Employment Land Strategy

Goulburn Mulwaree

Prepared for Goulburn Mulwaree Council

November 2016

HillPDA CONSULTING

QUALITY ASSURANCE

Report Contacts

NICHOLAS HILL

B. Science, M Human Geography, Macquarie University (2012) M.A Property Development (2015), University of Technology Sydney Macquarie University (2012)

Senior Consultant
Nick.Hill@hillpda.com

Supervisor

MARJORIE FERGUSON

M Economic History (Hons). Grad Dip Urban and Regional Planning.
Grad Dip Leisure Studies. MPIA CPP

Principal
Marjorie.Ferguson@hillpda.com.

Quality Control

This document is for discussion purposes only unless signed and dated by a Principal of HillPDA.

Reviewed by:

Dated 29/11/2016

Report Details

Job Ref No:	C16368
Version:	Final
File Name:	Goulburn Mulwaree Employment Land Strategy
Date Printed:	29/11/2016

CONTENTS

TABLES

FIGURES

LIST OF ABBREVIATIONS

ABS	Australian Bureau of Statistics
ANZSIC	Australian and New Zealand Standard Industrial Classification
BTS	Bureau of Transport Statistics
CBD	Central Business District
CCD	Census Collection District
DCP	Development Control Plan
DP&E	NSW Department of Planning and Environment
ELDM	Employment Lands Demand Model
FSR	Floor Space Ratio
GDP	Gross Domestic Product
GFA	Gross Floor Area
GLA	Gross Lettable Area
Ha	Hectares
HES	Household Expenditure Survey (ABS)
JTW	Journey to Work
LEP	Local Environmental Plan
LGA	Local Government Area
LQ	Land Quotient
NLA	Net Lettable Area
PTA	Primary Trade Area
SIA	Social Impact Assessment
SD	Statistical Division
Sqm	Square metre
SLA	Statistical Local Area
STA	Secondary Trade Area
TDC	Transport Data Centre
TTA	Tertiary Trade Area
TDC	Transport Data Centre
TTA	Tertiary Trade Area
TZ	Travel Zone

1 EXECUTIVE SUMMARY

Growth and economic development in the Goulburn Mulwaree Local Government Area (LGA) are key policy matters for Council. This Strategy provides an understanding of the nuances of the LGA by addressing the current and expected employment land requirements, whilst also positioning Goulburn Mulwaree as an attractive place to invest, by highlighting its competitive advantages and features.

Additionally, the Employment Land Strategy (Strategy) provides a strategic planning approach for Employment Lands in the LGA. The Strategy will guide future decision-making by Council and other stakeholders by:

- Assessing the availability and demand for employment lands;
- Considering the drivers for economic growth and emerging industries;
- Establishing recommendations upon which to consider future amendments to the Goulburn Mulwaree Local Environmental Plan 2009; and
- Integrating the planning analysis and recommendations to support the economic development/marketing activities of Council, in particular to future industries and employers.

To assist with planning over a variety of time periods the Strategy's recommendations have been broken down into short term (2017 – 2021), medium term (2022 – 2027) and long term (2028 - 2038) phases.

Initial stakeholder engagement was undertaken to inform the Strategy and is provided as Appendix A.

An Outcomes Report was prepared as a standalone report following the public exhibition of the draft Employment Land Strategy. This Report detailed the consultation process, summarised submissions and provided responses to issues and matter raised within submissions.

1.1 Contextual Analysis

In order to better understand the dynamics of the Goulburn Mulwaree LGA's local economy as well as broader economic and lifestyle influences for employment generation (and in turn demand for land) a demographic and industry analysis was undertaken.

The projected age profile for Goulburn Mulwaree remains consistent with trends experienced across the period 2001 - 2011, where a continuation of the ageing of the population will occur into the future. It is projected that the over 65 age cohort will increase by 77% through to 2031 and the working age cohort (15 - 64) projected to increase by only 9% across this period. A total population increase of 18% is projected to occur within 20 years between 2011 - 2031 which is a significant increase from the 3% population increase experienced across 10 years between 2001 - 2011.

The overall economic performance within the Goulburn Mulwaree LGA has been resilient despite challenges affecting regional NSW, the Australian economy in general and specific industries including manufacturing. Economic growth within the LGA has been approximately 9.4% in 8 years between 2006 - 2014 compared with the NSW regional average growth over the same period of 11.8%.[1]

However, recent economic growth in the LGA between 2011 - 2014 (2.2%) jumped considerably from the 2006 - 2011 period (0.6%) and there is a forecast increase in gross regional product between 2015 - 2017.

The Goulburn Mulwaree LGA has sufficient capacity within its existing employment lands to meet future demand. Additionally it is relatively affordable. These are positive factors for attracting new business to the area. Construction activity has fluctuated with non-residential building approvals dropping dramatically within the 2013 - 2014 period but recovering within the 2014 - 2015 period. There is a 10 year trend of increasing residential construction indicating demand for housing in the LGA.

The population growth and projections, economic and business performance and emerging industries present a mixed picture in terms of future demand for additional employment land. The current level of growth and general activity does not present a clear driver for additional land. However, there is evidence through the analysis of prominent and emerging industries that there are opportunities and characteristics which will support the expansion of employment related uses within the Goulburn Mulwaree LGA particularly in relation to specific precincts and industries.

[1] Forecast ID Regional NSW

1.2 Forecasting Demand for Floorspace and Land

1.2.1 Retail and Commercial Goulburn Central Business District

In relation to forecasting floorspace for retail and commercial the methodology applied within this study is based on household expenditure modelling.

This practice involves the definition of trade areas, analysing forecast population growth, estimating and projecting expenditure levels from current and future population, estimating the level of expenditure captured specifically by the Goulburn commercial core area and dividing captured expenditure by industry benchmark turnover levels to derive required floor areas.

This study has identified demand for an additional 14,000m² of floorspace relating to Goulburn Commercial Core zone by 2030. In planning for the provision of this forecast demand, a number of important factors should be considered and are discussed below.

Firstly, it is likely that on account of existing vacancy levels, a portion of the forecast increase in demand for commercial and retail floorspace should be located within the existing footprint of Goulburn Mulwaree's centres (acknowledging the proposed new centre at Marys Mount). Centres such as Marulan have good capacity to accommodate additional floorspace whilst Goulburn CBD (Commercial Core and Mixed use Zones) could facilitate additional floorspace (particularly commercial office uses) on its upper floors. As demand grows however, there will be increasing demand for additional land and space, leading to pressures to rezone and expand the boundaries of the centres. This pressure will be particularly acute for major tenants who require large sites to accommodate a bigger building footprint and car parking.

Secondly, it will be important to facilitate this demand and plan ahead to attract the additional businesses to the Goulburn Mulwaree LGA's centres as opposed to alternative surrounding LGAs. Furthermore, in order to protect Goulburn's CBD role as the main centre within the LGA, it will be important to ensure that it provides attractive and financially viable opportunities for investment and redevelopment.

1.2.2 Enterprise Corridor and Industrial Land

The employment land demand forecasting method used in this study is summarised below:

- Employment growth projections: Projections have been based on employment within the LGA as a proportion of population. Sources used include ABS Census data and NSW Population Projections; and
- Floorspace demand calculation: Industry standard employment ratios are applied to the projected employment forecasts for selected industries and subtracted from the current provision of floorspace within the identified precinct.
- In undertaking projections for industrial employment three different scenarios were undertaken:
  - Scenario 1 “Current Trend” – This scenario applies the current trend of decreasing rates of employment within industrial businesses. This trend is evident within industrial businesses as a proportion of total employment decreasing by approximately 2% between each census year from 2001. As such, this scenario applies the 2% however, the proportion stabilises at 20%;
  - Scenario 2 “Stable Scenario” – this scenario applies a constant industrial employment proportion of 22% for the forecast years; and
  - Scenario 3 “State Projections” – State employment projections undertaken by the Department of Employment project the proportion of persons employed within industrial businesses within Rest of NSW[2] to be 25% as of 2015 decreasing to 24% by 2020. As such this scenario applies a proportion of 24% to the projected years.

Using the results of the land audit shown in Table 1 it is estimated that approximately 2,267ha of vacant industrial land exists within the employment land precincts.

[2] Excludes Greater Sydney and Central Coast

Table 1: Industrial Floorspace and Land Projections

	1	2	3=1-2	4=3*0.5
	Total future floorspace demand (sqm GFA)	Current floorspace (sqm GFA)	Additional floorspace demand (sqm GFA)	Additional land required for floorspace demand (sqm)
Current Trend	370,792	390,497	-19,705	-9,852
Stable Scenario	407,938	390,497	17,441	8,720
State Projections	444,951	390,497	54,454	27,227

Source: HillPDA

1.3 Influences on Employment Land

The following influences have been identified:

- Goulburn Mulwaree's population and employment will enjoy modest growth into the future with the over 65's cohort growing the most by 2031. The impact of this type of demographic shift could manifest in a change in demand for specific industries and services including primary, secondary and tertiary educational institutions and aged care specific services. This includes aged care accommodation, medical establishments and specialist medical services. This type of shift could also result in a drop in the demand for employment land;
- When planning for employment land it is important to understand the nature of existing and emerging industries and how the local economy can respond to changes in the market;
- When planning for industrial areas, it is important to facilitate an oversupply or surplus of zoned land so as to provide a range of opportunities and types of sites for businesses. Furthermore a surplus of zoned land can act as an important price moderator. Available and affordable employment lands are key attractors for new businesses and are critical to facilitating the expansion of existing businesses located within an area;
- In the case of employment planning, the zoning and protection of good quality employment lands to protect existing and prospective industrial businesses is important; and
- Using the results of the land audit it is estimated that approximately 2,267ha of vacant industrial land exists within the precincts. This is more than sufficient to accommodate the projected growth in associated employment.

1.4 Recommendations

A summary of the key recommendations for the Goulburn Mulwaree LGA's existing and potential employment lands are provided below in Table 2.

The key for time frames within the following table are as follows:

- Short term (2017 – 2021);
- Medium term (2022 – 2027); and
- Long term (2028 - 2038).

Table 2: Summary of Recommendations for Employment Lands

Location	Time Frame	Existing Zoning	Recommendation
Goulburn CBD	Short Term	B3 Commercial Core B4 Mixed Use	▪ Develop an Action Plan for the Goulburn Central Business District: ○ Steering Committee to be set up (collaborative approach); ○ Review existing Goulburn CBD Master Plan; ○ Identify opportunities for sustainability of the town centre; ○ Review of existing planning controls (urban design); ○ Continued support of heritage conservation; ○ Quick win projects e.g. shopfront painting, removal of old signage; and ○ Investigate improved retail mix within the CBD.
Marulan Town Centre	Short Term	B2 Local Centre	▪ Rezone the area along George Street north of the Railway Bridge to the end of Marulan from B2 Local Centre to B6 Enterprise Corridor; ▪ Rezone Thoroughfare and Austin Streets from B2 Local Centre to R1 General Residential to reflect the existing land use; and ▪ Review the planning controls for the B2 Local Centre Zone to ensure future appropriate and viable development. ▪ Develop an Action Plan for Marulan: ○ Steering Committee to be set up (collaborative approach); ○ Identify a vision and future character and function for Marulan; ○ Identify opportunities for sustainability of the town centre; ○ Continued support of heritage conservation; ○ Quick win projects e.g. shopfront painting, removal of old signage; and ○ Seek opportunities for improved access to the highway for heavy trucks
South Goulburn Enterprise Corridor Precinct	Short Term	RE1 Public Recreation	▪ Rezone Council's previously owned land at the end of end of Lockyer Street to B6 Enterprise Corridor.

Location	Time Frame	Existing Zoning	Recommendation
	Short Term – Medium Term	B6 Enterprise Corridor	▪ Undertake an Urban Design and Traffic Analysis Study to look at ways to slow traffic and improve pedestrian movements within the area as well as investigate potential solutions for: ○ Traffic flow issues at Sowerby/Hume intersection; ○ Improving access to the vacant lots fronting Hume Street; and ○ Improving localised intersection at Ducks Lane/Hume Street to improve heavy vehicle access.
	Short Term		▪ Undertake a development feasibility exercise to determine whether the development contribution rates around the Ducks Lane/ Hume Street intersection and the area south of Ducks Lane (up to Run-O-Waters Estate) are inhibiting development.
	Short Term		▪ Rezone 150 Lansdowne Street, Goulburn to R5 Large Lot Residential where the previous residential subdivision was approved.
	Medium Term		▪ Investigate the opportunity to extend and fund an extension of Tait Crescent to Lockyer Street.
	Long Term		▪ Investigate the potential for future enterprise use of the caravan park if required.
North East Goulburn Enterprise Precinct	Short Term	B6 Enterprise Corridor	▪ Rezone three areas in the north east Goulburn Enterprise Corridor Precinct: ○ The area bounded by Sinclair, Chiswick and Common Streets and the Waste Management Facility to the east should be rezoned to IN1 General Industrial; ○ The area bounded by Hetherington, Chiswick and Long Streets and the B6 Enterprise Corridor zone to the north should be rezoned to RU2 Rural Landscape; and ○ The area bounded by Long Street, Sydney Road and the B6 Enterprise Corridor to the east should be rezoned to R1 General Residential.
	Short – Medium Term		▪ Investigate the feasibility of improved access and connectivity within the Precinct to support existing and/or future industry.
Tarago Industrial Precinct	Short Term	IN3 Heavy Industrial	▪ Identify land in the north of the precinct that could provide a longer term supply of industrial land.
	Short – Medium Term		▪ Assist with increasing the range of business opportunities which could build on the existing industries (Bioreactor and Wind Farm).
South Goulburn Industrial Precinct	Medium Term	IN1 General Industrial	▪ Investigation to rezone the land to the south of Tait Crescent from a rural zoning to either an industrial or enterprise corridor zone to facilitate subdivision and use of the lots for more general employment land.

Location	Time Frame	Existing Zoning	Recommendation
	Short – Medium Term		▪ Investigate with the owners of the saleyards and woolstores a more intensive employment use.
	Medium Term		▪ Review the size of the lots at the southern end of Rail yard sub precinct as there is potential to develop land to accommodate uses and/or to utilise spare capacity within larger lots.
	Long Term		▪ Investigate the opportunities to redevelop some existing dwellings or underutilised lots for industrial uses including to the north of Bungonia Road and the residential lands located at the intersection of Braidwood and Bungonia Roads.
Bradfordville Industrial Estate Precinct	Short Term	IN1 General Industrial	▪ Rezone 37 Ross Street from IN1 General Industrial to SP2 Infrastructure (Health); and ▪ Investigate alternate access to 37 Ross Street from Brewer Street as part of the rezoning process.
Murrays Flat Industrial Precinct	Short Term	IN1 General Industrial	▪ Continue investigation work for the Council site in this Precinct which will determine the best future land use and could act as a catalyst for future employment uses.
	Medium Term		▪ Investigate opportunities for increasing connectivity to this Precinct by either rail or road in conjunction with appropriate stakeholders.
Marulan Industrial Precinct	Short Term	IN1 General Industrial IN2 Light Industrial	▪ Review the existing and potential demand for an alternate access route to the Hume Highway for quarry and other truck movements travelling south. This will involve assessing truck and vehicle movements through Marulan as well as engaging with local residents and quarry and local industry owners; ▪ If demand is established Council should commence negotiations with quarry owners and affected landowners within the identified investigation area for the opportunity to progress alternate access to the Holcim interchange; and ▪ Investigate the funding opportunities (public and private) for an alternate access route.
	Long Term	IN2 Light Industrial	▪ The Suffolk Road Industrial area to be monitored over time for alternate land uses.
Miscellaneous Planning Controls Motor Sports University Hub	Short Term	B6 Enterprise Corridor IN1 General Industrial IN2 Light Industrial IN3 Heavy Industrial	▪ Review the existing planning controls for the Enterprise Corridor and Industrial zones.

Location	Time Frame	Existing Zoning	Recommendation
	Short Term	RU1 Primary Production RU6 Transition RU2 Rural Landscape	▪ Review the current zoning and planning controls to allow appropriate expansion for the motor sport industry.
	Short Term	SP2 Infrastructure (Educational Establishment)	▪ Advocate support for the establishment of the 'University Hub'

2 INTRODUCTION

2.1 Background

Growth and economic development in the Goulburn Mulwaree Local Government Area (LGA) are key policy matters for Council. This Strategy provides an understanding of the nuances of the LGA by addressing the current and expected employment land requirements whilst also positioning Goulburn Mulwaree as an attractive place to invest, by highlighting its competitive advantages and features. The Strategy delivers recommendations, including timeframes to allow Council to take a leadership role in facilitating the future growth of the LGA and the region.

2.2 Purpose of Strategy

All regional cities need to have an understanding of what success is for their region. Before pursuing development, it is important for communities to understand the benefit to the region (jobs, wealth creation or community skills development). Understanding that region's nuances and interactions is likely to bring about better outcomes that are better aligned to regional circumstances.[3] Approach and Methodology.

The Employment Land Strategy (Strategy) provides a strategic planning approach for employment lands in the LGA. The Strategy will guide future decision-making by Council and other stakeholders by:

- Assessing the availability and demand for employment lands;
- Considering the drivers for economic growth and emerging industries;
- Establishing recommendations upon which to consider future amendments to the Goulburn Mulwaree Local Environmental Plan 2009; and
- Integrating the planning analysis and recommendations to support the economic development/marketing activities of Council, in particular to future industries and employers.

Goulburn Mulwaree Council is committed to providing this robust Strategy to underpin the growth of the LGA and to ensure there are adequate and appropriate employment lands to provide for sustainable growth into the future.

The Strategy has been developed in two distinct parts:

- A **Recommendations Report** which contains the future directions for employment lands and recommendations; and

[3] Regional Australia Institute, September 2014, Prosperous Futures: Understanding the Potential of Australia's Regional Cities

- A **Background Report** which documents the locational context of the LGA and a literature review.

The methodology has involved the following tasks:

- Engagement with business/landowners/community groups to identify issues and future expectations;
- Review of State and local planning policies and findings;
- Analysis of population and employment profiles within the Goulburn Mulwaree LGA using ABS Census data and Bureau of Transport data;
- Analysis of macro-economic trends influencing the future of employment lands;
- Audit of existing land uses across employment areas noting the strengths and weaknesses of each;
- Projection of future employment growth to ascertain future floorspace demand;
- Consideration of retail demand and implications for future retail floorspace need;
- Assessment of future capacity of employment lands to accommodate projected growth; and
- Recommendations for Council's planning framework, additional work to be undertaken and marking activities to promote, facilitate and accommodate future employment growth within the LGA.

The Stakeholder outcomes, following consultation prior to the development of this Strategy are provided in Appendix A.

An Outcomes Report was prepared as a standalone report following the public exhibition of the draft Employment Land Strategy. This Report detailed the consultation process, summarised submissions and provided responses to issues and matter raised within submissions.

3 STUDY AREA AND CONTEXT

This Chapter provides an overview of the characteristics of the Goulburn Mulwaree LGA's employment lands, including a description of the location of the various precincts, characteristics and major businesses and issues for the Study Area.

3.1 Location and Context

Good accessibility creates significant opportunities for the establishment of a range of employment uses reliant on high quality transport connections and accessibility to domestic and international markets.

The Goulburn Mulwaree LGA is well located in the Sydney-Canberra Corridor which is a collection of three sub-regions including the northern (Wingecarribee LGA); central (Goulburn Mulwaree and Upper Lachlan LGAs); and southern (Queanbeyan Palerang and Yass Valley LGAs). The Goulburn Mulwaree LGA is highly accessible with excellent road and rail connections. Its location between Canberra and Sydney and quality road infrastructure gives easy access to the 12.6 million people living in the NSW/ACT/VIC coastal ribbon and their demand for consumer goods as shown by Figure 1. The LGA is located 196 kms south west of Sydney or approximately two and quarter hours. Canberra is 90 kms south of Goulburn taking approximately one hour in travel time.

The Goulburn Mulwaree LGA covers an area of 3,223 square kilometres and includes the major regional centre of Goulburn, the town of Marulan as well as a number of smaller villages including Tallong, Windellama, Tarago, Towrang, Parkesbourne, Tirranaville, Lake Bathurst and Bungonia. The Employment Land Precincts are located in Goulburn, Marulan and Tarago. The region's economic base has historically been comprised of agriculture, grazing and commerce, given its central location within the region. Over more recent decades, the economy has transitioned to a broader base and the top three sectors by employment are Health Care & Social Assistance (14%); Retail Trade (13%) and Public Administration & Safety (11%).[4]

[4] *ABS National Regional Profile Population 2013*

Figure 1: Illustrates the Main Transport Routes Through the Goulburn Mulwaree LGA.

Source: PSA Consulting Australia & Southern Regional Transport Plan

3.2 Employment Precincts

By current figures, only 3.2% of the Goulburn population is employed within the Agriculture, Forestry & Fishing sector.

In order to understand the nature of the employment land within the Goulburn Mulwaree LGA each distinct precinct was considered separately. In this Strategy, employment lands are defined as land which is zoned to accommodate activities resulting in employment. This includes land zoned for retail, commercial, enterprise corridor and industrial purposes. It is recognised that agriculture and primary industries are important to the economic prosperity of Goulburn Mulwaree however agricultural land will be the subject of separate investigations by Council. Additionally, residential zones that permit some retail use have also been excluded.

The Strategy provides a specific assessment of twelve (12) key employment precincts and eighteen (18) sub-precincts within the Goulburn Mulwaree LGA to determine the level of occupancy. An audit of the precincts has been undertaken and presented in Table 3. It is useful to understand the existing characteristics and function of each precinct to be able to understand responses to future economic growth.

Table 3: Precinct Audit

Precinct	Land use Zone	FSR	Area (ha)	Description
Goulburn CBD	B3 Commercial Core B4 Mixed Use	2:1 1.5:1	46.49 93.48	Goulburn CBD is centred on the historic and attractive Auburn Street and anchored by the Goulburn Plaza in the city centre and the Market Place on the south-western outskirts of the CBD. The Commercial Core zone covers five city blocks from Clinton Street in the south through to Bradley Street in the north. The main street is Auburn Street running north-south, which is flanked by Bourke Street running parallel to the west and Sloane St running parallel to the east. Many buildings within Goulburn, including within the CBD, are historically significant with several buildings being individually heritage listed and the area being included in the heritage conservation area in the Goulburn Mulwaree Local Environmental Plan 2009.
Marys Mount	B1 Neighbourhood Centre	2:1	14.8	To be known as Mistful Park Shopping Centre consisting of 1,520m² of floorspace. This will include a 750m² supermarket, 250m² of speciality shops and 520m² of medical. A 300m² child care centre is also planned in the Precinct. It is approximately 3klm north of Goulburn CBD
Marulan	B2 Local Centre	1.2:1	74.58	Marulan is located 30klm north of Goulburn with its retail and commercial core running along George Street. Twenty buildings have historic interest. The centre consists of 8 small retail outlets, including a Post Office, café, and bakery, plus a hotel. There is no supermarket but it does have a general store.
South Goulburn Hume Street Mary Street Sowerby Street Ducks Lane	B6 Enterprise Corridor	1:1	135ha	South Goulburn Precinct is located at the southern periphery of Goulburn. The Precinct totals 142ha and is comprised of a mix of accommodation, general industry, small businesses, warehousing and manufacturing. The area has an emerging concentration of bulky goods retailers and some manufacturing at the interchange with the Hume Highway.

Precinct	Land use Zone	FSR	Area (ha)	Description
North East Goulburn **South Common Street** **North Common Street** **Sydney Road** **Hetherington Street**	B6 Enterprise Corridor	1:1	135ha	The North East Goulburn Precinct is comprised of a mix of accommodation, general industry, small business and warehousing. This precinct accommodates the majority of vacant enterprise land across Goulburn Mulwaree while the lots located to the north of Sydney Road are a mix of residential housing, scrap metal and second hand car yards. The lots located along the southern side of Sydney Road are mainly accommodation and retail premises to service traffic entering Goulburn from the north. Common Street is largely vacant and Hetherington Street is largely underutilised land with residential housing located on large lots. The Goulburn Mulwaree Waste Management Centre is located at the eastern end of Sinclair Street.
Marulan	B6 Enterprise Corridor	0.8:1	33ha	The Enterprise Corridor Precinct within the township of Marulan is located at the southern entrance of the town from the Hume Highway. Land uses within the Precinct are comprised of highway services with vacant lots located along the Hume Highway.
Tarago	IN3 Heavy Industrial	n/a	3,214ha	The Tarago Industrial Precinct is located approximately 10km north-west of the village of Tarago. Land uses within the Precinct include a repurposed mine used as a waste facility, operated by Veolia. Also within the vicinity of Tarago is the Woodlawn Wind Farm operated by Infigen and considered part of the broader Capital Renewable Energy Precinct.
South Goulburn **Tait Crescent** **Sale Yards** **Rail Yards**	IN1 General Industrial	n/a	80ha	The South Goulburn Industrial Precinct is located in the south of Goulburn and includes a significant diversity of industrial land uses from warehousing to car yards, non-industrial uses, landscaping supplies, residential uses and processing facilities.
North Goulburn	IN1 General Industrial IN2 Light Industrial	n/a	12ha	The North Goulburn Industrial Precinct is located to the north of Goulburn opposite the Goulburn Correctional Centre. Industrial land uses are comprised mostly of small service based industries such as auto repairers, engineers, trade suppliers and scrap yards. A large majority of the lots within this precinct are occupied by residential dwellings which are a legacy of historic residential uses and caretakers' dwellings for current industrial uses. As such, the Precinct is very active and dynamic which is a reflection of the range of uses.
Bradfordville **Taralga Road**	IN1 General Industrial	n/a	69ha	The Bradfordville Industrial Precinct is also located to the north of Goulburn. Land uses range from storage and warehousing to manufacturing and transport, freight and logistics. The area retains a general industry focus although a new medical centre is being constructed in Ross Street.
Murrays Flat	IN1 General Industrial	n/a	169ha	The Murrays Flat Industrial Precinct is a large area zoned industry, located on the north-east of Goulburn along the Hume Highway. It is comprised of three vacant lots with a combined area of 169ha.

Precinct	Land use Zone	FSR	Area (ha)	Description
Marulan	IN1 General Industrial IN2 Light Industrial	n/a	473ha	The Marulan Industrial Precinct is located in the township of Marulan. Land uses range from quarries and Council's landfill site to private storage sheds and highway service centres.

Source: Goulburn Mulwaree LEP 2009 & HillPDA

4 SOCIO-ECONOMIC PROFILE

This Chapter gives an overview of the socio-economic profile of the LGA.

4.1 Goulburn Mulwaree's Existing Population

Population growth and the demographic analysis of the Goulburn Mulwaree LGA provides an indication of demand for particular industries and subsequent employment lands. Population growth is a fundamental driver of economic activity. The following sections outline historic population growth, population projections and the major demographic features of the LGA including age, education, income, expenditure and employment.

4.1.1 Population Growth

As of 2015 the estimated resident population of the Goulburn Mulwaree LGA was 29,550.[5] With respect to population change, over the 13 year period June 2001 - June 2014, Goulburn Mulwaree's resident population has:

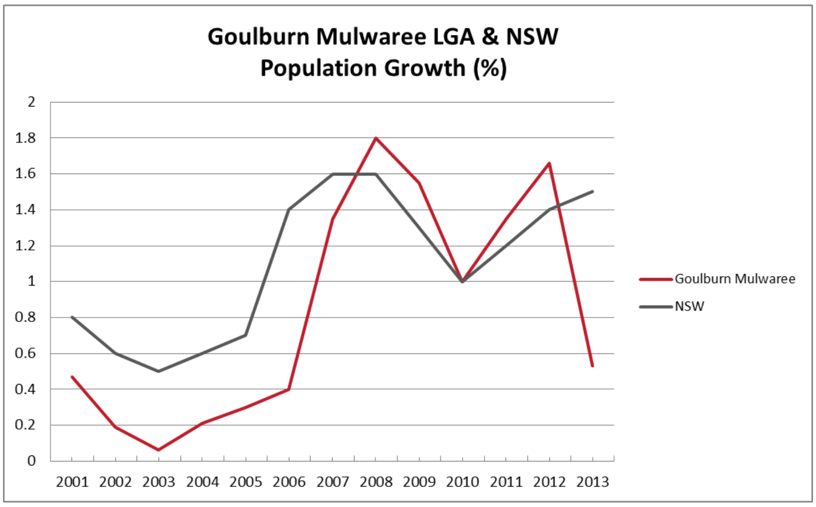
- Grown from 26,623 - 29,376; and
- Grown by just under 3,000 at an average of 229 persons per year.[6]

The population within the Goulburn Mulwaree LGA has grown inconsistently over the period from 2001 with a relatively slow rate of growth from 2001 - 2007. An upsurge in population growth then occurred, where growth more than doubled from 108 in 2006 - 2007 to 363 in 2007 - 2008. This higher rate of population growth was sustained through to 2013 with a slow down to growth of 150 in 2013 - 2014.

Whilst the rate of growth in the early 2000s was low, over the latter period the rate of population growth is fairly close to the NSW rate of growth as shown in Figure 2 below. In the years from 2013 - 2014 the NSW growth rate was sustained but decreased in the Goulburn Mulwaree LGA.

[5] ABS and Profile id
[6] ABS Regional population Growth, Australia, 30 August 2013 and 31 March 2015

Figure 2: Goulburn Mulwaree LGA & NSW Population Growth 2001-2013 (%)



Source: 3218.0 - Regional Population Growth, Australia, released 30 August 2013, 31 March 2015

4.1.2 Age Profile

As outlined by Profile.id and presented in Figure 3, the Age Structure, Services Age Groups2011 of the Goulburn Mulwaree LGA provides key insights into the level of demand for age based services and facilities such as child care. It is an indicator of Goulburn Mulwaree LGA's role and function and how it is likely to change in the future.

An analysis of the service age groups of Goulburn Mulwaree LGA in 2011, compared to Regional NSW shows that there was a similar proportion of people in the younger age groups (0 to 17 years) and a lower proportion of people in the older age groups (60+ years).

Overall, 23.1% of the population was aged between 0 and 17, and 23.9% were aged 60 years and over, compared with 23.6% and 24.5% respectively for Regional NSW.

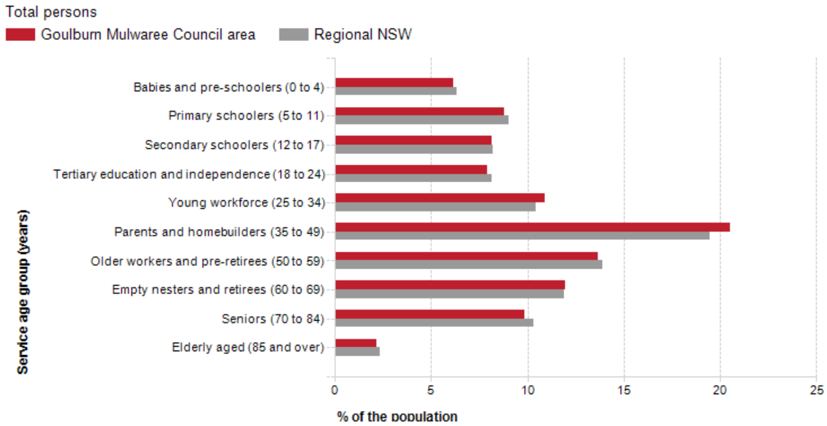
Goulburn Mulwaree LGA had a similar proportion of pre-schoolers and a lower proportion of persons at post retirement age than Regional NSW in 2011.

The major difference between the age structure of Goulburn Mulwaree LGA and Regional NSW is:

- A larger percentage of 'Parents and Homebuilders' (20.5% compared to 19.5%).

From 2006 - 2011, Goulburn Mulwaree LGA's population increased by 1,418 people (5.4%). This represents an average annual population change of 1.07% per year over the period.

Figure 3: Age Structure - Service Age Groups 2011



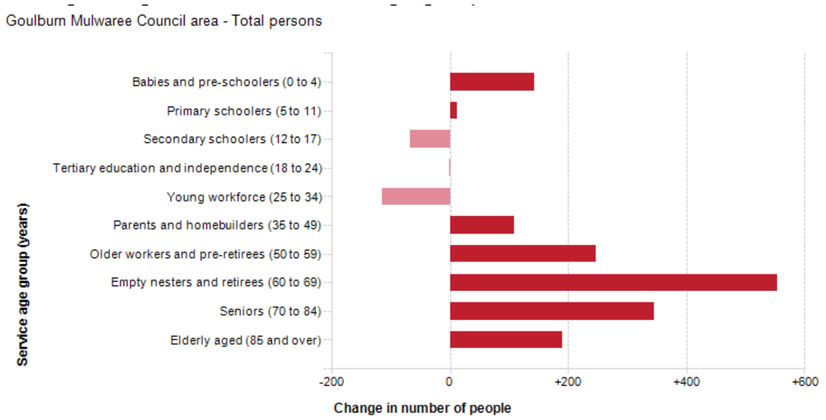
Source: ABS, Census of Population and Housing, 2011 (usual residence data). Compiled and presented in profile.id by id, the population experts

The largest changes in the age structure in this area between 2006 and 2011 were in the age groups:

- Empty nesters and retirees (60 - 69) (+554 people)
- Seniors (70 - 84) (+345 people)
- Older workers and pre-retirees (50 - 59) (+247 people)
- Elderly aged (85 and over) (+190 people)

These emerging trends, should they continue, represent a challenge for Goulburn Mulwaree by supporting job growth in related employment fields. Changes in the age structure by service age groups are shown in Figure 4.

Figure 4: Change in Age Structure - Service Age Groups, 2006 - 2011



Source: ABS, Census of Population and Housing, 2011 (usual residence data). Compiled and presented in profile.id by id, the population experts

4.1.3 Qualifications

An analysis of the qualifications held by the population of Goulburn Mulwaree is important for determining the levels of demand for certain industry employment. A region's labour force is an important factor for economic development. The availability of a skilled labour force is important for businesses and access to employees is a critical factor in investment decisions. The following information is sourced from the Australian Bureau of Statistics, Census of Population and Housing, 2011 (usual residence data) and Profile.id.

Analysis of the qualifications of the population in the Goulburn Mulwaree LGA in 2011 compared to Regional NSW shows that there was a lower proportion of people holding formal qualifications (Bachelor or higher degree; Advanced Diploma or Diploma; or vocational qualifications), and a similar proportion of people with no formal qualifications.

The top industries within Goulburn Mulwaree in which employees have a Certificate level qualification include:

Construction;

Health care & social assistance; and

Public administration & safety.

Overall, 39.2% of the population aged 15 and over held educational qualifications, and 47.1% had no qualifications, compared with 41.5% and 46.8% respectively for Regional NSW as shown in Figure 5.

The major difference between the qualifications held by the population of the Goulburn Mulwaree LGA and Regional NSW is:

- A smaller percentage of persons with Bachelor or Higher degrees (9.8% compared to 12.4%).

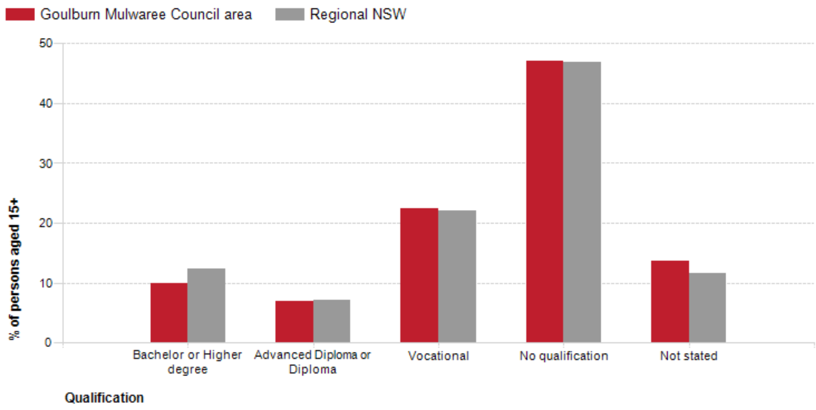
The largest changes in the qualifications of the population in Goulburn Mulwaree LGA between 2006 and 2011 were in those with:

- Vocational qualifications (+766 persons);
- Bachelor or Higher degrees (+491 persons); and
- Advanced Diploma or Diplomas (+182 persons).

The largest changes in the field of qualifications held by the local labour force between 2006 and 2011 in the Goulburn Mulwaree LGA were:

- Society and Culture (+388 people);
- Management and Commerce (+252 people);
- Health (+115 people); and
- Architecture and Building (+76 people).

Figure 5: Highest Qualification Achieved, 2011



Source: ABS, Census of Population and Housing, 2011 (usual residence data). Compiled and presented in profile.id by id, the population experts

4.1.4 Income

In Goulburn Mulwaree LGA at 2011, 67% of households were purchasing or fully owned their home, 21.2% were renting privately, and 5.7% were in social housing in 2011.[7]

An analysis of income data is important in order to determine the relative wealth of the Goulburn Mulwaree LGA which will also determine whether there is the potential for significant capital investment by people within the LGA or whether external investment should be sought. Data from the 2001, 2006 and 2011 Censuses shows that the median family income and household income has risen by 20% over the period from 2001-11 while personal income has risen by 32% as shown in Table 4.

Table 4: Goulburn Mulwaree – Selected Medians and Averages 2001, 2006, 2011

$/Weekly	2001	2006	2011	2006-11 (Change)
Median total personal income	343	396	523	32.1%
Median total family income	840	1,061	1,273	20.0%
Median total household income	670	794	956	20.4%

Source: ABS 2011 Census of Population and Housing Time Series Selected Medians and Averages

As seen in Table 5, when compared with Australia and Sydney, median weekly household income in Goulburn Mulwaree was substantially lower in 2011. On average, capital city statistical areas record substantially higher average incomes than regional statistical areas and as such is provided here for context. As such, when Goulburn Mulwaree's median weekly household income ($961) is compared to Regional NSW there is little difference.

[7] Profile.id, Community Profile Goulburn Mulwaree

Table 5: Household Income Comparison 2011 – Goulburn Mulwaree, Australia, Sydney & Rest of NSW

2011 ($/weekly)	Goulburn Mulwaree	AUS	Sydney	Regional NSW
Median total household income	$956	$1,234	$1,237	$961

Source: Australian Bureau of Statistics

4.1.5 Expenditure

Goulburn Mulwaree remains a relatively affordable place to live as can be seen in the median rents and sales in comparison to regional NSW and Sydney.

Housing costs are the most effective measurement for determining household expenditure. Housing costs in the Goulburn Mulwaree LGA, as measured by median house prices and rents from December 14 to December 15 are shown in Table 6.

The median market rent in December 15 is lower in the LGA ($240) than regional NSW ($265) and more than 50% less than in Sydney ($500).

Similarly the median house price is lower in the LGA in December 15 ($315,000), compared to Regional NSW ($370,000) and Sydney ($705,000). This said the Goulburn Mulwaree median house price rose by 10.5% over the 12 month period from December 14 – December 15 which shows a buoyant market.

Table 6 - Housing Costs Median Rent and Median House Price Data from Dec 14 – Dec 15

Area	Median House Price $'000s (Dec 14)	Median Market Rent (Dec 14)	Median House Price $'000s (Jun 15)	Median Market Rent (Jun 15)	Median House Price $'000s (Sept 15)	Median Market Rent (Sept 15)
Goulburn Mulwaree	285	235	291	210	315	240
Sydney SD	555	460	565	460	705	500
Rest of NSW*	344	260	338	260	370	265

Source: RBB (Rental Bond Board) & VG (Valuers General) Data 2015,*excludes Greater Sydeny

4.2 Goulburn Mulwaree LGA's Population Projection

This section details population projections for the LGA and estimated age profile.

4.2.1 Demographic Projection

The NSW Department of Planning and Environment prepares population, household and dwelling projections to give detailed information on how populations are expected to change over 20 years. These projections are based on assumptions made about future trends in fertility, mortality and migration. The Department notes that whilst the assumptions reflect the current outlook regarding these trends it is quite possible that they will not eventuate.

Table 7: Goulburn Mulwaree Population Projections 2011-2031

Year	2011	2016	2021	2026	2031
Goulburn Mulwaree Population	28,400	29,700	31,000	32,00	33,000
Goulburn Mulwaree Growth Rate (% p.a.)		1.0%	0.9%	0.8%	0.7%
NSW Growth Rate (% p.a.)		1.31%	1.31%	1.2%	1.09%

Source: NSW Department of Planning & Environment, 2016

4.2.2 Age Profile Projection

The projected age profile for the Goulburn Mulwaree LGA remains consistent with trends experienced across the period 2001 - 2011, where a continuation of the ageing of the population will occur. It is projected that the over 65 age cohort will increase by 77% through to 2031 and the working age cohort (15 - 64) projected to increase by only 9% across this period. A total population increase of 18% is projected to occur within 20 years between 2011 - 2031 which is a significant increase from the 3% population increase experienced across 10 years between 2001 - 2011. These emerging trends are illustrated in Table 8.

Table 8: Goulburn Mulwaree Age Profile Projections 2011-2031

	2011	2016	2021	2026	2031	Change from 2011	% Change
0-14	5,300	5,250	5,350	5,400	5,400	200	3.9%
15-24	3,500	3,600	3,500	3,500	3,550	50	1.0%
25-64	14,650	14,950	15,300	15,500	15,450	800	8.8%
65+	4,950	5,900	6,850	7,900	8,900	3,950	77%
Total	**28,400**	**29,700**	**31,000**	**32,300**	**33,300**	**5,000**	**18%**

Source: NSW Department of Planning & Environment, 2016

The loss of working age population from the LGA may be a result of young adults migrating to larger cities for education, employment and lifestyle opportunities.

The reversal of this trend, experienced by the Goulburn Mulwaree LGA, is the migration of older age cohorts from the metropolitan areas of capital cities to regional centres in order to raise families, seeking tree change lifestyles or for retirement and access to aged care services. All these factors were cited by stakeholders as key attractors to the LGA. Regional cities also gain older people from their hinterlands as people move in from smaller towns or farms in order to access services such as health or aged care.

The impact of this type of demographic shift could manifest in a change in demand for specific industries and services including primary, secondary and tertiary educational institutions and aged care specific services including aged care accommodation, medical establishments and specialist medical services. This type of shift could also result in a drop in the demand for employment.

4.3 Employment Profile

4.3.1 What Industries do Goulburn Mulwaree Residents Work In?

Overall there was a net loss of jobs in the agriculture, forestry fishing, mining and the group of industries that make up the Industrial sector over the 10 year period from 2001.

A breakdown of the industry sectors in which residents are employed is shown in Table 9.

More residents of Goulburn Mulwaree worked in health care and social assistance than any other industry in 2011.

Table 9: Goulburn Mulwaree Employment by Industry Sector (2001 – 2011)

	2001	2006	Change 01-06	2011	Change 06-11
Agriculture, forestry & fishing	229	127	-102	109	-18
Mining	60	40	-20	59	19
Industrial	2,404	2,175	-229	2,176	1
Retail trade	1,064	1,179	115	1,258	79
Accommodation & food services	741	829	88	796	-33
Business Services	782	802	20	989	187
Government services	2,613	2,833	220	3,310	477
Other services	405	405	0	449	44
Not specified	153	157	4	193	36
Total	**8,451**	**8,547**	**96**	**9,339**	**792**

Source: ABS Census Times Series Profile, 2011 – Goulburn Mulwaree (LGA)

An analysis of the jobs held by the resident population in Goulburn Mulwaree LGA in 2011 shows the three most popular industry sectors were:

- Health Care and Social Assistance (1,775 people or 14.6%);
- Retail Trade (1,565 people or 12.9%); and
- Public Administration and Safety (1,384 people or 11.4%).

These top employing industries indicate that the LGA's employment is transitioning to a service orientated base, the dominance of which

It is important to recognise that less than 4% of the population work in agriculture and less than 2% in mining.

may be attributed to the skill base of the resident workforce and the need to provide vital services to cater for the regional and local population.

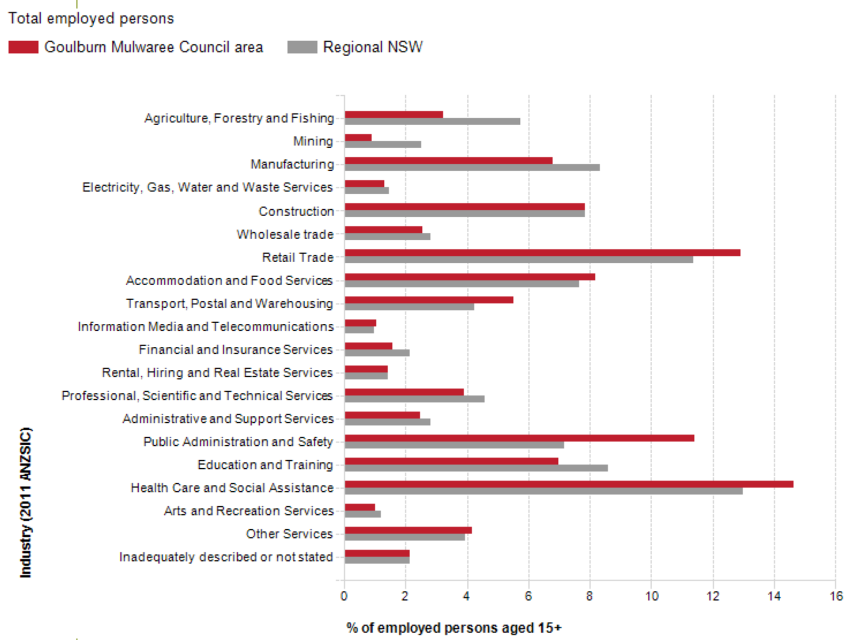
These three industry sectors together employed 4,724 people in total or 39.0% of the total employed resident population (12,126).

In comparison, Regional NSW employed 13.0% in Health Care and Social Assistance; 11.4% in Retail Trade; and 7.2% in Public Administration and Safety.

As can be seen from Figure 6 below the major differences between the jobs held by the population of the Goulburn Mulwaree LGA and Regional NSW were:

- A larger percentage of persons employed in public administration and safety (11.4% compared to 7.2%);
- A larger percentage of persons employed in health care and social assistance (14.6% compared to 13.0%);
- A smaller percentage of persons employed in agriculture, forestry and fishing (3.2% compared to 5.8%); and
- A smaller percentage of persons employed in education and training (7.0% compared to 8.6%).

Figure 6: Industry Sector of Employment 2011



Source: ABS, Census of Population and Housing, 2011 (usual residence data). Compiled and presented in profile.id by id, the population experts

The number of employed people in Goulburn Mulwaree LGA increased by 1,044 between 2006 and 2011.

The largest changes in the jobs held by the resident population between 2006 and 2011 in Goulburn Mulwaree LGA were for those employed in:

- Health Care and Social Assistance (+334 persons);
- Construction (+220 persons);
- Public Administration and Safety (+181 persons); and
- Transport, Postal and Warehousing (-140 persons).

4.3.2 Where do Goulburn Mulwaree Residents Work?

12,121 residents went to work as of 2011. The largest single destination for the resident labour force is within the Goulburn Mulwaree LGA itself (70%). This means that of the 12,121 residents who work, 8,564 were employed in local jobs as at 2011. The remaining 3,557 or nearly 30% travel outside the LGA to work (15%) or do not have a fixed location (14.3%). The ACT is the top destination for people travelling outside the LGA for work, followed by Wingecarribee.

Table 10: Employment Location of Residents

Goulburn Mulwaree LGA	2011	
Status	Number	%
Live and work in the LGA	8,564	70.7
Live in the LGA, but work outside the LGA	1,819	15.0
Work location unknown	1,738	14.3
Total employed residents	**12,121**	**100.0**

Source: Australian Bureau of Statistics, Census of Population and Housing 2011. Compiled and presented in profile.id

4.3.3 Who works in the Goulburn Mulwaree LGA?

In 2011, 1,819 (15.0%) of Goulburn Mulwaree LGA's working residents travelled outside of the area to work.

The Goulburn Mulwaree LGA has a high job containment rate at 70%. A high job containment rate can be expected for the LGA given its regional location and the travel distance from alternative employment generating centres. As a result, the LGA's economy plays a critical role in keeping its residents in paid work. 1,232 people live outside the LGA but work in the area. The most popular origins for workers were Upper Lachlan Shire and Wingecarribee owing to their good transport and road links to the Goulburn Mulwaree LGA.

4.3.4 Participation Rate

12,121 people living in Goulburn Mulwaree LGA in 2011 were employed, of which 63% worked full-time and 34% part-time.

According to the 2011 ABS Census Data and Profile.id, based on a labour force of 12,121 people[8] Goulburn Mulwaree LGA had an overall workforce participation rate of 57.8%. This was slightly higher than the equivalent figure for NSW (56.4%) as of the same year.

As shown in Table 11 below, the analysis of the employment status (as a percentage of the labour force) in Goulburn Mulwaree LGA in 2011 compared to Regional NSW shows that there was a similar proportion in employment, as well as a similar proportion unemployed.

Despite the ageing of the population Goulburn Mulwaree improved its workforce participation rate from 56.4% in 2006 - 57.8% in 2011 representing an extra 1,047 people in the labour force as shown in Table 11 below.

Table 11: Labour Force Status

Goulburn Mulwaree LGA	2006			2011			Change
Labour force status	Number	%	Regional NSW %	Number	%	Regional NSW %	2006 - 2011
Total labour force (Participation rate)	11,814	56.4	55.9	12,861	57.8	56.4	+1,047
Not in the labour force	8,039	38.4	38.6	8,314	37.3	38.5	+275
Labour force status not stated	1,081	5.2	5.4	1,092	4.9	5.2	+11
Total persons aged 15+	20,934	100.0	100.0	22,267	100.0	100.0	+1,333

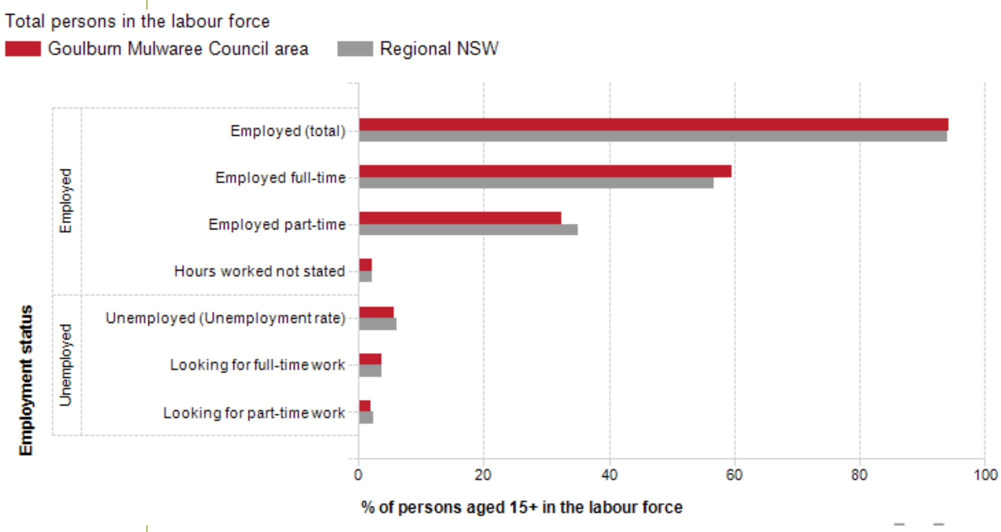
Source: Australian Bureau of Statistics, Census of Population and Housing 2006 and 2011. Compiled and presented by .id , the population experts.

An analysis of the ABS Census Data shows that the LGA has relatively low under-employment rates. The percentage of people who worked full time rose from 58.4% in 2006 - 59.6% in 2011 with part time working decreasing slightly from 33.3% in 2006 - 32.4% in 2011. The number of people looking for fulltime work has remained comparatively stable between 2006 (3.9%) and 2011 (3.7%).

In relation to employment status of the LGA in comparison to Regional NSW is shown in Figure 7 below.

[8] Labour force participation is the proportion of the population aged 15 and over that are either employed or looking for work.

Figure 7: Employment Status, 2011



Source: ABS, Census of Population and Housing, 2011 (usual residence data). Compiled and presented in profile.id by id, the population experts

5 TRENDS INFLUENCING EMPLOYMENT LAND

5.1 Australian Economy

The Reserve Bank of Australia has reported that the Australian economy grew by 3% over 2015. The rebalancing of economic activity away from the resources sector towards other sectors has continued. Activity in the non-resource sectors of the economy increased at an above-average rate over 2015, with output expanding fastest in industries that provide services to households and businesses. There has been continued growth in household consumption and dwelling investment continued to strengthen, supported by the very low level of interest rates.

Demand for Australian production in trade-exposed industries continued to be boosted by the depreciation of the exchange rate since early 2013. Exports of services, in particular, increased noticeably over 2015 and imports of services have declined. Public demand contributed to growth over the year, while non-mining business investment remained subdued and has been little changed for several years. There continues to be significant differences in economic conditions across the country, consistent with the rebalancing of economic activity. Unemployment rates have fallen noticeably in the eastern states, supported by an increase in demand, particularly for services.[9]

There are a number of local, regional and global trends that are likely to continue to influence the size, location and use of Goulburn Mulwaree's employment lands. Some trends will not be directly influenced by planning or economic development initiatives (global, national and state trends) however local and state governments can work together to take advantage or lessen the effects of emerging impacts.

[9] Reserve Bank of Australia, Statement on Monetary Policy, May 2016 - Domestic Economic Conditions

5.2 Analysis of Prominent and Emerging Industries in the Goulburn Mulwaree LGA

An analysis of prominent and emerging industries has been undertaken to determine the opportunities presented by these industries and an indication of growth as it may relate to Goulburn Mulwaree and specific precincts. The emerging industries have been identified having consideration of the economic structure of Goulburn Mulwaree, industries likely to be attracted to or grow and key opportunities identified through engagement with stakeholders. However, to maintain a balanced and sustainable economy and to support the growth of these core sectors, it is also important to consider the trends of other important and growing industry sectors including retail, office/commercial, health and child care.

5.2.1 Extractive Industries

A number of associated industries benefit from quarrying activities, including transport, accommodation and food services, vehicle maintenance services and professional services.

The existing extractive industries operating within the Goulburn Mulwaree LGA, specifically Marulan, have a significant role to play in contributing to the local economy well into the future. According to the NSW Minerals Industry Profile (2013), construction activity in NSW is expected to grow significantly in the coming decade and the materials required to support the industry will play an increasingly important role. The nature and use of construction materials as well as their relatively low unit value makes sourcing them close to their markets important. The proximity of Marulan quarries from the Sydney and greater NSW market means their importance will continue to increase when sources within the Sydney region (Penrith Lakes and Kurnell) become exhausted.

Recent initiatives undertaken by Council to connect local service providers with the quarries have been a positive initiative and this should be further supported into the future.

The main source of construction materials located within the LGA is Marulan which has large deposits of granodiorite and felsic volcanic rocks (NSW Minerals Industry Profile 2013). The two hard rock quarries within Marulan (Lynwood Holcim) and South Marulan (Peppertree Boral) will produce up to 8.5 million tonnes of aggregate product per year (NSW Minerals Industry Profile 2013). This product will supply the Sydney and greater NSW building and construction industries. The Lynwood Holcim quarry is expected to have a life of 90 years.

Additional quarries within Marulan including Gunlake, supply the Sydney market with bulk aggregates for concrete, construction and asphalt and specified and non-specified road base. This one quarry provides 500,000 tonnes of product to the market (NSW Minerals

Industry Profile 2013) with an application lodged with the State Government to increase supply to 2 million tonnes per annum.

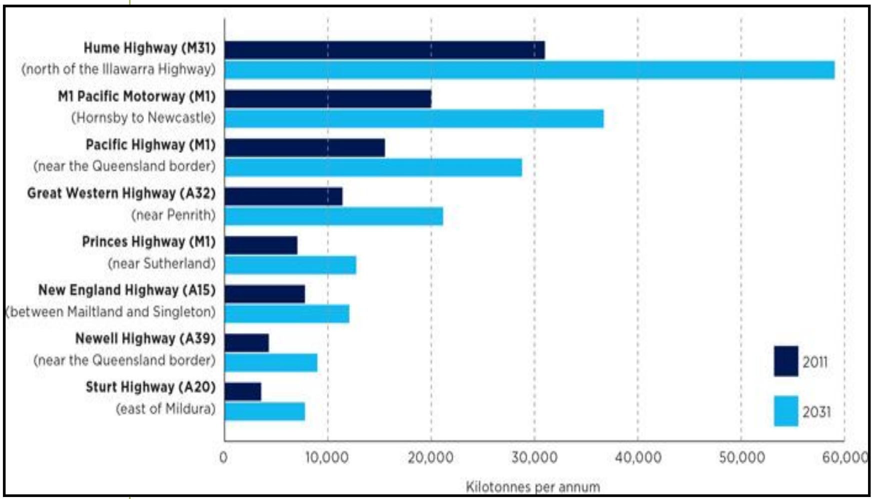
Land use and infrastructure planning is also required in order to ensure that any adverse impacts from the expansion of the quarrying industry are mitigated and managed in order to reduce the impact on the Marulan township and the LGA as a whole and do not undermine its attractiveness to future residents and associated businesses.

5.2.2 Transport, Freight and Logistics

The location of the Goulburn Mulwaree LGA between Sydney and Canberra and the surrounding road network connecting Victoria, NSW and the ACT ensures that the LGA is well positioned to capitalise on the transport, freight and logistics industries. The relative advantage of Goulburn's location should not be underestimated and 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. The Southern Region Transport Plan identifies that freight travelling through the Southern Highlands and Tablelands Region connects regional areas including the Central West and Western NSW to areas of strategic importance for local industry including Port Kembla and Port Botany.

The Transport for NSW Transport Freight and Logistics – Sector Demographics Report (January 2015) identifies the Hume Highway (M31/A31) as one out of two most frequently used corridors in NSW. The Hume, combined with the Pacific Motorway (M1/A1), carry the majority of interstate freight between Melbourne, Sydney and Brisbane. Figure 8 below illustrates the expansion of the Transport, Freight and Logistics Industry on specific sections of each transport route. As an indication the Hume Highway north of Goulburn is anticipated to carry up to 60,000 kilotonnes per annum by 2031.

Figure 8: Expansion of the Freight and Logistics Industry



Source: Transport for NSW Transport Freight and Logistics – Sector Demographics Report (January 2015)

The LGA is well positioned to capitalise on the transport, freight and logistics industries.

Freight and logistics is set to grow rapidly between 2015 and 2030. The Transport for NSW Transport Freight and Logistics – Sector Demographics Report (January 2015) identifies that freight tasks are predicted to double by 2030 and triple by 2050. Road transport in NSW is expected to grow 0.7% in 3 financial years to 2017 and rail freight is expected to increase by 2.5%. The NSW Freight and Ports Strategy (November 2013) indicates that the largest export from the LGA is building products. With this trend continuing, Goulburn Mulwaree has the opportunity to capitalise on growth in both the transport and logistics industry and industries reliant on movement of goods by road and increasing by rail to serve Canberra, Sydney or other locations.

Services associated with transport and logistics include logistics management and planning, warehousing and distribution, road transport, rail freight, intermodal operations, courier delivery services, customs and forwarding agencies. The presence of a number of transport and logistics services in South Goulburn demonstrates the existing competitive advantage of Goulburn Mulwaree.

5.2.3 Goulburn Rail Freight Hub

The Goulburn Rail Freight Facility presents a specific opportunity for the handling and management of containerised freight by rail. Council has recently approved proposals for the treatment and handling of wood product for export. In light of this approval there

The access to air freight has proven to be a major stimulus to the expansion of industry sectors which have export markets.

may be further opportunities for the handling of freight products such as processed meat, scrap metal, wool or grain products.

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. This Freight Hub will improve connectivity particularly 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.[10]

The transport costs are a key driver for transport and storage/distribution industries location decisions. Issues around the additional annual operational costs of locating in a region can outweigh any land price benefits which the LGA could offer. As such, companies servicing Canberra, Western Sydney and other regional NSW centres should be the initial focus.

A regional location is a viable option for transport and distribution businesses with a dispersed customer base and a metropolitan supplier base. The availability of suitable land or an established building in which to operate would make the decision to relocate easier. Relocating could also be more viable if the industry was required to locate away from sensitive land uses or away from land uses which were offensive. The Goulburn Mulwaree LGA has land available to accommodate this. The South Goulburn Enterprise Corridor Precinct represents premium land for such businesses.

5.2.4 Air Freight (Western Sydney Airport)

As part of a holistic plan to improve Western Sydney, the Australian Government has established $2.9 billion dollars in funding for developing major infrastructure upgrades as well as a commitment to developing a new airport at Badgerys Creek in Western Sydney. The proposed Western Sydney Airport is to be a full service airport capable of handling both domestic and international flights. The airport is to be operational by 2025. By 2030 the airport is expected to accommodate 63,000 passenger and freight air traffic movements. The Draft Airport Plan was released for public exhibition in October 2015.

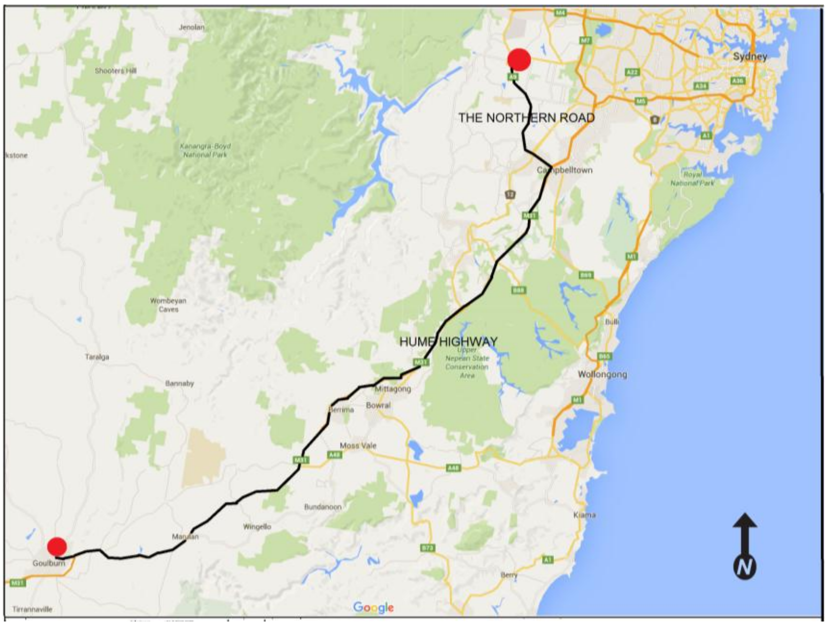
The proposed Western Sydney Airport will be located approximately 166km or 1 hour 51 minutes drive from Goulburn. Access to the airport from Goulburn would be 138km up the Hume Highway (M31)

[10] Strategic Economic Solutions, June 2016, Employment Lands Economic Analysis

and a further 28km up the Northern Road (A9) as identified in Figure 9. The Northern Road is scheduled for multiple upgrades under the Western Sydney Infrastructure Plan.

As such, several stakeholders noted the plans for development at Badgerys Creek of the Western Sydney Airport as being an opportunity, considering its accessibility compared to the current Sydney Airport. The Goulburn Mulwaree LGA could benefit from the development of the airport through improved access to passenger flights and airfreight. Increasing access to passenger flights could increase the connectivity of small and home based businesses within the LGA by increasing access to interstate and international markets. The accessibility to an airport can speed up the freight time for distributing fresh products to international markets.

Figure 9: Goulburn to Badgerys Creek (Western Sydney Airport)



Source: Google Maps

5.2.5 Air Freight (Canberra Airport)

The draft Regional Plan for the South East and Tablelands, reports that in 2012 the catchment for Canberra Airport incorporated about 900,000 people living within a 2.5 hr drive of the airport.[11] Canberra Airport is equipped to and ready for Boeing 747 air operations and has a planned freight precinct.

[11] Department of Planning and Environment, draft Regional Plan for the South East Tablelands.

The recent announcement that the airport will provide international services will have positive implications for the region and will promote tourism, trade and commerce.

5.2.6 Rural Industries

Rural industries in the Goulburn Mulwaree LGA that have a high value include cereal crops, nurseries and cut flowers, crops for hay, wool, eggs and livestock for slaughter. The biggest contributor to the rural industry is livestock for slaughter which represented over 60% of rural industry production in the LGA. Livestock that is grown for slaughter includes sheep and lambs ($6m, 1% of NSW), cattle and calves ($10.1m, 0.6% of NSW) and poultry ($5.7m, 0.8% of NSW). Wool production also remains a significant contributor to the rural industry with $6-8 million of production annually. Sheep and lambs are the only animals presently slaughtered (processed) in the LGA.

The value of some of the products generated by these rural industries has increased significantly over the 5 years of available data (see Table 12 below).

Table 12: Rural Commodity Revenue for Goulburn Mulwaree

	2010 - 2011			2005 - 2006			Change
Commodity	$	%	% of New South Wales	$	%	% of New South Wales	2005/06 - 2010/11
Cereal crops	1,147,236	3.1	0.0	754,720	3.1	0.0	392,516
Broad acre crops	625,047	1.7	0.0	66,273	0.3	0.0	558,774
Nurseries & cut flowers	479,808	1.3	0.2	2,606,380	10.6	0.7	-2,126,572
Crops for hay	2,196,435	6.0	0.8	1,868,661	7.6	0.5	327,774
Vegetables	726,210	2.0	0.2	138,206	0.6	0.0	588,004
Grapes (wine and table)	4,241	0.0	0.0	3,352	0.0	0.0	889
Other Fruit	336,446	0.9	0.1	41,813	0.2	0.0	294,633
Nuts	5,860	0.0	0.0				
Wool	8,193,294	22.5	1.0	5,980,969	24.3	0.9	2,212,325
Milk	32,538	0.1	0.0	29,539	0.1	0.0	2,999
Eggs	781,132	2.1	0.4	467,576	1.9	0.4	313,556
Livestock for slaughter	21,953,655	60.2	0.7	12,620,231	51.3	0.5	9,333,424
Agriculture - Total value	36,481,903	100.0	0.3	24,577,721	100.0	0.3	11,904,182

Source: Australian Bureau of Statistics, Value of Agricultural Commodities Produced, Australia, 2010-11. Cat. No. 7503.0

The rural industry in the Goulburn Mulwaree LGA requires land for industrial uses including processing and packaging facilities, storage

Ongoing support of rural industries particularly as it relates to processing, handling or transport will over time present demand for industrial land.

facilities and distribution facilities. The biggest rural industries in the LGA are not of a scale to require significant additional processing facilities but may have some needs that can be met by working closely with the industry. The most significant rural industry within Goulburn Mulwaree which requires employment lands is meat processing.

5.2.7 Meat Processing

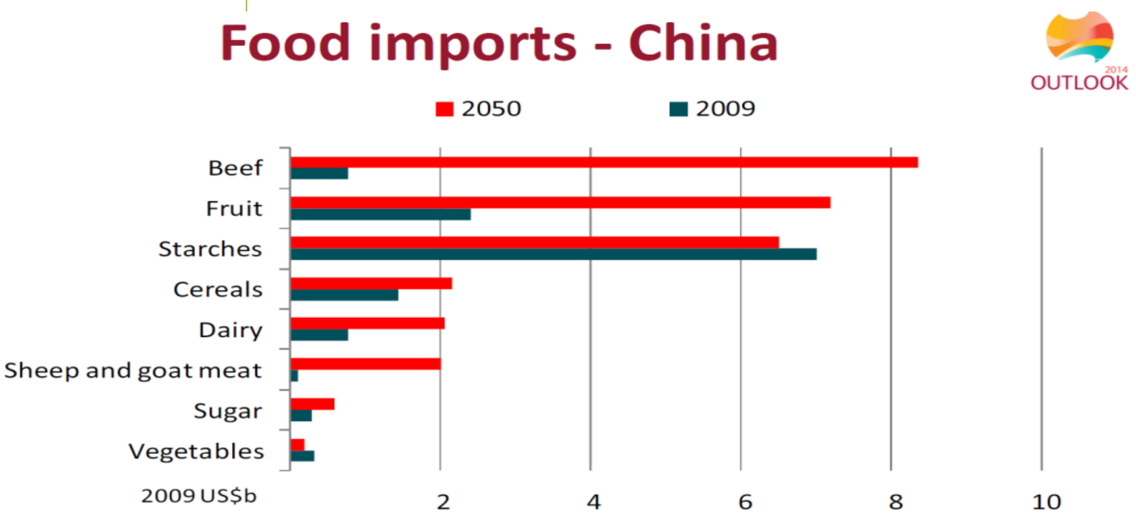
As noted above, livestock for slaughter is the largest rural industry in the Goulburn Mulwaree LGA. Southern Meats Pty Ltd has established a hi-tech abattoir in Goulburn to process lamb, sheep and offal and has the capacity to process 8,000 sheep and lambs per day. Employment numbers fluctuate significantly due to local climate conditions for growing sheep and lambs as well as international markets. The LGA is an important rural cross-roads providing access to the prime sheep growing areas. Its proximity to Sydney enables the company to access export markets. The company has recently joined with another Australian sheep meat processor, the Western Australian Meat Marketing Co-operative Limited (WAMMCO).

The company has invested considerable resources into ensuring that all environmental standards are met. Key issues for the long term success of this industry will include access to supply, which will be affected by weather conditions (droughts and bushfires) as well as the highly competitive industry. The scale of the operation may be a consideration for the long term viability of the industry with risk of larger players from closer to Sydney or Melbourne impacting the supply.

There may be some opportunities to work with the company to identify potential industries that could utilise waste from the plant for commercial purposes. This could involve the Tarago Environmental Industries Centre for waste management together with the Veolia run centre.

Strong demand from China for food imports is expected to keep rising as shown in the ABARES Outlook 2014 (see Figure 10 below) particularly in the demand for protein. This is positive for the potential for increasing meat processing in LGA.

Figure 10: Food Imports China



Source: ABARES Outlook 2014

It will be important to ensure appropriate capacity is retained for expansion of food processing facilities and transport freight and logistics uses which would support growth in rural industries.

Food processing industries are highly reliant on access to high transport routes, primarily road based, water connections and waste management. In addition, potential impacts including odour mean they require large sites with adequate buffers to sensitive land uses. These areas need to be identified.

5.2.8 Environmental Industries (Tarago)

At Tarago, there is a current waste management operation that has been developed by Veolia under contract to the NSW State Government. The site, previously an open-cut mine, is now used as one of the largest purpose-built bioreactor landfill projects in the world. This development comprises a number of elements that maximise use of the waste for productive purposes.

The facility currently accepts around 20% of Sydney's putrescible waste and has approval to increase the amount of waste from 500,000 tonnes per year to 1.13 million tonnes of waste per year to the Woodlawn Bioreactor. Since opening in 2004, over 3.8 million tonnes of waste has been used to generate green electricity and the facility now exports enough power to supply over 2,500 households.

This approved increase in waste to the Woodlawn Bioreactor included a provision for the residual material from the mechanical and biological treatment (MBT) facility to be disposed of in the bioreactor for further energy recovery. Lipman Pty Ltd have been awarded a $58 million contract to design, construct and commission the MBT facility, expected to be operating in 2016.

Figure 11: Woodlawn Bioreactor Site

Source: Sonny Photos

In total there are five business operations at the site including:

- Woodlawn Bioreactor (Bioenergy): resource recovery and disposal of putrescible waste in New South Wales. This facility is recovering energy to produce electricity;
- Aquaculture and horticulture operations: utilising the waste heat produced from the energy generation process for fish farming and incorporating hydroponics in the filtration system to remove excess nutrients;
- Woodlawn Facility: designed to extract the organic content from the mixed waste stream to produce compost for onsite mine rehabilitation;
- Agriculture: incorporating a working farm that applies nutrient and grazing rotation to improve meat and wool productivity while reducing impacts on the soil; and
- Wind farm (operated by Infigen Energy): a 50MW wind farm in an area known for significant year round wind generation.

Industries such as these require sites that need to be located in areas where they will not have impacts on sensitive land use such as residential. The ideal locations for heavy industrial uses also means that they are located in areas which may have limited access to a range of other features and infrastructure that makes for a successful industrial area.

The Tarago Industrial Precinct provides additional land for heavy industrial uses which may be attracted by current industries or alternatively seek the use of this area because of site characteristics.

The establishment of the Bioreactor and the Wind Farm may provide a catalyst for future renewable energy industries in the LGA.

5.3 Urban and Business Support Services

In addition to promoting the growth of the core sectors, it is essential for the Goulburn Mulwaree LGA to encourage and facilitate the growth of other sectors such as retail, office/commercial, healthcare, tourism, culture and childcare. As mentioned above, these sectors are critical, particularly in regional areas, to enhance the liveability of the area, helping to attract and retain workers.

The Goulburn Mulwaree LGA has many lifestyle benefits that could attract knowledge workers[12] including; the natural environment, sustainable agriculture, a proactive Council, health care facilities, arts and culture (focussed around conversion of the McDermott Centre into a Performing Arts Centre for Goulburn), affordable housing and an abundance of recreation and leisure pursuits.

It will be imperative however, for Goulburn Mulwaree to embrace the complementary lifestyle factors sought by today’s knowledge workers, including good quality office space, a choice of restaurant and café destinations, a range of entertainment facilities and an attractive night time economy.

5.3.1 Retail

Over the past three decades significant changes have occurred in the retail industry such as the introduction of new technologies, the ageing of the population, increased female participation in the workplace and changing consumer preferences. These changes have placed increased pressure on many existing centres to either adapt or lose market share. Online shopping has become increasingly popular where people can source goods and services (often more cheaply) without frequenting local shops.

[12] Knowledge Worker – a person whose job involves handling or using information – main capital is knowledge – accountants, software engineers, architects

"Service sector organisations, both public and private sector, are the main users of office space." Barkham (2002)

Demand for retail is closely linked to population growth and increasing wealth and perhaps more specifically, the associated increased level of expenditure. Earlier chapters have shown that the Goulburn Mulwaree LGA has been experiencing a small but steady growth in population which is predicted to remain. 12.9% of people are employed in retail activities within the LGA.

The Goulburn Central Business District (CBD) provides the main shopping precinct in the LGA with bulky goods retailing establishing along Hume Street in South Goulburn.

Retail expenditure and floorspace projections are discussed in Chapter 7.

5.3.2 Commercial

De-industrialisation is a trend that is continuing to result in the decline of traditional manufacturing and industrial jobs. This global trend is being driven by the greater efficiencies of technology and mechanisation. Conversely, the increasing affluence of NSW's population and growth of the New Economy (otherwise referred to as a knowledge and ideas based economy) is expected to strengthen demand for commercial floor space especially in key locations close to tertiary education and transport links.

The key long term trend in office development has therefore been the growth in the service and knowledge sectors. These sectors relate to public service and public sector administration; banking, insurance and finance; private sector administration, business services (law, accountancy and consultancy) and consumer services (health, education, media etc.).

Traditionally, commercial office space has been located within centres where it could cluster with a centre's retail, civic and community facilities. Consequently Goulburn CBD remains the main location within the LGA for commercial and professional businesses. The main industries to establish new businesses in Goulburn over the period 2009 - 14 have been in the Financial and Insurance Services sector (23).

The commercial services provide a support function for the entire LGA providing services such as finance, insurance, legal, information technology and employment services.

These businesses choose to locate in areas that suit their scale and offer and provide suitable access to their clients. Locations range from prime space (for example Goulburn CBD) through to those operating from private residences or converted properties on main roads.

5.3.3 Tourism

Australia and Sydney will continue to benefit from growth in tourism, in particular international tourism. Growth in the tourism industry is likely to drive demand for employment lands through business servicing activities such as accommodation and retail. Tourism within the Goulburn Mulwaree LGA is based on drive tourism. Of the 6.1 million visitors to the South East and Tablelands almost 3.5million were domestic day visitors. Almost 40% of all day trips were to the Southern Highlands and the Tablelands. [13] The diverse nature of the region offers wide ranging outdoor, cultural and heritage experiences. Increasing the number of visitors to the area and encouraging day trippers to stay overnight or take longer holidays in the area will benefit the local and regional economy of Goulburn Mulwaree.

Goulburn has many beautiful heritage buildings within the town centre as well as the multiple museums such as Goulburn Rail Heritage Centre, the Waterworks and the Riversdale Homestead. Additionally, the Goulburn War Memorial, the multiple churches within the town centre and the Big Merino all attract visitors.

Figure 12: Riversdale Homestead

Source: Goulburn Mulwaree Council

Tourism within the LGA also focuses on motorsport activities such as the Wakefield Park motor racing circuit, Goulburn Speedway, the Goulburn Motorcycle Club (who are seeking to establish a permanent facility) and the Marulan Driver Training Centre. SES in their 2016 Report, Employment Land Economic Analysis noted the opportunity

[13] NSW Trade and Investment 2015 Economic Profile South East and Tablelands

to leverage off the motoring and biking activities and skills based at the various racing circuits. This could lead to greater economic impact through co-branded satellite events, initiatives to bring the track users into the CBD and active industry networking.

Automotive services are already a specialisation for the Goulburn Mulwaree economy, with the sub-industry ‘Motor Vehicle & Motor Vehicle Parts Retailing’ accounting for 1.1% of employment in the LGA (109 jobs in 2011) – compared with 0.7% across NSW as a whole. Recently Legend Cars Australia relocated from Bungendore to Goulburn. They promote themselves as 'Australia's most affordable and fastest growing motor sport'. Typical ‘Legend Cars’ are shown in Figure 13.

Figure 13: Legend Car Racing

Source: http://www.legendcarsaustralia.com.au

Initiatives to combine this existing strength with more strategic integration of the racing circuits would make good use of two of the LGA’s latent economic strengths.

The Marian College Conference Centre and the St Patricks Hall (Figure 14 below) redevelopment in Goulburn town centre are both adaptively reusing existing historic buildings, as well as constructing new facilities on site. Between them they will bring $21m of investment into Goulburn and provide conference facilities, hotel rooms, serviced apartments as well as multi-dwelling housing.

Figure 14: St Patricks Hall Goulburn

Source: Goulburn Post

The natural environment is also an attractive feature of the Goulburn Mulwaree LGA and attracts visitors to the Wombeyan Caves and the Bungonia National Park. The draft South East and Tablelands Regional Plan also identifies the rise of eco-tourism (trails, agricultural experiences, food and wine and adventure based) and the importance of local economies capitalising on this trend.

There is an increased emphasis across Australia to improve efficiencies and facilities within the health sector and furthermore, ensure there is an adequately trained workforce to provide a good standard of care.

5.3.4 Health Care

The health care sector is an important part of the Australian economy, with expenditure in 2011 - 2012 equalling 9.1% of gross domestic product (GDP), the majority of which (70%) was funded by the Government. Healthcare services are generally provided by a range of medical practitioners, other health professionals, hospitals, clinics, and government and non-government agencies.

As the Australian population grows as a result of increasing fertility rates, numbers of migrants and ageing, the demand for health care facilities will continue to increase. The ABS projects that the proportion of the population aged 65 years and over could increase from 13.5% - 22.3% between 2009 and 2051.

It is older Australians who tend to be significant users of healthcare services with the Bettering the Evaluation and Care of Health (BEACH) survey finding that people aged 65 years and over take up 29.7% of GP’s consultation time, are prescribed more medications per visit and have longer average consultations. Older Australians are also major consumers of allied health and nursing services.[14] In addition to increasing demand from older Australians there is also an increased desire to have good health and rising expectations regarding the level and availability of care.

Reflecting the growth in this sector, employment in health occupations grew by 23% between 2003 and 2008 and between 2002 and 2007, there was a 26% increase in people completing health occupation university courses.[15]

In response to the trends outlined above, the State Government has committed $120m to the redevelopment Goulburn Base Hospital including a new emergency department, intensive care unit and theatres, inpatient services and a comprehensive ambulatory care service. The upgrade will occur in the next four years and is not subject to the poles and wires sale.

Further, it is likely that together with the health and employment benefits directly associated with the hospital, expenditure of those employed by the hospital will lead to indirect economic benefits by supporting other goods and services in the area.

As outlined by Strategic Economic Solutions, June 2016, the private sector plays an important role in high value service industries, particularly in the provision of retirement villages and hospitals and allied health. In the Goulburn Mulwaree LGA, the public/private employment mix in both health care and social services in 2011 is set out in Table 13 below. Overall, 65% of the jobs in the sector as a whole were provided in the private sector. The table shows that most of the private sector jobs are primarily in 'other health services' (such as pathology, diagnostic imaging and allied health like physiotherapy) and also in 'aged care services'. The overall employment mix in health alone (hospital and 'other health services') was close to 50% public and 50% private in 2011 – demonstrating the strength of the private health sector in the LGA and one that is likely to expand.

The mix in the other sectors was dominated by private employment – in aged care, child care and other social assistance services. The public sector jobs were overwhelmingly NSW Government funded, and were mostly in the Goulburn Hospital and psychiatric hospital.

[14] Primary Health Care Reform in Australia, Report to Support Australia's First National Primary Health Care Strategy, 2010
[15] Australia's Health 2010

The Illawarra TAFE campus and NSW Police Academy within Goulburn remains an important vocational training facility for Goulburn Mulwaree and as such should continue to be supported.

Table 13: Health Care and Social Assistance Employment Public and Private

	Commonwealth	State	Local Government	Private
Hospitals	0	382	0	67
Other Health Services	0	56	0	338
Social Assistance Services	0	12	0	231
Aged Care Services	0	32	0	301
Childcare Services	0	3	3	143
Total	**0**	**485**	**3**	**1080**

Source: ABS Census 2011 Customised table SES (place of work)

The strength and diversity of the health sector is known to be a factor supporting tree change migration to non-metropolitan locations like Goulburn Mulwaree.[16] Good health facilities also help population retention by encouraging residents to stay as they age, rather than moving to a city to meet an anticipated need for better health care in future.[17]

5.3.5 Tertiary Education

Tertiary education has been included in the assessment as it represents both a both a key need and emerging opportunity for the Goulburn Mulwaree LGA. The demographic analysis identified the need to both support population growth in younger and employment aged cohorts and the need to support skills development in the existing workforce.

Tertiary education is an industry sector which is represented within the LGA by the TAFE provider, Illawarra, which has recently scaled down operations. The NSW Police Academy is the main centre in NSW for vocational training for its workforce and new recruits. Courses are run in conjunction with Charles Sturt University.

It is recognised that tertiary education in regional centres like Goulburn provides a range of benefits including:

- Supporting the knowledge economy;
- Providing educational opportunities for regional populations;
- Developing the skill base of regions through partnerships, training and professional development, short courses, award courses and research;

[16] University of Canberra, Regional Wellbeing Survey
[17] Strategic Economic Solutions, Employment Land Analysis, June 2016

Cooma University Centre
www.coomauc.com.au

- Providing centres of research which provide national and potentially international linkages. This research may be directly related to regional economies in their home region; and
- Providing a diverse range of courses, consultancy and research to complement regional needs.

Tertiary education is undergoing significant change in recent years as a result of a number of factors including an increase in international full fee paying students and the desire of universities to provide a broader geographic coverage in the establishment of regional university campuses.

There are a number of NSW regional centres where satellite university campuses are located however these centres are well established and whether there is opportunity in Goulburn is debateable, given the proximity of Sydney and Canberra. The models of delivery for higher education are also changing where much of the teaching and resourcing is undertaken online through distance education. This said, there are 'university centre hubs' opening up, such as the Cooma Universities Centre, which supports regional students undertaking tertiary education. The Centre, established by Cooma Monaro Shire Council and Snowy Hydro serves as the primary point of contact for the delivery of university education in the Cooma region and facilitates and promotes education and career pathways between schools, vocational education and training providers, universities and industry.

The Centre provides access to numerous university courses high speed internet, video conferencing, plenty of space, 7am - midnight access and other facilities.

It is understood that Illawarra TAFE has the physical space and resources for establishment of such a Centre. There is opportunity for Council to lend its support along with industry (e.g. Boral, Veolia, Goulburn Base Hospital) in liaising with TAFE to promote establishment of a University Centre Hub in Goulburn.

5.3.6 Workspace2580

Workspace2580 is a partnership between Goulburn Mulwaree Council and Community Plus Inc which manages and uses the vacant basement, ground floor and first floor areas of 56 Clinton Street Goulburn.

It is a centre for professional and business learning, and a co-working space for business incubation and development, which can reduce costs, improve productivity and offer support for start-ups and entrepreneurs.

Workspace2580 also provides various office and workspace configurations for business support services such as the Chamber of Commerce and Business Enterprise Centre, and teleworking options for public servants who are otherwise daily commuters to their work.

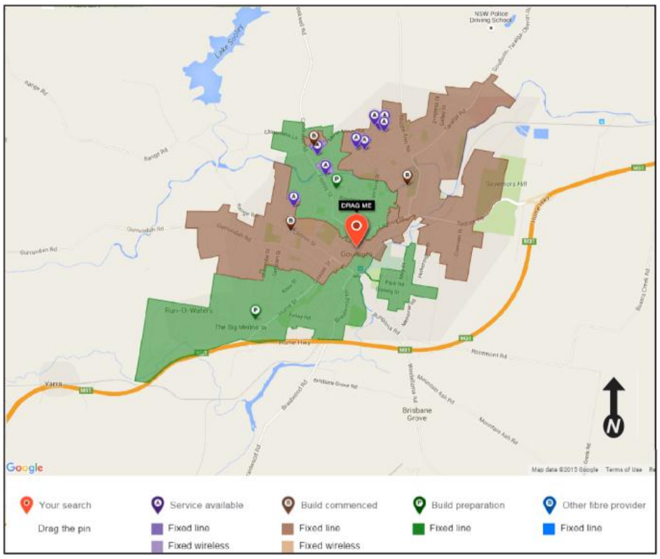
Workspace2580 has facilitated a partnership between the University of Canberra and the Goulburn community – first program to be rolled out is the Goulburn internship program which connects students with Goulburn Mulwaree businesses for real world workplace experiences.

5.3.7 National Broadband Network

Lack of access to high speed internet is an impediment to business development in Goulburn Mulwaree. Increasing access to a reliable service would also provide improvements in the education and health sectors.

The National Broadband Network (NBN) is currently being rolled out across Goulburn Mulwaree. Figure 15 illustrates the areas within Goulburn which are currently connected to the NBN. It indicates areas identified as "Built Commenced" which means that contracts for work commencement have been issued. There are also areas identified as "Build Preparation" which means that NBN contractors are undertaking pre-construction activities to deliver NBN high-speed broadband in the future.

Figure 15: NBN Rollout



Source: http://www.nbnco.com.au/connect-home-or-business/check-your-address.html

The NBN will have a broad benefit for employment within the Goulburn Mulwaree LGA across a range of sectors from home based businesses to those which utilise large amount of data such as engineering design, education and health. A faster and more reliable internet connection will improve opportunities to connect with multiple markets both domestically and internationally. Internet connections remove geographical barriers to communication which is increasingly important for regional areas.

The rollout of the NBN will have significant benefits for existing businesses, especially those which are reliant on data transfer. It will also provide additional opportunities for professionals who seeking to locate in Goulburn Mulwaree but are fully reliant on high speed internet.

6 WHAT DOES THIS MEAN FOR THE GOULBURN MULWAREE LGA?

In looking forward and developing a strategy for Employment Lands across the Goulburn Mulwaree LGA, the previous sections of this study have outlined a number of key trends affecting the likely level of demand. In this Chapter we summarise those key trends and review additional indicators to validate the trends identified for example Gross Regional Product and the pipeline of development.

6.1 Key Trends Affecting Demand for Employment Lands

A total population increase of 18% is projected to occur within 20 years between 2011 - 2031 which is a significant increase from the 3% population increase experienced across 10 years between 2001-2011.

The level of activity associated with growth industries, including quarrying, environmental industries and rural industries, should have a positive influence on the population forecasts and employment lands.

The projected age profile for the LGA remains consistent with trends experienced across the period 2001 - 2011, where a continued ageing of the population will occur. It is projected that the over 65 age cohort will increase by 77% through to 2031 and the working age cohort (15-64) increase by only 9% across this period.

The existing centre of Goulburn and the surrounding villages such as Marulan are the key focus for the provision of urban and business support services, including retail.

Continued investment in the urban areas including Goulburn Base Hospital and the two new conference centres will help stimulate retail and services expenditure across the Goulburn Mulwaree LGA.

There is likely to be an opportunity to grow the number of retail, tourism, health and social assistance businesses in the area, supporting the continued growth of those core sectors and delivering a balanced and sustainable economy.

These findings will inform the assumptions for the employment land modelling. To ensure the modelling is robust the trends of the Gross Regional Product have been reviewed and recent building and Development Approvals in order to establish if the improved market and agricultural conditions are driving additional investment in the area.

6.2 Economic Performance

The economic base and business performance of the Goulburn Mulwaree LGA serves as a key element of employment growth. The growth of existing businesses is the primary source of demand for employment land followed by the establishment of new industries. The following sections provide an analysis of the economic performance of the LGA's economy.

6.2.1 Gross Regional Product

The LGA has experienced relatively low levels of economic growth from the period 2006 - 2014 as indicated in Table 14. Data on changes in Gross Regional Product (GRP) over the period from 2006 to 2014 shows that the economy has grown by approximately 10% equating to an average annual growth rate of 1.2%.

The Goulburn Mulwaree LGA experienced a significant increase in GRP between 2011 and 2014. The rate of growth increased from 0.6% per annum to 2.2% per annum within a 5 year period.

Table 14: Gross Regional Product – Goulburn Mulwaree and New South Wales

	Goulburn Mulwaree Council		New South Wales		Goulburn Mulwaree as % of NSW
Yr to June	$m	Annual % change	$m	Annual % change	
2006	1,195		402,408		0.31%
2011	1,231	0.6%	448,323	2.2%	0.28%
2014	1,314	2.2%	477,007	2.1%	0.29%
2006-2014	1,314	1.2%	477,007	2.1%	0.29%

Source: Source: economy.id, Australian Bureau of Statistics. Australian National Accounts: National Income, Expenditure and Product, catalogue number 5206.0, and the National Institute of Economic and Industry Research (NIEIR) ©2014.

Table 15 below from the NSW 2014 - 15 Budget Papers indicates that the NSW economy is expected to grow strongly over the short term, with forecast growth around 3.5% per annum over coming years with unemployment declining slightly over the previous years.

Table 15: Gross Regional Product

NSW	2013-14 Outcomes	2014-15 Forecasts	2015-16 Forecasts	2016-17 Forecasts	2017-18 & 2018-19 Projections
Real state final demand	2.7	3.25	3.5	3.5	
Real gross state product	2.1	2.5	3	3	2.75
Employment	0.6	1.25	1.75	1.75	1.25
Unemployment rate	5.7	6	5.75	5.75	
Wage price index	2.5	2.25	2.5	2.75	3.5
Nominal Gross State Product	3.1	4	4	4.75	

Source: NSW 2014-15 Budget Paper No.3

6.2.2 Land Values

The relative affordability of employment lands within the LGA is noted as a key attractor for new businesses and also underpins investment decisions in employment land and buildings.

The NSW Valuer-General released Notices of Valuation for the Goulburn Mulwaree LGA in early 2015 which provides an indication of the extent of movement in property values over the past three years. Commercial land values within Marulan Town Centre and Goulburn CBD increased slightly, while values within the Enterprise Corridor Precincts to north and south of Goulburn remained steady.

The indications are that the LGA has affordable industrial land which is a positive marketing point to attract investment in industrial uses with a requirement for local staff/workforce. The value of the land is also an asset for businesses looking for sites that meet all the criteria for location, infrastructure and suitable local skills. Any business will be looking for the property investment to at least maintain its value.

6.2.3 New Business Growth

Growth in new businesses in the Goulburn Mulwaree LGA has been challenging with clear focus in professional services, primary industries and health care.

The main industries to establish new businesses over the period 2009-14 have been the Financial and Insurance Services (23), Agriculture, Forestry and Fishing sector (10), Health Care and Social Assistance (7), Professional, Scientific and Technical Services (5) with Mining and Electricity Gas Water and Waste Services (3 each) and Manufacturing (2). The highest failure rate of new businesses over the period since 2009 has been in Retail trade (33), Transport, Postal and Warehousing (22), Accommodation and Food Services (19) and Construction (19). A breakdown of the registered businesses is located in Table 16.

In 2014 there were 44 businesses employing between 20 and 199 people, 247 employing between 5 and 19 people, and 688 employing between 1 and 4 people. In total there were 2,235 businesses in Goulburn Mulwaree in 2014, down from 2,325 in 2012 and less than in 2009 when there was 2,311.

Table 16: Goulburn Mulwaree Council LGA - Total Registered Businesses 2009- 2014

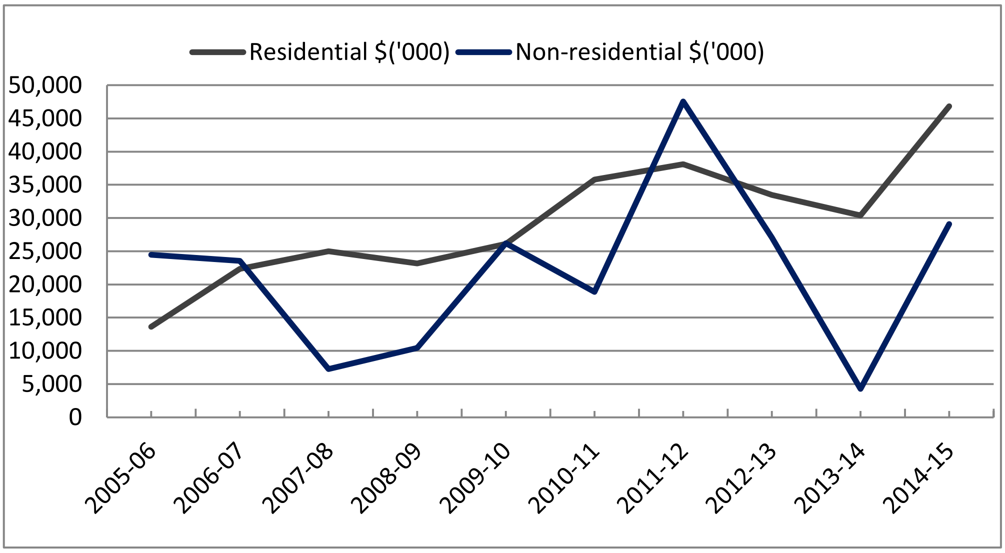
Industry	2009	2012	Change	2014	Change
Agriculture, Forestry and Fishing	579	589	10	590	0
Mining	1	3	2	4	1
Manufacturing	77	82	5	79	-3
Electricity, Gas, Water and Waste Services	4	7	3	7	-0
Construction	331	309	-22	312	3
Wholesale Trade	62	57	-5	47	-10
Retail Trade	200	177	-22	167	-11
Accommodation and Food Services	111	101	-10	92	-9
Transport, Postal and Warehousing	163	145	-18	141	-4
Information Media and Telecommunications	9	10	1	6	-3
Financial and Insurance Services	87	106	19	110	4
Rental, Hiring and Real Estate Services	176	170	-7	168	-2
Professional, Scientific and Technical Services	153	174	21	157	-16
Administrative and Support Services	68	69	0	55	-14
Public Administration and Safety	7	5	-2	6	1
Education and Training	33	28	-6	23	-4
Health Care and Social Assistance	103	112	8	111	-1
Arts and Recreation Services	24	27	3	29	2
Other Services	108	110	2	106	-4
Industry not classified	27	31	4	25	-5
Total business	**2,325**	**2,311**	**-14**	**2,235**	**-76**

Source: Australian Bureau of Statistics, Counts of Australian Businesses, including Entries and Exits, 2010 to 2014 Cat. No. 8165. NOTE: "Non-employing businesses includes sole proprietors where the proprietor does not receive a wage or salary separate to the business income; Profile id

6.2.4 Construction Activity

Construction activity has fluctuated over the 10 year period from 2005 - 2006, as indicated in Figure 16. In 2005 - 2006 there was approximately $38 million in projects approved for residential and non-residential buildings. Building construction approval peaked in 2011 - 2012 with non-residential building approvals of $47.5 million and residential building approvals for $38 million of work. Non-residential building approvals dropped within the 2013 - 2014 period to below $10 million of work. Residential building approvals peaked again in 2014 - 15 with $46.7 million of projects approved and $29 million of non-residential projects. Approved non-residential projects have been averaging just over $20 million per year while residential projects are averaging just under $30 million per year. There is clear trend of increasing residential approvals over the 10 year period.

Figure 16: Goulburn Mulwaree Building Approvals Residential and Non-Residential



Source: Australian Bureau of Statistics, Building Approvals, Australia, catalogue number 8731.0. Compiled and presented in economy.id

6.2.5 Summary

The overall economic performance of the Goulburn Mulwaree LGA has been resilient despite challenges affecting regional NSW, the Australian economy in general and specific industries including manufacturing. Economic growth within the LGA has been approximately 10% in 10 years.

However recent economic growth from 2011 - 2014 (2.2%) jumped considerably during the 2006 - 2011 period (0.6%) and there is a forecast increase in gross regional product from 2015 - 2017.

Industrial land within the Goulburn Mulwaree LGA is available and affordable which is a positive for attracting new business to the area. Construction activity has fluctuated with non-residential building approvals dropping dramatically during 2013 - 2014 but recovering within the 2014 - 2015 period. There is a 10 year trend of increasing residential construction indicating demand for housing in the LGA.

The population growth and projections, economic and business performance and emerging industries present a mixed picture in terms future demand for additional employment land. The current level of growth and general activity does not present a clear driver for additional land. However, there is evidence through the analysis of prominent and emerging industries that there opportunities and characteristics which will support the expansion of employment related uses within the LGA particularly in relation to specific precincts and industries.

There are a range of underlying factors which make the Goulburn Mulwaree LGA competitive in terms of new enterprise and industrial uses. The analysis of each precinct undertaken in following sections is focused on capacity for growth of employment to ensure that the LGA can take advantage of growth as it occurs in the long term, and maximising its competitive advantages.

7 EXISTING EMPLOYMENT LANDS AND CENTRES

This Chapter provides a profile of the Goulburn Mulwaree LGA's key existing industrial, commercial and retail centres as designated by Goulburn Mulwaree LEP 2009.

The Employment Lands Capacity Assessment involves an assessment of the existing supply of employment lands within the Goulburn Mulwaree LGA. The Capacity Assessment involves:

- A determination of total retail floor space in Goulburn. This is derived from an assessment of retail floor space approved since 2007 (year of previous estimation);
- A determination based on literature review, engagement and estimation of the current commercial land use within Goulburn; and
- A survey of all Industrial and Enterprise Corridor zones within the LGA to assess the status of current supply, and any issues relating to individual precincts and the LGA as a whole.

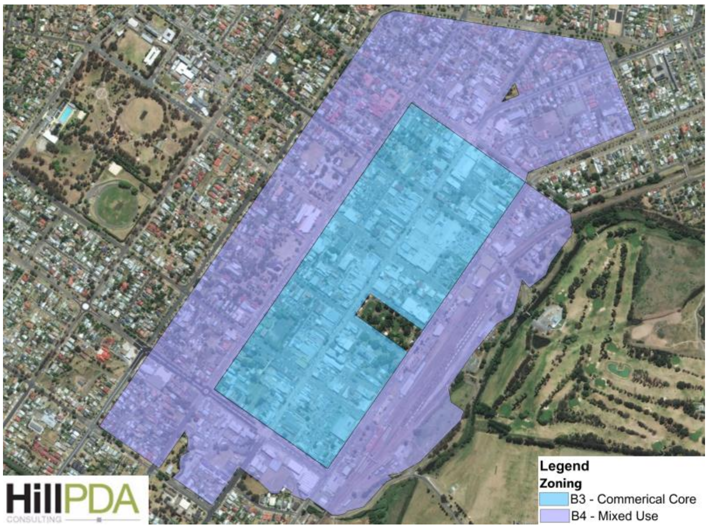
7.1 Goulburn Central Business District

The City of Goulburn is a major regional centre for retail services. The centre is anchored by Goulburn Plaza in the city centre and The Marketplace on the south-western outskirts of the CBD. The city has a fair representation of national supermarket and discount department store anchors including Coles, Woolworths, Aldi, Target and K Mart. Other uses include cafes, restaurants, hairdressers, hotels, motels and approximately 46 speciality stores.[18] The centre is also home to a number of civic uses including the Goulburn Mulwaree Council (including the Library and Regional Art Gallery), the Police Station and the historic Court House.

The CBD is presently zoned B3 Commercial Core and B4 Mixed Use as shown in Figure 17 below.

[18] Goulburn CBD Master Plan 2008

Figure 17: Goulburn Central Business District



Source: HillPDA

As part of this Strategy, Council completed an audit of all retail development applications which increased floor space areas, which have been approved by Council since December 2007. Approved retail development applications indicate 9,106sqm of retail floor space was added to the Goulburn CBD since 2007. As such, Goulburn CBD has an approximate retail floor space capacity of 49,106sqm.

Figure 18: Belmore Park Goulburn CBD

Source: www.panoramia.com

The Goulburn CBD provides office space for commercial and professional services businesses, which include real estate, legal offices, survey and financial services and other professional services.

Several local and state government agencies are located in the CBD, reflecting its role as a regional administrative centre. A formal audit of commercial floor space was not undertaken for the Employment Land Study. Usage, availability and issues relating to commercial floor space were addressed with stakeholders and a visual review was conducted. It confirmed that there is demand for commercial floor space in the CBD.

Several large purpose built office premises are also located within the CBD including the Council offices and State Government buildings. Key government tenants currently include:

- Goulburn Mulwaree Council;
- Department of Housing;
- Department of Juvenile Justice;
- Department of Community Services;
- Corrective Services;
- Country Energy;
- Office of Fair Trading;
- Workplace Authority; and
- Department of Primary Industries.

7.1.1 Strengths and Weaknesses for Goulburn Central Business District

Some of the key strengths are:

- Strong anchor stores and destinations (Woolworths, Target, K-Mart, Aldi, Coles, Goulburn Visitor Centre and the Council Civic Centre);
- The centre is considered to be trading soundly;
- The heritage buildings and features located in the centre;
- Belmore Park is an attractive location in the centre of the CBD;
- A healthy number of government tenants; and
- A Master Plan (2008) to improve the vitality and the function of the CBD, including land use, street and lane way activation, public domain improvements and traffic and parking.

Some of the key weaknesses are:

- The CBD is located approximately 5km from the Hume Highway which makes it more difficult to attract visitors into the centre;

- The lack of urban design vision which has led to unsympathetic development/additions within the CBD;
- Lack of higher end retail offer; and
- The commercial office property market in the Goulburn CBD is dominated by ground floor space. Spaces are often old, with limited refurbishments undertaken in recent years. Improving the quality and variety of available office space could potentially attract businesses to relocate into purpose-built space in the CBD.

7.1.2 Opportunities for Goulburn Central Business District

There are a number of opportunities for the Goulburn CBD;

- Economic growth across the LGA which could increase demand for retail and business services in Goulburn CBD;
- Reviewing the current planning controls/urban design to enhance the appearance/built form of the CBD whilst providing opportunity for new development;
- Encouraging the conservation of heritage buildings and sympathetic surrounding development; and
- Redeveloping upper floors and vacant and underutilised sites within the CBD.

7.2 Marulan Town Centre

Marulan village is located 30 kilometres north east of Goulburn, 500 metres off the highway as shown in Figure 19 below.

Marulan is now being impacted by three heavy rock quarries that are located nearby, increasing heavy vehicle traffic through the centre of town.

Figure 19: Marulan Town Centre

Marulan was long known as a highway town until it faded in importance following the freeway bypass in 1985. Marulan's local centre has been overtaken by two large highway service centres that have been established on the highway servicing north and southbound traffic. George Street, the main street running through the centre, is home to a mixture of fine but often run down historic buildings and more recent buildings of various qualities.[19] A number of retail outlets are located in Marulan, including a bakery, butcher, cafes, a post office and a hotel.

[19] Goulburn Mulwaree Development Control Plan 2009

Figure 20: Marulan Town Centre

Source: HillPDA

7.2.1 Strengths and Weaknesses for Marulan Town Centre

Some of the key strengths are the:

- Historic buildings;
- Location close to the highway; and
- Expanding industries such as the quarries and associated businesses that are attracted to the town.

Some of the key weaknesses are:

- Lack of vision for the centre;
- Run down and lack of preservation of the heritage buildings;
- Truck movements through the main street to access the highway;
- Extent of the B2 Local Centre to the north and the lack of activity in that part of town; and
- Large highway service centres that divert potential visitors from the Marulan town centre.

7.2.2 Opportunities for the Marulan Town Centre

There are a number of opportunities for Marulan Town Centre:

- Economic growth in the local region which could increase demand for retail and business services;
- Development of a vision for the future of the centre; and

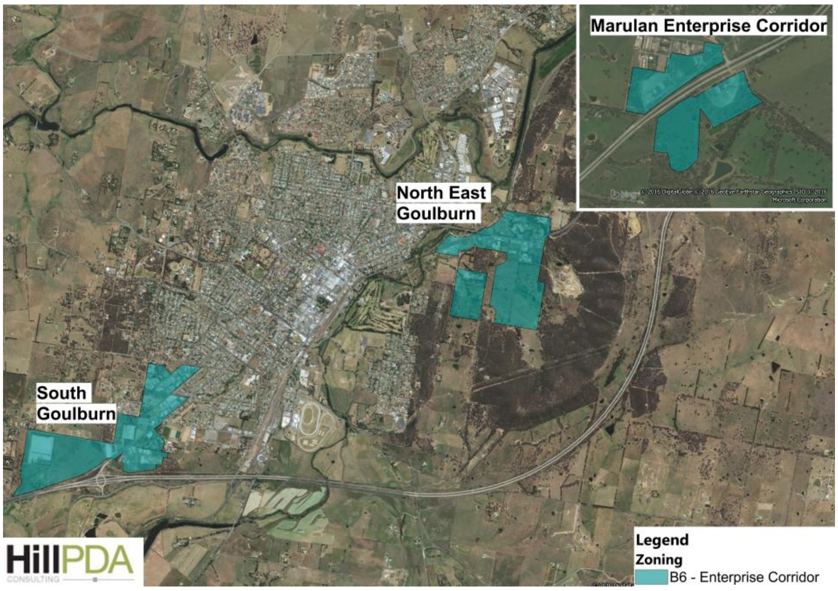
- Investigation of alternative transport routes for trucks to minimise travelling through the town centre.

7.3 ENTERPRISE CORRIDOR PRECINCTS

The North East Goulburn Precinct has over 50% of the vacant land identified across all Enterprise Corridor Precincts.

Enterprise Corridor zones across the LGA have been split into three (3) precincts for ease of completing the Employment Lands Strategy. These areas include: the South Goulburn Precinct, North East Goulburn Precinct and Marulan Precinct. Figure 21 illustrates the location of each Enterprise Corridor precinct.

Figure 21: Enterprise Corridor Precincts



The Enterprise Corridor Zone permits uses which are employment generating including service industries, retail businesses and manufacturing. The objectives of the Enterprise Corridor Zone identified in the Goulburn Mulwaree Local Environmental Plan 2009 are:

- To promote businesses along main roads and to encourage a mix of compatible uses;
- To provide a range of employment uses (including business, office, retail and light industrial uses); and
- To maintain the economic strength of centres by limiting the retailing activity.

The land use audit identified a total of 232 lots located within the Enterprise Corridor Precincts across the LGA. This equates to a total combined area of 310 hectares of zoned land. The total number of occupied lots was 151 or 122ha. There was a total of 1 lot (2ha) which was unavailable (contained a well-established non- enterprise use) and 8 lots (35ha) were underutilised (partly developed or clearly vacant building). The analysis is included in Table 17.

Table 17: Summary of Vacant/Occupied Lots/Hectares in Enterprise Corridor Precincts

Enterprise Corridor	Lots (#)	Area (Hectares)
Occupied	151	122
Vacant	72	151
Unavailable	1	2
Underutilised	8	35
Total	**232**	**310**

Source: PSA

Table 18: Summary of Vacant Lots/Hectares in Enterprise Corridor Precincts

Location of Vacant Enterprise Land	Lots (#)	Area (Hectares)
EC1 South Goulburn	36	50
EC2 East Goulburn	31	84
EC3 Marulan	5	17
Total	**72**	**151**

Source: PSA

A breakdown of the industry uses within this precinct as per ANZSIC 2006 classification is provided in Table 19.

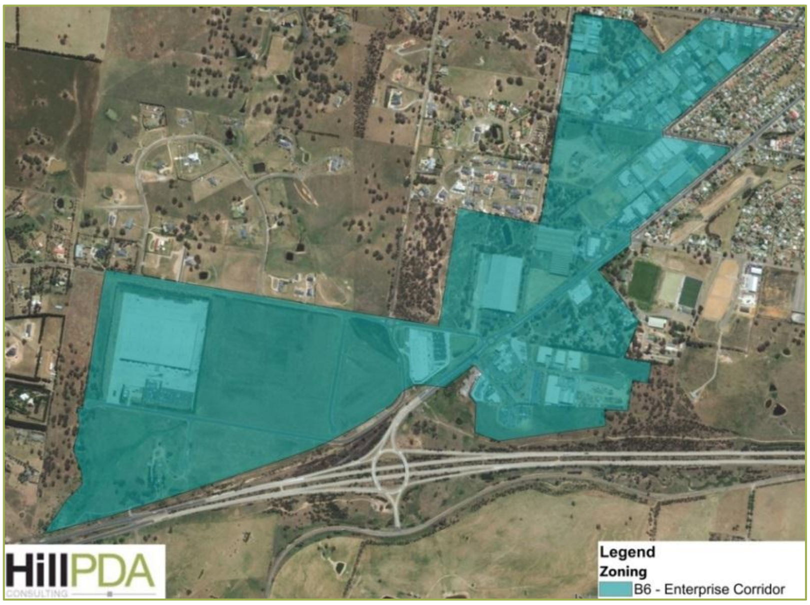
Table 19: Industry uses per ANZSIC Code within Enterprise Corridor Precincts

Type of Industry	ANZSIC Classification	Lots (#)	Lots (%)
Accommodation	440	9	5.9
Cafes, Restaurants & Takeaway Food Services	451	4	2.6
Cement, Lime, Plaster & Concrete Product Manufacturing	203	2	1.3
Fuel Retailing	400	6	3.9
Furniture, Floor Coverings, Houseware & Textile Food Retailing	421	2	1.3
Hardware, Building & Garden Supplies Retailing	423	15	9.9
Motor Vehicle Parts & Tyre Retailing	392	3	1.9
Motor Vehicle Retailing	391	3	1.9
Other Goods & Equipment Rental & Hiring	663	3	1.9
Recreational Goods Retailing	424	1	0.6
Residential Care Services	860	1	0.6
Residential Uses	N/A	33	21.8
Road Freight Transport	461	8	5.2
Veterinary Services	697	1	0.6
Warehousing & Storage Services	530	58	38.4
Waste Treatment, Disposal & Remediation Services	292	2	1.3
Total:	**N/A**	**151**	**100%**

7.4 South Goulburn Enterprise Corridor Precinct

The area identified as the South Goulburn Precinct totals 144ha and is comprised of a mix of accommodation, general industry, small businesses, warehousing and manufacturing.

Figure 22: South Goulburn Enterprise Corridor Precinct



A breakdown of the industry uses within this precinct as per ANZSIC 2006 classification is provided in Table 20.

Table 20: Summary of Industry by ANZSIC Classification in South Goulburn Enterprise Corridor Precinct

Type of Industry	ANZSIC Classification	Lots (#)	Lots (%)
Accommodation	440	3	3.3
Cafes, Restaurants, & Takeaway Food Services	451	3	3.3
Cement, Lime, Plaster & Concrete Product Manufacturing	203	2	2.2
Fuel Retailing	400	2	2.2
Furniture, Floor Coverings, Houseware & Textile Food Retailing	421	2	2.2
Hardware, Building & Garden Supplies Retailing	423	10	11.1
Motor Vehicle Parts & Tyre Retailing	392	1	1.1
Motor Vehicle Retailing	391	3	3.3
Other Goods & Equipment Rental & Hiring	663	2	2.2
Road Freight Transport	461	6	6.6
Veterinary Services	697	1	1.1
Warehousing & Storage Services	530	55	61.1
Total:	**N/A**	**90**	**100%**

Source: PSA

The northern lots located along Mary, Knox, Lansdowne and Cathcart Streets are generally older, well established developments.

Businesses requiring larger lots are located along Hume, Lockyer and Sowerby Streets. The majority of vacant lots in the area are located along Ducks Lane and Lillkar Road. Table 21 provides a breakdown of vacant, occupied, unavailable and underutilised lots.

Table 21: Summary of Vacant/Occupied Lots/Hectares in South Goulburn Enterprise Corridor Precinct

Industrial Zones	Lots (#)	Area (Hectares)
Vacant	36	50
Occupied	90	71
Unavailable	1	2
Underutilised	1	19
Total:	**128**	**142**

Source: PSA

The majority of the vacant land is concentrated in the Ducks Lane Enterprise Corridor Sub-Precinct.

Sub-precincts have been identified within each Enterprise Corridor Precinct in Goulburn. The South Goulburn Enterprise Corridor Precinct is comprised of four sub-precincts. These include the:

- Ducks Lane Enterprise Corridor;
- Lockyer Street/Sowerby Street Enterprise Corridor;
- Hume Street Bulky Goods Enterprise Corridor; and
- Robinson Street Enterprise Corridor.

7.4.1 Ducks Lane Enterprise Corridor Sub-Precinct

Ducks Lane is considered premium enterprise land which is serviced with direct access to the Hume Highway albeit via a roundabout from Hume Street. The majority of subdivided land within this sub-precinct is vacant; however two large lots feature prominent uses including a Coles distribution centre and Bunnings. The presence of these uses will continue to draw interest in this sub-precinct for similar or associated uses.

There is a significant supply of serviced enterprise land in this sub-precinct. There is also a significant amount of underutilised land including south of Lillkar Road where there is unformed and private access through to the Hume Highway.

7.4.2 Lockyer Street/Sowerby Street Enterprise Corridor Sub-Precinct

Employment uses within this sub-precinct vary and include tourism associated uses (such as hotels, fast food outlets, and tourist attractions) and significant manufacturing businesses. The majority of the precinct has been developed and only two vacant lots within Lockyer Street and three lots fronting Hume Street remain. The access into Sowerby Street from Hume Street is difficult and presents the only access point into the sub-precinct, other than an unsealed and informal access from the north of Goulburn from Hume Street across a vacant lot.

Council recently sold a 2.2 ha parcel of land behind Trappers Bakery. The land is presently zoned RE1 Public Recreation.

7.4.3 Hume Street Bulky Goods Enterprise Corridor Sub-Precinct

This sub-precinct has one significant vacant lot with access off Ducks Lane and is adjacent to residential development off Abbey Road which may represent a constraint for enterprise uses. The reuse of existing buildings within this sub-precinct includes the proposed Macarthur Grange Brewery on the site fronting Ducks Lane.

7.4.4 Robinson Street Enterprise Corridor Sub-Precinct

The majority of this sub-precinct is developed with the balance being one vacant lot along the southern end of Robinson Street. Future land supply within this sub-precinct is therefore limited, particularly as residential development is located to the north, east and west.

In addition the land at 150 Lansdowne Street located within this sub-precinct was granted a 17 x residential lot subdivision in December 2011.

7.4.5 Strengths and Weaknesses for the South Goulburn Enterprise Corridor Precinct

Some of the key strengths are:

- Successful precinct benefiting from direct access to the Hume Highway;
- Premium location for transport, freight and logistics and manufacturing uses reliant on road transport;
- Supply of available underutilised land; and
- Proposed Macarthur Grange Brewery.

Some key weaknesses are:

- Traffic flow issues at Sowerby/Hume Street intersection most weekends. Additionally school holidays/public holidays and during the ski season are particularly bad;
- Inefficient access to the vacant lots fronting Hume Street;
- The location and retail offer of the precinct discourages travellers from accessing Goulburn CBD;
- Perceived high development contribution rates around the Ducks Lane/ Hume Street intersection and the area south of Ducks Lane (up to Run-O-Waters Estate). Council has identified that the development of this part of the Ducks Lane area will require road treatment to adequately service the demands of the estimated vehicle movements; and
- Delayed opening of the Macarthur Grange Brewery.

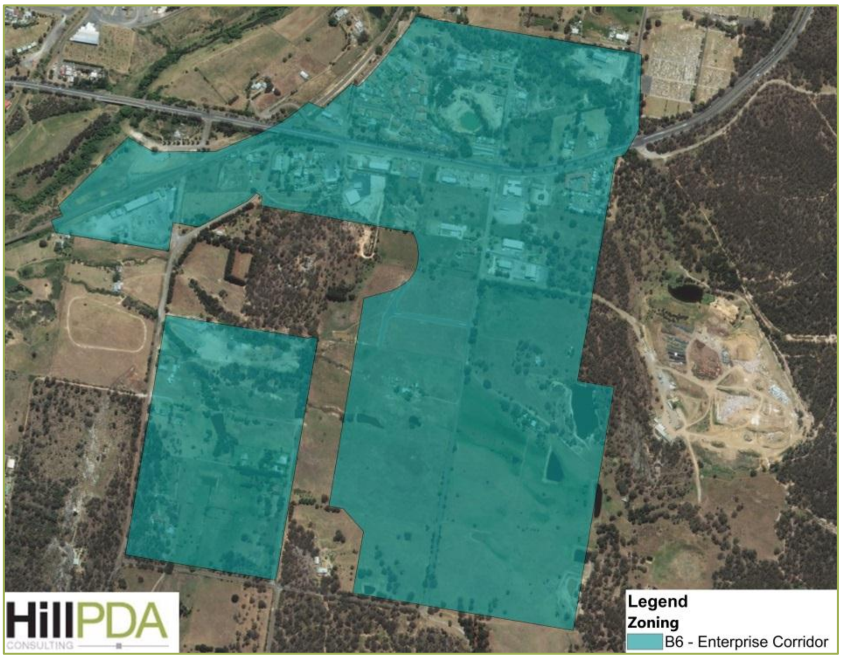
7.4.6 Opportunities for the South Goulburn Enterprise Corridor Precinct

- Localised improvements to the Ducks Lane/Hume Street intersection should be considered to improve heavy vehicle access;
- Extension of Lockyer Street to Tait Crescent to provide improved access and connectivity;
- Increasing the number of bulky goods retailing along Hume Street (although may draw shoppers from CBD);
- The rezoning of the previously owned Council east of the cul-de-sac at the end of Lockyer Street will provide additional enterprise land; and
- The north of the sub-precinct includes a caravan park which may form a long term supply for enterprise uses if required.

7.5 North East Goulburn Enterprise Corridor Precinct

The North East Goulburn Enterprise Corridor Precinct totals 136 hectares and is comprised of a mix of accommodation, general industry, small business and warehousing as shown in Figure 23.

Figure 23: North East Goulburn Enterprise Corridor Precinct



A breakdown of the industry uses within this precinct as per ANZSIC 2006 classification is provided in Table 22.

Table 22: Summary of Industry by ANZSIC Classification in North East Goulburn Enterprise Corridor Precinct

Type of Industry	ANZSIC Classification	Lots (#)	Lots (%)
Accommodation	440	5	8.7
Cafes, Restaurants & Takeaway Food Services	451	1	1.7
Fuel Retailing	400	1	1.7
Hardware, Building & Garden Supplies Retailing	423	5	8.7
Motor Vehicle Parts & Tyre Retailing	392	2	3.5
Other Goods & Equipment Rental & Hiring	663	1	1.7
Recreational Goods Retailing	424	1	1.7
Residential Care Services	860	1	1.7
Residential Uses	N/A	33	57
Road Freight Transport	461	2	3.5
Warehousing & Storage Services	530	3	5.2
Waste Treatment, Disposal & Remediation Services	292	2	3.5
Total:	**N/A**	**57**	**100**

Source: PSA

This precinct accommodates the majority of vacant enterprise land across the Goulburn Mulwaree LGA. The lots located to the north of Sydney Road are a mix of residential housing, scrap metal and disused car yards. The lots located along the southern side of Sydney Road are mainly accommodation and retail premises to service traffic entering Goulburn from the north. Common Street is largely vacant and Hetherington Street is largely underutilised land with residential housing located on large lots. The Goulburn Mulwaree Waste Management Centre is located at the eastern end of Sinclair Street. Table 23 provides a breakdown of vacant, occupied, unavailable and underutilised lots.

Table 23: Summary of Vacant/Occupied Lots/Hectares in North East Goulburn Enterprise Corridor Precinct

Industrial Zones	Lots (#)	Area (Hectares)
Vacant	31	84
Occupied	57	38
Underutilised	5	13
Total	**93**	**135**

Source: PSA

There are a number of issues that operate in the precinct in relation to its operation as an Enterprise Corridor zone:

- The current access is sub-optimal when compared to South Goulburn;
- Local access, including access off Sydney Road requires improvement; and
- The mix of non-enterprise uses (residential aged care facility and residential) within the precinct is likely to act as a disincentive to enterprise uses.

Four sub-precincts are identified within the North East Goulburn Enterprise Corridor Precinct. These sub-precincts include the North Common Street Enterprise Corridor Sub-Precinct; the Hetherington Street Enterprise Corridor Sub-Precinct; the Sydney Road Enterprise Corridor Sub-Precinct and the South Common Street Enterprise Corridor Sub-Precinct. The range of land uses within these sub-precincts varies from retail hire services to service centres and fast food operations.

7.5.1 North Common Street Enterprise Corridor Sub-Precinct

This sub-precinct has a wide variety of land uses including historic industrial activities now utilised for non-enterprise uses, private storage sheds, scrap metal yards and a residential aged care facility in the north-west. The establishment of industrial or employment generating uses in this sub-precinct is limited, given the presence of the residential aged care facility.

Consideration should be given to a road network and services to enable the development of vacant lots along the eastern side of the sub-precinct. Herbert Street is an unformed road off Common Street that links to Gorman Road which could be improved and allow parking at the rear and landscaping opportunities at the front.

7.5.2 Hetherington Street Enterprise Corridor Sub-Precinct

This sub-precinct also has a variety of land uses including rural residential, transport depots and landscape supplies. The sub-precinct is bisected by the railway line and has relatively poor access from Sydney Road. The presence of the existing residential uses provides a constraint to the ongoing development of the sub-precinct for further enterprise land uses.

7.5.3 Sydney Road Enterprise Corridor Sub-Precinct

Land uses within this sub-precinct are highway-associated, with retail and service uses. There are limited vacant lots along the Sydney Road frontage with four large lots along Common Street and Sinclair Street available for development. Each lot has good access and can utilise Common Street to access Sydney Road.

There are also residential properties within this area.

7.5.4 South Common Street Enterprise Corridor Sub-Precinct

This sub-precinct is made up of large serviced lots many of which are vacant although Council is in receipt of a development application for a concrete manufacturing industry at 5 Common Street. Council also has a Waste Management Facility located to the east of Common Street and adjacent land use must be compatible with this on-going facility. Enterprise or industrial uses are likely to prevail to the east of Common Street given the location of the Waste Management Facility and will provide a good location for industries that are seeking sites away from residential land use.

7.5.5 Strengths and Weaknesses for the North East Goulburn Enterprise Corridor Precinct

Some key strengths are:

- There is a significant supply of vacant enterprise land across this sub-precinct; and
- Businesses are performing well along Sydney Road where there is reasonable access and visibility.

Some of the key weaknesses are:

- Little take up of enterprise uses;

- Poor access to the Hume Highway;
- A range of incompatible and abutting land uses; and
- The land uses are varied and there is no industry focus.

7.5.6 Opportunities for the North East Goulburn Enterprise Corridor Precinct

- Given the constraints and existing land uses, consideration could be given to a change in land use in parts of the precinct; and
- Investigate opportunities to improve access within the precinct.

7.6 Marulan Enterprise Corridor Precinct

The Enterprise Corridor Precinct within the township of Marulan is located at the southern entrance of the town from the Hume Highway.

Figure 24: Marulan Enterprise Corridor Precinct

A breakdown of the industry uses within this precinct as per ANZSIC 2006 classification is provided in Table 24.

Table 24: Summary of Industry by ANZSIC Classification in Marulan Enterprise Corridor Precinct

Type of Industry	ANZSIC Classification	Lots (#)	Lots (%)
Accommodation	440	3	75
Fuel Retailing	400	1	25
Total:	**N/A**	**4**	**100%**

Source: PSA

The total area of all the lots within the zone is 33 hectares as detailed in Table 25.

Table 25: Summary of Vacant/Occupied Lots/Hectares in Marulan Enterprise Corridor Precinct

Industrial Zones	Lots (#)	Area (Hectares)
Vacant	5	17
Occupied	4	13
Underutilised	2	3
Total	**11**	**33**

Source: PSA

The occupied lots contain highway service centres. The vacant areas are located on the Hume Highway which could be considered an advantage subject to resolving relevant access issues. This precinct is well located for transport oriented enterprises which service both the transport travelling through Marulan and the local quarry industries.

Presently, users of facilities located on the northern side of the highway, including heavy vehicles, have to travel through the village to access the southbound interchange.

Similarly, developments on the southern side of the highway do not have direct access to northbound travel. These sites would both benefit from improved accessibility to passing and local traffic in both directions.

7.6.1 Strengths and Weaknesses for the Marulan Enterprise Corridor Precinct

A key strength is:

- There is a significant supply of vacant enterprise land across this sub-precinct; and

A key weaknesses is:

- The enterprise uses such as the service centres draw visitors away from Marulan Town Centre.

7.6.2 Opportunities for the Marulan Enterprise Corridor Precinct

- Opportunities for new enterprise businesses (light industrial, office, business) which will have good access to the Hume Highway.

7.7 INDUSTRIAL PRECINCTS

Industrial Zones permit uses which are employment generating uses. The objectives of the various Industrial Zones identified in the Goulburn Mulwaree Local Environmental Plan 2009 are:

IN1 General Industrial

- To provide a wide range of industrial and warehouse land uses;
- To encourage employment opportunities;
- To minimise any adverse effect of industry on other land uses; and
- To support and protect industrial land for industrial uses.

IN2 Light Industrial

- To provide a wide range of light industrial, warehouse and related land uses;
- To encourage employment opportunities and to support the viability of centres;
- To minimise any adverse effect of industry on other land uses;
- To enable other land uses that provides facilities or services to meet the day to day needs of workers in the area; and
- To support and protect industrial land for industrial uses.

IN3 Heavy Industrial

- To provide suitable areas for those industries that need to be separated from other land uses;
- To encourage employment opportunities;
- To minimise any adverse effect of heavy industry on other land uses;
- To support and protect industrial land for industrial uses; and
- To recognise and provide for the diverse demands and implications of industry, warehousing, transport and servicing activities and ancillary land uses.

For ease of assessment, industrial precincts have been allocated to areas of existing Industrial zoned land across the LGA.

They include Tarago Industrial Precinct, South Goulburn Industrial Precinct, North Goulburn Industrial Precinct, Bradfordville Industrial Estate Precinct, Murrays Flat Industrial Precinct, Marulan Industrial Precinct and South Marulan Industrial Precinct.

As noted, the Goulburn Industrial Precincts are located around Goulburn, Marulan, Tarago and along major transport routes. These precincts appear to have been developed over time and represent different periods of historical development. The analysis of the uses which have established and location characteristics show that there is a level of focus for each precinct, with each tending to serve somewhat different functions within the local economy.

7.7.1 Industrial Land Use Audit Results

The land use audit identified a total of 342 lots located within the Industrial Precincts across the LGA. This equates to a total combined area of 4,178 hectares. The total number of occupied lots was 268 or 1,910 hectares. There were a total of 9 lots (1ha) which were unavailable to be occupied as detailed in Table 26.

Table 26: Summary of Vacant/Occupied Lots/Hectares in Industrial Precincts

Industrial Zones	Lots (#)	Area (Hectares)
Total:	342	4,178
Occupied:	268	1,910
Vacant:	65	2,267
Unavailable:	9	1

Source: PSA

A comparison of the percentage of vacant lots against the percentage of vacant land area within Industrial Precincts across the LGA identifies that there is substantially more vacant land in hectares than there are in lots. This indicates that vacant land is underdeveloped for industrial uses and as such would require either appropriate access to be established on the lot or the connection of the lot to services in order to accommodate industrial uses. Table 27 differentiates the vacant industrial land into each precinct.

Table 27: Comparison of Vacant Land Available in Each Industrial Zone

Industrial Zones - Vacant	Lots (#)	Area (Hectares)
General Industrial:	35	316
Light Industrial:	10	182
Heavy Industrial:	17	1,769
Total:	**62**	**2,267**

Source: PSA

Table 28 identifies where the vacant industrial lands are located. The following section includes maps of each industrial precinct across the LGA which identifies the location of all occupied and vacant land.

Table 28: Comparison of Vacant Industrial Land Available in Each Industrial Precinct

Location of Vacant Industrial Land	Lots (#)	Area (Ha)	Zone
Tarago:	17	1,769	Heavy Industrial
South Goulburn:	12	23	General Industrial
North Goulburn:	7	2	Light Industrial
Bradfordville Industrial Estate:	13	20	General Industrial
Murrays Flat:	3	168	General Industrial
Marulan:	9	259	General & Light Industrial
Marulan South:	1	24	General Industrial
Total:	**62**	**2,445**	**N/A**

Source: PSA

A breakdown of the industry uses within this precinct as per ANZSIC 2006 classification is provided in Table 29.

Table 29: Industrial Precinct Audit by Industry Code: Source PSA

Type of Industry	ANZSIC Classification	Lots (#)	Lots (%)
Automotive Repair & Maintenance	941	20	7.4
Building Installation	453	1	0.3
Building Installation Services – Electrical	323	2	0.7
Cement, Lime, Plaster & Concrete Product Manufacturing	203	2	0.7
Civil Engineering	452	9	3.3
Construction Material Mining	091	2	0.7
Electricity Generation	261	17	6.3
Fuel Retailing	400	3	1.1
Furniture, Floor Coverings, Houseware & Textile Food Retailing	421	7	2.6
Hardware, Building & Garden Supplies Retailing	423	17	6.3
Meat & Meat Product Manufacturing	111	1	0.3
Motor Vehicle & Motor Vehicle Part Manufacturing	231	4	1.4
Motor Vehicle Parts & Tyre Retailing	392	7	2.6
Motor Vehicle Retailing	391	2	0.7
Other manufacturing	259	1	0.3
Other Goods & Equipment Rental & Hiring	663	1	0.3
Other Professional Scientific & Technical Services	699	2	0.7
Postal Services	510	1	0.3
Rail Freight Transport	471	15	5.6
Residential Uses	N/A	79	29.5
Road Freight Transport	461	18	6.7
Sewerage & Refuse Disposal, Sanitation And Similar	900	8	2.9
Veterinary Services	697	1	0.3
Warehousing & Storage Services	530	42	15.7
Wholesale Agricultural Raw Materials, Live Animals, Food, Beverages & Tobacco	512	5	1.8
Total:	**N/A**	**267**	**100%**

In consideration of overall vacant land it is noted that Tarago holds 72% of vacant land and all the vacant Heavy Industrial land. Murrays Flat and Marulan hold approximately 16% of total vacant land. The remaining precincts have a variety of vacant land which once investigated, are subject to a range of considerations and constraints which may limit the establishment of industrial uses.

7.8 Tarago Industrial Precinct

The Tarago Industrial Precinct is located approximately 10km west of the village of Tarago. The extent of the Precinct is shown in Figure 25.

Figure 25: Tarago Industrial Precinct

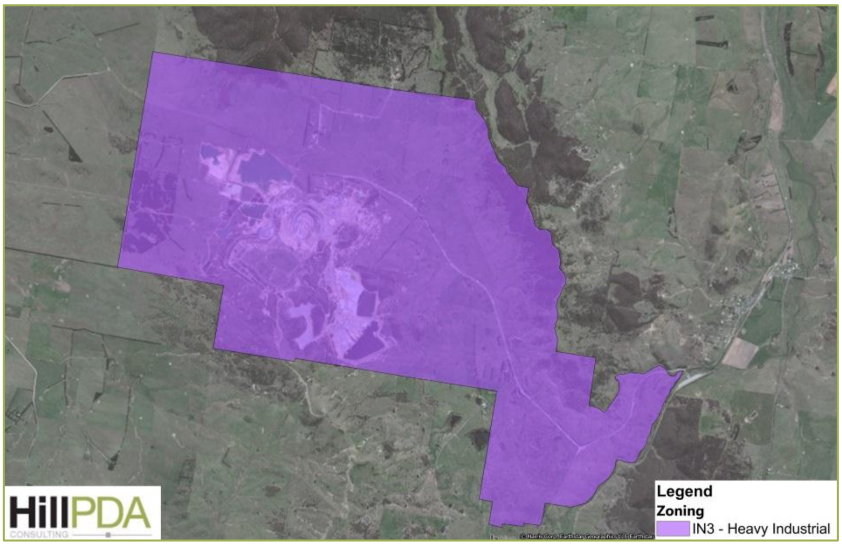


Table 30 identifies the number of vacant/occupied lots and the area of vacant/occupied industrial land within the Tarago Industrial Precinct. It identifies that there is only a limited number of large lots potentially available within this precinct. The relative size of each lot is very large and reflects that the area of available land is more than the area of occupied land. It is also considered that the occupied lots within the precinct still contain a significant capacity to intensify or expand existing uses on site.

Table 30: Summary of Vacant/Occupied Lots/Hectares in Tarago Industrial Precinct: Source PSA

Industrial Zones	Lots (#)	Area (Hectares)
Vacant	17	1769
Occupied	28	1548
Total:	**45**	**3317**

The Tarago Industrial Precinct includes a repurposed mine used as a waste facility, operated by Veolia. Also within the vicinity of Tarago is the Woodlawn Wind Farm operated by Infigen and considered part of the broader Capital Renewable Energy Precinct.

The topography of the Tarago Precinct could be a potential constraint to development as there is steep land (ridgeline) to the north-west of the industrial zoned lands. Conversely it could also be a potential opportunity given the establishment of the Woodlawn Wind Farm requires this topography in order to be effective.

The distance of the Industrial Precinct from sensitive land uses including residential land uses makes it potentially attractive for further heavy industrial uses. As such, its current zoning is considered appropriate. Expansion of the current waste management and energy production uses is being undertaken and this should be supported where appropriate. Further analysis is required to determine requirements for other heavy industrial uses which may also see this precinct as an opportunity.

There is a large amount of vacant employment land (16%) within this precinct however much of the land is owned by Woodlawn which is used as a buffer for their Bioreactor.

7.8.1 Strengths and Weaknesses for the Tarago Industrial Precinct

Some of the key strengths of the Tarago Industrial Precinct are:

- Good location for heavy industry away from sensitive land uses; and
- Location of existing renewable energy industries and spin off industries.

Some of the key weaknesses of the Tarago Industrial Precinct are:

- A large part of the land is identified as a buffer for the Bioreactor and as such future uses are limited;
- Perceived (but unproven) dangers of wind farms; and
- The availability of power and water supplies for heavy industrial uses.

7.8.2 Opportunities for the Tarago Industrial Precinct

There are a number of opportunities for the Tarago Industrial Precinct:

- There is land to the north of Tarago Industrial Precinct which could be investigated for the provision of a longer term supply of heavy industrial land; and
- This Precinct could become a renewable energy industrial region supporting spin off industries.

7.9 South Goulburn Industrial Precinct

The South Goulburn Industrial Precinct is located in the south of Goulburn and includes several sub-precincts including the Tait Crescent Industrial Sub-Precinct, the Sale Yards Industrial Sub-Precinct and the Rail Yards Industrial Sub-Precinct.

Figure 26: South Goulburn Industrial Precinct

The survey of existing operations across the precinct identify a significant diversity of industrial land uses from warehousing to car yards, non-industrial uses, landscaping supplies, residential uses and processing facilities. A breakdown of the industry uses within this precinct as per ANZSIC 2006 classification is provided in the table below.

Table 31: Summary of Industry by ANZSIC Classification in South Goulburn

Type of Industry	ANZSIC Classification	Lots (#)	Lots (%)
Civil Engineering	452	2	4
Fuel Retailing	400	1	2
Furniture, Floor Coverings, Houseware &	421	2	4

Type of Industry	ANZSIC Classification	Lots (#)	Lots (%)
Textile Food Retailing			
Hardware, Building & Garden Supplies Retailing	423	7	14.2
Meat & Meat Product Manufacturing	111	1	2
Motor Vehicle Parts & Tyre Retailing	392	1	2
Motor Vehicle Retailing	391	2	4
Rail Freight Transport	471	12	24.4
Residential Uses	N/A	6	12.2
Road Freight Transport	461	16.3	4
Warehousing & Storage Services	530	8	
Wholesale Agricultural Raw Materials, Live Animals, Food, Beverages & Tobacco	512	5	10.2
Total:	**N/A**	**49**	**100%**

Source: PSA

Table 29 identifies the number of vacant/occupied lots and the area of vacant/occupied lots within the South Goulburn Industrial Precinct. They identify that there is only a limited number of lots available within this precinct. The small size of lots within this precinct reflects the limited area of available land in hectares.

Table 32: Summary of Vacant/Occupied Lots/Hectares in South Goulburn Industrial Precinct

Industrial Zones	Lots (#)	Area (Hectares)
Vacant	12	23
Occupied	49	68
Total	**61**	**91**

Source: PSA

The connectivity of this precinct to Hume Street and the enterprise zoned and rural lands located to the west ensure this precinct is highly accessible and well-located land, which makes it attractive for industrial uses.

7.9.1 Tait Crescent Industrial Sub-Precinct

The Tait Crescent Industrial Sub-Precinct is newly subdivided land which has attracted a diversity of small to medium sized service and food processing uses.

7.9.2 Sale Yards Industrial Sub-Precinct

The predominant use of land within this sub-precinct is saleyards and woolstores located to the south of Finlay Road. A number of smaller lots with various small-scale industrial service-based industries are located north of Finlay Road including auto repairers and private storage sheds.

7.9.3 Rail Yards Industrial Sub-Precinct

There is a mixture of land uses within this sub-precinct ranging from fuel depots, freight transport, engineering, landscaping supplies and the railway museum. Existing land uses within this sub-precinct are predominantly associated with rail transport. Considering the importance of transport, freight and logistics, the continuation and support of the rail yards should be supported and protected.

7.9.4 Strengths and Weaknesses for the South Goulburn Industrial Precinct

Some key strengths are:

- Within the Tait Crescent Industrial Sub-Precinct there are a number of formed vacant lots which provide immediate supply for similar uses;
- The Sale Yards Industrial Sub-Precinct is an established industrial area; and
- The Rail Yards Industrial Sub-Precinct is an established industrial area with land uses that support the transport, freight and logistics industries.

Some of the key weaknesses are:

- Underutilisation of the saleyards and woolstores as sale activity moves to the large new developments at Yass and Moss Vale;
- The Sale Yards Industrial Sub-Precinct has a hilly topography; and
- There is limited vacancy within the Rail Yards Industrial Sub-Precinct.

7.9.5 Opportunities for the South Goulburn Industrial Precinct

- Undertake investigation on the appropriateness of extending Tait Crescent and the rezoning of the land to the south of Tait Crescent to facilitate subdivision and use of the lots for more general employment land;
- South of Tait Crescent is a large parcel of land zoned rural which could potentially be utilised for Enterprise/Industrial land if access was provided. The expansion of this precinct should be

considered in conjunction with the Lockyer Street Enterprise Corridor Sub-Precinct;

- Re-use saleyards and woolstores for a more intensive employment use subject to remediation, planning and development of the site. This would increase the area of available land for industrial uses;
- Proximity of the Sale Yards Industrial Sub-Precinct to the Goulburn Rail Freight Facility;
- Potential land to the south of the Sale Yards Industrial Sub-Precinct which could be explored for industrial uses;
- Given the size of the lots at the southern end of the Rail Yards Industrial Sub-Precinct there is potential to develop land to accommodate uses and/or to utilise spare capacity within larger lots; and
- Within the Rail Yards Industrial Sub-Precinct there are further opportunities to redevelop some existing dwellings or underutilised lots for industrial uses including to the north of Bungonia Road and the residential lands located at the intersection of Braidwood and Bungonia Roads.

7.10 North Goulburn Industrial Precinct

The North Goulburn Industrial Precinct is located to the north of Goulburn opposite the Goulburn Correctional Centre.

Figure 27: North Goulburn Industrial Precinct

The average lot size within this precinct is 1,000m², with land uses comprised mostly of small service-based industries such as auto repairers, engineers, trade suppliers and scrap yards. A large majority of the lots within this precinct are occupied by residential dwellings which are a legacy of historic residential uses and caretakers' dwellings for current industrial uses and urban support services. The precinct is very active and dynamic which is a reflection of the range of uses. A breakdown of the industry uses within this precinct as per ANZSIC 2006 classification is provided in Table 33.

Table 33: Summary of Industry by ANZSIC Classification in the North Goulburn Industrial Precinct

Type of Industry	ANZSIC Classification	Lots (#)	Lots (%)
Automotive Repair & Maintenance	941	12	11.4
Civil Engineering	452	3	2.8
Furniture, Floor Coverings, Houseware & Textile Food Retailing	421	2	1.9
Hardware, Building & Garden Supplies Retailing	423	6	5.7
Other Goods & Equipment Rental & Hiring	663	1	1
Rail Freight Transport	471	3	2.8
Residential Uses	N/A	57	54.2
Road Freight Transport	461	6	5.7
Sewerage & Refuse Disposal, Sanitation & Similar	900	6	5.7
Warehousing & Storage Services	530	9	8.5
Total:	**N/A**	**105**	**100%**

Source: PSA

Table 34 identifies the vacant and occupied land within the North Goulburn Industrial Precinct. When taking into consideration the large number of residential uses interspersed within industrial uses it is identified that there is only limited capacity for expansion of employment uses within this precinct.

Table 34: Summary of Vacant/Occupied Lots/Hectares in the North Goulburn Industrial Precinct

Industrial Zones	Lots (#)	Area (Hectares)
Vacant	7	2
Occupied	105	10
Total:	**112**	**12**

Source: PSA

Access from Chantry Street ensures the precinct has a reasonable level of connectivity to Goulburn and the nature of the uses indicates that industrial activity services the Goulburn Mulwaree population. The Precinct is unlikely to attract industrial uses which require access to the main highway and development will continue to largely focus on industries servicing the Goulburn Mulwaree population.

The established nature of the residential dwellings within the precinct makes it difficult to determine a more directive strategy to promote employment uses in this precinct.

7.10.1 Strengths and Weaknesses for the North Goulburn Industrial Precinct

Some key strengths are:

- Established industrial area with businesses that coexist with residential land use; and
- There is an established cluster of urban support services in this location that provide employment opportunities and services for local residents.

A key weakness is:

- A number of buildings on sites within this precinct were unoccupied.

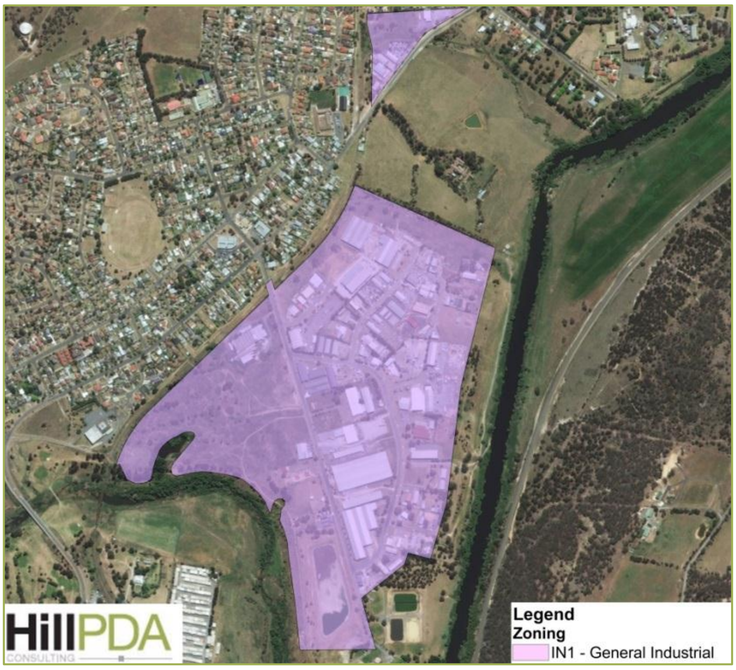
7.10.2 Opportunities for the North Goulburn Industrial Precinct

- Considering the current level of existing activity, the precinct is suitable for industrial uses/urban support services and it will most likely grow through expansion of existing uses in response to population growth within Goulburn Mulwaree.

7.11 Bradfordville Industrial Estate Precinct

The Bradfordville Industrial Precinct is also located to the north of Goulburn and includes the Bradfordville Industrial Estate and the Taralga Road area as shown in Figure 28 below.

Figure 28: Bradfordville Industrial Estate Precinct



Land uses within this precinct range from storage and warehousing to manufacturing and transport, freight and logistics and retain this general industry focus. A breakdown of the industry uses within this precinct as per ANZSIC 2006 classification is provided in Table 35.

Table 35: Summary of Industry by ANZSIC Classification in the Bradfordville Industrial Estate Precinct

Type of Industry	ANZSIC Classification	Lots (#)	Lots (%)
Automotive Repair & Maintenance	941	7	10.2
Building Installation	453	1	1.4
Building Installation Services – Electrical	323	2	2.9
Cement, Lime, Plaster & Concrete Product Manufacturing	203	1	1.4
Civil Engineering	452	4	5.8
Electricity Generation	261	1	1.4
Furniture, Floor Coverings, Houseware & Textile Food Retailing	421	3	4.4
Hardware, Building & Garden Supplies Retailing	423	4	5.8
Motor Vehicle & Motor Vehicle Part Manufacturing	231	4	5.8
Motor Vehicle Parts & Tyre Retailing	392	6	8.8
Residential Uses	N/A	4	5.8
Other Professional Scientific & Technical Services	699	2	2.9
Postal Services	510	1	1.4
Road Freight Transport	461	5	7.3
Sewerage & Refuse Disposal, Sanitation And Similar	900	2	2.9
Veterinary Services	697	1	1.4
Warehousing & Storage Services	530	20	29
Total:	**N/A**	**68**	**100%**

Source: PSA

Table 36 identifies the number of vacant/occupied lots and the area of vacant/occupied lots within the Bradfordville Industrial Precinct. It identifies that there is limited number of vacant lots within this precinct (16). The variable size of lots within this precinct reflects the larger area in hectares of available land (21ha).

Table 36 - Summary of Vacant/Occupied Lots/Hectares in the Bradfordville Industrial Estate Precinct

Industrial Zones	Lots (#)	Area (Hectares)
Vacant	16	21
Occupied	68	47
Unavailable	9	1
Total:	**93**	**69**

Source: PSA

There is a range of lot sizes within precinct: larger lots are located along Ross Street and Copford Road; smaller lots are located along O'Sullivan Place, Pursehouse Place and Gulson Street. The lots available for development within the Bradfordville Industrial Estate Sub-Precinct range from 2000m² - 5000m². These lots are suitable for general industrial uses and given demand for lots within this sub-precinct, provide a short to medium term supply.

It was evident that a number of buildings on sites within the Bradfordville Industrial Estate Precinct were unoccupied or underutilised and as such, will provide employment land into the future.

The development of a medical centre at 37 Ross Street has led to a proposal to develop a health hub within this sub-precinct on a large lot. It is assumed that the proposal is in response to an underlying demand within Goulburn for health related services.

The majority of lots within the Taralga Road area are occupied, however it was noted that a number of buildings may be underutilised. The Taralga Road area contains a number of lots identified as unavailable because of the lack of accessibility. If an appropriate access was constructed these lots could be used for general industrial uses.

7.11.1 Strengths and Weaknesses for the Bradfordville Industrial Estate Precinct

A key strength is:

- Established industrial area.

The key weakness are:

- This precinct is located off Taralga Road which makes access to the national road network (Hume Highway) difficult;
- A number of the buildings on sites are unoccupied or underutilised; and
- Lack of landscaping/trees along the streets.

7.11.2 Opportunities for the Bradfordville Industrial Estate Precinct

- The development of a medical centre on Ross Street has led to a proposal to develop a health hub within this sub-precinct on a large lot. It is assumed that the proposal is in response to an underlying demand within Goulburn for health related services. Rezoning would be required to facilitate the intent to provide a private hospital.

7.12 Murrays Flat Industrial Precinct

The Murrays Flat Industrial Precinct is a large area zoned industrial, located on the north-east of Goulburn along the Hume Highway. It is comprised of three vacant lots with a combined area of 169 hectares.

Figure 29: Murrays Flat Industrial Precinct

Council owns land to the west of the industrial land which will soon be surplus to needs as a sewage farm. A new wastewater treatment plant is being built to service Goulburn. Council has begun investigation work into the future use of this large site. There are environmental constraints; however it is understood that there are 100 acres which could be used for appropriate industries.

In recent times there has been significant developer interest in this area.

Table 37 identifies the number of vacant/occupied lots and the area of vacant/occupied lots within the Precinct. All three lots within this precinct are vacant.

Table 37: Summary of Vacant/Occupied Lots/Hectares in Murrays Flat Industrial Precinct

Industrial Zones	Lots (#)	Area (Hectares)
Vacant	3	169
Occupied	0	0
Total:	**3**	**169**

Source: PSA

The location of the Murrays Flat Industrial Precinct is strategic for a number of reasons, including its proximity to the Hume Highway in the north and the railway line in the south. However safe access on and off the highway is problematic.

Even though this site presents developable land, while access remains unresolved its development will be constrained. There may be potential to establish a rail freight facility or siding adjacent to the Council land which has the potential to improve connectivity.

There is also the opportunity to establish an alternative access to Murrays Flat Road from Gorman Road to the west.

7.12.1 Strengths and Weaknesses for the Murrays Flat Industrial Precinct

Some key strengths are:

- Vacant industrial lots; and
- Future surplus Council land.

Some key weaknesses are:

- Previous proposals for development within this precinct have proven problematic due to poor access from Murrays Flat Road onto the Hume Highway in order to travel both south to Goulburn/Canberra and north to Sydney; and
- Funding of an interchange to provide access onto the Hume Highway from Murrays Flat Road.

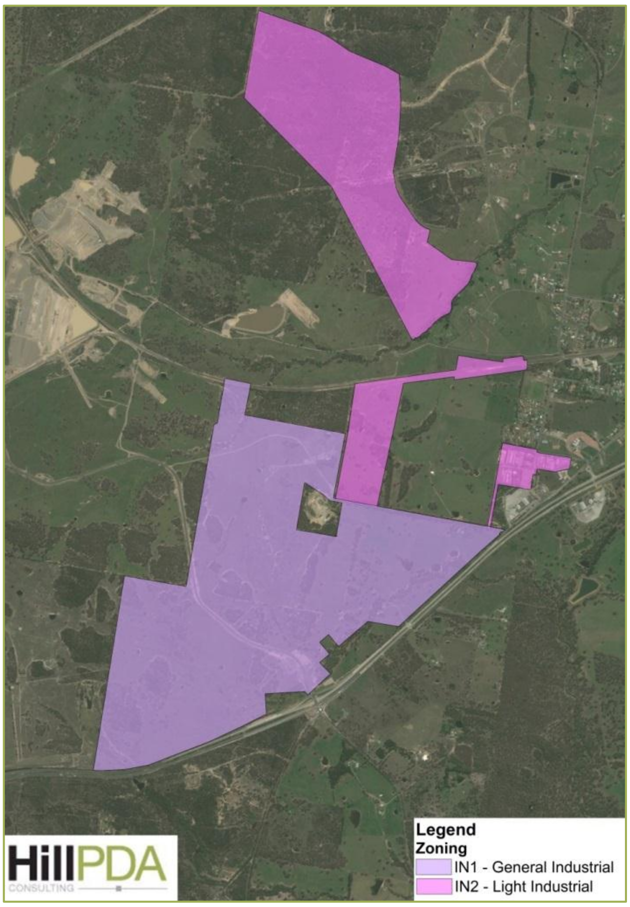
7.12.2 Opportunities for the Murrays Flat Industrial Precinct

- Longer term once Council's site is available for redevelopment; and
- Investigate improvements to access into and out of the North East Goulburn Enterprise Corridor Precinct and the Murrays Flat Precinct onto Hume Highway.

7.13 Marulan Industrial Precinct

The Marulan Industrial Precinct is located in the township of Marulan, located north of Goulburn and includes several sub-precincts including the Portland Avenue/Wilson Drive Industrial Sub-Precinct; the West Marulan Industrial Sub-Precinct and the Suffolk Road Industrial Sub-Precinct.

Figure 30:Marulan Industrial Precinct



Land uses across these sub-precincts range from quarries and Council’s landfill to private storage sheds and highway service centres. A breakdown of the industry uses within this precinct as per ANZSIC 2006 classification is provided in Table 38.

Table 38: Summary of Industry by ANZSIC Classification in Marulan Industrial Precinct

Type of Industry	ANZSIC Classification	Lots (#)	Lots (%)
Automotive Repair & Maintenance	941	1	6.25
Cement, Lime, Plaster & Concrete Product Manufacturing	203	1	6.25
Construction Material Mining	091	2	12.5
Fuel Retailing	400	2	12.5
Road Freight Transport	461	5	31.2
Warehousing &Storage Services	530	5	31.2
Total:	**N/A**	**16**	**100%**

Source: PSA

Table 39 identifies the number of vacant/occupied lots and the area of vacant/occupied lots within the Marulan Industrial Precinct. There are a limited number of lots available within this precinct, with large lots undeveloped. The majority of vacant industrial lots within the Marulan Industrial Precinct are large lots located within the West Marulan Industrial Precinct.

Table 39: Summary of Vacant/Occupied Lots/Hectares in Marulan Industrial Precinct

Industrial Zones	Lots (#)	Area (Hectares)
Vacant	9	259
Occupied	16	214
Total:	**25**	**473**

Source: PSA

7.13.1 Portland Avenue/Wilson Drive Industrial Sub-Precinct

The Portland Avenue/Wilson Drive Industrial Sub-Precinct is largely occupied with general industrial uses such as private storage sheds and small service industries. The lots are smaller than the vacant lots located in the other sub-precincts. This could indicate there is a demand for smaller industrial lots for general industrial uses within Marulan.

7.13.2 West Marulan Industrial Sub-Precinct

Within the West Marulan Industrial Sub-Precinct, vacant lots are located along the Hume Highway with dual access from the rear of the lots via Wilson Drive. The feasibility of utilising these lots for land uses which could service the quarries would need to be determined given their easy access to the Highway and from areas within Marulan.

The remainder of the sub-precinct has a large supply of land which could accommodate industrial uses. The location of the interchange at South Marulan Road ensures there is safe and efficient access to this sub-precinct, however the provision of an improved road network and infrastructure should be considered in order to utilise this site effectively.

7.13.3 Suffolk Road Industrial Sub-Precinct

The Suffolk Road Industrial Sub-Precinct is comprised of one large lot which constitutes a significant amount of industrial land supply. Access is difficult and through established residential areas off Dorsett Road. Unless an alternative vehicle access can be established, the development of the area for industrial land uses is limited.

7.13.4 South Marulan Industrial Precinct

The South Marulan Industrial Precinct is located in the south of Marulan.

Figure 31: South Marulan Industrial Precinct

Table 40 identifies the number of vacant/occupied lots and the area of vacant/occupied lots within the South Marulan Industrial Precinct. There are a limited number of vacant lots within this precinct, with larger lots un-developed.

Table 40: Summary of Vacant/Occupied Lots/Hectares in South Marulan Industrial Precinct

Industrial Zones	Lots (#)	Area (Hectares)
Vacant	1	24
Occupied	2	23
Total	**3**	**47**

Source: PSA

It is assumed that the development of these lots is associated with the Foti pyrotechnics factory.

The precinct is considered constrained in providing a supply of industrial land considering its geographical isolation and the lack of infrastructure and servicing. Any future land uses will most likely be directly associated with and reliant on the existing pyrotechnics factory.

7.13.5 Strengths and Weaknesses for the Marulan Industrial Precinct

Some key strengths are:

- Vacant industrial lots; and
- Potential to expand quarry activities.

Some key weaknesses are:

- Suffolk Road industrial land is isolated with poor access;
- Vehicles travelling south from the southern part of Marulan need to drive through the town centre which reduces the amenity of the main street; and

7.13.6 Opportunities for the Marulan Industrial Precinct

- Investigate the potential to obtain alternate access to the Hume Highway through private land; and
- Increase in support industries with the expansion of the quarries.

7.14 Additional Employment Lands

A number of areas across the LGA are considered suppliers of employment land, however these sit outside Industrial or Enterprise Corridor zones. The Abattoir Precinct has been specifically considered in light of supporting existing rural industry and recognising potential growth. In addition, this specific Precinct has been recognised for industries of a similar nature.

7.14.1 Abattoir Precinct

The Abattoir Precinct is located along Mazamet Road in south Goulburn on the southern side of the Hume Highway. It has direct access from the Hume Highway interchange.

The abattoir is an established food processing industry within Goulburn Mulwaree providing significant employment. The Precinct also includes a compost manufacturing facility.

The abattoir is an important rural industry for the Goulburn Mulwaree LGA and the ongoing functioning and development of this industry should be supported. The current RU1 zoning is considered appropriate in the short to medium term.

7.14.2 Motor Sports

There are four motor sports facilities in the LGA where activity and business is increasing. The four sites all have different zones:

- Wakefield Park – RU1 Primary Production;
- Speedway – RU6 Transition;
- Motorcycle Club – RU6 Transition; and
- Marulan Driver Training Centre – RU2 Rural Landscape.

Given the popularity of this industry and the potential economic benefits to the LGA from increased visitors and spinoff businesses it will be important for Council to continue its support. This may include appropriate zonings.

8 RETAIL FLOORSPACE PROJECTIONS

This Chapter provides a review of current retail floorspace and services within Goulburn Commercial Core. It also estimates the likely demand for retail shop front floorspace that could be accommodated within the Centre as a result of projections and growth in expenditure.

The area is defined as land zoned B3 Commercial Core under the Goulburn Mulwaree Local Environmental Plan 2009, refer to Figure 32 below.

Figure 32: Goulburn Commercial Core

Source: HillPDA

8.1 Methodology

The methodology applied within this section is based on household expenditure modelling.

This practice involves the definition of trade areas, analysing forecast population growth, estimating and projecting expenditure levels from current and future population, estimating the level of expenditure captured specifically by the Centre and dividing captured expenditure by industry benchmark turnover levels to derive required floor areas.

8.2 Defining Goulburn's Trade Area

The trade area served by any retail centre is determined by a combination of factors including:

- The strength and attraction of Goulburn as determined by factors such as the composition, layout, ambience / atmosphere and car parking in the centre / facility;
- Competing retail centres, particularly their proximity to Goulburn and respective sizes, retail offer and attraction;
- The location and accessibility of Goulburn including the available road and public transport network and travel times;
- The presence or absence of physical barriers, such as rivers, railways, national parks and freeways; and
- Outcome of the 2015 Escape Spending Study Report.

Understanding the local retail hierarchy and its competitive offer is an essential step in defining a trade area for Goulburn. To help define this, a description of relevant centres in the locality and the Escape Spending Study Report undertaken for Council in 2014 is provided below.

8.2.1 Escape Spending Study Report

The Escape Spending Study was undertaken by the University of Western Sydney for Council in 2014. The key findings of the report which would influence the trade area for Goulburn is as follows:

- Most people interviewed shopped, at least sometimes, outside of the LGA. The main reason given for shopping elsewhere is the lack of range or variety in the local area such as clothing stores;
- Most residents interviewed shopped locally where possible for items such as groceries but shopped out of town if products and services are not available in town;
- Online and out of town stores offer more competitive prices;
- Some respondents did not mind travelling further to get a better range of products at a better price;

- Going out of the LGA for a day trip and/or social outing was listed as a reason why people were shopping outside their local area; and
- The current retail mix was perceived to be limited and of a lower quality, especially within the clothing/fashion sector.

8.2.2 Canberra CBD

Canberra is located approximately 90 kilometres or a one hour and five minute drive to the south of Goulburn[20]. As of 2014, Canberra CBD and surrounding shopping centres provided approximate 314,350sqm of lettable retail floorspace. Within this total floorspace were approximately 26 supermarkets, two David Jones, two Myers, two Targets, three Big Ws and two Kmarts.

As identified within the 2015 Escape Spending Study the variety of retail offering within Canberra attracts residents from the Goulburn Mulwaree LGA where they undertake comparison shopping, special purpose and leisure shopping.

8.2.3 Goulburn Major Regional Centre

Goulburn is a major regional centre for retail services. Goulburn's Commercial Core is centred on historic Auburn Street, and anchored by Goulburn Plaza in the city centre and The Marketplace on the south-western outskirts of the core area. The city has a fair representation of national supermarket and discount department store anchors including Coles, Woolworths, Aldi, Target and K Mart. Strip and specialty retail along Auburn Street complements the shopping centre with national furniture retailers such as Harvey Norman and SuperCheap Auto.

Significant retail development occurring since 2007 includes the redevelopment of the Goulburn Plaza, development of the Target Goulburn within the commercial core and establishment of Bunnings within the South Goulburn Enterprise Corridor Precinct. The retail sector represents a major component of the Goulburn Commercial Core.

Retail floorspace within the Goulburn Commercial Core was calculated to be approximately 40,000sqm as identified within the Goulburn Master Plan published in 2008. The Goulburn Plaza and the Goulburn Marketplace comprises 18,900sqm of this floorspace area

[20] Google travel times

within the GCC. The large national supermarkets chains, large discount department stores and an additional 46 specialist retailers across the centres are located in these areas.

As part of this Strategy, Council completed an audit of all retail development applications increasing floor space areas as approved by Council since December 2007. Approved retail development applications indicate 9,106sqm of retail floorspace was added to the Goulburn Commercial Core since 2007. As such, Goulburn Commercial Core has an approximate retail floorspace supply of 49,106sqm.

8.2.4 Crookwell Regional Town

Crookwell regional town is located approximately 44 kilometres or a 33 minute drive to the west of Goulburn.[21] Retail provision is primarily located along Goulburn Street and provides local residents with convenience shopping needs. An IGA supermarket of approximately 1,200sqm is located within Crookwell.

8.2.5 Marulan Regional Village

Marulan regional village is located approximately 31 kilometres or a 20 minute drive to the east of Goulburn.[22] The main retail provision is located along George Street where approximately 1,400sqm of retail floorspace is provided over approximately eight neighbourhood shops and one hotel. There is no supermarket in Marulan however there is a general store, bakery and butcher which provide daily convenience shopping for residents and visitors.

8.2.6 Gunning Regional Village

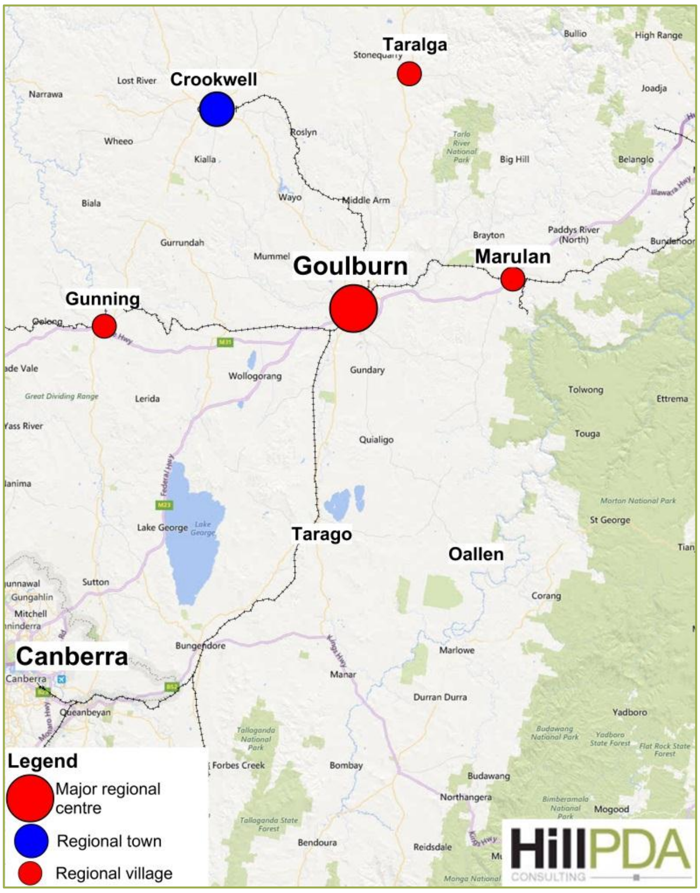
Gunning regional village is located approximately 49 kilometres or a 40 minute drive to the west of Goulburn.[23] The main retail provision is located along Yass St. Retail provision is limited within the village with provision focusing on daily needs such as a butcher, café and newsagency. There is no supermarket provision within the village with residents traveling to Goulburn for their weekly grocery needs.

[21] Google travel times
[22] Google travel times
[23] Google travel times

8.2.7 Taralga Regional Village

Taralga regional village is located approximately 44 kilometres or a 34 minute drive to the north of Goulburn.[24] The main retail provision is located along Orchard Street. Retail provision is limited within the village with provision focusing on daily needs and passing traffic such cafés, pubs and newsagency. There is no supermarket provision within the village with residents traveling to Goulburn for their weekly grocery needs.

Figure 33: Surrounding Retail Hierarchy



Source: HillPDA

8.2.8 Trade Area

Based on the retail hierarchy, competitive offer described above and results from the Escape Spending Study Report (2015), Goulburn's Primary Trade Area (PTA) relates to the immediate surrounding residential population of Goulburn Mulwaree LGA.

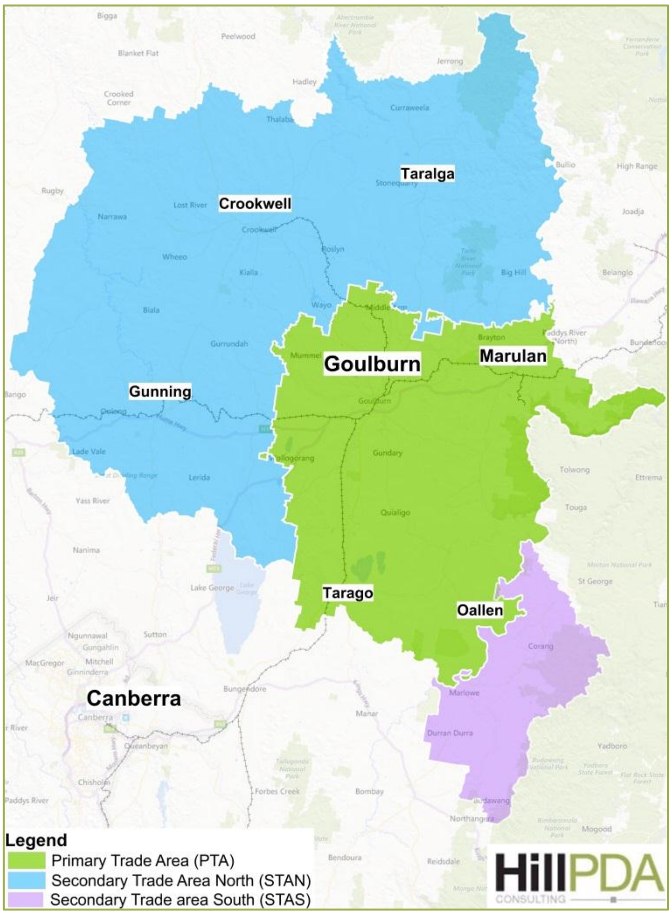
[24] Google travel times

Retail provision within:

- Canberra restricts the extent of Goulburn trade area to the south;
- The towns of Bowral and Moss Vale and natural barriers restrict it to the east; and
- The towns Young, Yass, Cowra and Bathurst restricts the trade area to the north and west.

A Secondary Trade Area North (STAN) extends northward encompassing the suburbs of Bannaby, Bannister, Binda, Breadalbane, Broadway, Collector, Crookwell, Grabben Gullen, Lade Vale, Laggan, Myrtleville and Wombeyan Caves. The Second Trade Area South (STAS) encompasses the suburb of Nerriga. The combination of the PTA and the two STAs forms the Main Trade Area (MTA).

Figure 34: Goulburn Trade Area



Source: HillPDA

8.2.9 Population Forecasts

- Population forecasts for the MTA have been derived from the Department of Planning and Environment's 2014 Population forecasts and Pitney Bowes Anysite software;
- The table below shows that the MTA is forecast to experience a growth in population of approximately 3,526 persons or 14% between 2016 and 2031.

Table 41: Population Projections within the Trade Area (2016- 2031)

	2016	2021	2026	Growth	Annual growth
PTA	29,800	31,200	32,450	2,650	0.4%
STAN	7,778	8,008	8,584	806	0.5%
STAS	426	445	496	71	0.8%
MTA	**38,004**	**39,653**	**41,530**	**3,526**	**0.4%**

Source: Department of Planning and Anysite

8.3 Forecast Household Retail Expenditure

Expenditure modelling is based on a combination of population, visitors[25] and employment projections together with anticipated change in real expenditure growth. On this basis a bespoke model was designed to determine the level of demand for additional retail floorspace in the MTA up to 2031 period using 2016, 2021 and 2026 as interim milestone years.

- Total expenditure generated by residents in the PTA and STAs is likely to grow from $532 million in 2016 to $703 million by 2031.

This equates to an increase of $171 million in retail expenditure or 32% over the period. Total turnover of supermarkets / grocery stores is expected to increase by $56 million alone over the period comprising 32% of total forecast expenditure as of 2031.

Table 42: Total MTA Expenditure Forecast by Retail Store Type ($m2014)

	2016			2031		
YEAR	PTA	STAN	STAS	PTA	STAN	STAS
Supermarkets & Grocery Stores	136.8	35.4	1.4	178.8	48.7	2.1
Take-away Liquor Stores	17.5	4.4	0.2	22.9	6.0	0.3
Specialty Food Stores	15.9	4.1	0.2	20.8	5.7	0.2
Fast-Food Stores	20.2	5.1	0.2	26.3	7.1	0.3
Restaurants, Hotels and Clubs*	35.1	8.9	0.4	45.8	12.2	0.5
Department Stores	28.1	7.3	0.3	36.7	10.0	0.4
Apparel Stores	28.5	7.4	0.3	37.2	10.2	0.4

[25] An additional 5% retail expenditure was factored in to the PTA expenditure.

	2016			2031		
Bulky Goods Stores	61.8	16.1	0.6	80.8	22.1	1.0
Other Personal & Household Goods Retailing	62.0	16.1	0.6	81.1	22.1	1.0
Selected Personal Services**	13.6	3.5	0.1	17.8	4.9	0.2
Total Retailing	**419.5**	**108.3**	**4.3**	**548.3**	**148.8**	**6.4**

Source: Department of Planning and Anysite

* Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling)

** Bulky Goods includes fabrics, soft goods, furniture, floor coverings, hardware, houseware, electrical appliances, sports and camping stores.

*** Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photo processing and hire of videos.

8.3.1 Future Retail Floorspace Supply and Demand

Demand for retail floorspace is calculated by applying target turnover rates (or industry benchmarks) to the total retail spend generated by residents, workers and visitors to the MTA. The latter would not capture the entirety of potential retail expenditure from residents within the MTA as residents travel to Canberra and surrounding centres such as Bowral, Cowra and Bathurst restricting the trade area to the north and west.

As such, HillPDA has applied varying retail capture rates for the Goulburn CBD for the PTA and STAs as shown in the following table. Please note that HillPDA has also included retail expenditure by visitors.

Table 43: Goulburn CBD Retail Floorspace Demand by Store Type (2016-2031 sqm GLA)

	Target Rate*	PTA	STAN	STAS	2016	2021	2026	2031
Supermarkets & Grocery Stores	9,500	75%	35%	50%	12,058	12,918	13,824	14,717
Take-away Liquor Stores	10,500	70%	30%	50%	1,288	1,380	1,476	1,571
Specialty Food Stores	6,500	70%	30%	50%	1,899	2,034	2,176	2,317
Fast-Food Stores	6,500	70%	30%	50%	2,400	2,571	2,751	2,928
Restaurants, Hotels and Clubs*	4,000	80%	30%	50%	7,643	8,191	8,760	9,319
Department Stores	2,880	50%	25%	35%	4,394	4,707	5,038	5,366
Apparel Stores	4,800	25%	5%	5%	1,548	1,660	1,773	1,883
Bulky Goods Stores	2,960	15%	5%	5%	3,381	3,624	3,874	4,120
Other Personal & Household Goods Retailing	3,920	65%	25%	30%	11,244	12,049	12,886	13,709
Selected Personal Services**	2,800	65%	25%	30%	3,449	3,696	3,952	4,205
Total Retailing	4,712	59%	24%	36%	49,303	52,832	56,511	60,133
Vacancies (5%)					2,465	2,642	2,826	3,007
Total Floorspace Demand					**51,768**	**55,474**	**59,337**	**63,140**

Source: Various including ABS Retail Survey 1998-99 indexed to 2011 dollars, Shopping Centre News, Urbis Retail Averages, various consultancy studies and Hill PDA research. Target turnover levels are expected to increase at a rate of 0.6% per annum above the CPI rate in line with the historic trend.

* Turnover relating only to consumption of food and liquor (excludes all other types of revenue such as accommodation, gaming and gambling)

** Selected Personal Services includes hair and beauty, laundry, clothing hire and alterations, shoe repair, optical dispensing, photo processing and hire of videos

Based on the floorspace forecasts shown in the table above, it is anticipated that in 2016 residents and visitors within the MTA would generate sufficient demand for 51,770sqm of retail floorspace. Over the period to 2031 this is expected to increase to a demand of approximately 64,545sqm, representing an increase of 11,371sqm or 22%.

8.4 Retail Floorspace Supply versus Demand

As identified in the Table 44 below, Goulburn Commercial Core provided approximately 49,106sqm of retail floorspace in 2016.

With this amount factored into the supply side, Goulburn currently has a marginal undersupply of approximately 2,660sqm as of 2016. This undersupply is expected to increase to 14,000sqm by 2031, as total demand for retail floorspace within the Goulburn Commercial Core reaches approximately 63,140sqm.

Table 44: Retail Floorspace Supply versus Demand 2016-2031 (GLA)

	2016	2021	2026	2031
Retail Demand*	51,769	55,474	59,337	63,140
Retail Supply	49,106	49,106	49,106	49,106
Over/Undersupply**	2,662	6,368	10,231	14,034

Source: HillPDA

*5% vacancy has been factored

**Red Text indicates oversupply, Blue Text indicates undersupply

8.5 Goulburn Commercial Core Retail Capacity Assessment

The supply and demand analysis, based on the status quo of anchor tenants and retailers, identified that there is currently a marginal undersupply of retail floorspace in the order of 2,660sqm within Goulburn Commercial Core as of 2016. However, although this supply and demand analysis focused on land zoned B3 Commercial Core it is anticipated that some retail floorspace would be directed towards the surrounding B4 Mixed Use zone, evident in the location of retailers such as BWS and First Choice Liquor. Accordingly it is assumed that the Goulburn Commercial Core is trading in equilibrium overall (2016).

In line with population and real expenditure growth, there is expected to be an undersupply of approximately 14,000sqm within the Commercial Core by 2031. This would be sufficient for the targeting of retail uses identified within the Escape Spending Study Report 2015 that are currently not or insufficiently represented within the centre such as the clothing / fashion sector.

Increased provision within the Goulburn Commercial Core Area would reduce local residents travelling to other centres, therefore redirecting expenditure to the centre of Goulburn and increasing its attractiveness and competitive edge.

9 FUTURE ENTERPRISE CORRIDOR AND INDUSTRIAL FLOORSPACE DEMAND

The employment land demand forecasting method used in this study is summarised below.

- Employment growth projections: Projections have been based on employment within the LGA as a proportion of population. Sources used include ABS Census data and NSW Population Projections; and
- Floorspace demand calculation: Industry standard employment ratios are applied to the projected employment forecasts for selected industries and subtracted from the current provision of floorspace within the identified precinct.

Assumptions used within this section are as follows:

- Relationship between employment and land use remains constant over the projected period;
- Projections are based on employment trends and State projections rather than observed industry behaviour;
- Employed residents within the Goulburn Mulwaree LGA (especially those within industrial categories) is a good indicator of employment provision within the LGA[26]; and
- Industry employment forecasts drawn from population forecasts provide a partial indicator of likely future industrial land requirements.

9.1 Employment Projections

Over the census years of 2001, 2006 and 2011 employment as a proportion of total population in Goulburn Mulwaree has ranged between 40 and 44%. As such HillPDA has used the mid-range proportion of 42% to forecast total employment within the LGA to 2031.

Using this method it is forecast that total employment within the LGA is likely to increase to 13,925 jobs by 2031, representing an increase of 1,683 jobs or 14% from 2011.

[26] The Escape Spending Study Report undertaken by the University of Western Sydney in 2015 found that 90% of persons interviewed for the Report lived and worked in the LGA while the remaining 105 travelled to Canberra. It would be presumed that these would not be working in typical industrial industries rather commercial or administrative industries.

Also evident in Table 45, is that persons employed within industrial categories historically has ranged between 24 to 28% as a proportion of total employment.

Further, over the three census periods, persons employed within industrial employment as a proportion of total employment has decreased by 2% each recorded census year.

Table 45: Employment Projections

Industry	2001	2006	2011	2016	2021	2024	2031
Agriculture, forestry and fishing	653	441	381				
Mining	92	61	107				
Industrial[27]	2,982	2,863	2,933				
Retail trade	1,287	1,471	1,564				
Accommodation & food services	913	1018	988				
Business Services	986	1084	1268				
Government services	3,206	3,541	4,130				
Other services	485	508	614				
Not specified	216	203	257				
Total employment	10,820*	11,190*	12,242*	12,369	12,950	13,469	13,925
Industrial employment as a proportion of total employment	27.6%	25.6%	24.0%				
Population	26,739*	26,960*	27,736*	29,800	31,200	32,450	33,550
Total employment as proportion of population	**40%**	**42%**	**44%**	**42%**	**42%**	**42%**	**42%**

Source: ABS Time Series Profile 2011, **NSW DPE Population projections 2014 and HillPDA

9.2 Industrial Employment Forecasts

In undertaking projections for industrial employment three different scenarios were undertaken:

1. Scenario 1 “Current Trend” – This scenario applies the current trend of decreasing rates of employment within industrial businesses. This trend is evident within industrial businesses as a proportion of total employment decreasing by approximately 2% between each census year from 2001. As such, this scenario applies the 2% however, the proportion stabilises at 20%;
2. Scenario 2 “Stable Scenario” – this scenario applies a constant industrial employment proportion of 22% for the forecast years; and

[27] Includes the industries of Manufacturing, Electricity, gas, water and waste services , Construction , Wholesale trade and Transport, postal and warehousing

3. Scenario 3 "State Projections" – State employment projections undertaken by the Department of Employment project the proportion of persons employed within industrial businesses within Rest of NSW[28] to be 25% as of 2015 decreasing to 24% by 2020. As such this scenario applies a proportion of 24% to the projected years.

Table 46: Department of Employment, Employment Projections

	2015	2020
Industrial industries employment	16,800	16,243
Total employment	1,234,300	1,322,139
Industrial employment as a proportion of total employment	25%	24%

Source: Department of Employment, Employment Projections 2016

The proportions used for each scenario are provided below.

Table 47: Scenario Industrial Employment Proportions

Scenario	2016	2021	2024	2031
State Projections	24%	24%	24%	24%
Stable Scenario	22%	22%	22%	22%
Current Trend	22%	20%	20%	20%

Source: HillPDA

9.2.1 Employment Projections

As of 2011, residents employed in industrial categories within the LGA were 2,933 persons. Using the above method it is projected that employment within these categories is likely to decrease / increase to approximately 2,785 to 3,340 persons by 2031.

Table 48: Industrial Employment Projections

Scenario	2016	2021	2024	2031
State Projections	2,969	3,108	3,232	3,342
Stable Scenario	2,721	2,849	2,963	3,064
Current Trend	2,721	2,590	2,694	2,785

Source: HillPDA

9.3 Additional Floorspace Requirements

A broad estimate of the industrial land needed to accommodate a forecast increase in industrial employment to 2031 is derived through applying industry employment densities per square metre to the

[28] Excludes Greater Sydney and Central Coast

increase in employment. A desktop review of floorspace provision within each of the enterprise corridors and industrial precincts within the LGA revealed approximately 390,500sqm GFA of employment floorspace. This provides an employment density of 133/sqm GFA. This density has been applied to the forecast in industrial employment growth.

9.3.1 Total Floorspace Demand (2031)

Applying this employment density to the projected total employment within industrial businesses reveals that a total of between 370,790sqm and 444,950sqm demand of floorspace would be needed within the LGA by 2031.

9.3.2 Additional Floorspace Needed (2031)

Subtracting this demand from current floorspace provision reveals that under the Current Trend there would be net reduction of -19,700sqm of floorspace required, while under the Stable Scenario and State Projection Scenario an additional 17,440sqm to 54,455sqm respectively would be required to maintain equilibrium with employment growth.

Table 49: Industrial Floorspace and Land Projections

	1	2	3=1-2	4=3*0.5
	Total future floorspace demand (sqm GFA)	Current floorspace (sqm GFA)	Additional floorspace demand (sqm GFA)	Additional land required for floorspace demand (sqm)
Current Trend	370,792	390,497	-19,705	-9,852
Stable Scenario	407,938	390,497	17,441	8,720
State Projections	444,951	390,497	54,454	27,227

Source: HillPDA

9.3.3 Additional Land Required to Meet Projected Growth

Typically the building area of industrial developments does not encompass the entirety of the developable land of the parcel they reside within. This is as a result of the specific site requirements of typical industrial occupiers which need truck turning areas, parking areas, loading and unloading areas and so on. As such HillPDA has applied a ratio of 0.5 to the projected additional industrial floorspace demand.

Under the **Current Trend** Scenario a net reduction of approximately 1ha of developed industrial land would be needed as a result of reduced floorspace demand.

Under the **Stable Scenario** approximately an additional 1ha of land would be developed to accommodate the projected growth in industrial employment.

Under the **State Projections Scenario** approximately 3ha of land would need to be developed.

Using the results of the land audit it is estimated that approximately 2,267ha of vacant industrial land exists within the precincts. This is more than sufficient to accommodate the projected growth in associated employment.

10 THE STRATEGY FOR RETAIL AND BUSINESS LAND

10.1 Guiding Influences

Regional centres tend to benefit from a consolidated central business district as it tends to enhance the performance of the centre. Higher order retailing can be concentrated in one place rather than spreading it out across numerous centres.

This study has identified demand for an additional 14,000m² of floorspace relating to Goulburn Commercial Core zone by 2030. In planning for the provision of this forecast demand, a number of important factors should be considered and are discussed below.

Firstly, it is likely that on account of existing vacancy levels, a portion of the forecast increase in demand for commercial and retail floorspace should be located within the existing footprint of Goulburn Mulwaree's centres (acknowledging the proposed new centre at Marys Mount). Centres such as Marulan have good capacity to accommodate additional floorspace whilst Goulburn CBD (Commercial Core and Mixed use Zones) could facilitate additional floorspace (particularly commercial office uses) on its upper floors. As demand grows however, there will be increasing demand for additional land and space, leading to pressures to rezone and expand the boundaries of the centres. This pressure will be particularly acute for major tenants who require large sites to accommodate a bigger building footprint and car parking.

Secondly, it will be important to facilitate this demand and plan ahead to attract the additional businesses to the Goulburn Mulwaree LGA's centres as opposed to alternative surrounding LGAs. Furthermore, in order to protect Goulburn's CBD role as the main centre within the LGA, it will be important to ensure that it provides attractive and financially viable opportunities for investment and redevelopment.

10.2 Recommendations Goulburn Central Business District

The central business district (more commonly known as a town centre) is the term historically used to refer to the commercial or geographical centre or core area of a town or neighbourhood. A town centre acts as a community focal point or hub, with a clustering and concentration of destinations and mixed land uses that attract people to a variety of activities. The Goulburn CBD fulfils the role as a major regional centre and tourist base and it will be important to maintain this role into the future.

In relation to future supply and in line with population and real expenditure growth, there is expected to be an undersupply of approximately 14,000sqm within the centre by 2031. Notwithstanding this undersupply it is recommended that no additional land be rezoned, at this time, to accommodate this demand. This is because there are opportunity sites/buildings within the Commercial Core and Mixed Use area which are presently empty or underutilised.

This is not to say that the current planning controls should not be reviewed within the B3 Commercial Core and B4 Mixed Use zones but that these zones should not be expanded.

In order to build on the existing CBD Master Plan 2008 it is recommended that Council develop an Action Plan with three main objectives for the future of the Goulburn town centre:

1. Support for new investment and development;
2. Support for local businesses to grow and be sustainable; and
3. Support for an enhanced shopping environment for customers.

Additionally, place makers, such as Place Partners have identified that town centres such as Goulburn have the inherent challenges all centres face in that the management of an area is shared between many stakeholders. These include Council, landowners, chambers of commerce, real-estate managers, and tenants. The development of a successful place involves the cooperation and management of the area by all, no one group has the capacity or the responsibility to achieve desired results.[29] An Action Plan could be the first step in a collaborative approach for the future sustainability of the Goulburn CBD.

There are many examples of successful town centre programs that have been prepared in metropolitan and regional centres that can be used as reference points for the development of an Action Plan for the Goulburn CBD. One of the outcomes of a collaborative approach is that the some actions need not take a lot of funding and can be implemented quickly. Quick wins, such as planting, shopfront painting and heritage advisory workshops are highly visible and show to the community that action is being taken to support the sustainability of the Goulburn town centre. The Action Plan should be realistic, affordable and achievable.

[29] Refresh Drummoyne, Action Plan, April 2011, Place Partners

The Goulburn CBD has many positive attributes that it can build upon such as its history, heritage buildings, open space and parking within the town centre

The many stunning heritage buildings contribute to the interest and the amenity of the streetscape. Unfortunately over the years unsympathetic development has occurred in the CBD which detracts from the heritage items. It is timely that Council relook at the urban design controls for the CBD to protect heritage buildings and streetscapes while also providing opportunities for increased investment and development. The two are not mutually exclusive.

Property owners often perceive a heritage listing as an impediment to development however this is not necessarily the case. Heritage buildings can be developed without compromising the integrity of the item itself or a conservation area.

Attractive historical centres that are pleasant, safe and easy to walk through encourage investment and redevelopment. Goulburn has recently seen two developments which are adaptively reusing heritage items for commercial purposes – Marian College and St Patricks Hall. These two developments will bring new residents and visitors to the CBD and provide good examples of what can be done with adaptive reuse of buildings.

In recent times there has been an increase in residential development in the CBD which is good for enhancing vitality and the night time economy. Shop-top housing is permitted in the B3 Commercial Core zone and residential flat buildings are permissible in the B4 Mixed Use zone. Council should encourage and promote the fact that shop-top housing is permissible in the town centre.

It is envisaged that an Action Plan could include (but not limited to) the following:

- Strategic planning – review of existing planning controls;
- Public domain improvements – street furniture, public art, landscaping;
- Property and business activities – improvement of shop fronts – removal of old signage, cleaning, painting, heritage conservation; and
- Opportunities for events within the CBD – markets, festivals.

10.2.1 Recommendations

It is recommended that:

- A steering committee is set up comprising appropriate stakeholders (e.g. Chamber of Commerce) to develop an Action Plan for the Goulburn CBD. This is to ensure that the centre continues to provide a strong a focus for the community and visitors, is a better place to live and work, and creates improved opportunities for investment in new businesses and tourism.

The following should be part of the work undertaken for an Action Plan:

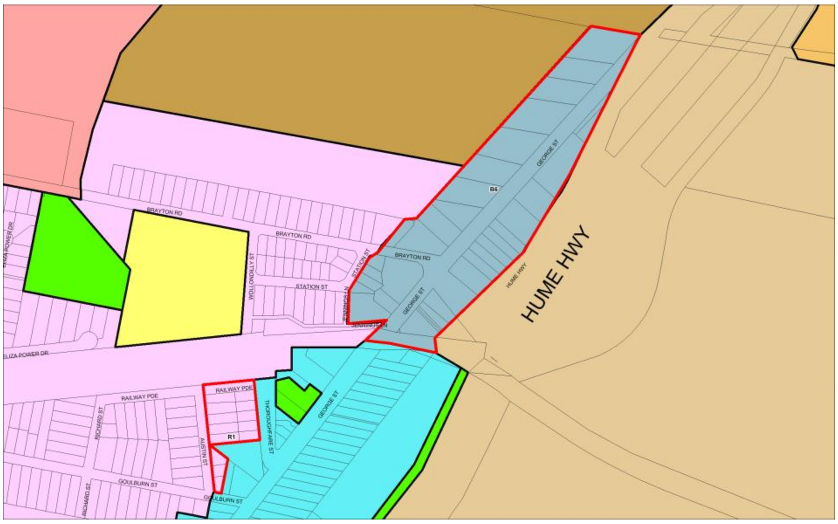
Initiate quick win projects e.g. removal of old signage, dollar for dollar shopfront painting and visual merchandising

- Undertake an Urban Design Study to review the existing planning controls (Local Environmental Plan and Development Control Plan) in the Goulburn CBD to conserve the heritage buildings whilst creating opportunities for increased investment and development for both the existing and new buildings;
- Review the Goulburn CBD Master Plan which was adopted in 2008. The Master Plan identified a range of actions aimed at improving the vitality and function of the CBD including land use, street and laneway activation, public domain improvements, traffic movements and parking and pedestrian access. This review should identify the work that has been implemented and the actions that should be incorporated into a new Action Plan;
- Continue to promote the value of heritage to the community and investigate new programs such as ‘development’ workshops for owners of heritage items. Council’s Heritage Advisor and Council planning and building staff could give information and development and compliance advice on conserving heritage buildings while allowing appropriate redevelopment;
- Initiate quick win projects eg removal of old signage, dollar for dollar shopfront painting and visual merchandising.
- Investigate an improved retail mix within the centre e.g. whether there is opportunity to encourage a higher retail offer into Goulburn such as high end clothing. This would reduce escape expenditure to Canberra and Sydney.

10.3 Recommendations for Marulan Town Centre

The present B2 Local Centre zoning runs from just south of Goulburn Street to the north of George Street, a length of about 1.5 kilometres. This is too long for a local centre, particularly for the size and function of Marulan. There is more than enough capacity for growth in the main part of Marulan (Goulburn Street to the Railway Bridge). Consequently there has been little or no new development in the northern part of Marulan in recent times and this is partly due to the zoning which requires retail and commercial use development. It is therefore recommended that this area north of the railway bridge be rezoned to B6 Enterprise Corridor zone as shown in Figure 35 below:

Figure 35: New Enterprise Zoning for Marulan



Source: Goulburn Mulwaree Council

The proposed Enterprise zone will allow a range of land uses ranging from light industrial, business and office uses while limiting retail.

Additionally, the properties around Thoroughfare and Austin Streets should be rezoned to R1 General Residential to reflect existing land use. It is unlikely that commercial/retail would be appropriate here given its location away from the main street. Refer to Figure 35 above.

Furthermore, it is recommended that the land uses for the B2 Local Centre within the Goulburn Mulwaree Local Environmental Plan be reviewed for appropriate residential development Similarly it is timely to review the controls within the Goulburn Mulwaree Development Control Plan for the Centre to ensure that they are appropriate to facilitate feasible development.

Marulan has some interesting heritage buildings but the township is looking tired and in need of a facelift to encourage more residents and visitors as shown in Figure 36 below.

Figure 36: Marulan Town Centre

Source: HillPDA

The town centre also suffers from heavy truck movements as access to the southbound lanes of the Hume Highway is only available from the northern side of town (this point will be dealt with in later recommendations when discussing industrial lands).

Similar to the recommendation for the Goulburn CBD, an Action Plan for Marulan should be developed in collaboration with stakeholders. The Action Plan should set a vision for Marulan, in terms of its future character and function.

10.3.1 Recommendations

- Rezone the area along George Street north of the Railway Bridge to the end of Marulan from B2 Local Centre to B6 Enterprise Corridor. The latter is considered a more appropriate zone given its location along the highway and the range of uses that are permissible;
- Rezone Thoroughfare and Austin Streets from B2 Local Centre to R1 General Residential to reflect the existing land use;
- Review the types of residential land use that should be permissible in the B2 Local Centre to ensure appropriate and viable development into the future. Currently there is a wide range of residential uses. Furthermore, controls such as the minimum amount of commercial floor area in the Development Control Plan for Marulan should be reviewed. These types of controls may have the effect of restricting development feasibility; and

- A steering group of stakeholders (e.g. residents, Chamber of Commerce, industries) is set up to create a vision and Action Plan for Marulan.

The following should be included in the Action Plan:

- Identifying the vision and future character and function of Marulan e.g. tourist town, centre for residents, centre to support new industries (or all three);
- Identifying opportunities for public domain upgrades e.g. increased landscaping, improved signage and building conservation and for Marulan generally in relation to attracting new businesses to the Enterprise Corridor and Industrial lands; and
- Identifying opportunities to work with local businesses such as the quarries for ongoing improvements to the town centre, including access for heavy vehicles.

11 THE STRATEGY FOR ENTERPRISE AND INDUSTRIAL LANDS

11.1 Guiding Influences

Firstly, when planning for industrial areas, it is important to facilitate an oversupply or surplus of zoned land in order to provide a range of opportunities and types of sites for businesses. Furthermore a surplus of zoned land acts as an important price moderator. Available and affordable employment lands are key attractors for new businesses and are critical to facilitating the expansion of existing businesses located within an area.

This challenge should be addressed by Council facilitating a range of zoned land (i.e. light and general industrial) and thereby options for development.

Secondly, good quality employment lands should be protected in order to maintain existing and prospective industrial lands.

Using the results of the land audit it is estimated that approximately 2,080ha of vacant land exists within the employment precincts (excluding retail and commercial). This is more than sufficient to accommodate the projected growth in associated employment into the future. This is of relevance in consideration of the fact that Goulburn is moving to a more serviced based economy where the Health Care and Social Assistance and Public Administration and Safety is expected to grow.

11.2 Recommendations for Enterprise Corridor Land

11.2.1 North East Goulburn Enterprise Corridor Precinct

This Precinct has a range of land uses that are not limited to enterprise or industrial uses and includes pockets of residential. The Enterprise Corridor zoning affects the value of the residential properties within the zone. This precinct currently has a large vacancy rate. Additionally, access in and around the Precinct is also an issue.

South of Sydney Road - Common Street South

The area that has been considered for rezoning is shown in Figure 37 below.

Figure 37: Area under Investigation

Source: HillPDA

Common Street South has seen little development over recent times and vacancy rates remain high. Notwithstanding, the owners of 5 Common Street (eastern side) are seeking approval for a concrete manufacturing industry and have lodged a Development Application (DA) with Council. The owners are also requesting an industrial zoning (site was zoned industrial when site was purchased) as approval of their DA is proving difficult under the B6 Enterprise Corridor zone, given the nature of the industry. An industrial zoning would be more appropriate for this type of employment use.

The Council Waste Management Facility is also located in this area (east of Common Street) and Council is mindful that surrounding land use must be compatible with the operations of the Waste Management Facility. There are regular truck movements and odour and noise can be common events. Therefore a residential zoning is not appropriate around this facility.

The eastern side of Common Street is presently zoned B6 Enterprise Corridor however it is considered reasonable to rezone this area back to IN1 General Industrial given the potential for new manufacturing industries and the location and operation of Council's Waste Management Facility. Refer to Figure 38 below.

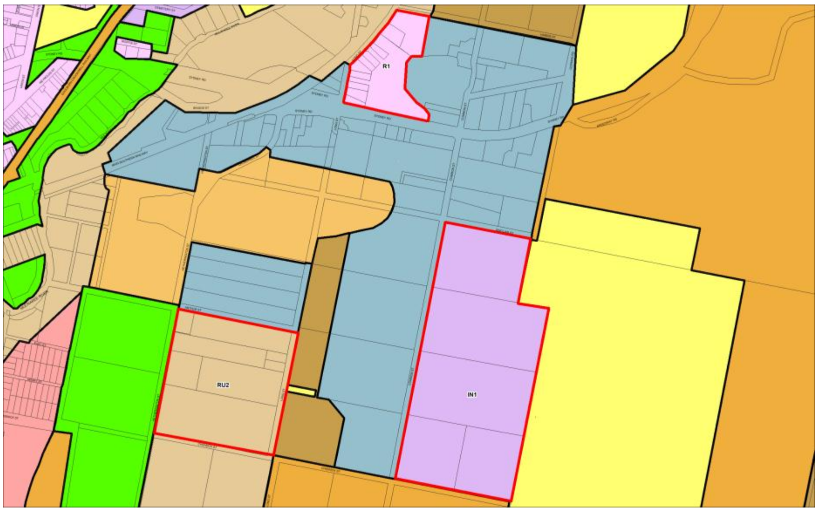
The area to the west of Common Street is recommended to remain B6 Enterprise Corridor as it will act as a buffer to the proposed industrial area to the east of Common Street.

There is area of B6 Enterprise Corridor land between Hetherington, Long Street, Chiswick Street and B6 Enterprise zone to the north as shown in Figure 38 below. Houses are located in this area and it is recommended that the area be rezoned to RU2 Rural Landscape which will allow the character of the area to remain as well as permitting dwelling homes. Refer to Figure 38 below.

North of Sydney Road

There is a residential aged facility located in the northern part of the B6 Enterprise Corridor zone, north of Sydney Road. An enterprise zoning is not reflective of the existing land use and it is recommended that the area outlined in red in Figure 38 below be rezoned to R1 General Residential.

Figure 38: Proposed Rezoning Outlined in Red



Source: Goulburn Mulwaree Council

Recommendations

- Rezone three areas in the north east Goulburn Enterprise Corridor Precinct as shown in Figure 38 above:
  - The area bounded by Sinclair, Chiswick and Common Streets and the Waste Management Facility to the east should be rezoned to IN1 General Industrial;
  - The area bounded by Hetherington, Chiswick and Long Streets and the B6 Enterprise Corridor zone to the north should be rezoned to RU2 Rural Landscape; and

    - The area bounded by Long Street, Sydney Road and the B6 Enterprise Corridor to the east should be rezoned to R1 General Residential.
- Consideration should be given to a road network and servicing to enable the development of vacant lots along the eastern side of the sub-precinct. Herbert Street is an unformed road off Common Street that links to Gorman Road which could be improved and allow parking at the rear and landscaping opportunities at the front.

11.2.2 South Goulburn Enterprise Corridor Precinct

This Precinct is performing well with employment uses on offer to residents and drivers diverting from the highway. These include accommodation, food and beverages businesses. The location of these services arguably shifts travellers from the Goulburn CBD and it is difficult to address this issue specifically. Access around this Precinct is problematic. A potential extension to Tait Crescent as shown in Figure 39 may improve traffic flow and open up additional employment lands.

There is a property within this Precinct at 150 Lansdowne Street which has been granted a 17 x residential lot subdivision. Given this approval it is unlikely that the property will used for an enterprise land use. It is appropriate therefore for the area approved for the residential subdivision to be rezoned to R5 Large Lot Residential which is consistent with the residential land use in close proximity.

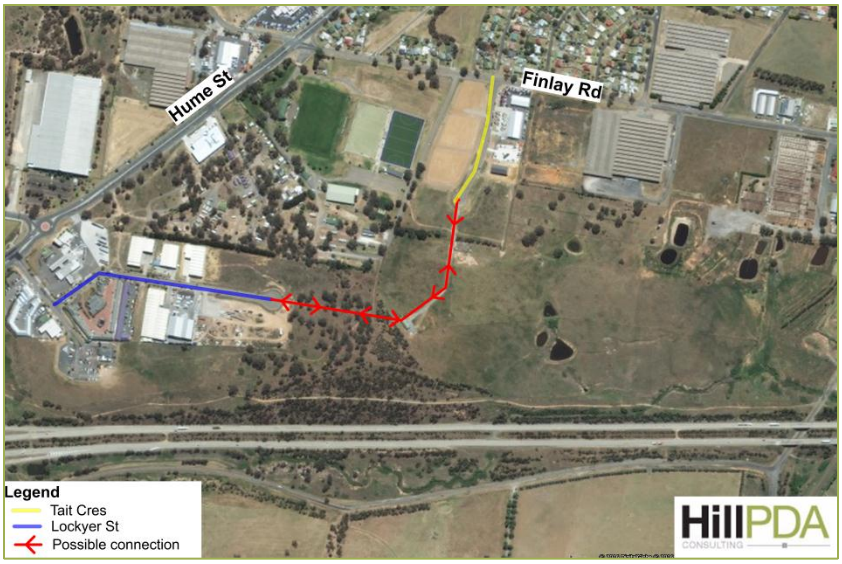
Recommendations

It is recommended that:

- Council undertake an Urban Design and Traffic Analysis Study to look at ways to slow traffic and improve pedestrian movements within the area as well as investigate potential solutions for:
    - Traffic flow issues at Sowerby/Hume intersection;
    - Improving access to the vacant lots fronting Hume Street; and
    - Improving localised intersection at Ducks Lane/Hume Street to improve heavy vehicle access.
- Undertake a development feasibility exercise to determine whether the development contribution rates around the Ducks Lane/ Hume Street intersection and the area south of Ducks Lane (up to Run-O-Waters Estate) are preventing development;

- Investigate the opportunity to extend and fund an extension of Tait Crescent to Lockyer Street in collaboration with land owners;

Figure 39: Potential Extension of Tait Crescent to Lockyer Street



Source: HillPDA

- Rezone Council's previously owned land at the end of Lockyer Street to B6 Enterprise Corridor as shown in Figure 40 below.

Figure 40: Previously Council Owned Land

Source: HillPDA

- Investigate the potential for future enterprise use of the caravan park if required in the longer term.

11.3 Recommendations for Industrial Land

11.3.1 Tarago Heavy Industrial Precinct

The Bioreactor is a cutting edge facility located in close proximity to a major urban centre, Canberra, and offers the opportunity to develop products and services based on treatment and management of putrescible waste. The facility provides waste management services to a number of councils in Sydney and there are potential spin off businesses that could be commercially tested.

This area could be furthered explored for new renewable energy industries.

Recommendations

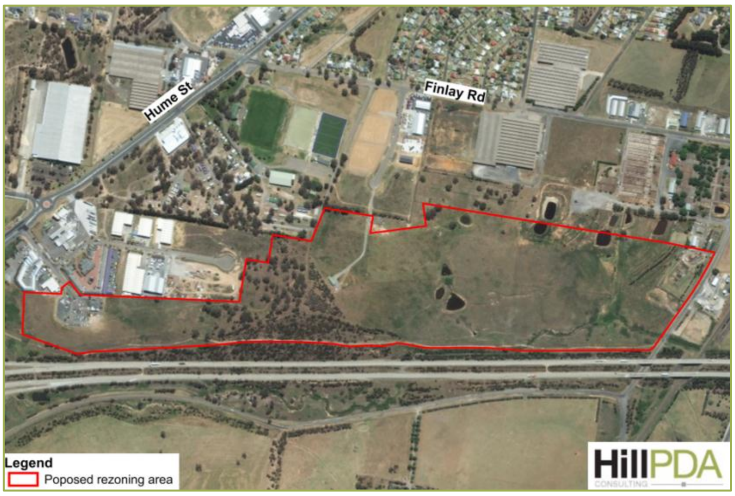
- Identify land in the north of the precinct that could be utilised for heavy industry and
- Council to facilitate and assist with initial scoping of the business opportunities and work with the NSW government to identify funding sources and appropriate expertise that could develop up an initial list of potential business opportunities. The latter could then be tested with potential operators in the local and regional market and further afield as appropriate. This may require initial exploration with the operator of the waste facility as they may already be developing other value adding opportunities.

  This could include businesses with the potential to further develop operations that build on the current Veolia businesses and products, which could be agriculture related or other yet to be identified opportunities. A key part of furthering these business opportunities would be for Council, in the first instance, to prepare a “prospectus” style of market information that describes the benefits of the location, information on availability of access to existing infrastructure, any new infrastructure cost/ provision, as well as the processes for approval. Council would also need to identify potential industries or businesses that would benefit from establishing in this precinct.

11.3.2 South Goulburn Industrial Precinct

This area should continue to be supported for industrial land uses. The saleyards and woolstores are currently underutilised. There is a rural zoned area to the south of this precinct as shown in Figure 41 which may be suitable for rezoning should additional land be required in this area in the future. The rural zoning is no longer appropriate in the long term given surrounding land uses.

Figure 41: Potential Rezoning Tait Crescent

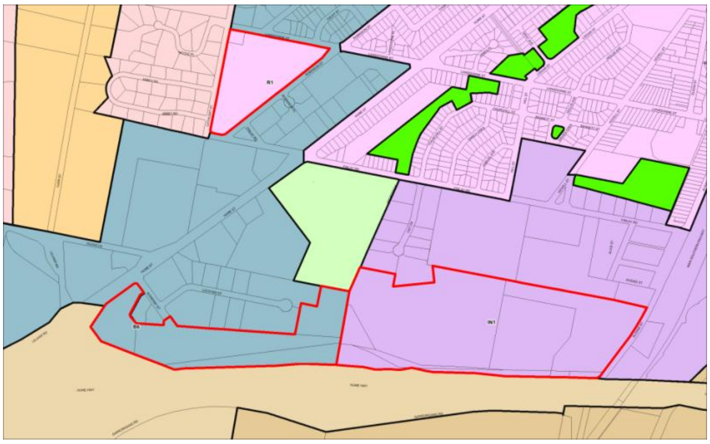


Source: HillPDA

Recommendations

- Undertake a review to rezone the land to the south of Tait Crescent from a rural zoning to B6 Enterprise Corridor and IN1 General industrial to facilitate subdivision and use of the lots for more general employment land. This review should include suitable access from Tait Crescent. The proposed rezoning is shown in Figure 42;

Figure 42: Potential Rezoning South Goulburn Industrial Area



Source: Goulburn Mulwaree Council

- Review with the owners of the saleyards and woolstores a more intensive employment use subject to remediation, planning and development of the area. This would increase the area of available land for industrial uses;

- Review, in conjunction with the land owners the size of the lots at the southern end of Rail Yard sub precinct. There is potential to develop land to accommodate uses and/or to utilise spare capacity within larger lots; and
- Investigate the opportunities to redevelop some existing dwellings or underutilised lots for industrial uses. This includes to the north of Bungonia Road and the residential lands located at the intersection of Braidwood and Bungonia Roads if additional industrial land is required in this Precinct.

11.3.3 North Goulburn Industrial Precinct

There are no recommendations for this Precinct as it is functioning well with urban support employment services.

11.3.4 Bradfordville Industrial Estate Precinct

The current IN1 General Industrial zoning permits medical centres and in November 2014, Council approved a medical centre and associated health care buildings at 37 Ross Street. The latter has an area of 12.45ha (excluding roads), separated into two portions by a 20m wide unformed road reserve. In November 2015 the applicant submitted a planning proposal to rezone the subject site to expand health activities to permit a hospital, rehabilitation clinic, and oncology unit and research facility. To date there has been no decision on the Planning Proposal.

The site is shown in Figure 43 below.

Figure 43: Location of Proposed Health Hub

This Strategy has concluded that the development of a Goulburn Health Hub has planning merit in both social and economic terms through co-location of a range of health services for the community, job creation and flow-on effects to service industries. Concern has been raised in relation to the loss of industrial land (20% of the Precinct) and the precedent that a rezoning of this kind may have on the remainder of the Bradfordville Industrial Precinct.

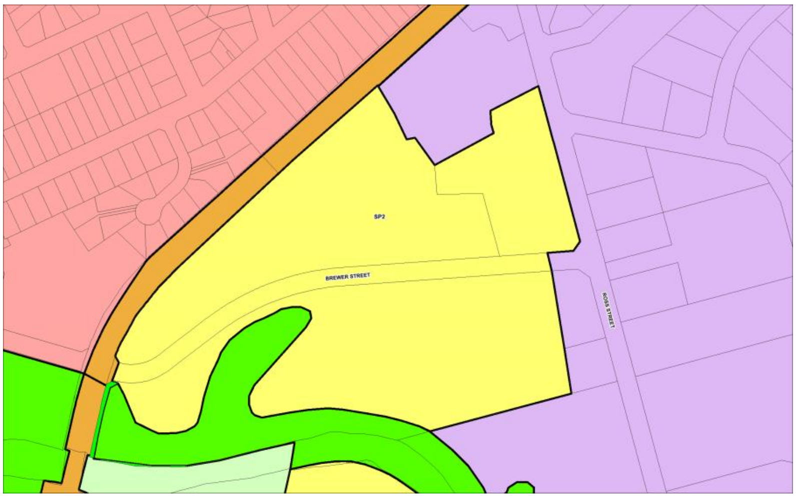
Notwithstanding the loss of industrial land, on balance this Strategy is recommending that a rezoning to SP2 Infrastructure is supported for the following reasons:

- A Medical Centre is permissible and already approved on the site;
- The loss of industrial land in Bradfordville will not have a significant effect on the future supply of employment land as there is enough available land elsewhere in the LGA and within the Precinct;
- The Goulburn Mulwaree LGA like many other areas is moving towards a more serviced based economy, and coupled with an ageing population there is demand for increased health facilities. The nearest private hospitals are located in Bowral and Canberra;
- The potential for land use conflict is considered minimal as the site is located on the west of the Precinct and is adjacent to residential land which lies to the north west of the site as well as public and private recreation zoned land to the north west. It is considered that interface issues with the general industrial area can be adequately addressed (large building setbacks, landscaping etc.);
- There is opportunity to open up access to the subject site from Brewer Street which would minimise traffic on Ross Street; and
- The economic and social benefits are considerable and will provide employment opportunities as well as increased facilities for the community.

Recommendation

- A rezoning for 37 Ross Street from IN1 General Industrial to SP2 Infrastructure is recommended as shown in Figure 44 below. This should be progressed in the short term.

Figure 44: Proposed SP2 Infrastructure for Health Hub

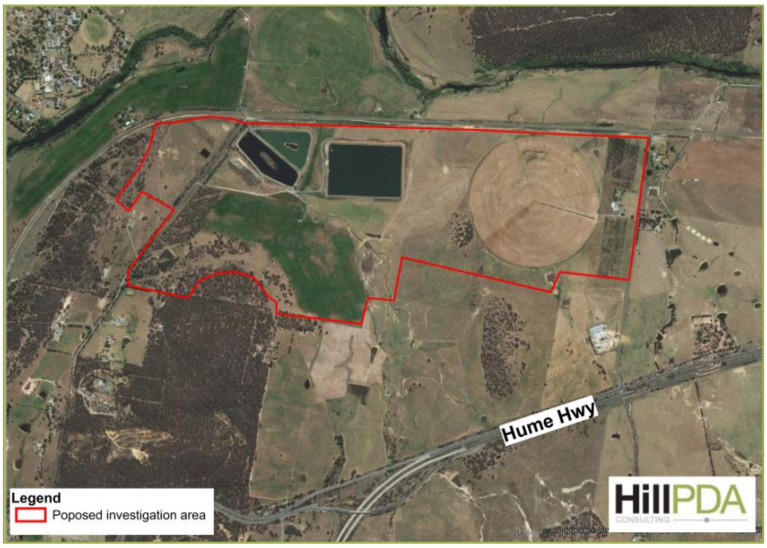


Source: Goulburn Mulwaree Council

11.3.5 Murrays Flat Industrial Precinct

This area offers potential opportunities in the future particularly when Council's SP2 Infrastructure land becomes surplus to need when the new sewerage treatment plant is opened. Council is presently investigating future use of this land and this should continue to be supported. The Council land is shown in Figure 45 below.

Figure 45: Council Land Investigation Area Murrays Flat



A significant issue for the redevelopment of this precinct is connectivity and access to Goulburn City and the Hume Highway. During the public exhibition period a land owner at Boxers Creek (opposite Murrays Flat) requested that their land be rezoned to an employment land use. Given the lack of uptake in the current industrial land at Murrays Flat and the restricted access to and from the Hume Highway this rezoning is not supported at this time.

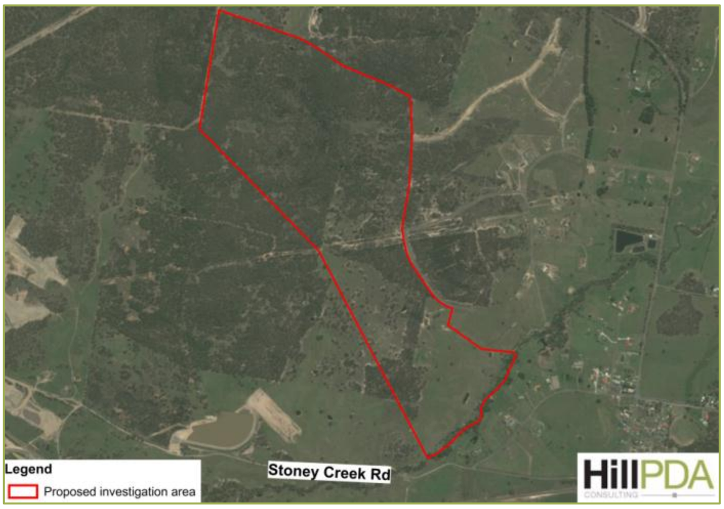
Recommendations

- Council should continue to support the investigation work for its large site in this Precinct which will determine the best future land use and could act as a catalyst for future employment uses in this area; and
- Examine opportunities for increasing connectivity to this Precinct by either rail or road. Demand will have to be established as well as funding mechanisms. This will require discussions with the appropriate State Agencies and land owners.

11.3.6 Marulan Industrial Precinct

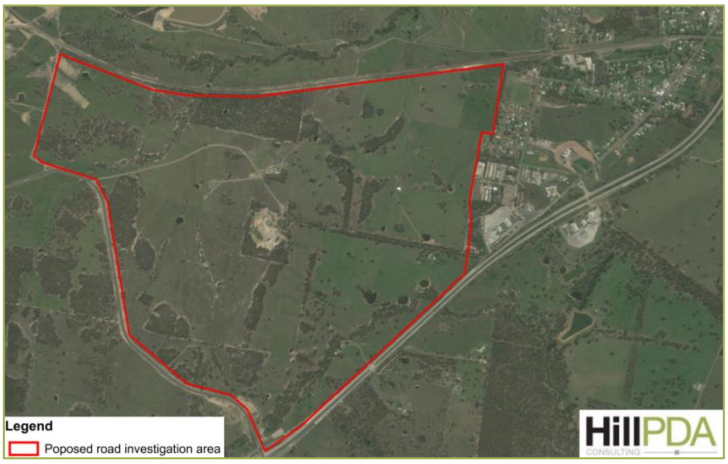
The existing extractive industries operating within Marulan have a significant role to play in contributing to the local economy well into the future. The industrial lands in Marulan will continue to support business uses such as vehicle and machinery repair workshops. It is considered that there is more than enough available industrial land for future use. The Suffolk Road Industrial Sub-Precinct is comprised of one large lot which constitutes a significant industrial land supply. Access is difficult and through established residential areas from Dorsett Road. Unless an alternative vehicle access can be established, the development of the area for industrial land uses is limited. However any new land use will require careful consideration due to its proximity to quarry activity. This area is identified in Figure 46 below.

Figure 46: Suffolk Road Investigation Area



Large vehicles access the southbound lanes of the Hume Highway by driving through Marulan which is undesirable for a pedestrian focused centre. There may be an opportunity to negotiate with the owners of land within the investigation area as shown in Figure 47 below, for a new access route to the Holcim interchange. This will take careful and comprehensive discussions with landowner and Roads and Maritime Services. Funding of any new route will also have to be found. These discussions should commence in the near future as existing quarries are seeking to expand their activities.

Figure 47: Investigation Area for a New Access Route to the Hume Highway



Source: HillPDA

Recommendations

- Review the existing and potential demand for an alternate access route to the Hume Highway for quarry and other truck movements travelling south. This will involve assessing truck and vehicle movements through Marulan as well as engaging with local residents and quarry and local industry owners;
- If demand is established Council should commence negotiations with quarry owners and affected landowners within the identified investigation area for potential onsite developments and the opportunity to progress alternate access to the Holcim interchange;
- Investigate the funding opportunities (public and private) for an alternate access route; and
- Monitor the Suffolk Road Industrial sub-precinct which is vacant and isolated, over time a for alternate land use.

11.4 Miscellaneous Recommendations

11.4.1 Planning Controls for Enterprise Corridor and Industrial Zones

At present the Enterprise Corridor Zones range in floor space ratio of between 0.8:1 and 1.0:1 with no height limit and the industrial zones have neither height nor floor space provisions.

The lack of planning controls can give property owners' and developers' flexibility in designing their developments but offers no guidance to Council planning staff for appropriate built form. This is of importance when sites are located close to sensitive uses and the interface between land uses becomes critical.

It is recommended that Council undertake a review of the planning controls for the Enterprise Corridor and Industrial zones to determine whether there is merit in devising additional controls.

11.4.2 Motor Sports

This sport is growing in popularity and Council should continue to give it support as it has the potential to provide increased economic benefit to the LGA.

It is recommended that Council review the current zoning and planning controls on the land where motor sports are, or wish to be located to allow appropriate expansion for the industry.

11.4.3 Tertiary Education

The opportunity to have access to local tertiary education is important to assist in upskilling the local population.

The models of delivery for higher education are changing whereby much of the teaching and resourcing is undertaken online through distance education. This said, there are 'university centre hubs' opening up, such as the Cooma Universities Centre which support regional students undertaking tertiary education. The Centre, established by Cooma Monaro Shire Council and the Snowy Hydro serves as the primary point of contact for the delivery of university education in the Cooma region provides access to numerous university courses high speed internet, video conferencing, plenty of space, 7am-midnight access and other facilities.

It is understood that the Illawarra TAFE has the ability to provide the physical space and resources. There is opportunity for Council to lend its support along with industry (e.g. Boral, Veolia, Goulburn Hospital) in liaising with TAFE in promoting a University Centre in Goulburn.

It is recommended that Council advocate support for the opening of a university centre in Goulburn.

12 SUMMARY OF RECOMMENDATIONS

The following table provides a summary of the recommendations made in this Strategy.

The key for time frames within the following table are as follows:

- Short term (2016 – 2020);
- Medium term (2021 – 2026); and
- Long term (2027 - 2037).

Table 50: Summary of Recommendations

Location	Time Frame	Existing Zoning	Recommendation
Goulburn CBD	Short Term	B3 Commercial Core B4 Mixed Use	▪ Develop an Action Plan for the Goulburn Central Business District: ○ Steering Committee to be set up (collaborative approach); ○ Review existing Goulburn CBD Master Plan; ○ Identify opportunities for sustainability of the town centre; ○ Review of existing planning controls (urban design); ○ Continued support of heritage conservation; ○ Quick win projects e.g. shopfront painting, removal of old signage; and ○ Investigate improved retail mix within the CBD.
Marulan Town Centre	Short Term	B2 Local Centre	▪ Rezone the area along George Street north of the Railway Bridge to the end of Marulan from B2 Local Centre to B6 Enterprise Corridor; ▪ Rezone Thoroughfare and Austin Streets from B2 Local Centre to R1 General Residential to reflect the existing land use; and ▪ Review the planning controls for the B2 Local Centre Zone to ensure future appropriate and viable development.
			▪ Develop an Action Plan for Marulan: ○ Steering Committee to be set up (collaborative approach); ○ Identify a vision and future character and function for Marulan; ○ Identify opportunities for sustainability of the town centre; ○ Continued support of heritage conservation; ○ Quick win projects e.g. shopfront painting, removal of old signage; and ○ Seek opportunities for improved access to the highway for heavy trucks
	Short Term	RE1 Public Recreation	▪ Rezone Council's previously owned land at the end of end of Lockyer Street to B6 Enterprise Corridor.

Location	Time Frame	Existing Zoning	Recommendation
South Goulburn Enterprise Corridor Precinct	Short Term – Medium Term	B6 Enterprise Corridor	▪ Undertake an Urban Design and Traffic Analysis Study to look at ways to slow traffic and improve pedestrian movements within the area as well as investigate potential solutions for: ○ Traffic flow issues at Sowerby/Hume intersection; ○ Improving access to the vacant lots fronting Hume Street; and ○ Improving localised intersection at Ducks Lane/Hume Street to improve heavy vehicle access.
	Short Term		▪ Undertake a development feasibility exercise to determine whether the development contribution rates around the Ducks Lane/ Hume Street intersection and the area south of Ducks Lane (up to Run-O-Waters Estate) are inhibiting development.
	Short Term		▪ Rezone 150 Lansdowne Street, Goulburn to R5 Large Lot Residential where the previous residential subdivision was approved.
	Medium Term		▪ Investigate the opportunity to extend and fund an extension of Tait Crescent to Lockyer Street.
	Long Term		▪ Investigate the potential for future enterprise use of the caravan park if required.
North East Goulburn Enterprise Precinct	Short Term	B6 Enterprise Corridor	▪ Rezone three areas in the north east Goulburn Enterprise Corridor Precinct: ○ The area bounded by Sinclair, Chiswick and Common Streets and the Waste Management Facility to the east should be rezoned to IN1 General Industrial; ○ The area bounded by Hetherington, Chiswick and Long Streets and the B6 Enterprise Corridor zone to the north should be rezoned to RU2 Rural Landscape; and ○ The area bounded by Long Street, Sydney Road and the B6 Enterprise Corridor to the east should be rezoned to R1 General Residential.
	Short – Medium Term		▪ Investigate the feasibility of improved access and connectivity within the Precinct to support existing and/or future industry.
Tarago Industrial Precinct	Short Term	IN3 Heavy Industrial	▪ Identify land in the north of the precinct that could provide a longer term supply of industrial land.
	Short – Medium Term		▪ Assist with increasing the range of business opportunities which could build on the existing industries (Bioreactor and Wind Farm).
South Goulburn Industrial Precinct	Medium Term	IN1 General Industrial	▪ Investigation to rezone the land to the south of Tait Crescent from a rural zoning to either an industrial or enterprise corridor zone to facilitate subdivision and use of the lots for more general employment land.

Location	Time Frame	Existing Zoning	Recommendation
	Short – Medium Term		▪ Investigate with the owners of the saleyards and woolstores a more intensive employment use.
	Medium Term		▪ Review the size of the lots at the southern end of Rail yard sub precinct as there is potential to develop land to accommodate uses and/or to utilise spare capacity within larger lots.
	Long Term		▪ Investigate the opportunities to redevelop some existing dwellings or underutilised lots for industrial uses including to the north of Bungonia Road and the residential lands located at the intersection of Braidwood and Bungonia Roads.
Bradfordville Industrial Estate Precinct	Short Term	IN1 General Industrial	▪ Rezone 37 Ross Street from IN1 General Industrial to SP2 Infrastructure (Health); and ▪ Investigate alternate access to 37 Ross Street from Brewer Street as part of the rezoning process.
Murrays Flat Industrial Precinct	Short Term	IN1 General Industrial	▪ Continued support of the investigation work for the Council site in this Precinct which will determine the best future land use and could act as a catalyst for future employment uses.
	Medium Term		▪ Investigate opportunities for increasing connectivity to this Precinct by either rail or road in conjunction with appropriate stakeholders.
Marulan Industrial Precinct	Short Term	IN1 General Industrial IN2 Light Industrial	▪ Review the existing and potential demand for an alternate access route to the Hume Highway for quarry and other truck movements travelling south. This will involve assessing truck and vehicle movements through Marulan as well as engaging with local residents and quarry and local industry owners; ▪ If demand is established Council should commence negotiations with quarry owners and affected landowners within the identified investigation area for the opportunity to progress alternate access to the Holcim interchange; and ▪ Investigate the funding opportunities (public and private) for an alternate access route.
	Long Term	IN2 Light Industrial	▪ The Suffolk Road Industrial area to be monitored over time for alternate land uses.
Miscellaneous Planning Controls Motor Sports University Hub	Short Term	B6 Enterprise Corridor IN1 General Industrial IN2 Light Industrial IN3 Heavy Industrial	▪ Review the existing planning controls for the Enterprise Corridor and Industrial zones.

Location	Time Frame	Existing Zoning	Recommendation
	Short Term	RU1 Primary Production RU6 Transition RU2 Rural Landscape	▪ Review the current zoning and planning controls to allow appropriate expansion for the motor sport industry.
	Short Term	SP2 Infrastructure (Educational Establishment)	▪ Advocate support for the opening of the 'University Hub' at Illawarra TAFE.

APPENDIX A: STAKEHOLDER ENGAGEMENT

Stakeholder engagement is an important element in the development of the Goulburn Mulwaree Employment Lands Strategy. Council is committed to effectively engaging with all stakeholders and interested members of the community, particularly local business and those who are actively marketing employment lands. As such, the views and comments provided by the stakeholders directly inform the Strategy.

The importance of stakeholder engagement has been recognised for promoting healthy and strong economic growth for the region and to improve the capacity of local residents and businesses to effectively participate in this growth. Through an ongoing commitment to engagement of business owners, representative groups and the community, Council will support business in making decisions regarding investment, expansion and employment within Goulburn Mulwaree.

12.1.2 Stakeholder Engagement Plan

The Strategy was supported by a Stakeholder Engagement Plan. It involved an integrated program of engagement activities structured around consultation meetings with a focus on awareness raising and issues identification.

Goulburn Mulwaree Council hosted four stakeholder consultation meetings in October 2015. The stakeholder groups consisted of Council officers, real estate agents, local business/community groups and surveyors/planners involved in the development industry. Ongoing engagement, including one-on-one meetings, has continued since the consultation meetings were conducted.

The consultation process provided stakeholders with an opportunity to build and test the findings from the review of current strategies, and identify issues associated with employment lands within the LGA including but not limited to:

- Any surpluses or deficits in the supply of employment lands within the LGA;
- Any impediments to development or establishment of businesses within the LGA; and
- Anything associated with trends in employment industries within the LGA.

The key themes or findings identified through the stakeholder engagement process were reinforced by each group of stakeholders and was also largely reflective of the literature review. The feedback received by participants has been summarised as either opportunities or challenges and are identified in Table 51 below.

Table 51: Key Stakeholder Themes / Findings

Theme	Detail
Opportunities	
Education	▪ Proximity to tertiary institutions in Sydney and Canberra ▪ Sustainability Hub ▪ Potential distance education opportunity
Population	Changing demographics ▪ Larger families ▪ Changing skill set ▪ Aging population ▪ Foreign investors
Location	Transport ▪ Access to Sydney/Canberra ▪ Home based businesses ▪ Local businesses ▪ Banking and shopping for local culture and local service
Industries	Rural Industries ▪ Poultry ▪ Intensive horticulture/agriculture ▪ Aquaculture and glass-house production Emerging Industries ▪ Sustainable building industry ▪ Public/private partnerships ▪ Clustering health services ▪ Disability services ▪ Freight logistics ▪ International Investment
Challenges	
Development	▪ Little incentive for large retailers to locate in Goulburn ▪ Contributions scheme for Sowerby Street and Common Street makes development on the land unattractive ▪ Heritage restrictions within buildings in CBD make utilising these buildings unviable ▪ Existing strategies not supportive of residential land uses within the CBD

Theme	Detail
Land Availability	▪ Lack of strategic direction for location of commercial land ▪ Vacant areas of viable commercial lands within CBD ▪ Underutilised land: ○ Bradfordville shopping centre ○ Supertex building ▪ No large commercial areas available ▪ Surplus light industrial land ▪ Demand for heavy industrial land but none readily available ▪ Challenges faced by Common Street area ▪ Contaminated Lands: ○ Sale yards ○ Rail yards ○ End of Maud Street
Infrastructure & Service Provision	▪ Internet rollout is slow ▪ Sewerage in Marulan ▪ Vehicle access issues: ○ Lockyer Street ○ Ducks Lane ○ Murrays Flat ▪ Bradfordville Industrial Estate: must travel through town to access ▪ Urban design on the main CBD street (Auburn Street) is required
Land Use Conflict	▪ Quarry industry and residences in Marulan ▪ Larger holdings on the fringe of the CBD inappropriate for commercial development (specifically larger retail stores).

Disclaimer

1. This report is for the confidential use only of the party to whom it is addressed ("Client") for the specific purposes to which it refers and has been based on, and takes into account, the Client's specific instructions. It is not intended to be relied on by any third party who, subject to paragraph 3, must make their own enquiries in relation to the issues with which this report deals.
2. Hill PDA makes no representations as to the appropriateness, accuracy or completeness of this report for the purpose of any party other than the Client ("Recipient"). Hill PDA disclaims all liability to any Recipient for any loss, error or other consequence which may arise as a result of the Recipient acting, relying upon or using the whole or part of this report's contents.
3. This report must not be disclosed to any Recipient or reproduced in whole or in part, for any purpose not directly connected to the project for which Hill PDA was engaged to prepare the report, without the prior written approval of Hill PDA. In the event that a Recipient wishes to rely upon this report, the Recipient must inform Hill PDA who may, in its sole discretion and on specified terms, provide its consent.
4. This report and its attached appendices are based on estimates, assumptions and information provided by the Client or sourced and referenced from external sources by Hill PDA. While we endeavour to check these estimates, assumptions and information, no warranty is given in relation to their reliability, feasibility, accuracy or reasonableness. Hill PDA presents these estimates and assumptions as a basis for the Client's interpretation and analysis. With respect to forecasts, Hill PDA does not present them as results that will actually be achieved. Hill PDA relies upon the interpretation of the Client to judge for itself the likelihood of whether these projections can be achieved or not.
5. Due care has been taken to prepare the attached financial models from available information at the time of writing, however no responsibility can be or is accepted for errors or inaccuracies that may have occurred either with the programming or the resultant financial projections and their assumptions.
6. This report does not constitute a valuation of any property or interest in property. In preparing this report Hill PDA has relied upon information concerning the subject property and/or proposed development provided by the Client and Hill PDA has not independently verified this information except where noted in this report.
7. In relation to any valuation which is undertaken for a Managed Investment Scheme (as defined by the Managed Investments Act 1998) or for any lender that is subject to the provisions of the Managed Investments Act, the following clause applies:
8. This valuation is prepared on the assumption that the lender or addressee as referred to in this valuation report (and no other) may rely on the valuation for mortgage finance purposes and the lender has complied with its own lending guidelines as well as prudent finance industry lending practices, and has considered all prudent aspects of credit risk for any potential borrower, including the borrower's ability to service and repay any mortgage loan. Further, the valuation is prepared on the assumption

that the lender is providing mortgage financing at a conservative and prudent loan to value ratio.

9. HillPDA makes no representations or warranties of any kind, about the accuracy, reliability, completeness, suitability or fitness in relation to maps generated by HillPDA or contained within this report.

ABN 52 003 963 755

SYDNEY

Level 3, 234 George Street

Sydney NSW 2000

GPO Box 2748 Sydney NSW 2001

t: +61 2 9252 8777

f: +61 2 9252 6077

e: sydney@hillpda.com

MELBOURNE

Suite 114, 838 Collins Street

Docklands VIC 3008

t: +61 3 9629 1842

f: +61 3 9629 6315

e: melbourne@hillpda.com

BRISBANE

Level 27 Santos Place, 32 Turbot Street

Brisbane QLD 4000

GPO Box 938 Brisbane QLD 4001

t: +61 7 3181 5644

e: brisbane@hillpda.com