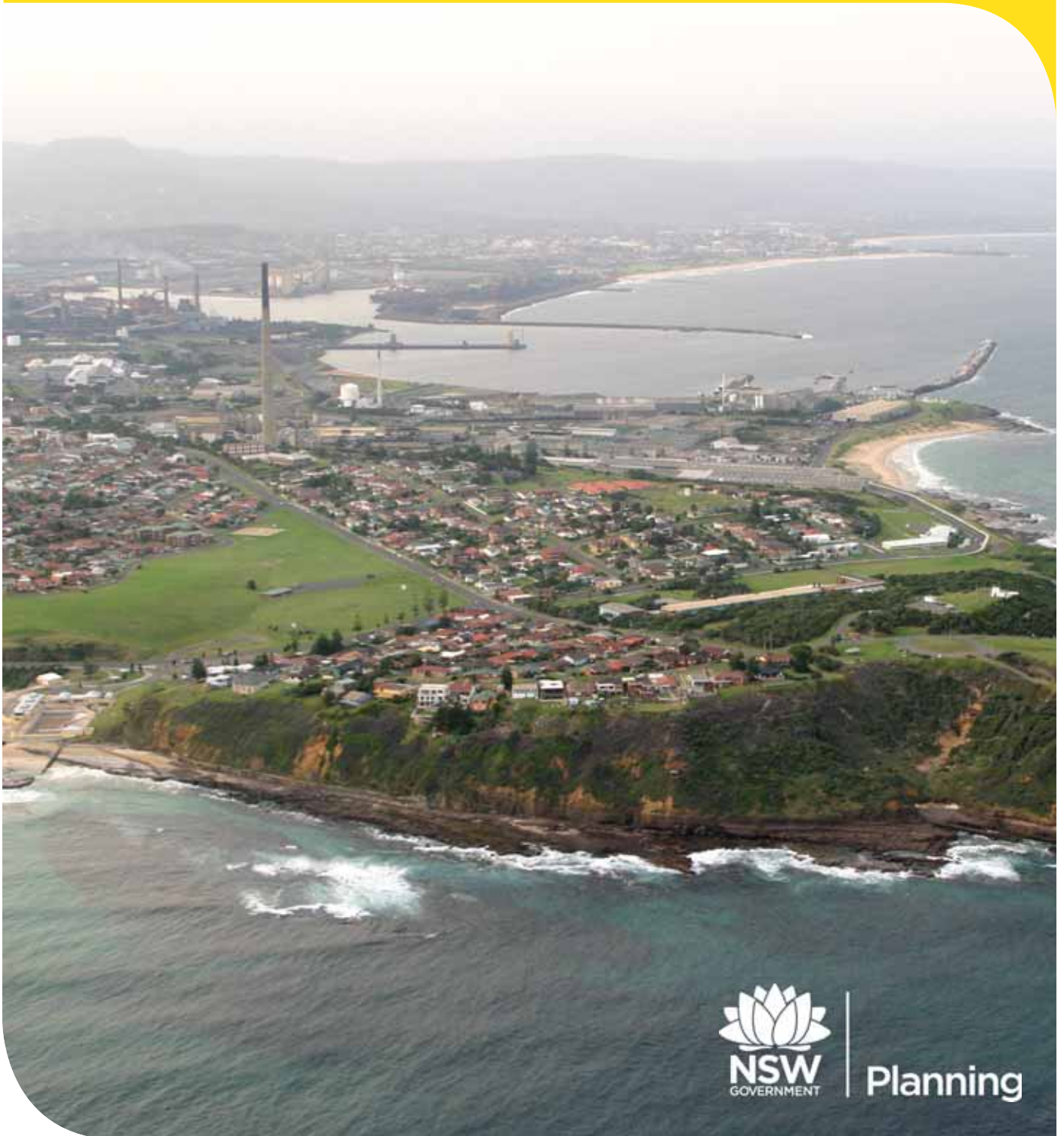


# Illawarra and South Coast Employment Lands Update 2009



Planning

# Executive Summary

**It is a key priority of the NSW Government to identify sufficient land for employment activities, delivering jobs and allowing businesses to thrive. The challenge is to identify appropriate employment opportunities, protect suitable employment lands and develop a hierarchy of centres that create economic efficiency in providing services and infrastructure for the Illawarra and South Coast.**

One of the actions arising from the Illawarra and South Coast Regional Strategies was a program to monitor the supply and location of employment lands within the regions. This program is an important tool for strategic planning at a local and regional level, as well as for tracking the progress of initiatives for the supply of employment land within the Illawarra and South Coast. It should be noted that for the purpose of this program, the Illawarra region incorporates the local government area of Wingecarribee.

The monitor is used by the Illawarra Employment Lands Taskforce to ensure that sufficient employment land is available in the short and long term to encourage investment in the region. In addition, the monitor compliments the *Employment Lands Guidelines* for the Illawarra, released by the Department of Planning in February 2008.

This employment lands monitor results from collaboration between the Department and Wingecarribee, Wollongong, Shellharbour, Kiama, Shoalhaven, Eurobodalla and Bega Valley Councils. The monitor, to be updated biennially, provides detailed information on employment land supply and availability for the Illawarra and South Coast regions.

Analysis of the employment lands data in the monitor demonstrates that an adequate supply of employment land exists across both regions to sustainably accommodate the needs projected by the regional strategies to 2031. It is important that this supply of employment land is maintained, protected and where possible expanded to provide a competitive advantage in the regions and to increase opportunities for provision of jobs closer to home, consistent with the NSW State Plan.

**Key conclusions drawn for each of the three regions include:**

**South Coast Region** - There is approximately 850 hectares of vacant zoned employment land remaining in the South Coast region which is a reduction of approximately 57 hectares from the 2004 data. This is a positive indication that vacant employment lands are being developed in the South Coast region. With the take-up of employment land, particularly within the Shoalhaven, councils are being encouraged to identify additional employment lands in their local environmental plans.

**Illawarra Region** - the employment lands database indicates there is approximately 55 hectares of vacant zoned employment land remaining within the Illawarra region. This is to be supplemented with an additional 43 hectares of recently rezoned land at the Illawarra Regional Business Park and with the proposed rezoning of an additional 175 hectares of employment land as part of draft West Dapto local environmental plan (bringing the total employment land for Stages 1 and 2 of West Dapto to 324 hectares). This will result in a total of 424 hectares of vacant zoned employment land for the Illawarra region, a reduction of approximately 111 hectares from the 2004 data.

**Wingecarribee Region** - There is approximately 24 hectares of vacant zoned employment land remaining within the Wingecarribee region. This is to be supplemented with an additional 640 hectares of rezoned land within the Wingecarribee Enterprise Corridor resulting in a total of 664 hectares of vacant zoned employment land in the Wingecarribee region. This is an increase of 529 hectares from the 2004 data.

# Introduction

**In February 2007, the Department of Planning released both the Illawarra and South Coast Regional Strategies. Both strategies plan for the provision of appropriately located land to sustainably accommodate the projected housing and employment needs for the two regions to 2031. One of the actions to arise from both the regional strategies is the development of an employment lands monitor.**

The monitor will provide an important tool for strategic planning at a local and regional level to ensure a sustainable supply of employment land is provided for the Illawarra and South Coast. The Illawarra and South Coast employment lands monitor is managed by the Department of Planning with information supplied biennially by councils and utility providers such as Sydney Water, Integral Energy and Country Energy.

While the monitor covers the Illawarra and South Coast regions, it also provides data on the Wingecarribee local government area (LGA) in recognition of the proximity and connections to the Illawarra. As a result, when discussing the employment lands monitor, reference to the Illawarra region incorporates the Wingecarribee LGA.

## Background

At the time of the release of the Illawarra and South Coast Regional Strategies, the population for the two regions was approximately 447,000 people. By 2031 this is projected to grow by 107,600 people, requiring an additional 55,800 jobs. In order to ensure sufficient employment lands exist to achieve these employment projections, both strategies identify the need for

the protection of key employment lands from inappropriate development and/or fragmentation and recognise the necessity for new opportunities for employment land in appropriate locations.

For the purpose of this monitor, employment land is broadly defined as land that could be used for employment generating activities – in other words, land zoned for industrial and commercial uses. In 2004, the Department of Planning commissioned an audit of employment lands in the Illawarra and South Coast regions. The initial 2004 audit covered the local government areas of Wollongong, Shellharbour, Kiama, Shoalhaven, Eurobodalla and Bega Valley. The audit was subsequently expanded in 2005 to include the local government area of Wingecarribee.

The source data for this monitor is the employment lands database held by the Department and is based on an update that was completed in 2007. The database provides an analysis of employment land stock on a regional and local level, and it is used to guide policy development regarding the need for additional employment lands as well as to respond to enquiries in relation to employment land availability.



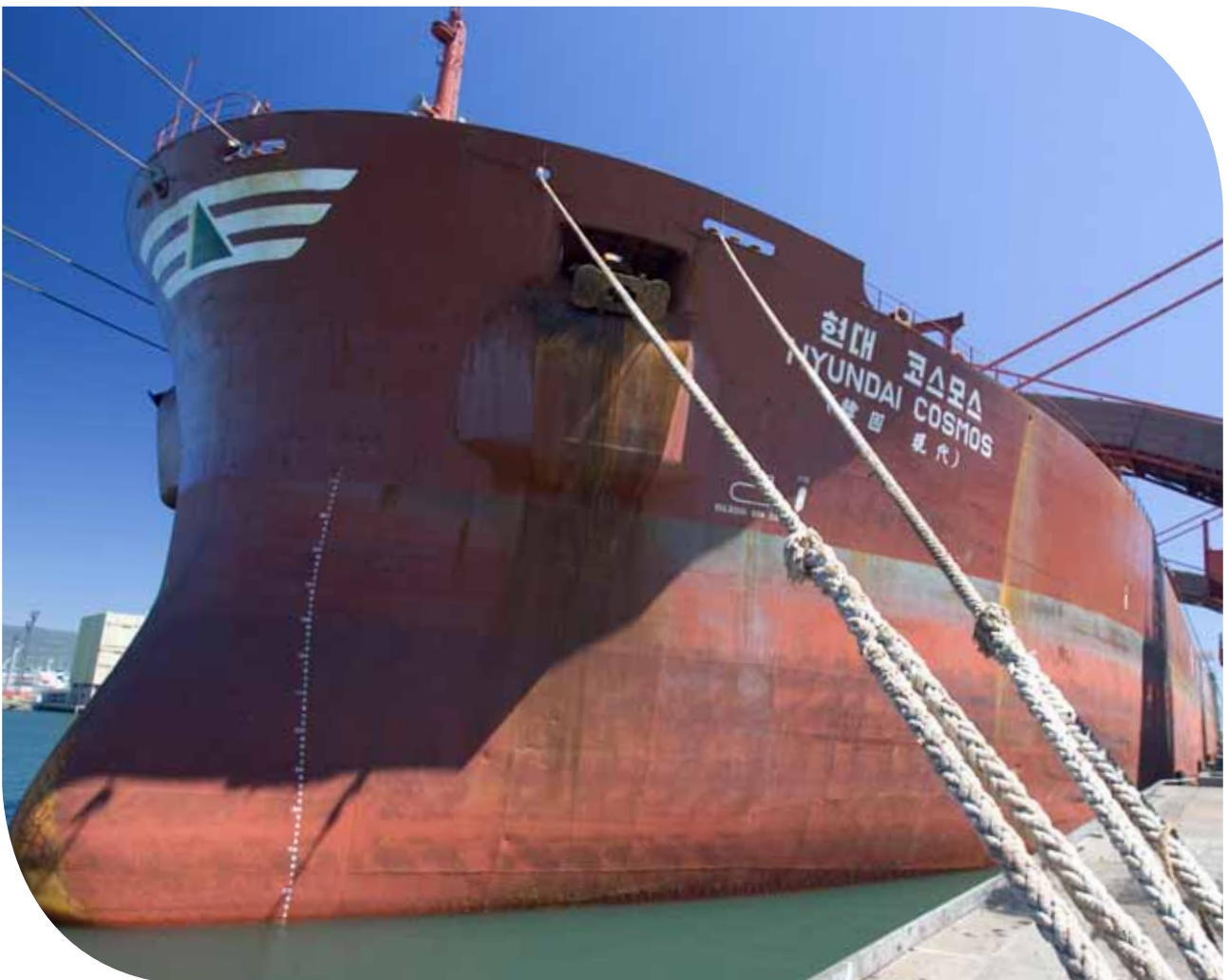
# Introduction

## Use of the employment lands database:

- The database uses base data and sites may be constrained by issues such as buffers, parcel size, land tenure, environmental constraints and serviceability. For more detailed information on particular sites, the relevant council should be contacted;
- The 2004 audit did not differentiate between sub categories of employment lands (eg heavy and light industrial), therefore no comparisons of this information was able to be undertaken with the 2007 audit. Future audits will enable this tracking;
- No vacant land data from 2007 was available for the Kiama local government area (LGA).

## Illawarra Employment Lands Taskforce

The Illawarra Employment Lands Taskforce (IELT) is a specific initiative for the Illawarra under the NSW State Plan: A New Direction for NSW. The IELT is the primary collaborative body, involving relevant State agencies and local government within the Illawarra, to implement the actions related to employment lands contained within the Illawarra, South Coast and Sydney-Canberra Corridor Regional Strategies. LGAs included in the IELT program include; Wollongong, Shellharbour, Kiama, Wingecarribee and Shoalhaven. The IELT, which held its inaugural meeting in January 2007, is chaired by the Minister for the Illawarra. The monitor is one of the tools used by the IELT to manage the supply and availability of employment lands for the Illawarra region.

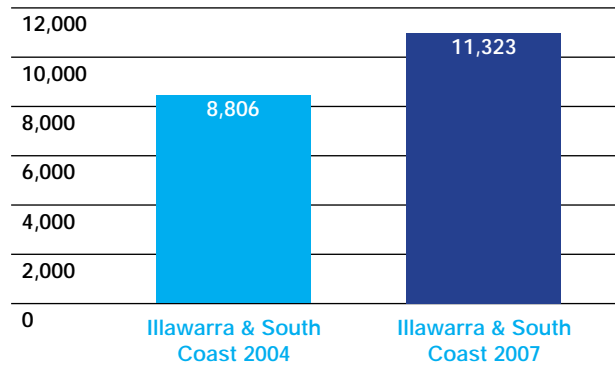


# Illawarra and South Coast Employment Lands Database Overview

## Total Parcels

For the Illawarra and South Coast there was an increase of 2,517 employment land parcels from 2004 to 2007 reflecting the ongoing subdivision of broadacre estates. The largest increase (37%) occurred in the Wollongong LGA which reinforces the role Wollongong plays as a major employment generator for the area.

Other large increases include Wingecarribee (23%) and Bega Valley (19%).



Illawarra & South Coast Employment Lands  
Total Parcels (2004 vs 2007)

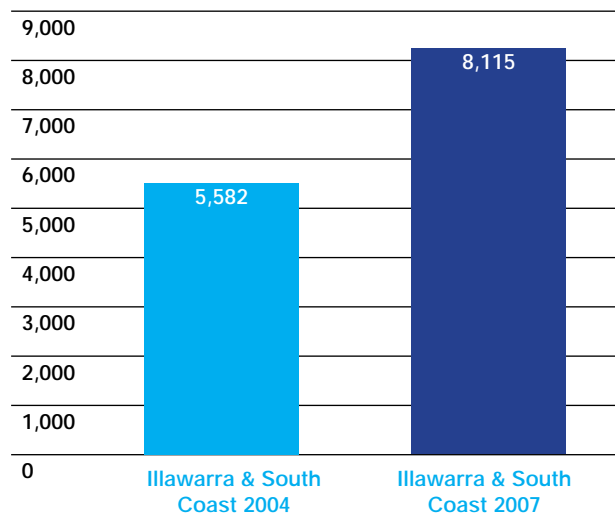
## Total Area

There has been an increase of 2,533 hectares of employment land from 2004 to 2007.

The largest increase in area occurred in the Wingecarribee LGA with 32% followed by Wollongong with 29%.

The large increase in the Wollongong LGA further reinforces Wollongong's role as the major employment generating area for the region. The increase in both the number of parcels and the area of employment land also contributes to maintaining an employment land surplus to provide a regional competitive advantage.

Other large increases in employment land area occurred in the Shoalhaven (up 19%) and Shellharbour (up 10%).



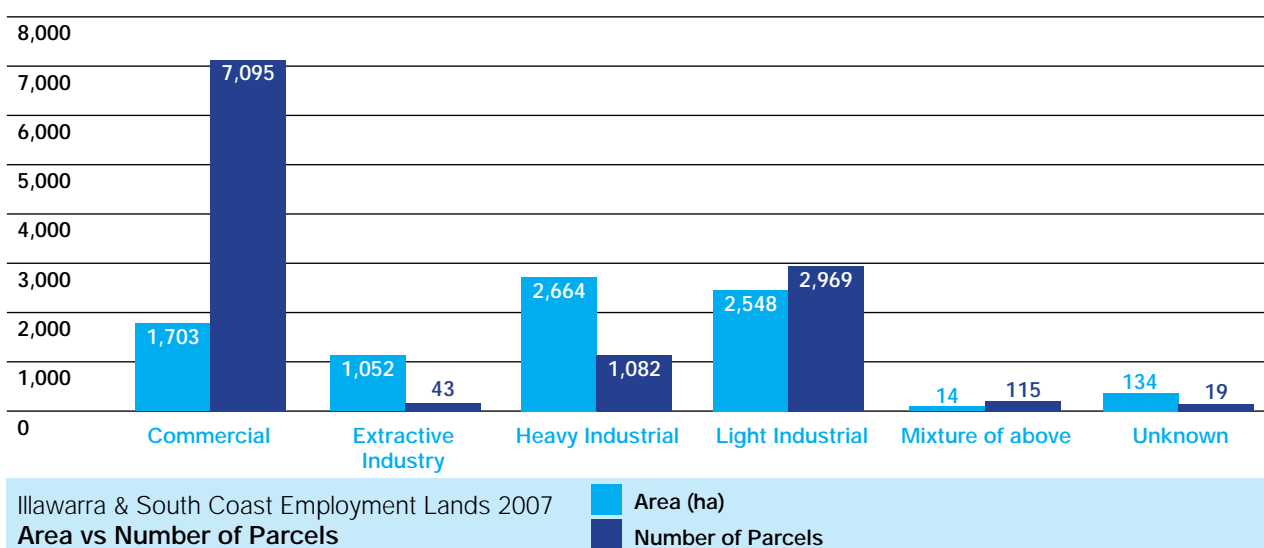
Illawarra & South Coast Employment Lands  
Total Area (ha) (2004 vs 2007)

# Illawarra and South Coast Employment Lands Database Overview

## Distribution of Land by Zone (2007)

In 2007, across the Illawarra and South Coast regions, 33% of the total employment land area was zoned heavy industrial. This was closely followed by light industrial (31%) and commercial (21%). Employment generating activities within industrial zones are typically more land intensive and therefore generally require larger parcels of land. This is reflected in the data below and explains the larger increases in area for industrial land use activities.

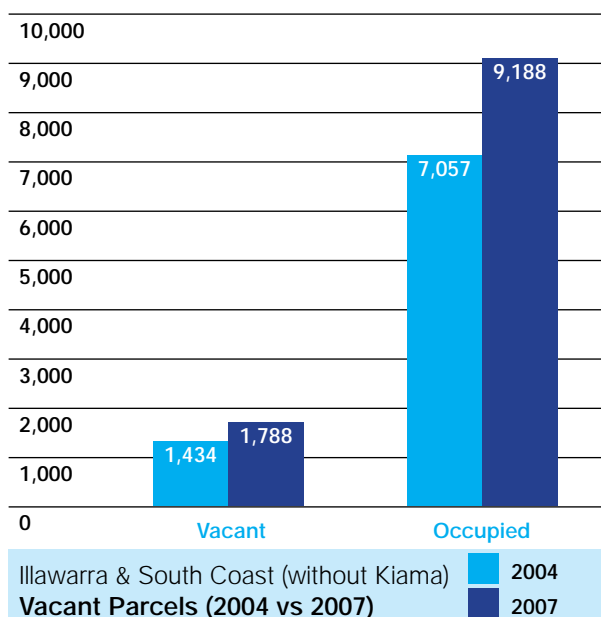
When compared to total number of parcels, 63% of total parcels for the regions are zoned commercial compared to heavy industrial (9.5%). This is indicative of the smaller areas and larger numbers of parcels required for commercial employment generating activities.



## Vacant Land

The table to the right indicates that there has been an overall increase in the number of employment land parcels from 2004 to 2007, although the occupancy rate has remained constant.

In 2007, the total area of vacant land for the Illawarra (excluding Kiama), and South Coast regions was approximately 920 hectares. As noted earlier, a number of land rezonings have occurred since the last update to expand the supply of vacant zoned employment land, such as at the Illawarra Regional Business Park and Wingecarribee Enterprise Corridor. These rezonings will be reflected in the 2009 update of the monitor.

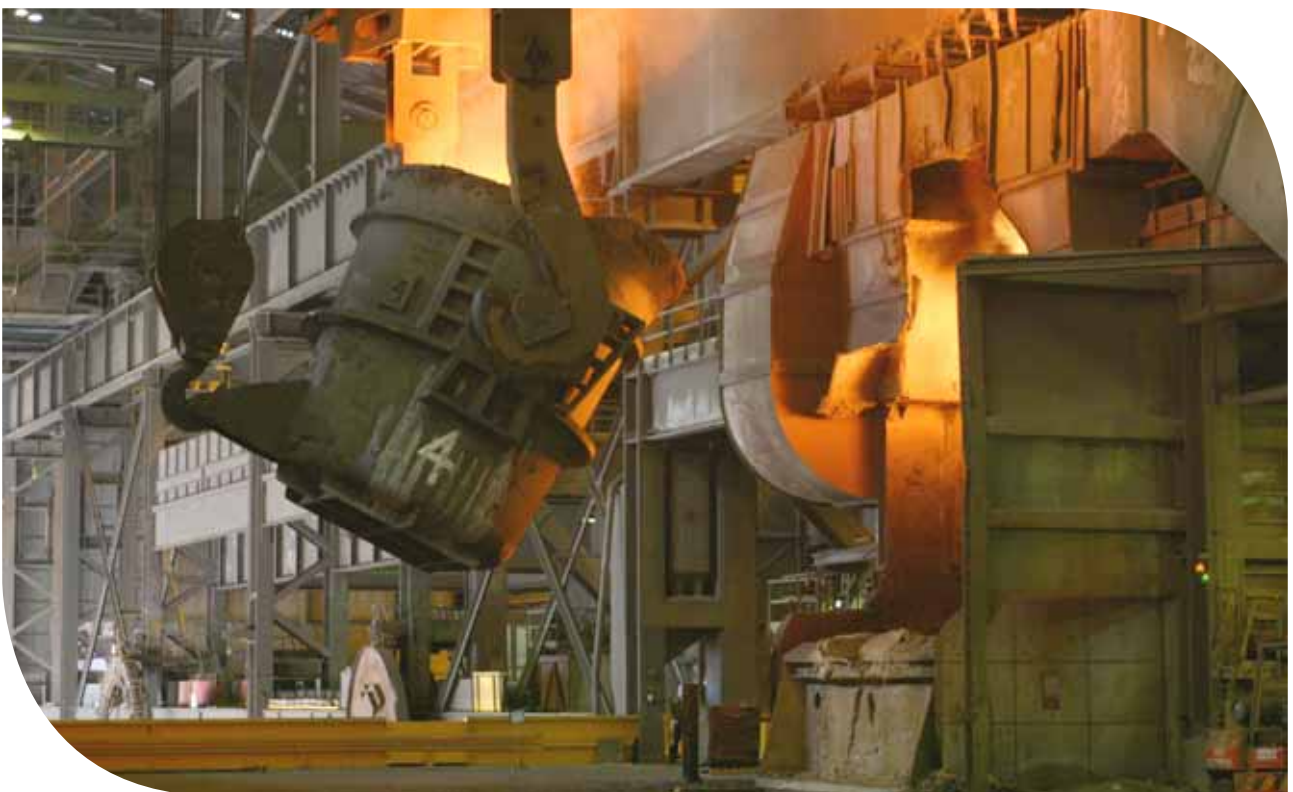
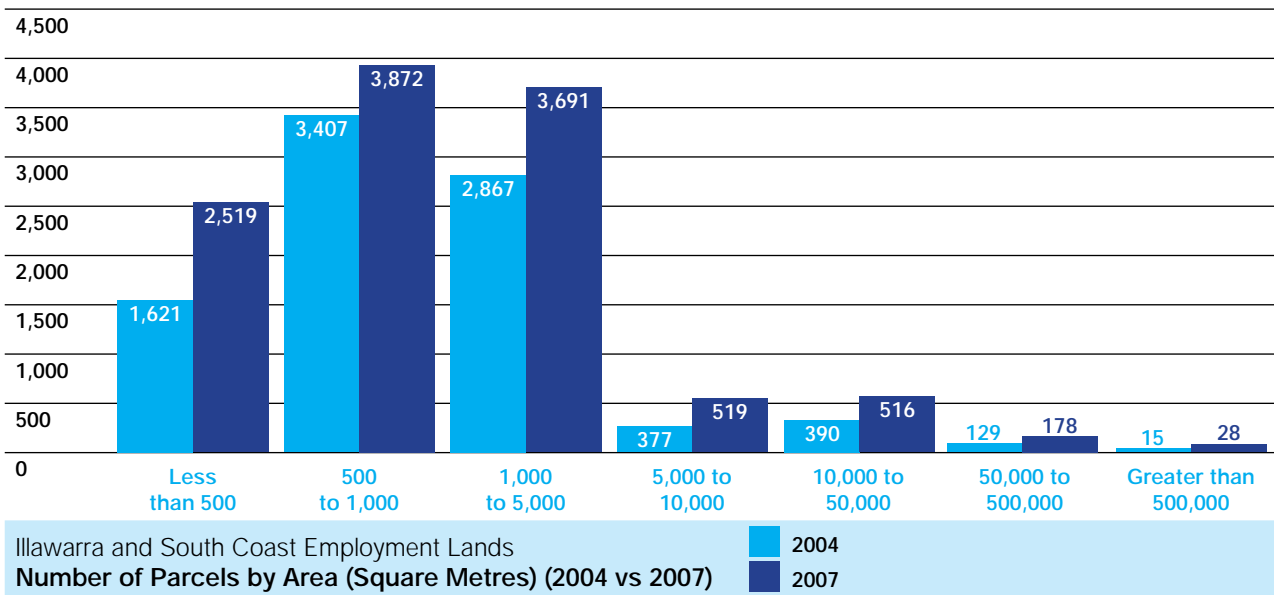


# Illawarra and South Coast Employment Lands Database Overview

## Number of Parcels by Area

The Illawarra and South Coast regions have experienced an increase in employment land from 2004 to 2007. The graph below provides a breakdown of the growth in employment land for the Illawarra and South Coast regions.

The greatest growth in terms of total number of parcels has been for those less than 500 square metres, however a demand still remains for a range of lot sizes.



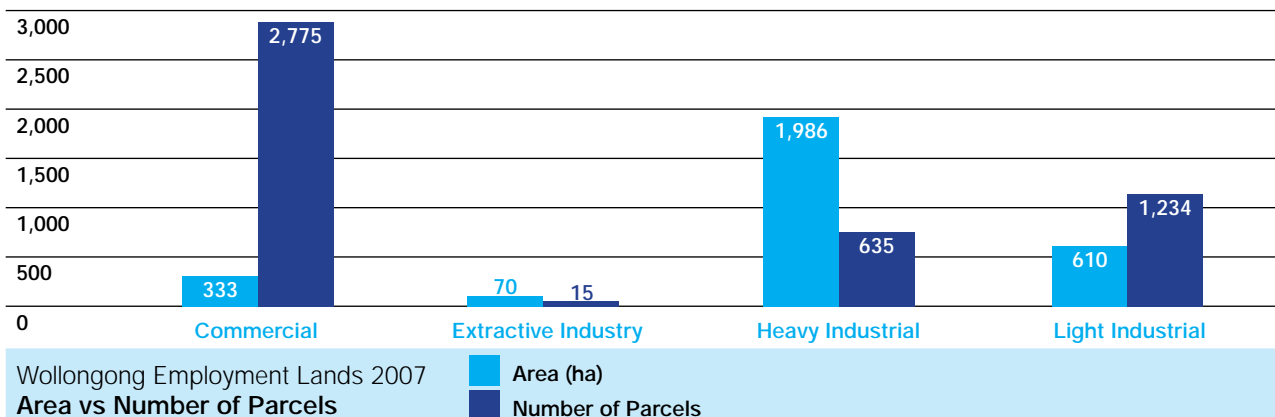
# Local Government Areas Wollongong



## Distribution of Land by Zone (2007)

In 2007, 66% of the total employment land area within the Wollongong LGA was zoned heavy industrial. This was followed by light industrial (20.5%) and commercial (11%).

When compared to the total number of employment land parcels within the LGA, these figures vary considerably. The commercial zone contains the largest count of parcels (60%) followed by light industrial (26%) and heavy industrial (13.6%).



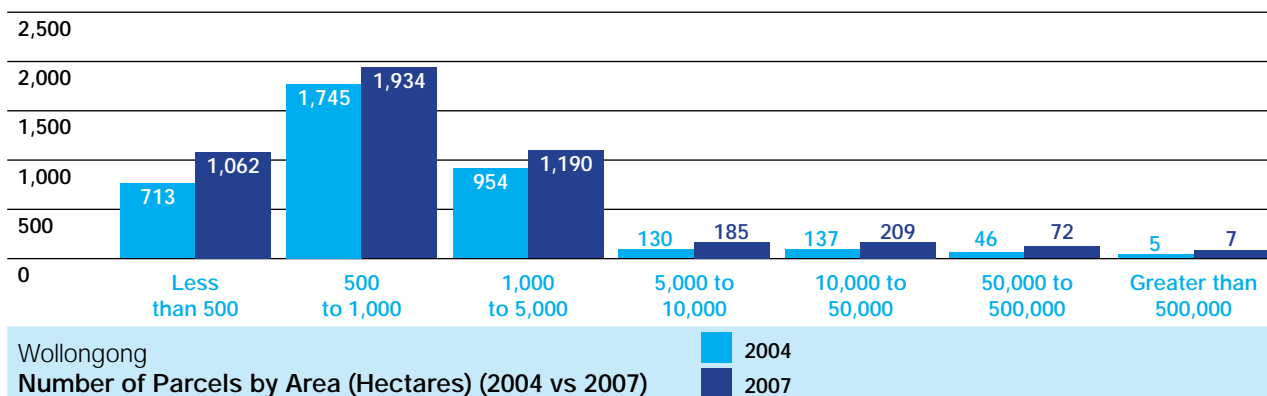


## Size Distribution of Employment Land Parcels

The Wollongong LGA has experienced a growth in the number of employment land parcels from 2004 to 2007. The largest increases have been in the employment land parcels:

- Less than 500 square metres;
- Between 5,000 and 10,000 square metres; and
- Between 50,000 to 500,000 square metres.

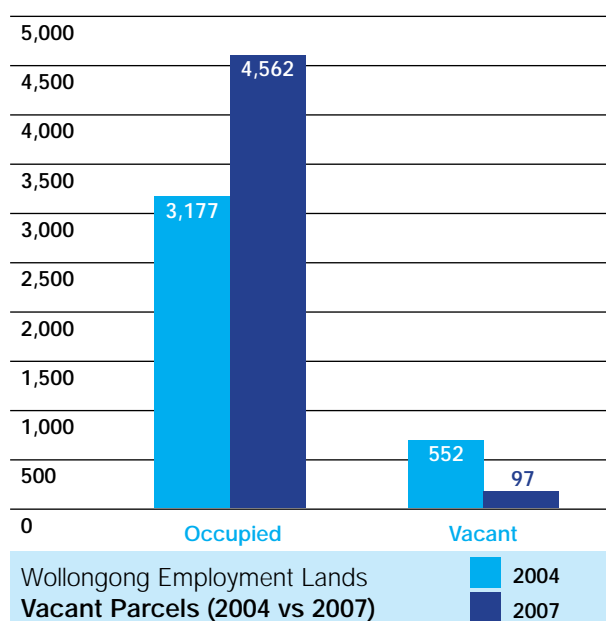
The Illawarra Regional Strategy noted the current high demand for larger parcels of employment land (20,000 – 30,000 square metres and 100,000 – 150,000 square metres) within the region. The table below shows an increase in the number of parcels larger than 10,000 square metres. In both 2004 and 2007, 94% of employment land parcels were 10,000 square metres or less.



## Vacant Land

In 2007, the Wollongong LGA had an employment lands occupancy rate of 98%, which has risen from the 2004 figure of 85%, indicating a positive take-up of land.

In the 2007 audit of employment lands 97 parcels of land were identified as vacant. This equates to approximately 44 hectares of employment land availability for the Wollongong LGA. Rezoning proposals, such as the proposed zoning of 175 hectares of land at Kembla Grange (West Dapto) and the rezoning of 20 hectares at Tallawarra will improve the supply of vacant employment land within the LGA.



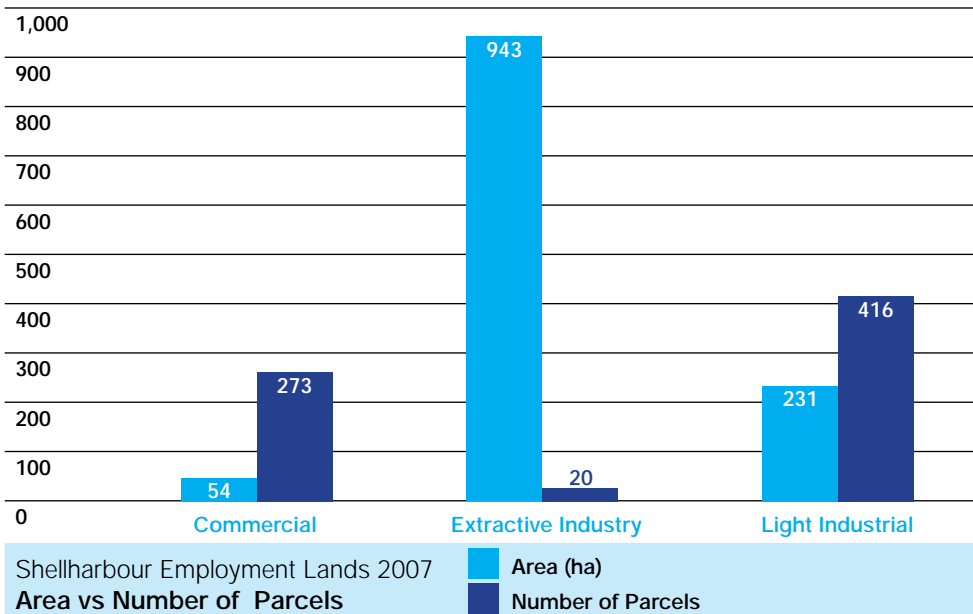
# Local Government Areas

## Shellharbour

### Distribution of Land by Zone

In 2007, 76.8% of the total employment land area within the Shellharbour LGA was zoned extractive industry, reflecting the extent of extractive industry resources within the LGA. This was followed by light industrial (18.8%) and commercial (4.4%).

When compared to the total number of employment land parcels within the LGA, these figures vary considerably. The light industrial zone becomes the largest containing 58.7% of the total employment land parcels, followed by commercial (38.5%) and extractive industry (2.8%).



### Size Distribution of Employment Land Parcels

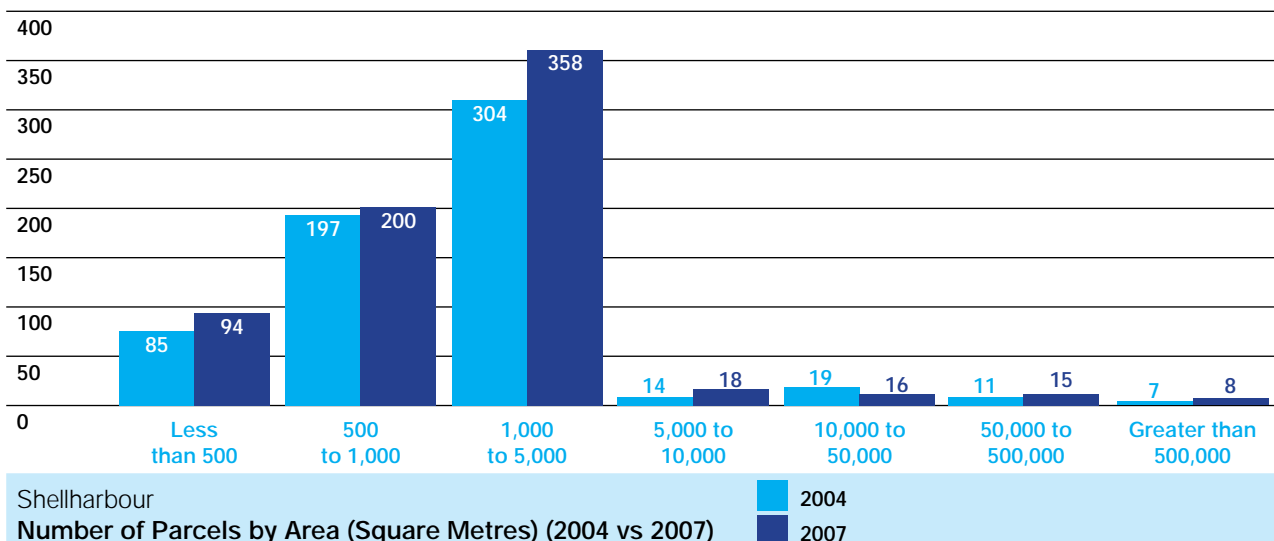
The Shellharbour LGA has experienced a growth in the total number of employment land parcels from 2004 to 2007. The largest percentage increases have been in employment land parcels between:

- 5,000 and 10,000 square metres; and
- 50,000 and 500,000 square metres.

The LGA also experienced a decline in employment land parcels between:

- 10,000 and 50,000 square metres.

In 2007, 94% of employment land parcels were 10,000 square metres or less which has not changed from the 2004 figure.

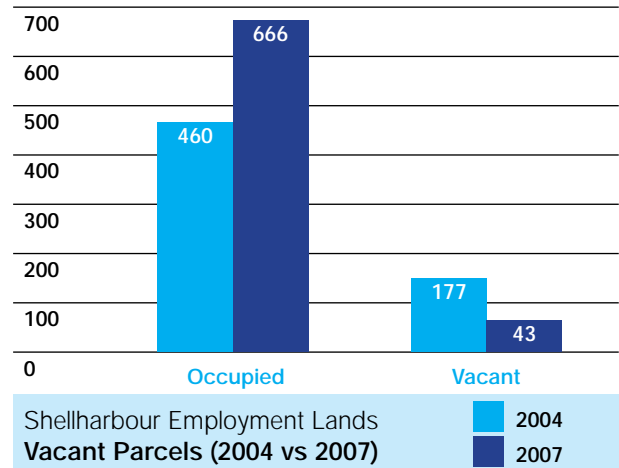


## Vacant Land

In 2007, the Shellharbour LGA had an employment lands occupancy rate of 94%, up from 72% in 2004.

In the 2007 audit of employment lands 43 parcels of land were identified as vacant, which equates to approximately six hectares of employment land availability for the Shellharbour LGA.

The Illawarra Regional Strategy notes a requirement to identify additional employment land within the Shellharbour LGA. Studies are currently being undertaken in relation to the Illawarra Regional Airport, one of the 12 regionally significant employment sites, to review the airport's capabilities and infrastructure. This study, combined with the recent rezoning of 43 hectares at the Illawarra Regional Business Park (on land immediately west of the airport) will contribute to increasing the provision of vacant employment lands within the Shellharbour LGA.

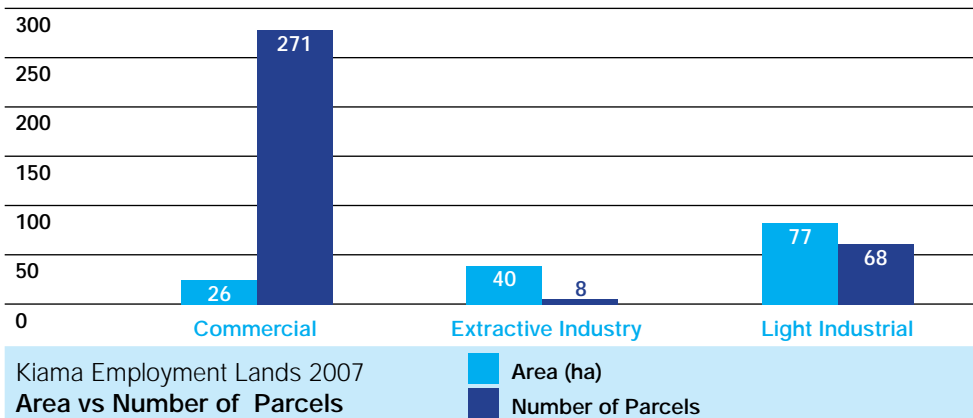


# Local Government Areas

## Kiama

### Distribution of Land by Zone

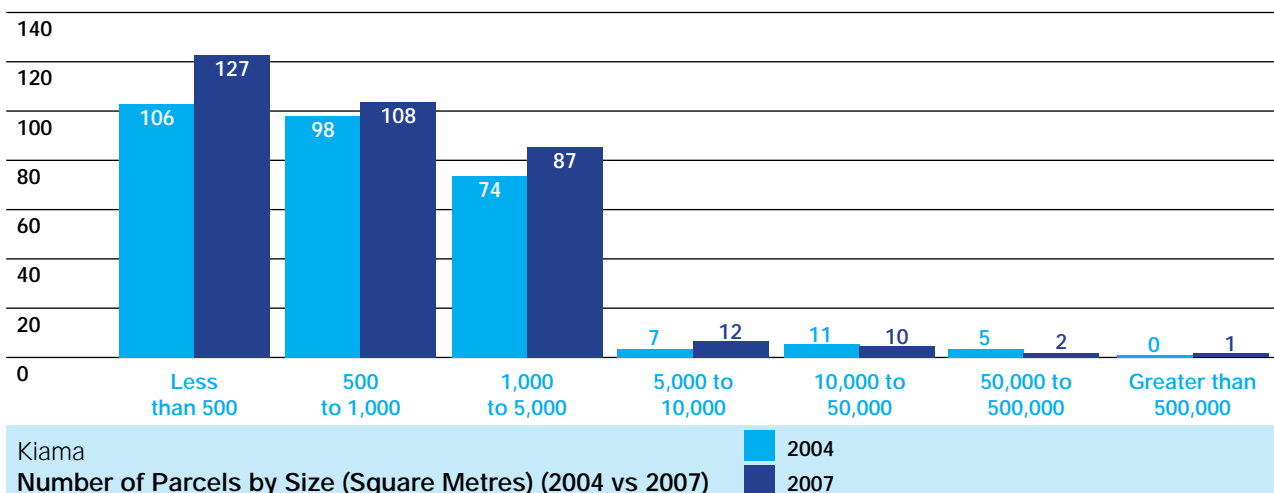
In 2007, 54% of the total employment land area within the Kiama LGA was zoned light industrial. This was followed by extractive industry (28%) and commercial (18.2%). When compared to the total number of employment land parcels within the LGA, these figures vary considerably. The commercial zone is the largest containing 78.1% of the total employment land parcels, followed by light industrial (19.6%) and extractive industry (2.3%).



### Size Distribution of Employment Land Parcels

The Kiama LGA experienced a growth in the number of employment land parcels from 2004 to 2007.

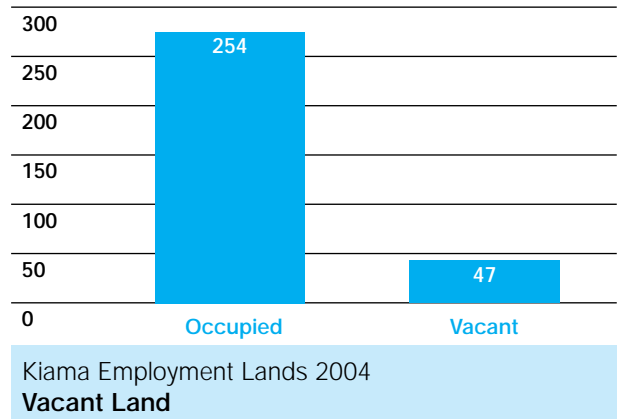
In 2007, 96% of employment land parcels were 10,000 square metres or less, up slightly from 95% in 2004.



## Vacant Land

No occupied/vacant land data was available for the Kiama LGA for 2007. This does not enable a comparison of occupied land in 2007 to 2004. However, the table below shows that in 2004, the Kiama LGA had 254 parcels of occupied employment land translating to an approximate employment land occupation rate of 84%.

The Bombo Quarry site is currently undergoing master planning to identify its potential for employment lands development. Depending on the outcome of this master planning, an expansion of the supply of vacant employment land may be likely.

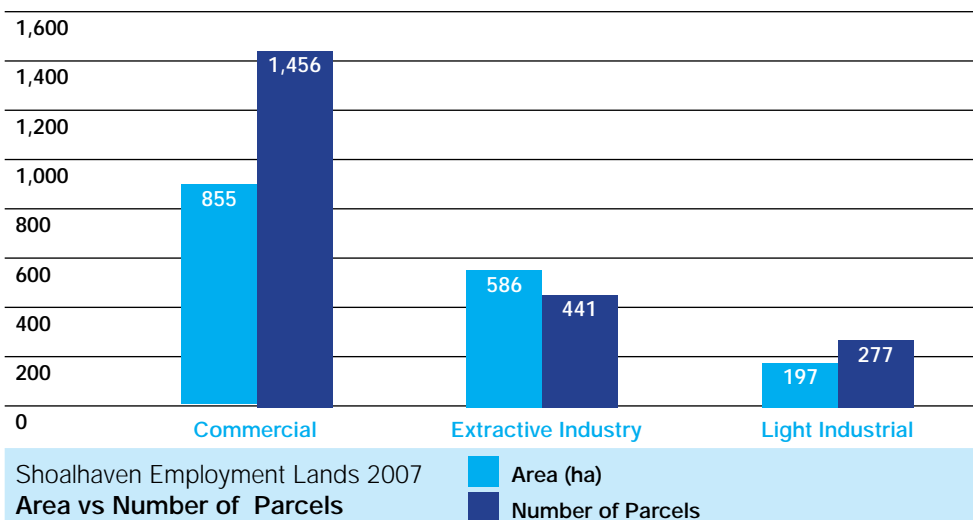


# Local Government Areas Shoalhaven

## Distribution of Land by Zone

In 2007, 52% of the total employment land area within the Shoalhaven LGA was zoned commercial. This was followed by heavy industrial (36%) and light industrial (12%).

When compared to the total number of employment land parcels within the LGA, these figures show some similarities. The commercial zone remained the largest (67%) of total employment land parcels followed by heavy industrial (20%) and light industrial (13%).

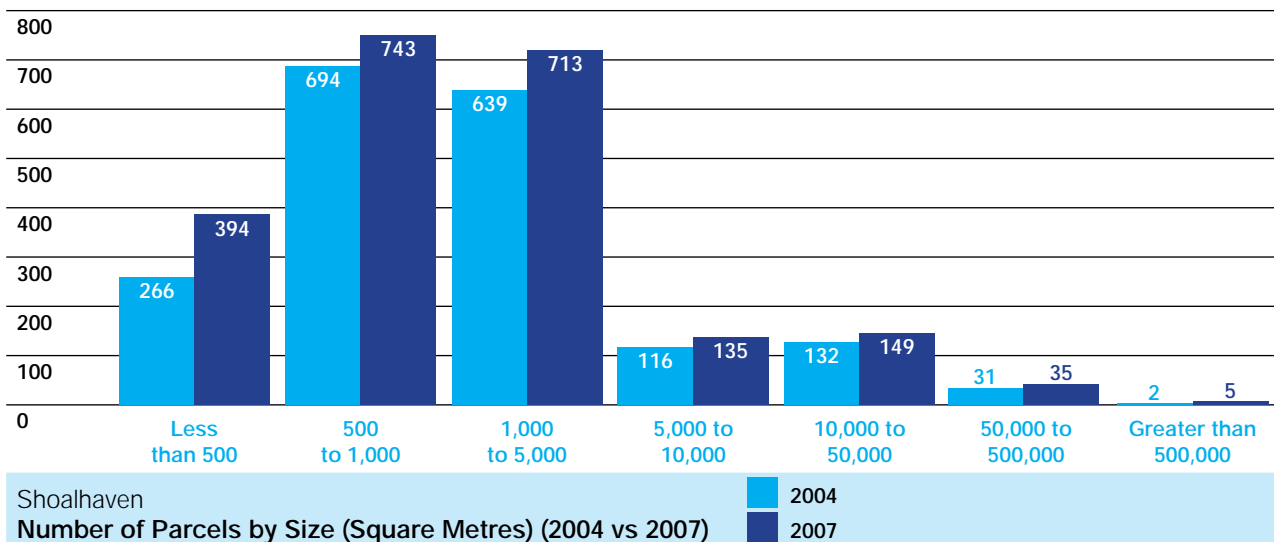


## Size Distribution of Employment Land Parcels

The Shoalhaven LGA has experienced a growth in both the total number of parcels and the total area of employment land from 2004 to 2007. The largest percentage increases have been in those employment land parcels:

- Less than 500 square metres; and
- Larger than 500,000 square metres.

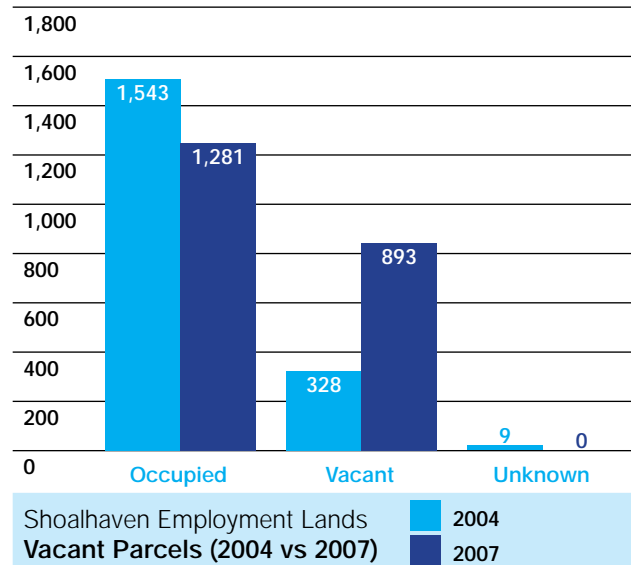
In 2007 91% of employment land parcels were 10,000 square metres or less. This has not changed from 2004.



## Vacant Land

In 2007, the Shoalhaven LGA had an employment lands occupancy rate of 59%, down from 82% in 2004.

In the 2007 audit of employment lands there were 893 parcels identified as vacant. This sharp increase in vacant lots from the 2004 data may result from the large quantity of latent employment land within the Shoalhaven LGA that was rezoned through the *Shoalhaven Local Environmental Plan 1985*. Many of these lots were large lots which may have subsequently been subdivided resulting in an increase in the total number of lots.

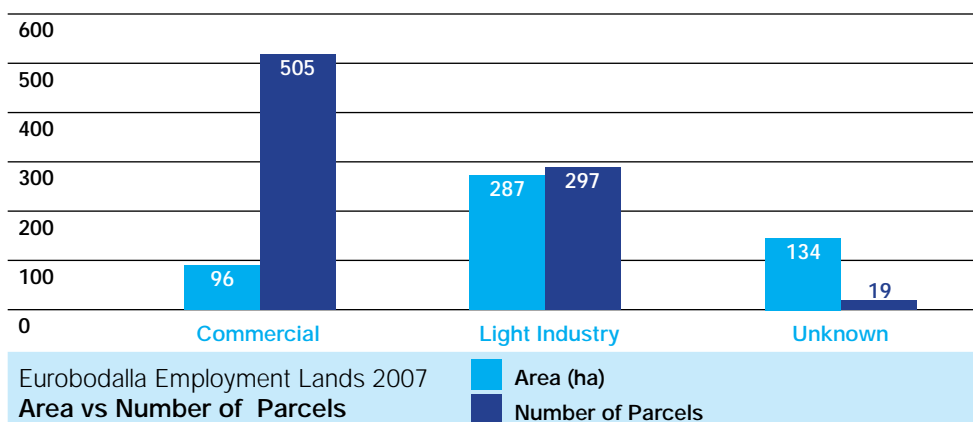


## Local Government Areas Eurobodalla

### Distribution of Land by Zone

In 2007, 56% of the total employment land area within the Eurobodalla LGA was zoned light industrial followed by commercial (18.6%).

When compared to the total number of employment land parcels within the LGA, these figures vary considerably. The commercial zone is the largest (62%) followed by light industrial (36.2%).



## Size Distribution of Employment Land Parcels

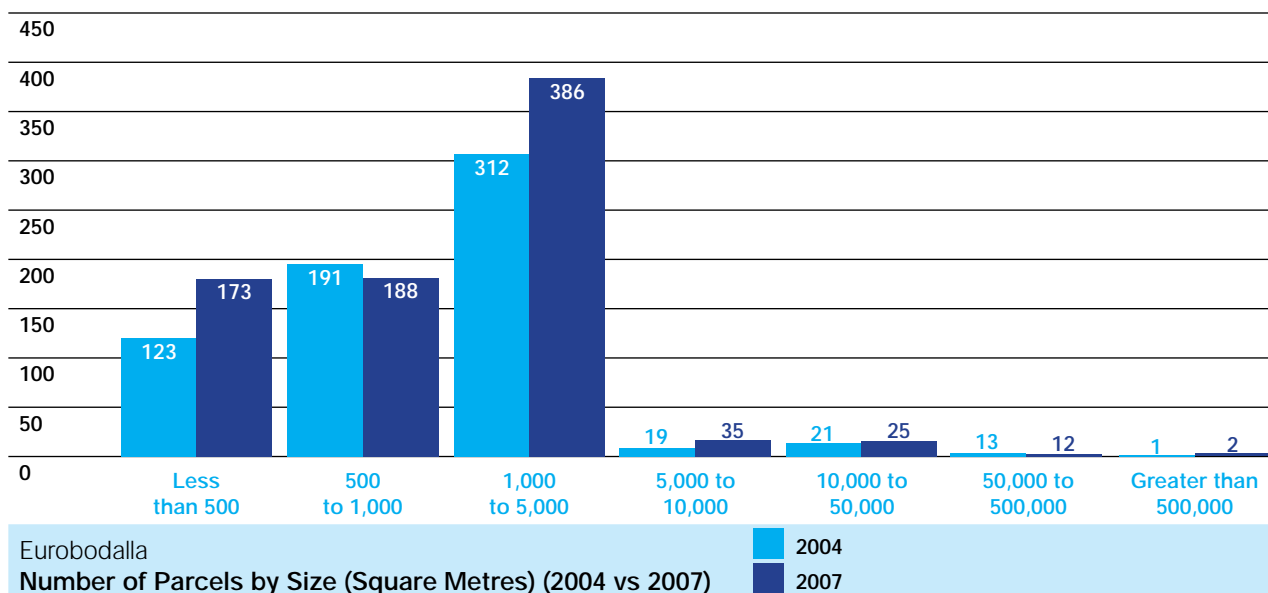
The Eurobodalla LGA experienced a growth in both the number of parcels and the area of employment land from 2004 to 2007. The largest percentage increases have been in employment land parcels;

- Between 5,000 and 10,000 square metres; and
- Larger than 500,000 square metres.

There was a reduction in the number of employment land parcels between:

- 500 and 1,000 square metres; and
- 50,000 and 500,000 square metres.

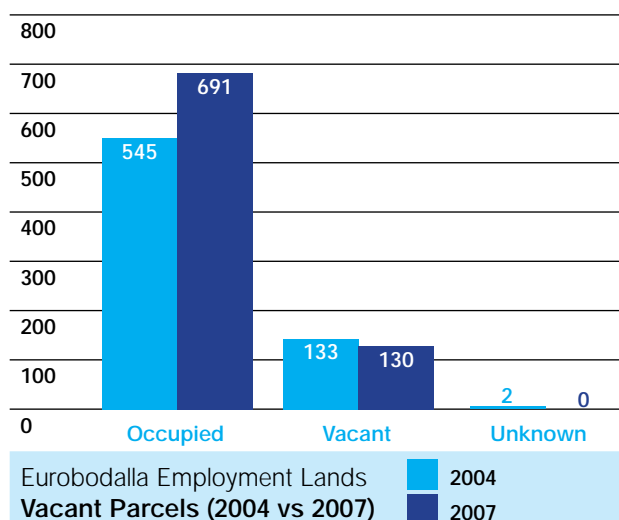
In 2007, 95% of employment land parcels were 10,000 square metres or less. This has not changed from 2004.



## Vacant Land

In 2007, the Eurobodalla LGA had an employment lands occupancy rate of 84%, up from 80% in 2004.

The 2007 audit of employment lands identified there were 130 parcels vacant which equates to approximately 113 hectares of employment land available in the Eurobodalla LGA.



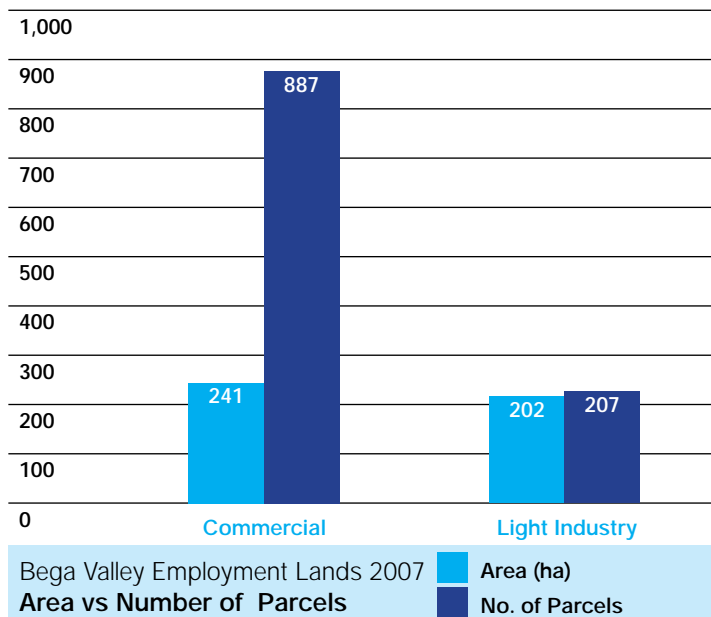


# Local Government Areas

## Bega Valley

### Distribution of Land by Zone

In 2007, 55% of the total employment land area within the Bega Valley LGA was zoned commercial followed by light industrial (46%). When compared to the total number of employment land parcels within the LGA, these figures show some similarities. The commercial zone remained the largest and contained 81% of the total employment land parcels, followed by light industrial (19%).

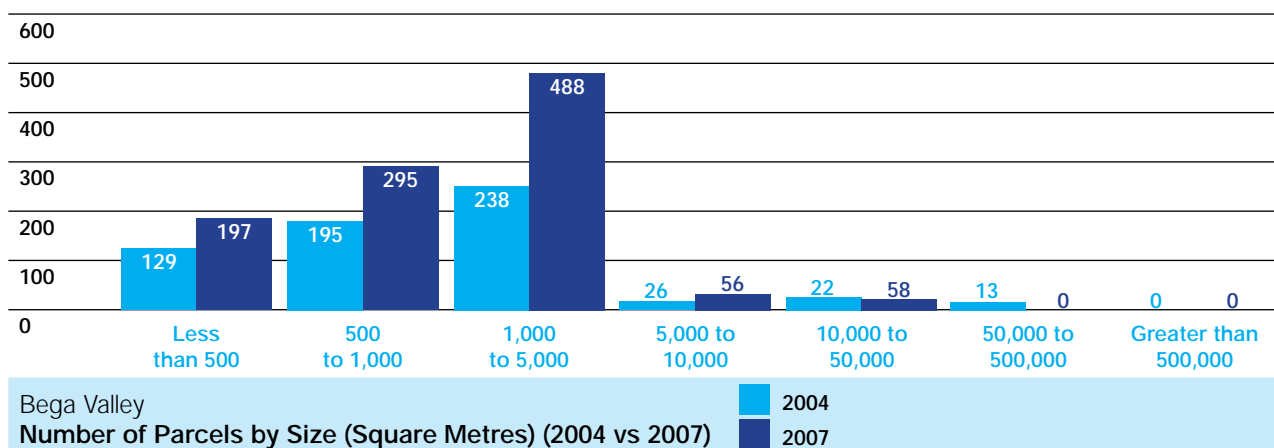


### Size Distribution of Employment Land Parcels

The Bega Valley LGA has experienced a growth in the total number of employment land parcels from 2004 to 2007. The LGA did however have a decrease in the number of parcels between 50,000 and 500,000 square metres. The largest percentage increases have been in employment land parcels between:

- 1,000 and 5,000 square metres;
- 5,000 to 10,000 square metres; and
- 10,000 and 50,000 square metres.

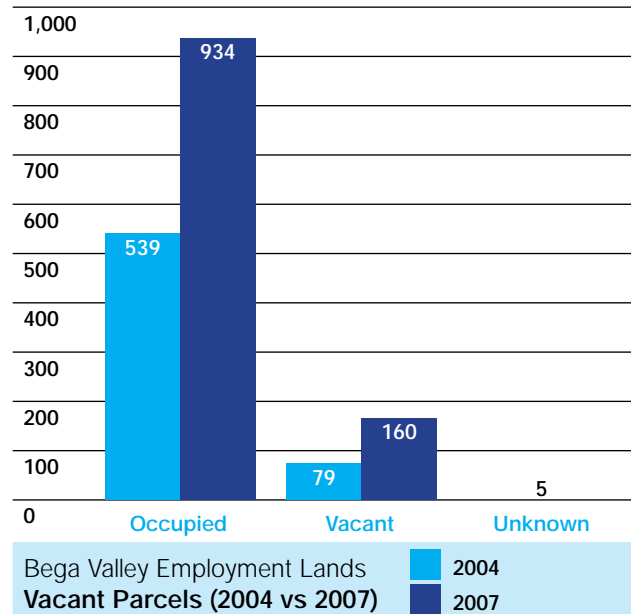
In 2007, 95% of employment land parcels were 10,000 square metres or less, a slight increase from 94% in 2004.



## Vacant Land

In 2007, the Bega Valley LGA had an employment lands occupancy rate of 85%. This has decreased slightly from the 2004 occupancy rate of 87%.

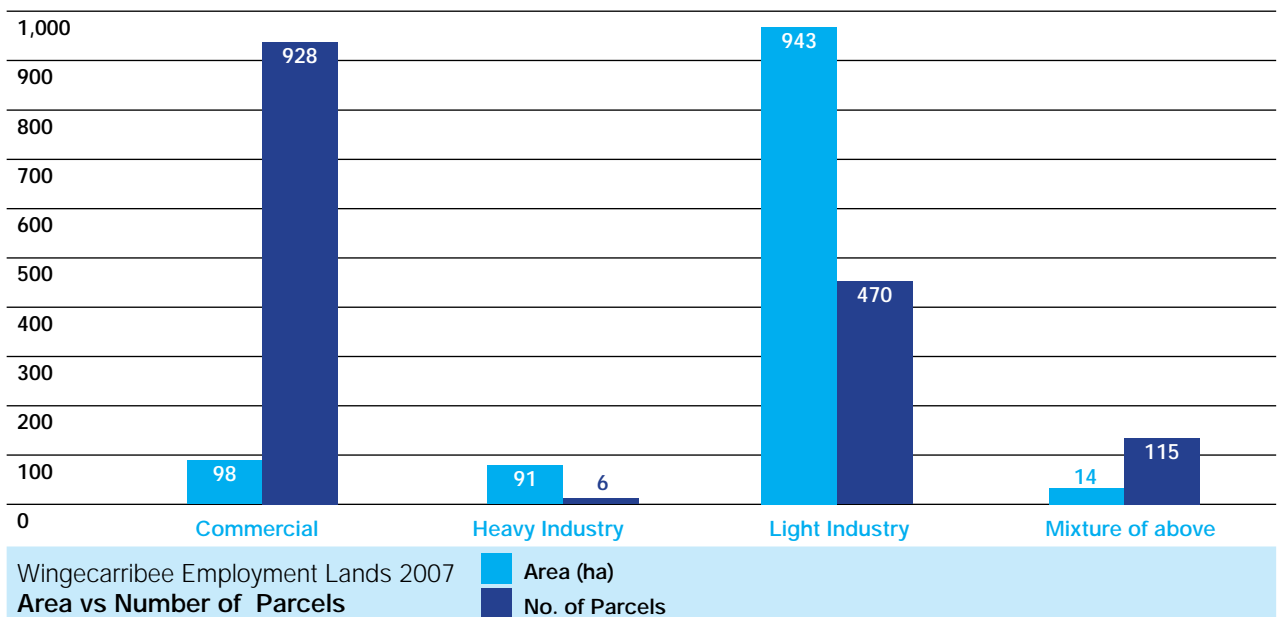
In the 2007 audit of employment lands there were 160 parcels identified as vacant. This equates to approximately 94 hectares of employment land availability for the Bega Valley LGA.



# Local Government Areas Wingecarribee

## Distribution of Land by Zone

In 2007, 82% of the total employment land area within the Wingecarribee LGA was zoned light industrial. This was followed by commercial (9%) and heavy industrial (8%). When compared to the total number of employment land parcels within the LGA, these figures vary considerably. The commercial zone became the largest containing 61% of the total employment land parcels. This was followed by light industrial (31%).

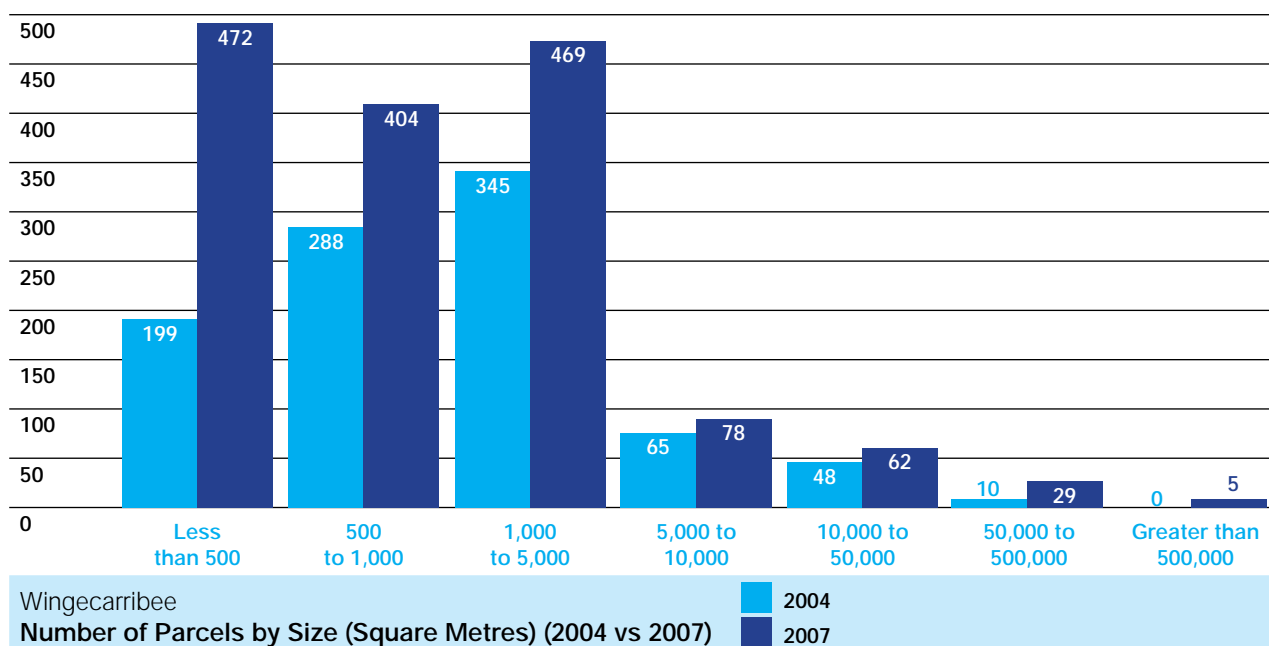


## Size Distribution of Employment Land Parcels

The Wingecarribee LGA has experienced an increase in employment land (both in the number of parcels and area) from 2004 to 2007. The largest percentage increases have been in employment land parcels:

- less than 500 square metres;
- 50,000 to 500,000 square metres; and
- larger than 500,000 square metres.

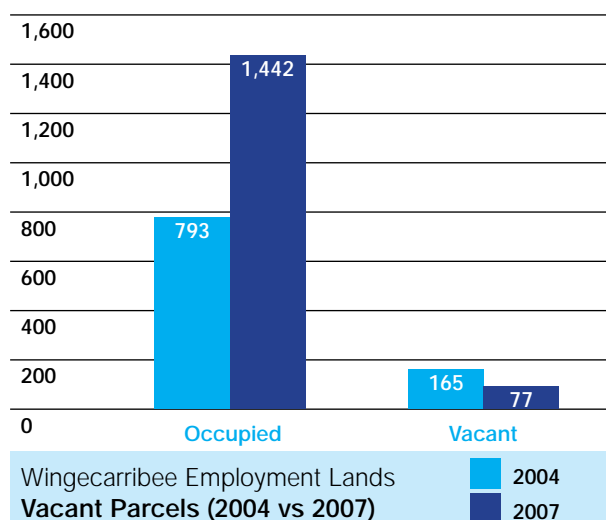
In 2007, approximately 94 % of employment land parcels were 10,000 square metres or less. This has not changed from 2004.



## Vacant Land

In 2007, the Wingecarribee LGA had an employment lands occupancy rate of 95%, up from 83% in 2004.

The 2007 audit of employment lands identified that there were 77 parcels of land vacant which equates to approximately 24 hectares of employment land availability for the Wingecarribee LGA. The Wingecarribee Enterprise Corridor, which is not captured by the 2007 data, will increase this amount by an additional 640 hectares, bringing the total vacant zoned employment land to 664 hectares.





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