Rail

4.3.1 Geographic Location in Relation to Freight Flows

Goulburn Mulwaree is located on the Great Southern rail route from Sydney to Melbourne, at the intersection with the Bombala Line that connects to Canberra, with a major railway depot

[21] Global Gateway Cities: Future Transport Regional NSW Services and Infrastructure Plan, NSW Government, Oct 2017.

and junction. The rail link between Sydney and Goulburn was established in 1869 making Goulburn a major rail centre for both passengers and freight. The architectural and social history of Goulburn is strongly influenced by the importance of rail to the city. presents the rail network in NSW.

Rail connects Goulburn to the Wollongong on the south coast, via Moss Vale.

Figure 9 NSW Rail Network 2017[22]

Because of the greater trip distances required to make rail economically competitive over road transport, the location for rail freight relates to a different set of trips and freight types. Road transport is generally competitive up to 600-700 km due to its greater origin-destination flexibility and timeliness, so longer trips, multi-modal trips, and heavy, lower value products such as timber and steel would be more relevant. Rail may also play a role in moving full container loads of goods to an area where they avoid the road congestion around major ports and can be stored, sorted and distributed, as this limits the need for mode changeover in the supply chain and improves efficiencies.

The Goulburn Mulwaree Land Strategy states that the Goulburn Rail Freight Hub will draw freight from the surrounding region and will be capable of handling higher value products should volumes be economically viable. It stated that the Rail Hub can improve connectivity particularly

[22] TfNSW, Draft Freight and Ports Plan, 2017

to Port Botany in Sydney and has the potential to be a valuable addition to the region's existing and potential importing and exporting businesses. These connectivity and capacity factors are attractive to prospective developers in the freight distribution and logistics industry.

4.3.2 Access

Goulburn has significant rail yards but these are somewhat constrained being in the central part of the urban area.

4.4 Other freight hubs

Competition exists in freight distribution hubs in other strategically located towns in New South Wales, often where there is easier access to major road and rail connections in multiple directions.

4.4.1 Key Sydney Road and Rail Intermodal Terminals

The map featured in Figure 10 shows the locations of key intermodal terminals in Sydney.

Figure 10 Map of Key Intermodal Terminals in Sydney[23]

The Table 4 below presents a summary of key intermodal terminals in Sydney:

Table 4 Key Intermodal Terminals in Sydney

Location	Operator	Overview
Intermodal Logistic Centre, Enfield	Aurizon	The Enfield Intermodal Logistics Centre is a 60-hectare site and interfaces with the MFN. The terminal has the capacity for 300,000 TEU and is moved between rail and truck using two 920 metre rail slidings.
Yennora Intermodal Terminal	Qube	Yennora Intermodal Terminal is located in the Western suburbs between Granville and Liverpool. The terminal capacity is in the capacity of 5,000 full and 9,000 empty containers and has two rail slidings 530m long. The Yennora terminal interfaces with the main southern line. Services to Port Botany are restricted to outside the morning and afternoon peak passenger periods. The operation is mainly oriented toward the port market.

[23] Sourced from http://www.micl.com.au/the-project-1/

Villawood	Toll/DP World	The Villawood terminal is an intermodal terminal for export containers. The terminal connects to the SSFL and has two main rail sidings which are 300m in length with a capacity of up to 185,000 TEU.
Sydney Freight Terminal, Chullora	Pacific National	Sydney Freight Terminal is Sydney's main interstate terminal. The capacity of the terminal is 600,000 TEU and can receive 1500 metre trains from break-up and shunting into the terminal itself.
Sadleirs Logistics, Belfield	Sadleirs Logistics	Freight forwarding terminal
St Peters – Cooks River Intermodal Terminal, Mascot	Maritime Container Services Pty Limited	The Cooks River terminal receives empty containers from importers and is responsible for cleaning, storing and restoring them for export loading or empty export. The terminal allows for trains of 600 metres in length and has capacity from 11,500 to 14,500 TEUs.
Port Botany Intermodal Terminal, Port Botany	Qube	Import/Export related terminal to and from Port Botany.
Port Botany Stevedore Terminal	Hutchison	Major Port Botany Stevedoring terminal transferring import/export containers to and from shipping.
Port Botany Stevedore Terminal	Patrick	Major Port Botany Stevedoring terminal transferring import/export containers to and from shipping.
Port Botany Stevedore Terminal	DP World	Major Port Botany Stevedoring terminal transferring import/export containers to and from shipping.
Macarthur Intermodal Shipping Terminal, Minto	Qube	The Marcarthur terminal is a 16-hectare intermodal facility and has a capacity of up to 200,000 TEUs. The terminal currently operates on the Sydney Trains network between Minto wand the connection to the MFN at Sefton Park Junction.

Further to the table above the Moorebank intermodal terminal is under construction in the south-western Sydney suburb of Moorebank anticipated to have a capacity of approximately 1.5 Million TEU for port-related and interstate container traffic.

4.4.2 Parkes

Parkes Logistics Hub is a $50 million freight terminal planned outside the central west New South Wales town of Parkes. It is located at the crossroads of Newell Highway and the transcontinental rail line. Parkes is an example of a freight hub, which is leveraging its location at a key intersection in the transport network where Inland Rail connecting Brisbane to Melbourne will intersect with the east/west rail line.

Figure 11 Indicative Location of Parkes Logistics Hub[24]

4.5 Future transport technologies

When considering a strategic direction it is important to keep in consideration future transport technologies that may affect industry activity.

4.5.1 Last Mile Freight

Last Mile Freight is highlighted within Transport for NSW Roadmap for Future Transport Technology (2016) that advanced technologies in other fields related to the production of goods and services have led to a change in the overall freight task. Technologies such as 3D printing allow goods to be produced closer to their destination market, reducing transportation distances and the overall freight burden. While the overall freight task may remain similar in terms of total goods consumed, the task has become much more focused on the last mile, spreading demand more evenly across the local and main road network and potentially increasing the total number of freight and delivery vehicles on the road.

The Regional NSW Services and Infrastructure plan states that there is a freight initiative called the Last Mile Productivity Program, which is a state-wide initiative for investigation in the next 0 - 10 years.

4.5.2 Emerging Technologies

In 2017 businesses were consulted across Greater Sydney and Regional NSW as part of the Regional Services and Infrastructure Plan. Faster connections between Regional Cities and their surrounding centres and new technologies were highly appreciated in feedback with businesses eager to hear more about electric vehicles, driverless vehicles, use of drones, and smart data to better plan transport services and potential freight services.

4.5.3 Drone Delivery

There have been numerous recent trials of the use of drones for last mile-light weight deliveries including trials in the US with Amazon testing a drone delivery service, in Switzerland with Swiss

[24] Sourced from www.parkes.nsw.gov.au

Post testing the use of drones for postal services, and Google's 'Project Wing' testing drone deliveries in Australia.[25]

4.5.4 Automation

Automation in freight can involve vehicles interacting with each other and infrastructure to move in highly efficient platoons while transporting goods. The technology could also improve safety by minimising driver input. Truck 'platooning' in connected and automated vehicles can increase the productivity, efficiency and safety of freight traffic over long distances with increasing the potential for more options for same-day/next-hour delivery of freight using unmanned automated vehicles.

[25] Sourced from https://www.amazon.com/Amazon-Prime-Air/b?ie=UTF8&node=8037720011
https://www.post.ch/en/about-us/company/innovation/swiss-post-s-innovations-for-you/drones-in-logistics
https://www.engadget.com/2017/10/17/alphabet-project-wing-australia-tests/

5. Stakeholder engagement

Stakeholder engagement was an important aspect in expanding the evidence base to form the basis of this research paper. This included the use of a questionnaire and a stakeholder workshop with a range of participants.

5.1 Questionnaire

As part of this project, a questionnaire was developed as a method to gain industry insight into the current constraints and opportunities of freight in Goulburn. Relevant stakeholders were approached for feedback regarding freight in the area, and more specifically were asked to answer a set of questions that have been detailed below.

1. Why have you set up in Goulburn?
2. What part of the industry do you operate in?
3. Do you have any issues with the existing road network and the connectivity to Sydney / Canberra / Melbourne / Inland NSW?
4. Do you see any benefits associated with the Goulburn area being a freight and logistics hub?
5. Do you think the proximity to Sydney is a help or a hindrance to Goulburn being a major centre for this industry?
6. What would make the area more attractive for investment in freight, distribution and logistics?

The main responses of note from the participants were surrounding road network issues and the benefits of the rail facilities at Goulburn. Through this industry consultation, it was highlighted that roads connecting Goulburn to the South Coast Area such as Nowra are a major concern. Approximately 16.5 km of Nerriga Road is currently unsealed. A current roads package will see the sealing of those sections as well as the widening and reconstruction of some sections and the replacement of the single-lane timber bridge at Charleyong.[26]

Questionnaire respondents also mentioned that the rail service at Goulburn is very good for the area, in particular for harvesting and transporting logs. However, more customers (demand) were required so that the total number of train services per week could increase, to improve ocean freight connections with the port. Most local industry respondents to the questionnaire believed Goulburn was close enough to Sydney for a major transport hub to be considered here, especially with the more affordable land parcels.

Specific responses to the questionnaire are included in Appendix B.

5.2 Workshop discussion and outcomes

A freight and logistics workshop was held with stakeholders on 22nd May 2018. A list of stakeholders in attendance at this workshop is shown in Table 5 below and whiteboard notes plus attendee contact details are included in Appendix B.

[26] Sourced from https://www.goulburnpost.com.au/story/5099649/first-sod-turned-on-nerriga-road/ June 2018

Table 5 Stakeholders Involved in Workshop Discussion

Organisation
Goulburn Mulwaree Council
Transport for New South Wales
Coles
Linfox
Grangers Freight
Power Rail
Divalls Bulk Haulage

General discussion during this workshop revolved around the key features and issues of freight and distribution hubs, and the barriers, challenges and opportunities for Goulburn in becoming a hub.

The barriers for Goulburn becoming a freight and distribution hub were identified as a lack of rail quarantine facilities, challenging landform, public perceptions, limited general awareness of Goulburn in NSW, and a lack of demand for this type of activity. The lack of demand for freight and distribution hub activity was evidenced by the previously occupied Coles Myer site at South Goulburn at the corner of Hume Street and Ducks Lane. Other demand barriers exist in Goulburn with current underutilisation of the sal-yards and wool-stores, as sale activity has moved to large developments at Yass and Moss Vale.

The working group then discussed challenges to the establishment of freight and distribution hubs. The group viewed the main challenge as the Sydney based distribution centres with respect to the 195 km distance between Goulburn and Sydney identified in section 4.2, and the greater costs associated to service the greater Sydney metropolitan area. Other challenges were land parcel availabilities, red tape, weight limits, Port Kembla to Goulburn passing loads, close proximities to residential areas, and not enough incentives and focus on growth and development.

Finally, opportunities for Goulburn distribution hubs were discussed. The low operational costs/cost of living, inland to coast location, rail links and Port Botany distribution centres, and sale yards area were all seen as positive opportunities that Goulburn could offer to developers and companies. The imminent upgrade of the Nerriga Road corridor and the chance for various stakeholders to collaborate to ‘sell Goulburn’ were other opportunities that came out of the discussions.

6. Conclusions

According to the assessment of the attractiveness of the Goulburn for freight distribution and logistics, many of the likely drivers of demand for freight distribution hubs exist in Goulburn. Availability of land, labour, services, and supporting infrastructure all appear to be conducive and the major potential impediment appears to be its geographic location in relation to freight flows.

The assessment of the location and economic distances from main centres determined that Goulburn is a mid-distance from Sydney, which is a balance concerning the cost aspects of intermodal terminals. The cost of transferring goods is compared to the benefit of reduced travel to the city and the ability to avoid congestion and delays near the port. In this instance, Goulburn's geographical location and distance from Sydney is potentially too great for it to become a distribution hub to Sydney following the completion of the upcoming intermodal terminals in Western Sydney.

Goulburn is recognised as being in an area that can bring together a number of local products in a range of approximately 50 kilometres from the site (although the geography of the area also allows some extension of this range for ease of access from the hills in the south and agricultural areas to the west). This is currently occurring as the intermodal operator at the Rail Hub in Goulburn is consolidating timber from areas south of Canberra and bringing them to a central rail access point in Goulburn. The mainline access in Goulburn also has the ability to stretch the intermodal inputs from the west by providing more direct access to Sydney than is otherwise available.

The availability of clients to achieve critical mass is the other driver of intermodal terminals. This driver is more difficult to address as different clients have different value perceptions and their own sets of investment drivers. In saying this, interventions could be looked at by council to try to incentivise investment and encourage demand in regional freight hub activities in Goulburn. Potential incentive options to encourage demand in the freight industry in Goulburn Mulwaree are outlined in Section 7 Possible Interventions.

For servicing Sydney, in simple terms, the equation appears to be offsetting the less than ideal distance with other factors such as well priced and available land, and good supporting infrastructure.

Depending on the drivers at play for different investors, Goulburn Mulwaree could be an attractive site to establish a regional freight distribution hub for surrounding areas (50-kilometre radius), assuming critical mass is achieved. The Goulburn Rail Hub that was established in December 2015 provides evidence of this.

7. Possible interventions

There are a range of interventions available to the Goulburn Mulwaree Council if it wishes to encourage additional freight distribution and logistics activity, beyond what may occur naturally as a result of market forces. These are outlined below, roughly in order of cost.

7.1 Promotion

Direct promotion to the investor community, highlighting the availability of suitable land at reasonable prices, a willing workforce, and the advantages of Goulburn's location. Promotion could take the form of developing an 'investor pack' with details of currently zoned land available, relevant council policies, and information on the benefits of locating in Goulburn. Potential investors could be identified via the major commercial property agents such as CB Richard Ellis (CBRE) and Jones Lang LaSalle (JLL).

7.2 Land zoning

This may be less relevant because there is already significant land zoned for development, but having this process completed, which can take a considerable time, is an advantage in terms of having land ready for development.

7.3 Facilitation

Councillors and officers will undoubtedly have a detailed knowledge of the local situation, and be able to make introductions, facilitate meetings, explain planning processes, et cetera and generally smooth the way forward new projects. This has particular relevance to explaining local planning policies, zoning and rules in terms of how a proposed investment fits within that framework. Willingness to help an investor navigate planning regulations and facilitate a proposal can often have a significant effect, without necessarily a large financial contribution.

7.4 Rates or infrastructure contributions relief

This intervention may not have a financial cost, but effectively it is a subsidy from the rest of the community – for the wider benefit of that community in terms of increased economic activity. In principle, it needs to be handled carefully because it may result in a bidding war between different local authorities, especially for proposals that may be marginal in other respects. As a general principle, it may be better to make viable proposals even more successful than try to support marginal proposals.

7.5 Land provision

Where Council actually owns the land, it may be able to make it available for long-term lease, or sale on favourable terms.

7.6 Direct subsidy/seed funding

As above, financial contributions considered carefully as part of an overall policy framework. Some of the risks can be mitigated by directing funding at a specific activity, such as associated infrastructure like access, open space or park areas that directly benefit a development.

Direct investment in a proposal would be at the extreme end of potential interventions, because of the risks this carries for commercial losses.

8. Next steps

It is recommended that Goulburn Mulwaree Council first establish the level of intervention (if any) it considers appropriate given the issues and options above, and particularly the attractiveness of the area as a location for additional freight and distribution hub activity in relation to key drivers. This is effectively a policy decision for the Council, particularly where it must consider the cost of intervention in areas such as Sections 7.4 to 7.6 above in relation to other community priorities.

The components of a strategy to advance this area could include the following:

- Analysis of specific freight types that are likely to be relevant for the Goulburn Mulwaree situation, such as consumer goods, equipment and parts distribution, manufactured primary products, and recycling streams. This should include research into likely competitor locations and their strengths and weaknesses relative to Goulburn Mulwaree.
- Review of existing plans, policies and zoning to identify any barriers to freight and distribution activities. Note that the recent Employment Land Strategy has already canvassed most of these issues and it is apparent that land availability is very unlikely to be a constraint.
- Identification of any associated barriers such as the development of higher quality and capacity transport links to the South Coast and the role of the Council in advocacy to reduce those barriers[27].
- Development of an 'investor pack' that clearly sets out the investment proposition for Goulburn, including the advantages for employees who would work at such a facility.
- Developing a marketing campaign that identified investors in this area and encouraged them to discuss potential projects with the Council. This could include ongoing dialogue with key stakeholders as per the consultation already undertaken for this project, to further develop ideas and keep updated on local issues.

[27] The $39m upgrade of a 16.5km unsealed section of Nerriga Road and replacement of a single lane bridge at Charleyong is already underway. This refers to how development of these key transport routes would support the objective of a freight and distribution hub.

Appendices

Appendix A - Stakeholder Interviews

Completed questions and/or interested in attending a workshop

Grangers Freight Lines	Interested in attending the workshop. See response below.	Ok to attend on the date
International Primary Products*	*Additional contact identified (not on original list). See response below. Invited to the workshop after receiving a positive response. (waiting on reply).	I'll be back in NZ then but could call in for an hour +/-
Coles Myer Logistics Pty Ltd (Coles Distribution Centre Goulburn)	Spoke to Stuart on the phone. Interested in being involved and interested in sending a transport person to the workshop. Questions not yet answered.	Emailed about the date and no response.
Brendon James in Roads and Maritime (Southern Region Planning Manager)	Sent email.	Spoke on phone and is interested in more details about the workshop. Is interested in attending/sending the right people to attend.
Tim Wyatt (ACT Transport Strategy)	Sent email. Responded that Nathan would get in touch from their urban corridors study.	We will be conducting a project control group meeting on Fri 18 May to discuss and review the preliminary corridor modelling if yourself and representatives from Goulburn Mulwaree Council would like to attend? If so could you please provide contacts of the council members for meeting invites to be forwarded to. Also, we would like to attend the workshop in Goulburn via video link if you can please provide more information that'd be great and I will confirm interest from my end.

Awaiting further response

Divall's	Spoke to Camilla on phone – referred to Claire and provided an email address. Left an email.	Spoke to Troy on the phone as the person most likely to attend – seemed interested. Email sent but no response.
Linfox	Emailed general enquiries, Sergio, Bromley and Mark. Reply received from Sergio which said Andrew Porter will follow up.	Following up internally still. "Will respond one way or another as soon as possible"
Wright Haulage	Sent an email. Left a message.	Left another message. One more email then can assume not interested
Goulburn Express Freight Pty Ltd.	Sent an email. Left a message.	I spoke to Cameron at Goulburn Express Freight and he said that he would struggle to make a workshop but is happy for someone to call in for a chat. To follow up if this is possible

Diana Zagora or offsider in TfNSW	Sent email to Diana. On leave until 1/5. Out of office had an email address for Ela. Sent email to Ela.	No response yet. I have left a message on Diana's Phone (4/5) but no response.
Pacific National	Left a message on general enquiries.	Followed up with a contact from Peter Templer. Called and emailed. Waiting for response.
Freight NSW	*Not sure on a contact for this one. Following up.	Emailed Simon O'Hara: Thank you, Troy. Can I put some of this out to members for their input and these important points you raise? Waiting for response.

Completed and not interested in attending

Deegan's Transport Pty Ltd	Spoke to Kim on the phone. See response below.	
Crawford Freight Lines*	*Additional contact not on the original list. Not invited to the workshop but contacted to answer questions. Couldn't answer questions due to confidentiality (see below).	
Collins Adelaide	Tried online enquiries for Sydney office and Melbourne office. Spoke to one guy on the phone who wasn't overly helpful. Tried again and got referred to Steve. Tried again and got an email address. Sent an email.	Spoke to them on the phone. Answers to the questions below. Not interested in attending a workshop
SB Transport P/L (Michael Stuart)	Called the number provided but the company does not seem to be operating anymore. Michael is now running a company called "Bluewater Barge." Left a message.	Left a message and an email. No response. Can assume that it's no longer relevant to Michael.
Southern Transport Services Pty Ltd	Spoke to Fred on the phone. Said that he can answer the questions but would struggle to attend the workshop. Sent an email.	Replied email that he cannot attend on the date. Gets my emails but doesn't answer questions. When I get him on the phone he's too busy to talk.

Interview Questions

1. Why have you set up in Goulburn?
2. What part of the industry do you operate in?
3. Do you have any issues with the existing road network and the connectivity to Sydney / Canberra / Melbourne / Inland NSW?
4. Do you see any benefits associated with the Goulburn area being a freight and logistics hub?
5. Do you think the proximity to Sydney is a help or a hindrance to Goulburn being a major centre for this industry?
6. What would make the area more attractive for investment in freight, distribution and logistics?

Grangers

1. Goulburn needed road freight so Dad started in 1953.
2. We deliver freight for major Transport and Courier Companies such as TNT, Vellex Transport, Tamex and other companies. We also have our own trucks to transport freight all over Australia from Goulburn for numerous local companies and into Goulburn from Sydney and Melbourne and Brisbane.
3. Roads connecting us to the South Coast Area such as Nowra is the major concern.
4. Goulburn is central to the coastal areas such as Nowra to Batemans Bay areas if the Nerriga Road ever gets finished and the 15t load limit lifted as it was supposed to we could service that area better. We can service Canberra and areas west from Goulburn we are trying to educate other transport companies to drop freight into Goulburn as we are on the major road corridor between Sydney and Melbourne and we could distribute to these areas without having to go into Sydney.
5. I think it's close enough to Sydney to be a major Transport hub as we already have a rail system and rail yards that are underutilised that could alleviate the Sydney Ports by unloading the Boats and railing it direct to Goulburn and having Goulburn as the distribution area. This would take the pressure of the road network in Sydney with container movements.
6. We need something to trigger the way people think, as we currently store and ship items around Australia for a major train parts supplier in the same time frame and as if they were in Sydney which they were but their overhead costs are down and freight costs have still remained competitive.

International Primary Products

1. There is sufficient forest available, a suitable rail yard, a regular train service, the city/town is an adequate size with suitable supporting infrastructure and trading partners available, Goulburn is central and not too far from Sydney or Canberra.
2. We are a primary producer, trader, exporter and logistics user/facilitator
3. No, the rail service is very good, they just need more customers and train options per week or month to help us match trains to ship bookings and schedules
4. Yes, the more freight that hubs through Goulburn the easier it will be for IPPAU to mix and match our ocean freight bookings and log supply to the trains that are available each month. As well there are obvious advantages in keeping trucks off the roads and reducing the overall truck haul distance via the use of rail. Many of the forests that we harvest or get logs from would NOT be viable without the rail link to Sydney.
5. Major help, even though Goulburn is relatively nearby Sydney it is still far too expensive to try and do any logistics in Sydney environs.
6. Our DA is too restrictive, 0700-1800 Mon-Fri, 0800-1300 Sat… we need to be able to run 24/7 as the Rail Yard is too small and so needs a quick turnaround.

Collins Adelaide

1. They are not set up in Goulburn
2. The company transports fresh produce
3. No problems with connectivity
4. Not really for them
5. Yes definitely a help for Goulburn but not for them as a company. However, they use Goulburn as a changeover point for drivers. An example is that drivers would come out of Adelaide travelling to Sydney, and change over in Goulburn. The Goulburn driver would continue onto Sydney while the Goulburn driver would rest. Then the reverse coming back.
6. It was mentioned that sometimes stopping next to the road can be dangerous, so a truck parking area, near the main road, would be useful. [Mentioned the area past the roundabout, near the abattoir as a site that they were thinking about setting something up…]

Crawford Freight Lines

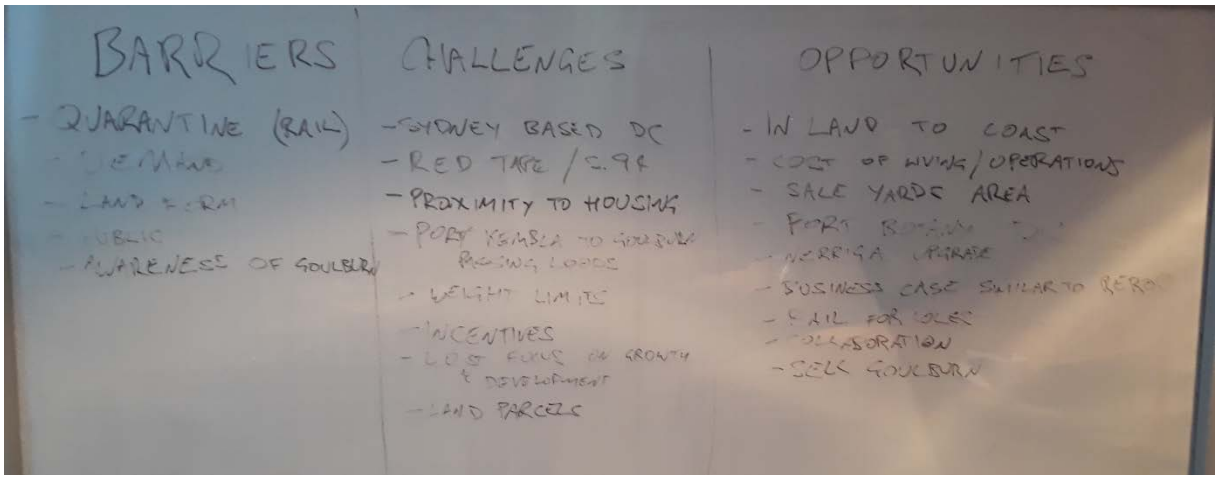
1. We than you for including us in your process, however, we treat this type of information as confidential in the main and unfortunately are unable to answer your questions.
6. Our advice would be if the Council / Government wishes to understand/improve business and the required infrastructure to support such, we feel it best they turn their attention to assisting business to achieve growth and employment and remove so much red tape and over the top compliance requirements holding business back.
   As a provider of Logistics to many major clients it is an issue we hear from our client base far too often. If any improvements can be made in relation to the above, Goulburn will definitely benefit and thrive.

Deegan's

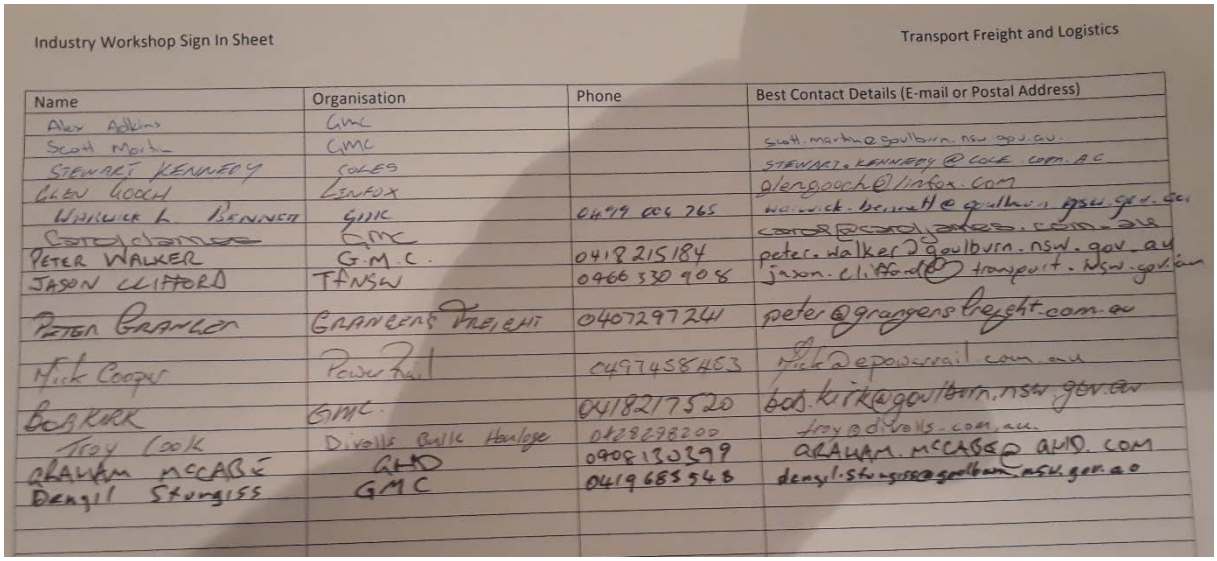
Not interested in participating. They used to do all the beer in the region but then they were told that they could keep the work but only if they subcontract out to Linfox (due to contract arrangements). General comments are that the major companies are the ones that we would need to talk to.

Appendix B – Stakeholder Workshop

Whiteboard notes



Attendee contact details



Industry Workshop Sign In Sheet — Transport Freight and Logistics

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Revision	Author	Reviewer		Approved for Issue		
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