

North Coast Subregions Background Paper



Planning &
Environment

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Introduction

The North Coast has three discrete subregions that are focused on specific centres and reflect shared interests, geographical proximity, social links and existing services. These subregions are:

- **Lower North Coast** – comprising Kempsey, Port Macquarie–Hastings and Greater Taree Local Government Areas;
- **Mid North Coast** – comprising Clarence Valley, Coffs Harbour, Bellingen and Nambucca Local Government Areas; and
- **Far North Coast** – comprising Tweed, Byron, Ballina, Lismore, Richmond Valley and Kyogle Local Government Areas.

A settlement hierarchy has been developed based on the size, services, role and character of various centres. The North Coast settlement hierarchy is included in Appendix 1.

Lower North Coast subregion

The Lower North Coast subregion comprises Greater Taree, Port Macquarie–Hastings and Kempsey Local Government Areas and covers approximately 10,788 square kilometres. It is located on the Manning, Macleay and Hastings River catchments. The Great Eastern Escarpment and Great Dividing Range skirt the subregion's western part.

The Biripi and Dunghutti nations are the traditional owners of this land.

The subregion is connected with the Hunter Region to the south via the Pacific Highway and with the New England Tablelands to the west via the Oxley Highway.

The Lower North Coast is the southern gateway to the North Coast and provides the first experience of the coastal lifestyles and rich environment of the North Coast. The subregion is around three hours' drive north of Sydney, via the Pacific Highway, and a little over an hour from Newcastle.

The subregion's proximity makes it a popular destination for residents of the Sydney Metropolitan and Hunter areas. Conversely, Lower North Coast residents are increasingly able to access services offered in these metropolitan areas. There are opportunities to strengthen these ties as the Lower North Coast grows.

Port Macquarie is the subregion's regional city and offers a range of higher-order services including business, office and retail uses with arts, culture, recreation and entertainment centres that support the Lower North Coast population. Port Macquarie has the highest current and projected population of any centre in the subregion. It has a significant economic role for the Lower North Coast subregion's population as it services the wider community through its principal referral hospitals, tertiary education services and a major regional airport.

Taree is the regional centre and provides a range of supplementary services to the Lower North Coast and is a significant service hub for residents of the Manning Valley. As a regional centre it services a broad area, beyond the local surrounding settlements and shares similar functions to Port Macquarie as a regional city but serves a smaller catchment and has a more limited range of services, facilities and employment opportunities. Kempsey is a town that offers services and facilities for its surrounding catchment, and has a strong manufacturing base that provides significant employment for the subregion.

People and Housing Snapshot

Regional City	Port Macquarie
Regional Centre	Taree
Town / Village	Coastal and inland towns and villages throughout the Lower North Coast Subregion including: Kempsey Wauchope Old Bar Wingham Lake Cathie/Bonny Hills Camden Haven South West Rocks
Population in 2011	152,500
Proportion of North Coast population in 2011	28%
Population in 2036	176,200
Proportion of total North Coast population in 2036	28%
Indigenous Persons (% of Lower North Coast population)	5.1%
Dwellings in 2011	72,350
Proportion of total North Coast dwellings in 2011	28%
Dwellings in 2036	88,050
Proportion of total North Coast Lone Person Households in 2011	28%
Persons aged over 65 years in the Lower North Coast in 2011	23%
Persons aged over 65 years in the Lower North Coast in 2036	34%
Unemployment Rate (2011)	8.0%

Between 1996 and 2011, the population of the Lower North Coast subregion grew by 25,650 people to 152,500. By 2036, the subregion's population is projected to grow by 15.5%, or 23,700 people. Port Macquarie and Taree will experience the highest levels of growth – over half of the population will reside in the Port Macquarie Local Government Area where an additional 12,900 dwellings will be needed.

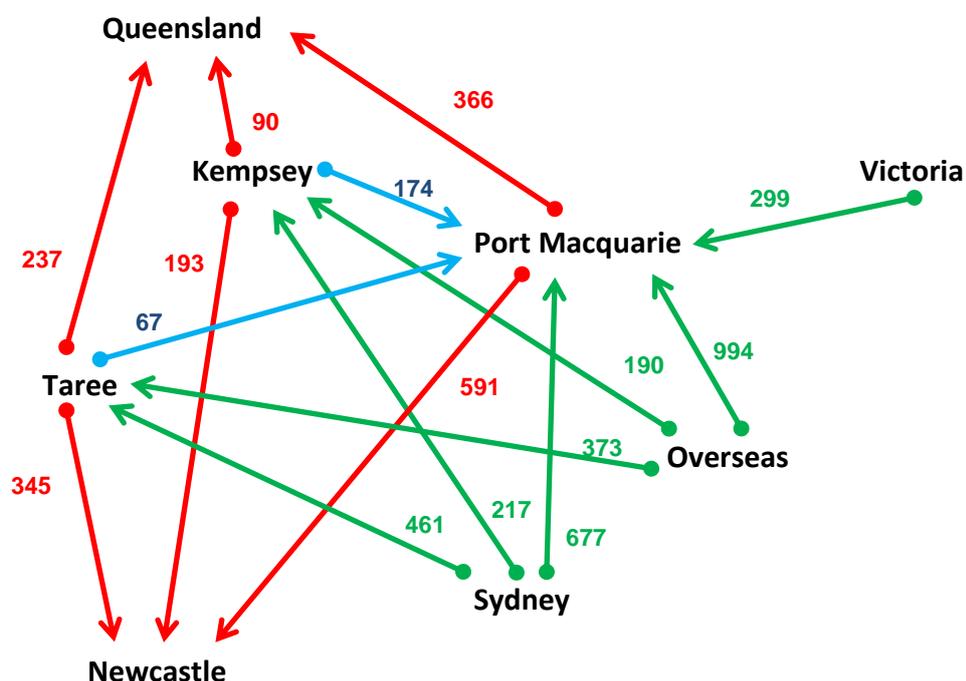
Percentage of the Lower North Coast's population in 2011:

Port Macquarie-Hastings	Greater Taree	Kempsey
49%	32%	19%

The Lower North Coast subregion has the oldest age structure of all the North Coast's subregions. By 2036, more than one-third of the population will be over 65 years of age. The ageing population will be less pronounced in Port Macquarie where the number of people aged over 65 years will increase by 10%. This is lower than the expected increase in people aged over 65 years for Greater Taree and Kempsey (13%).

Population growth across the North Coast is primarily driven by inward migration. Current migration data for the Lower North Coast (Figure 1) illustrates the majority of the in-migration over the five years to 2011 was from overseas. Over this period, outward migration was mostly to Newcastle, and then Queensland.

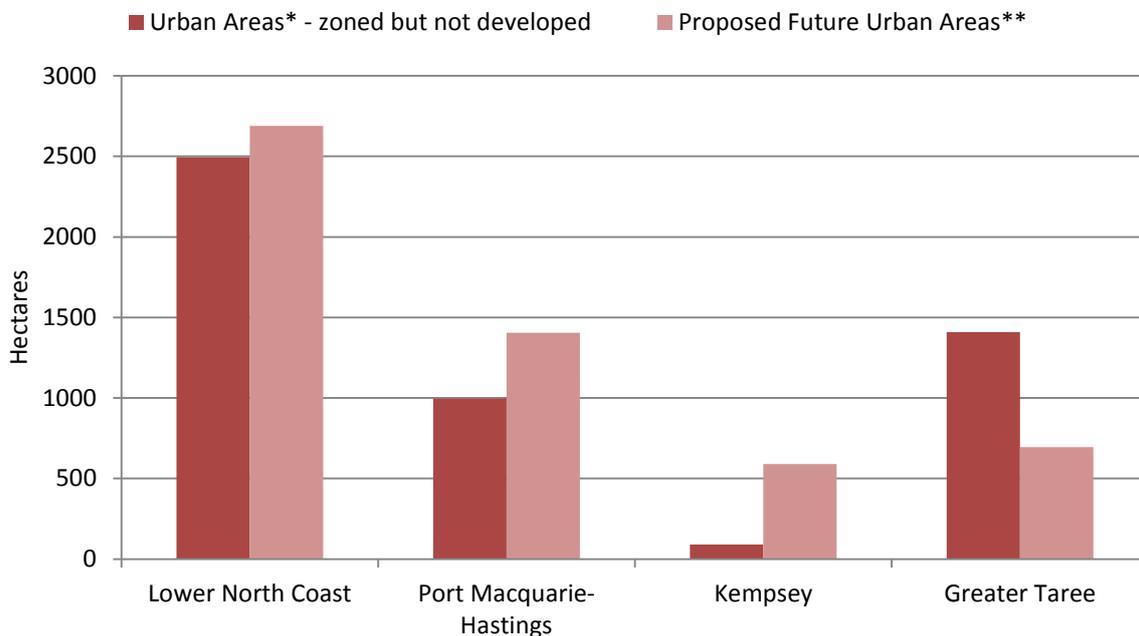
Figure 1: Lower North Coast net migration data for 2006-2011



Housing Supply

A review of land in the urban growth areas was undertaken in consultation with councils. Figure 2 provides a snapshot in time for the current supply of zoned and unzoned land on the Lower North Coast. Each council has identified proposed future urban release areas, within the urban growth areas. Not all the land within the proposed urban growth areas can be developed for urban uses due to potential constraints.

Figure 2: Current and potential residential land supply on the Lower North Coast (2015)



*Excludes environmental, recreational, special purpose and waterways, as well as employment lands.

**Includes new land release areas only, not infill or brownfield areas.

Tourism

The Lower North Coast subregion includes a number of nationally recognised tourist destinations and some of the State’s most important environmental and cultural heritage assets.

They include.

- Greater Taree, including Old Bar, Harrington, the Manning River as well as Ellenborough Falls – one of the southern hemisphere’s longest single drop waterfalls;
- Kempsey, including the historic Trial Bay Gaol, Smoky Cape Lighthouse in Hat Head National Park, as well as Crescent Head and South West Rocks; and
- Port Macquarie-Hastings, including Lake Cathie, Bonny Hills and Camden Haven.

Economy and Infrastructure

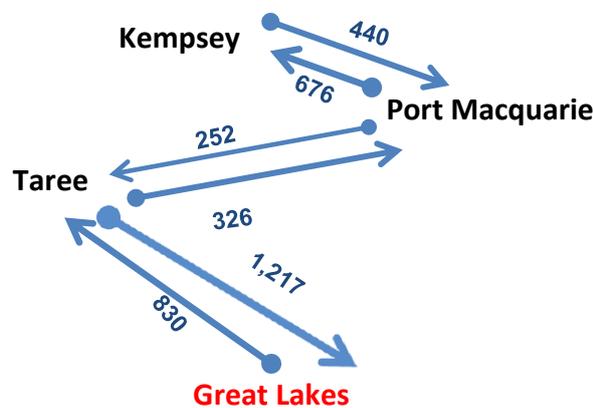
The Lower North Coast subregion has many strengths and natural advantages that will underpin growth. Given the close proximity to Sydney, Newcastle and the Lower Hunter, the Lower North Coast is increasingly being seen as a major urban growth location. The Pacific Highway upgrade will strengthen established links to Sydney, the Central Coast and the Port of Newcastle. Significant infrastructure investment is planned for the Lower North Coast to support this growth (see Appendix 2). Leveraging these subregional assets can help create a healthy and thriving community, supported by a vibrant and diverse economy.

The subregion's largest employment sector is health care and social assistance. Retail trade is growing and becoming comparatively more important to the subregional economy. The increasing appeal of the subregion as a lifestyle destination, as well as its close links to Newcastle and Sydney, are also influencing employment growth.

Over half of all jobs are located in the Port Macquarie Local Government Area. Greater Taree and Kempsey also offer significant job opportunities. This is illustrated in the journey to work data for the subregion, shown below in Figure 3.

Kempsey and Greater Taree both have an established manufacturing base with important industry sectors including food processing, timber processing, heavy vehicles and clothing. Upgrades to the Pacific Highway will support these industries and their connection to external markets. Additionally, Greater Taree and Kempsey have opportunities for jobs growth in the logistics and warehousing sectors to support improved connectivity.

Figure 3: Lower North Coast journey to work data for 2011

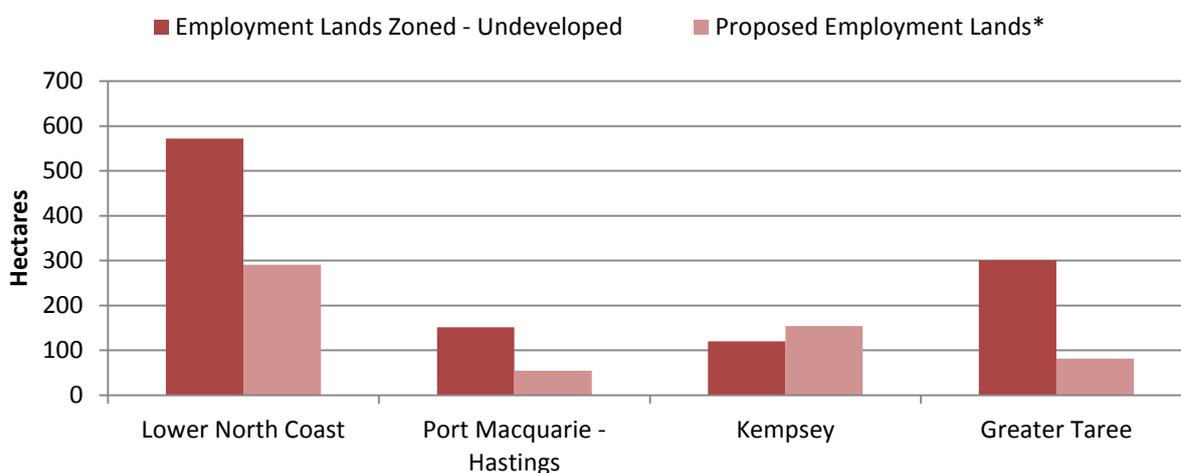


The majority of commuters travel to work between the Taree and Great Lakes Local Government Areas, reflecting the established links between these two communities. More than 1,000 people are regularly commuting between Port Macquarie and Kempsey. The upgrade to the Pacific Highway will enable Port Macquarie-Hastings and Kempsey Councils to work together to provide a range of economic and housing opportunities for businesses and new residents.

Employment Lands Supply

The 2015 North Coast Employment Land Study investigated the supply of land in the urban growth areas. Figure 4 illustrates the results of this study as well as the proposed size of future employment lands within the urban growth areas.

Figure 4: Current and potential employment lands supply on the Lower North Coast (2015)



*Includes greenfield areas only

Agriculture

Agricultural activities are widespread across the Lower North Coast. Over 450,000 hectares of land are used for agricultural production. The rural landscape is characterised by grazing, dairy and horticulture.

In 2011, the gross value of agriculture on the Lower North Coast was \$192 million, comprising one-quarter of the total agricultural value produced on the North Coast. Table 1 indicates the economic value of agricultural commodities produced on the Lower North Coast.

Table 1: Value of agriculture in the Lower North Coast subregion for 2010-11

Agricultural commodity	Lower North Coast - Gross Value (\$m)	% of NSW
Livestock - Cattle and calves (for consumption)	76.2	5
Whole milk	65.7	13
Horticulture - Nurseries and cut flowers and cultivated turf	17.2	6
Avocados	7.6	51
Eggs produced for human consumption	5.9	3
Hay - Pasture and cereal and other crops cut for hay	5.6	2
Pasture cut for hay	5.4	3
Livestock – Poultry (for consumption)	4.1	1
Macadamia nuts	1.4	3
Kiwi fruit	0.2	40

Mid North Coast subregion

The Mid North Coast subregion is the largest subregion on the North Coast and comprises the Clarence Valley, Coffs Harbour, Bellingen, and Nambucca Local Government Areas. It covers approximately 14,690 square kilometres and is located on the Clarence, Bellinger and Nambucca river catchments.

The Gumbaynggirr, Yaegl and Bundjalung nations are the traditional owners of this land.

The Pacific Highway provides connections both north towards Queensland and south towards the Hunter and Sydney. Waterfall Way provides connections to Armidale, while the Gwydir Highway provides the only connection between the North Coast and the New England for 25 metre B-double vehicles.

Located mid-way between Sydney and Brisbane, the subregion is a popular place to live and visit. It is well known for its coastal villages and its spectacular hinterland, which is characterised by rainforests and forests, banana plantations and other agricultural activity.

The main service centre on the Mid North Coast is the regional city of Coffs Harbour which provides a range of higher-order services and employment for the subregional population. Coffs Harbour provides the largest commercial component of any location in the subregion to support employment growth. Located to the north of Coffs Harbour is Woolgoolga, which acts as a service centre for residents of the northern suburbs of this local government area.

Grafton is the Mid North Coast's regional centre and includes many government offices as well as a range of supplementary and administrative services. Grafton also acts as an important transport node, providing connections inland along the Gwydir Highway, north towards Casino along the Summerland Way and towards Brisbane on the Pacific Highway. Maclean is located north of Grafton and supports Grafton as a service centre for the northern part of the subregion. Bellingen and Macksville offer supplementary services and facilities for the lower part of the subregion and have close links with Coffs Harbour for employment and services.

People and Housing Snapshot

Regional City	Coffs Harbour
Regional Centre	Grafton
Town / Village	Coastal and inland towns and villages throughout the Mid North Coast Subregion including: Bellingen Macksville Maclean Woolgoolga Nambucca Heads Dorrigo Yamba Urunga
Population in 2011	154,400
Proportion of North Coast population in 2011	28.4%
Population in 2036	181,700
Proportion of total North Coast population in 2036	28%
Indigenous Persons (percentage of Mid North Coast population)	4.8%
Dwellings in 2011	72,450
Proportion of total North Coast dwellings in 2011	28%
Dwellings in 2036	89,700
Proportion of total North Coast Lone Person Households in 2011	28%
Persons aged over 65 years in the Mid North Coast in 2011	20%
Persons aged over 65 years in the Mid North Coast in 2036	31%
Unemployment Rate (2011)	8.7%

Between 1996 and 2011, the population of the Mid North Coast subregion grew by 20,250 people to 154,400. The Mid North Coast is projected to grow by 18% or 27,300 people by 2036. The highest levels of growth will be experienced in Coffs Harbour and to a lesser extent the Clarence Valley. By 2036, over half of the subregion's total population will reside in the Coffs Harbour Local Government Area where an additional 13,260 dwellings will be needed.

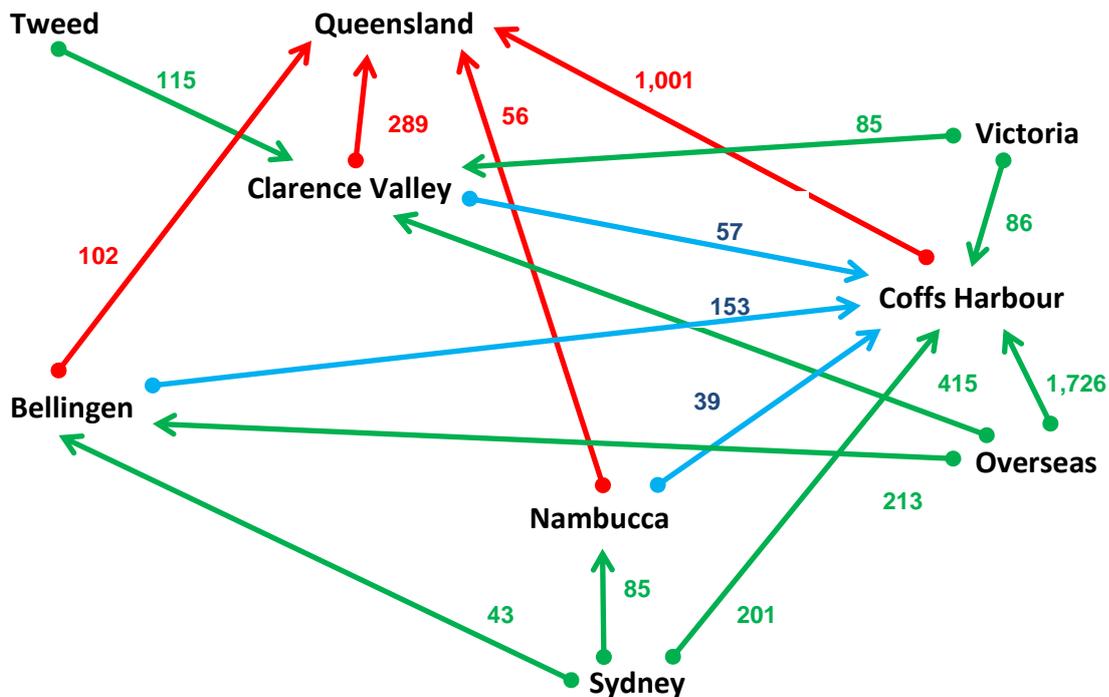
Percentage of the Mid North Coast's population in 2011:

Coffs Harbour 46%	Clarence Valley 33%	Nambucca 12.5%	Bellingen 8.5%
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The ageing of the subregional population will be most pronounced in the Clarence Valley, Bellingen and Nambucca Local Government Areas. The number of people aged over 65 years is projected to increase between 13% and 14%.

Population growth across the Mid North Coast is primarily driven by migration. Current migration data (Figure 5) indicates that the majority of in-migration to the Mid North Coast comes from overseas and Sydney, while outward migration was mostly to Queensland.

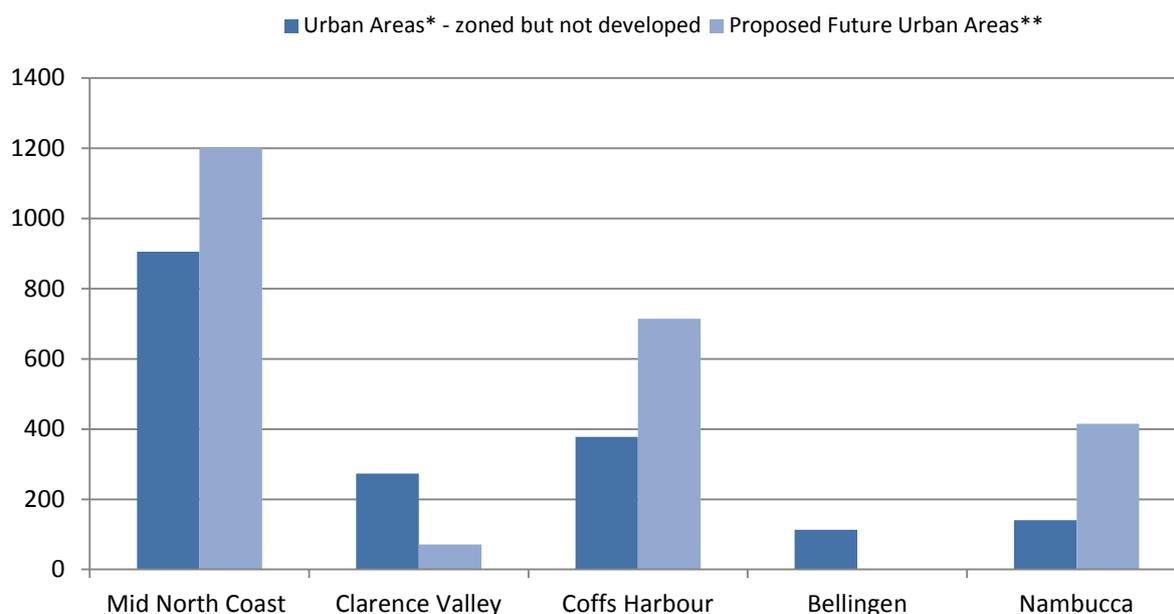
Figure 5: Mid North Coast net migration data for 2006-2011



Housing Supply

A review of land in the urban growth areas was undertaken in consultation with councils. Figure 6 provides a snapshot in time of the current supply of zoned and unzoned land in the Mid North Coast. Each council has identified proposed future urban release areas, within the urban growth areas. Not all the land within the proposed urban growth areas can be developed for urban uses due to potential constraints.

Figure 6: Current and potential residential land supply on the Mid North Coast (2015)



*Excludes environmental, recreational, special purpose and waterways, as well as employment lands.

**Includes new land release areas only, not infill or brownfield areas.

Tourism

The subregion's environmental and recreational features make it attractive to new residents and domestic and international visitors. There are a wide range of accommodation options for visitors and conference facilities that make it popular with business travellers.

The natural environment of the Mid North Coast makes it a popular tourist destination, including as the host for the FIA World Rally championships. Some high value environmental features include:

- the World Heritage listed Dorrigo National Park in the Bellingen Shire;
- the World Heritage listed Iluka Nature Reserve in the Clarence Valley; and
- destination towns such as Nambucca Heads, Scotts Head, Urunga or Yamba.

The NSW Government will investigate opportunities to expand nature-based and cultural tourism, and visitor numbers to some of these places.

Economy and Infrastructure

The subregion's economic make-up has changed and evolved over the last 150 years. The early economy was heavily influenced by the timber industry and agricultural activity. More recently, as increasing numbers of people have moved to the subregion for lifestyle reasons, the economy has shifted towards healthcare and social assistance and service industries.

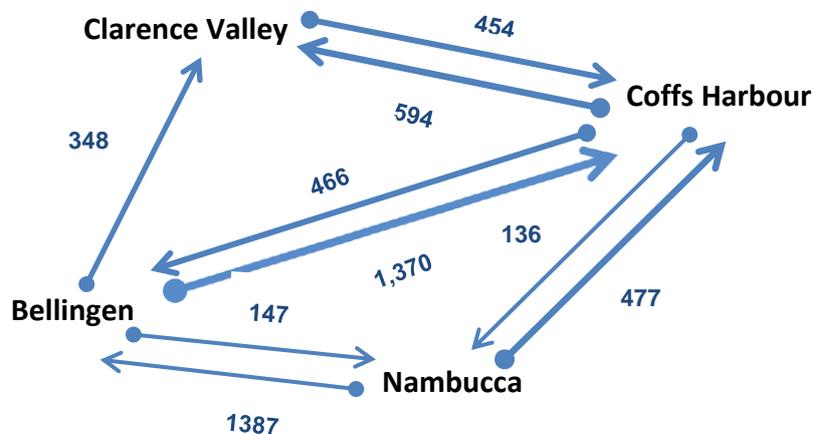
Almost half of the subregion's jobs are located in the Coffs Harbour Local Government Area with another third are located in the Clarence Valley. Grafton has been an important centre for the Mid North Coast and provides a range of government and administrative services to the subregion.

While the Mid North Coast has the highest unemployment rate in the region, it has significant employment generators such as Coffs Harbour Base Hospital, Southern Cross University - Coffs Harbour Campus and a large tourist-based economy in retail and accommodation services. The Mid North Coast also has a strong manufacturing industry in Nambucca and Clarence Valley, due to the relatively low cost of land, the capacity to expand and the close proximity to Newcastle, Brisbane and Sydney.

People in the subregion move between adjacent local government areas for work (Figure 7). The majority of people are commuting to work between Coffs Harbour and Bellingen, and then between Clarence Valley and Coffs Harbour.

As shown in Appendix 3 significant infrastructure investment is planned for the Mid North Coast to support projected population growth and to deliver employment growth.

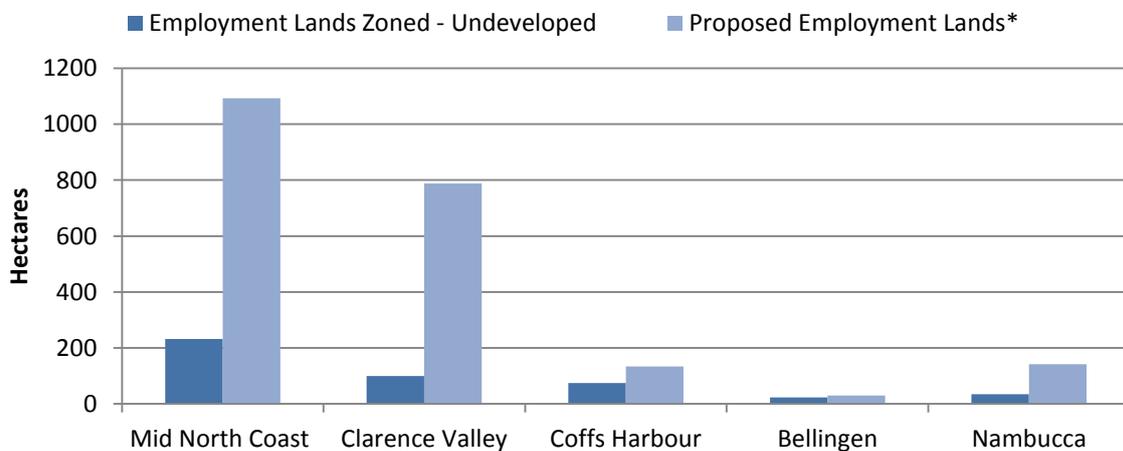
Figure 7: Mid North Coast journey to work data for 2011



Employment Lands Supply

The 2015 North Coast Employment Land Study investigated the supply of land within the urban growth areas of the Mid North Coast. Figure 8 illustrates the results of this study as well as the proposed future employment lands within the urban growth areas.

Figure 8: Current and potential employment lands supply on the Mid North Coast (2015)



*Includes greenfield areas only

Agriculture

Agricultural activities are widespread across the Mid North Coast, with over 435,000 hectares of land used for agricultural production. The rural landscape is characterised by grazing, dairy, horticulture and crops such as blueberries, sugar cane and bananas. In 2011, agriculture gross value in the Mid North Coast was \$212.7 million, comprising one-quarter of the total agricultural production value on the North Coast. The agricultural sector has continued to grow strongly in the subregion.

Since 2011, there has been significant growth in the number of blueberry farms in the subregion due to the frost-free environment. Over 90% of NSW blueberries are produced on the Mid North Coast.

Table 2: Value of agriculture in the Mid North Coast subregion for 2010-11

Agricultural commodity	Mid North Coast -Gross Value (\$m)	% of NSW
Blueberries	67.5	93
Livestock - Cattle and calves (for consumption)	55.8	3
Whole milk	26.2	5
Sugar cane	21.9	35
Bananas	11.2	60
Horticulture - Nurseries and cut flowers and cultivated turf	9.7	3
Nurseries	5.7	3
Potatoes	2.3	4
Macadamia nuts	2.1	5
Raspberries	1.4	88
Avocados	1.1	7

Far North Coast subregion

The Far North Coast subregion includes the Tweed, Byron, Ballina, Lismore, Richmond Valley and Kyogle Local Government Areas and covers approximately 10,277 square kilometres. It is located on the Richmond, Tweed, Upper Clarence and Wilson river catchments and supports one of the most biodiverse environments in Australia. It comprises nationally recognised tourist destinations and some of the State's most important environmental and cultural heritage assets.

The Bundjalung nation are the traditional owners of this land.

The Pacific Highway provides important connections to South East Queensland and Brisbane. The Bruxner Highway is an important link between Ballina, Lismore, Casino and Tenterfield on the Northern Tablelands. Summerland Way also provides important connections with Grafton, Casino, Kyogle and Beaudesert.

The northern part of the subregion borders Queensland and consequently has strong social and economic links with the Gold Coast and Brisbane. The subregion extends south along the coast as far as Evans Head and west to Woodenbong and Tabulam.

Tweed Heads is the regional city in the subregion and has strong links to South East Queensland and to the northern towns of Murwillumbah and Byron Bay.

Lismore and Ballina are the two regional centres in the subregion. They have greater autonomy from Tweed Heads compared to some other regional centres of the Mid and Lower North Coast subregions. They have a large enough catchment to support major facilities like the Lismore Base Hospital, Southern Cross University and the Ballina-Byron Airport.

Lismore is located inland from the coastal strip and provides higher-order services and administrative functions for the lower and western parts of the subregion. Ballina is an important gateway to the region via its airport and is a popular coastal lifestyle destination. Casino and Kyogle are towns that provide significant rural lifestyle opportunities, have significant agricultural value, and provide essential services and facilities to residents of the western part of the subregion.

Byron Shire boasts an eclectic mix of coastal and rural towns and villages which are popular with residents and surrounding regional neighbours. Byron is Australia's most easterly point and is known worldwide as an iconic destination. The Shire has a population of approximately 32,100 and attracts over 1.3 million visitors a year. Tourism accounts for more than half of Byron Shire's \$1.37 billion gross business revenue and makes a significant contribution to the regional economy. The Shire has emerging and niche industry sectors such as gourmet and artisan food manufacturing, creative industries, and knowledge-based enterprises that leverage the Byron brand identity. This has become critical to the region's future prosperity and employment diversity.

People and Housing Snapshot

Regional City	Tweed
Regional Centres	Ballina Lismore
Town / Village	Coastal and inland towns and villages throughout the Far North Coast Subregion including: Byron Bay Casino Kyogle Murwillumbah Mullumbimby Evans Head Coraki Kingscliff Lennox Head Alstonville
Population in 2011	236,500
Proportion of North Coast population in 2011	43%
Population in 2036	282,550
Proportion of total North Coast population in 2036	44%
Indigenous Persons (% of Far North Coast population)	3.6%
Dwellings in 2011	109,500
Proportion of total North Coast dwellings in 2011	43%
Dwellings in 2036	136,750
Proportion of total North Coast Lone Person Households in 2011	44%
Persons aged over 65 years in the Far North Coast in 2011	19%
Persons aged over 65 years in the Far North Coast in 2036	29%
Unemployment Rate (2011)	7.9%

Over the last ten years, the Far North Coast subregion has experienced the highest levels of population growth on the North Coast. Between 1996 and 2011, the population grew by 17% to 236,500 people. Population growth is expected to continue due to the subregion's proximity to South East Queensland. Between 2011 and 2036, based on current trends, the population of the Far North Coast subregion is expected to grow by over 46,050 people. Forty percent of this population will live in Tweed where an additional 16,860 dwellings will be needed.

Over the same period, South East Queensland’s population is projected to grow by 1.3 million people (almost 20% of Australia’s population growth). By 2035, an additional 320,000 people are expected to reside on the Gold Coast, which directly adjoins Tweed Shire. Accommodating the Gold Coast’s increase in population will require an additional 130,000 dwellings, plus a large amount of associated business and industrial land.

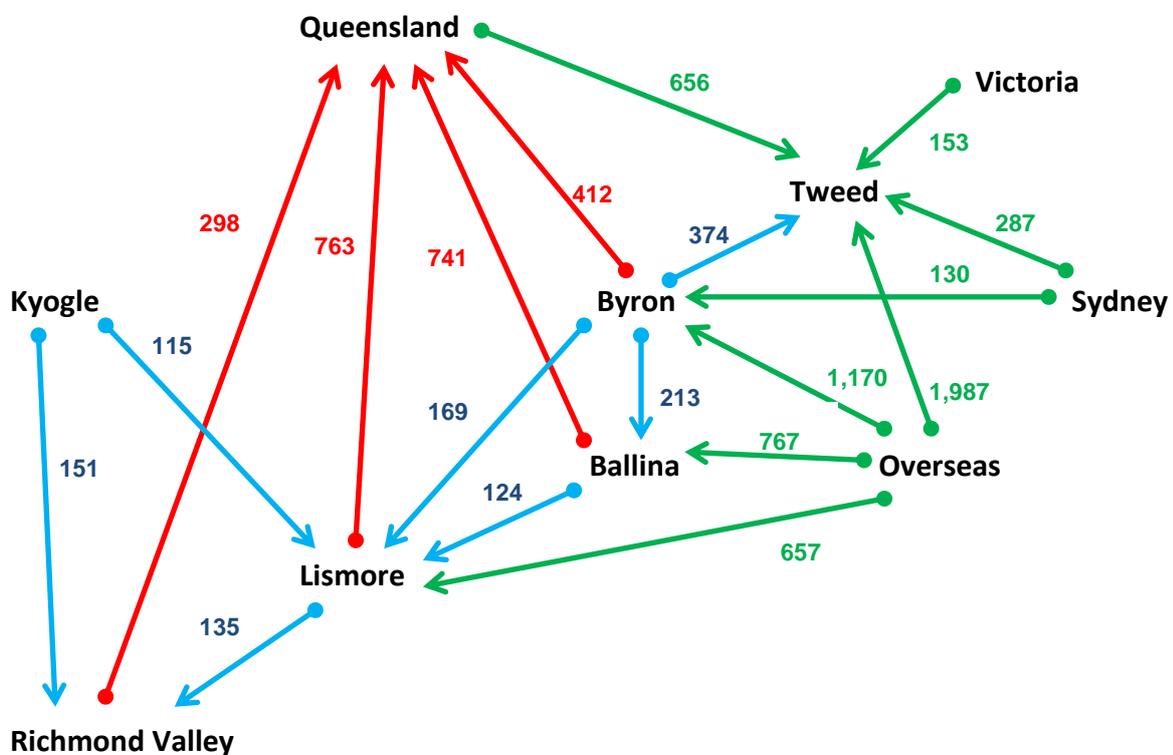
Percentage of the Far North Coast’s population in 2011:

Tweed	Lismore	Ballina	Byron	Richmond Valley	Kyogle
37%	19%	17%	13%	10%	4%

Current migration data (Figure 9) illustrates the majority of the in-migration to the subregion comes from overseas, with only minor net migration from Sydney. Outward migration was predominantly to Queensland. Tweed was the only local government area with a positive migration movement over the five years to 2011. People moved from Byron to surrounding local government areas and from coastal areas to Lismore.

Historically, the influence of Queensland has been felt primarily in the Tweed Local Government Area. Impacts on the wider subregion have been experienced through tourism. As South East Queensland continues to grow its influence is likely to spread further south into the wider subregion.

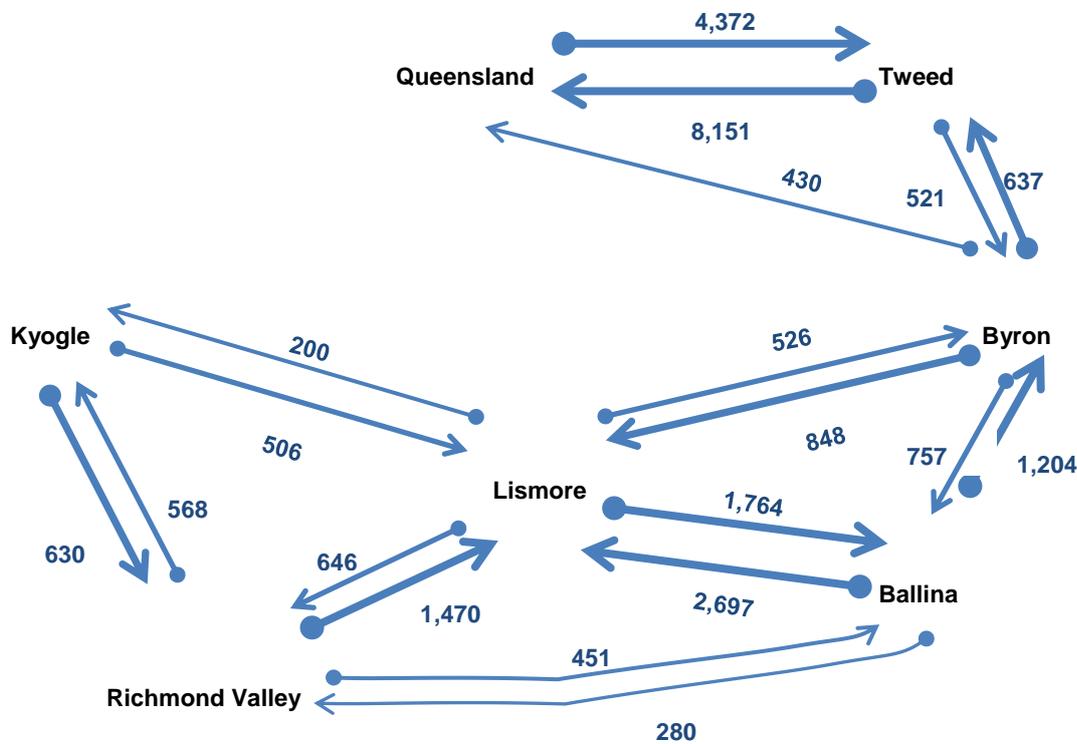
Figure 9: Far North Coast net migration data for 2006-2011



As illustrated in Figure 10 large numbers of the subregion’s residents (especially from Tweed Shire) rely on South East Queensland for employment and services. The subregion’s urban

areas are increasingly interconnected, with large numbers of people regularly commuting between coastal and hinterland centres. Larger employment centres, such as Lismore, also experience net inflows of people accessing work from other local government areas.

Figure 10: Far North Coast journey to work data for 2011



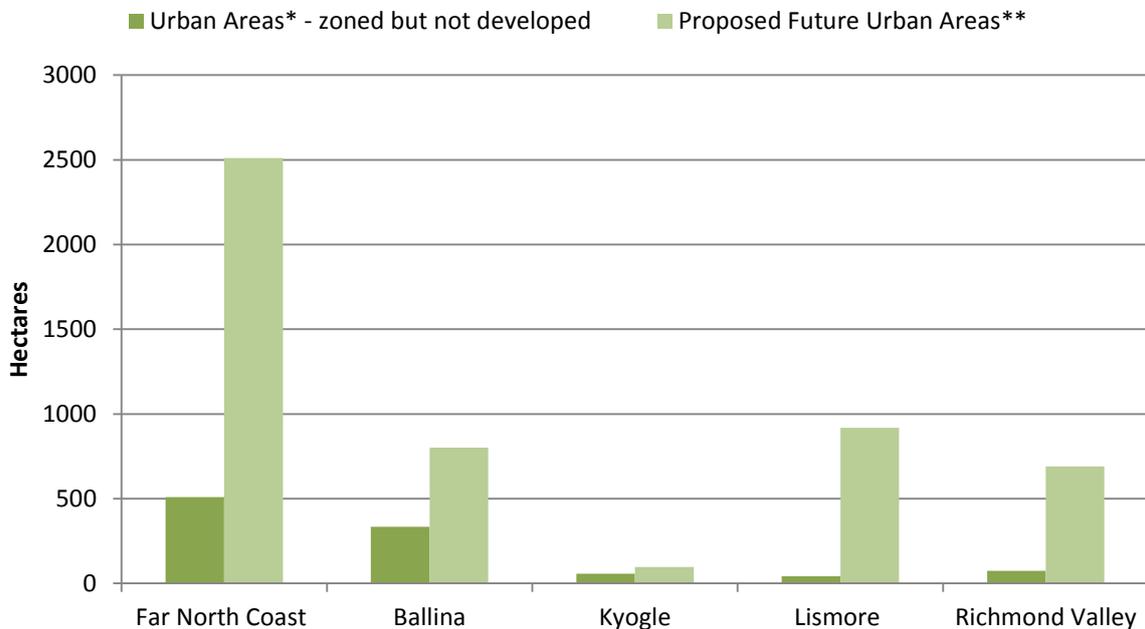
The subregion's ties with South East Queensland provide unique opportunities and challenges. The growth of South East Queensland, coupled with improved connectivity between the two states as a result of recently completed Pacific Highway upgrades, is already placing significant growth pressure on the Far North Coast subregion. The South East Queensland Regional Plan identifies the Tweed coast almost as an extension of the greater Gold Coast urban area. Several planning proposals have recently been submitted to Tweed Shire Council seeking to allow new industrial and residential releases in the coastal area and along the edge of the upgraded highway. Day and weekend trippers from Queensland are now pushing further south, putting pressure on the infrastructure of coastal towns like Byron Bay.

Housing Supply

A review of land in the urban growth areas was undertaken in consultation with councils.

Figure 11 provides a snapshot in time for the current supply of zoned and unzoned land on the Far North Coast. Each council has identified proposed future urban release areas, within the urban growth areas. Not all the land within the proposed urban growth areas can be developed for urban uses due to potential constraints.

Figure 11: Current and potential residential land supply on the Far North Coast (2015)



*Excludes environmental, recreational, special purpose and waterways, as well as employment lands.

**Includes new land release areas only, not infill or brownfield areas.

Tourism

The Far North Coast is highly valued by residents and visitors. The subregion's diverse attractions include beaches, rural scenery, river valleys, villages, World Heritage Areas, local arts and crafts and festival events. Byron Bay provides an international gateway to the subregion's many tourism assets and attractions. Events and festivals hosted across Byron Shire also contribute to the national and international reputation of the subregion as a cultural and entertainment destination.

The Far North Coast is strongly linked to the tourism economy of the Gold Coast region, which offers significant growth opportunities for the subregion. In 2011, the Gold Coast region attracted 10.3 million visitors. In the same year, Tweed Shire attracted 147,700 visitors. Tweed Heads has a shared economy with Coolangatta, based heavily on tourism. Byron Bay is another significant tourist destination on the Far North Coast with an estimated average of 1.36 million visitors per year.

Economy and Infrastructure

Health care and social assistance, education and training and retail trade represent the largest employment industries on the Far North Coast. Alongside traditional agricultural, forestry and fishing industries, the developing creative and knowledge-based industries provide important economic opportunities. The Far North Coast has well-developed education facilities, including Southern Cross University campuses, six TAFE campuses and nearly 30 institutions specialising in arts, crafts, theatre and film.

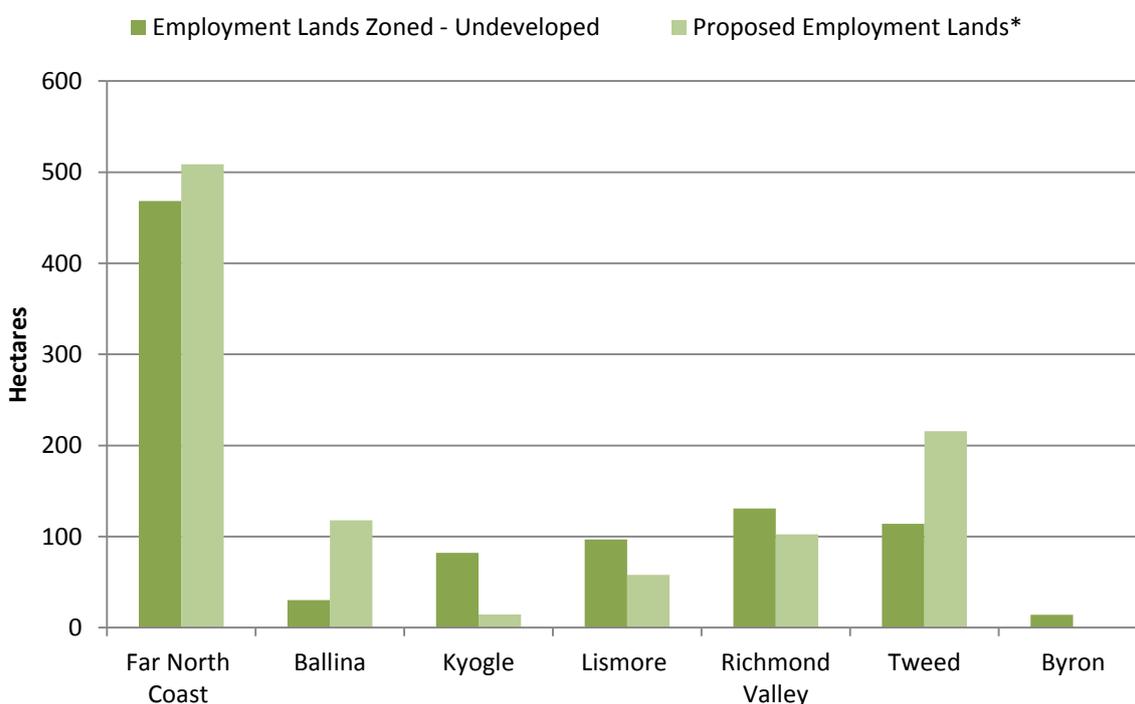
Tweed and Lismore have the greatest share of employment in the subregion, providing 35% and 20% of jobs respectively. Ballina provides a further 18% of jobs and Byron 13%.

As shown in Appendix 4, significant infrastructure investment is planned for the Far North Coast to support projected population growth and to deliver employment growth.

Employment Land Supply

The *2015 North Coast Employment Land Study* investigated the supply of land within the urban growth areas. Figure 12 illustrates the results of this study as well as the proposed future employment lands within the urban growth areas.

Figure 12: Current and potential employment lands supply on the Far North Coast (2015)



*Includes greenfield areas only

Agriculture

Agricultural activities are widespread across the Far North Coast, with over 470,000 hectares of land used for agricultural production. In 2011, agriculture gross value from the Far North Coast was worth \$400 million – the largest contributor on the North Coast.

Fertile soils and a favourable subtropical climate produce a diversity of agricultural landscapes. The volcanic soils of the Cudgen-Duranbah plateau enable intensive horticulture production. The floodplains primarily support sugar cane production. Elevated basaltic slopes and marginal lands support bananas, avocados, macadamias and cattle grazing, and contain much retained biodiversity. Table 3 indicates the economic value of agricultural commodities produced on the Far North Coast.

Table 3: Value of agriculture in the Far North Coast subregion 2010-11

Agricultural commodity	Far North Coast - Gross Value (\$m)	% of NSW
Livestock - Cattle and calves (for consumption)	93.2	6
Livestock - Poultry (for consumption)	52.5	8
Sugar cane	39.7	63
Whole milk	42.4	8
Horticulture - Nurseries and cut flowers and cultivated turf	44.8	14
Macadamia nuts	38.7	91
Bananas	7.3	39
Livestock - Pigs (for consumption)	9.4	6
Passionfruit	3.6	97
Avocados	3.3	22
Custard apples	2.6	90
Soybeans	2.2	21
Herbs	0.5	11
Guava	0.7	100
Papaws	0.3	100%
Mangoes	0.1	33

Appendix 1: North Coast Settlement Hierarchy

Centre type	Function	Centre location
Regional city	<ul style="list-style-type: none"> • Provide the greatest range of higher-order services and employment opportunities in education, health, entertainment, community support, professional and personal service, comparison and specialty retail, sport and recreation. • Provide the largest commercial component of any location in the subregion to support employment growth. • Act as the main shopping and business centre for the subregion, with a full-scale shopping mall, regional education and health facilities, taller office and residential buildings and central community facilities. • Source of significant parks and recreational and major regional sporting facilities. • Act as an administrative service centre for Government. • The Local Government Area offers a minimum of 20,000 jobs. • The Local Government Area typically has more than 30,000 dwellings. • The Local Government Area typically home at least 60,000 people. 	Coffs Harbour Port Macquarie Tweed Heads
Regional centre	<ul style="list-style-type: none"> • Provide infrastructure and characteristics similar to the regional cities, while serving smaller catchments. They generally offer a more limited range of services, facilities and job opportunities. • Perform an important role in the subregion's economy, and provide essential services to their catchments. • Act as administrative service centres for State agencies. • The Local Government Area offers a minimum of 10,000 jobs in the area. • Typically have more than 20,000 dwellings. • Typically home to between 30,000 and 60,000 people. 	Ballina Lismore Taree Grafton
Town/Village	<ul style="list-style-type: none"> • Have a structured urban form that is self-contained with shopping and business services and a variety of job opportunities in tourism and retail. They rely on the regional centre and regional city for other opportunities. • Typically have a main street, sports facilities and reasonable access to parkland. • Some villages may only provide for convenience needs (such as a general store/post office and/or a hotel) and typically have limited commercial development. 	Coastal and inland towns and villages throughout the North Coast including: Kempsey Wauchope Old Bar

Centre type	Function	Centre location
	<ul style="list-style-type: none"> • Provide services and facilities for surrounding rural areas. Important commuter areas for regional centres and cities. • May provide higher-order services such as manufacturing, bulky goods, warehousing, health and professional services. 	<p>Wingham Lake Cathie/Bonny Hills Camden Haven South West Rocks Bellingen Macksville Maclean Woolgoolga Nambucca Heads Dorrigo Yamba Urunga Byron Bay Casino Kyogle Murwillumbah Mullumbimby Evans Head Coraki Kingscliff Lennox Head Alstonville</p>

Appendix 2: Infrastructure investment on the Lower North Coast

	Project or Program	Timing	Funding Status	Project Status	Delivery Agency	Strategic Justification
Transport	Pacific Highway: Oxley Highway to Kundabung	1-5 years	NSW Budget (partially funded)	Construction commenced	RMS	The duplication of the Pacific Highway will improve transport connectivity and the freight network between Sydney and Brisbane by reducing travel times and improving travel safety and efficiency.
	Pacific Highway: Kundabung to Kempsey	1-5 years	NSW Budget (partially funded)	Construction commenced	RMS	The duplication of the Pacific Highway will improve transport connectivity and the freight network between Sydney and Brisbane by reducing travel times and improving travel safety and efficiency.
	Pacific Highway: Frederickton to Eungai	1-5 years	NSW Budget (partially funded)	Construction commenced	RMS	The duplication of the Pacific Highway will improve transport connectivity and the freight network between Sydney and Brisbane by reducing travel times and improving travel safety and efficiency.
	Upgrades to sections of Oxley Highway between Port Macquarie and Wauchope	1-5 years	NSW Long Term Transport Master Plan	In progress	RMS	Upgrading of this Highway will improve connectivity to Port Macquarie City Centre, the Pacific Highway and the new release area at Thrumster.
	Oxley Highway and Wrights Road Intersection Improvements, Port Macquarie	1-5 years	NSW Budget (partially funded)	Funded	RMS	These upgrades will improve connectivity to the City Centre, new Charles Sturt campus, the Port Macquarie Base Hospital and capacity for housing growth in the area.
Health	Port Macquarie Base Hospital Expansion	1-5 years	NSW Budget (partially funded)	Currently under construction	Ministry of Health	A new in-patient mental health unit will more than double the number of mental health beds at the hospital, which forms part of the Port Macquarie Health Services Precinct.
	Kempsey District Hospital Redevelopment	1-5 years	NSW Budget (partially funded)	Currently under construction	Ministry of Health	The redevelopment will provide new and expanded facilities to increased service capacity to meet the changing care needs of the community.
	Kempsey Ambulance Station	1-5 years	NSW Budget (partially funded)	Currently under construction	Ministry of Health	The new station will ensure the area continues to be well-served by emergency services infrastructure for the safety of existing and future populations.

	Project or Program	Timing	Funding Status	Project Status	Delivery Agency	Strategic Justification
	Manning Hospital Redevelopment	1-5 years	NSW Budget (partially funded)	In progress	Ministry of Health	The redevelopment will deliver a significant enhancement to cancer care and renal services as well as create space for intensive care services. The hospital forms part of the Taree Health Services Precinct which is well supported by complementary land uses such as the University of Newcastle's Rural Clinical School and Taree TAFE, which runs courses in nursing and aged care.
Education	New Charles Sturt University Campus, Port Macquarie	Long term 10+ years	Charles Sturt University	In progress	Charles Sturt University	The works will provide a new campus for up to 5,000 students by 2030 to assist in accommodating the region's growing demand for tertiary education opportunities.
	Taree TAFE – Facilities Upgrade	1-5 years	NSW Budget (partially funded)	In progress	TAFE Commission	Upgrades are to include nursing and aged care facilities onsite to provide vocational training in these skill sectors and respond to the communities changing care needs.
Emergency Services	Wingham Fire Station Extension	1-5 years	NSW Budget 2015/16	In progress	Fire & Rescue NSW	The extension will ensure the area continues to be well-serviced by emergency services infrastructure for the safety of existing and future populations.

Appendix 3: Infrastructure investment on the Mid North Coast

Project or Program		Timing	Funding Status	Project Status	Delivery Agency	Strategic Justification
Transport	Pacific Highway: Nambucca Heads to Urunga	1-5 years	NSW Budget (partially funded)	Construction commenced	RMS	The duplication of the Pacific Highway will improve transport connectivity and the freight network between Sydney and Brisbane by reducing travel times and improving travel safety and efficiency.
	Pacific Highway: Warrell Creek to Nambucca Heads	1-5 years	NSW Budget (partially funded)	Construction commenced	RMS	The duplication of the Pacific Highway will improve transport connectivity and the freight network between Sydney and Brisbane by reducing travel times and improving travel safety and efficiency.
	Pacific Highway: Woolgoolga to Ballina	1-5 years	NSW Budget (partially funded)	Construction commenced	RMS	The duplication of the Pacific Highway will improve transport connectivity and the freight network between Sydney and Brisbane by reducing travel times and improving travel safety and efficiency.
	Coffs Harbour Bypass (planning) and delivery	1-20 years	NSW Budget (partially funded)	Planning commenced	RMS	The bypass will provide an uninterrupted traffic flow along the Pacific Highway, further reducing travel times and improving travel efficiency and road safety in the locality.
	Summerland Way additional crossing of the Clarence River at Grafton	1-5 years	NSW Budget (partially funded)	Planning commenced	RMS	A second bridge at Grafton will help to reduce congestion and traffic delays in the area while also improving flows on the Summerland Way, which provides an important connection north towards Casino.
	Upgrading the timber bridge over Sportsman Creek at Lawrence	1-5 years	Bridges for the Bush Program (partially funded)	Planning commenced	RMS	A new bridge over Sportsman Creek will improve travel safety and reliability and connectivity to urban areas.
	Coffs Harbour Airport upgrades	1-5 years	Regional Tourism Infrastructure Fund	Planning commenced	Transport for NSW	The upgrades will include the expansion of the airport parking apron and improvements to the terminal to handle more passengers.
	Coffs Harbour Hospital	1-5	NSW Budget	Funded	Ministry of	The redevelopment will include new operating theatres,

	Redevelopment	years	(partially funded)		Health	improved community health services, enhancements to existing surgical services, and an ambulatory care area to cater for the needs of a growing and changing population. The upgrades will also contribute to creating the Coffs Harbour Health Services Precinct where complementary and compatible land uses will be encouraged in close proximity to the hospital.
Health	Coffs Harbour Health Campus Car Park	1-5 years	NSW Budget (partially funded)	Currently under construction	Ministry of Health	The provision of a new car park will continue to improve access to health care.
	Grafton Hospital Ambulatory Care	1-5 years	NSW Budget (partially funded)	Planning commenced	Ministry of Health	A new facility at Grafton Base Hospital will improve health care delivery, including renal services, occupational therapy and physiotherapy, to support the projected demand for these services.
	Macksville Hospital Redevelopment	1-5 years	NSW Budget (partially funded)	Planning commenced	Ministry of Health	The redevelopment of this hospital will improve ambulatory care and outpatient treatments to accommodate future community health needs, and attract health professionals to live and work in the region.
Emergency Services	Northern NSW Correctional Centre, Grafton	1-5 years	NSW Budget	Funded	Department of Justice	The centre will meet the demand for more correctional places on the North Coast.
Electricity	Grafton North Zone Substation upgrade	1-5 years	NSW Budget	Currently under construction	Essential Energy	Upgrading of the zone substation will increase power supply capacity to accommodate growing demand for electricity.

Appendix 4: Infrastructure investment on the Far North Coast

	Project or Program	Timing	Funding Status	Project Status	Delivery Agency	Strategic Justification
Transport	Pacific Highway: Tintenbar to Ewingsdale	1-5 years	NSW Budget (partially funded)	Construction commenced	RMS	The duplication of the Pacific Highway will improve transport connectivity and the freight network between Sydney and Brisbane by reducing travel times and improving travel safety and efficiency.
	Ballina Byron Airport upgrades	1-5 years	Regional Tourism Infrastructure Fund	Planning commenced	Transport for NSW	The upgrades will include the resurfacing of the airport's parking apron and improvements to the airport terminal to increase passenger numbers.
	Lismore Airport upgrades	1-5 years	Regional Tourism Infrastructure Fund	Planning commenced	Transport for NSW	The upgrades will include improvements to the airport's security, lighting, amenities and general aviation facilities to assist in attracting more passengers.
	Replacement of the Tabulam Bridge across the Clarence River	1-5 years	Bridges for the Bush Program (partially funded)	Planning commenced	RMS	Replacing the existing bridge will improve road transport productivity along the Bruxner Highway, which serves as an important east-west road connection for the movement of goods and people to and from the region.
Health	Tweed Hospital Upgrade	1-5 years	NSW Budget (partially funded)	Funded	Ministry of Health	The upgrade will include a new emergency department, enhanced wards and specialist units and a new multi-storey car park. The upgrades will also contribute to a new Tweed Health Services Precinct where complementary and compatible land uses will be encouraged in close proximity to the hospital.
	Pottsville Ambulance Station	1-5 years	NSW Budget (partially funded)	Funded	Ministry of Health	The new station will ensure the area continues to be well serviced by emergency services infrastructure for the safety of existing and future populations and will complement the existing Pottsville HealthOne facility.

Project or Program	Timing	Funding Status	Project Status	Delivery Agency	Strategic Justification
Murwillumbah Hospital Car Park improvements	1-5 years	NSW Budget (partially funded)	Funded	Ministry of Health	The provision of improved car parking will provide ongoing access to health care.
Lismore Base Hospital Redevelopment (Stage 3A)	1-5 years	NSW Budget (partially funded)	Currently under construction	Ministry of Health	The redevelopment will improve access to and equity in the delivery of a wider range of services, and additional capacity to respond to the growth in demand and the needs of the local community. It will also assist in creating the Lismore Health Services Precinct by encouraging complementary and compatible land uses in close proximity to the hospital.
Lismore Base Hospital Car Park	1-5 years	NSW Budget (partially funded)	Currently under construction	Ministry of Health	As part of the redevelopment of the Base Hospital additional car parking is required.
Byron Central Hospital	1-5 years	NSW Budget (partially funded)	Currently under construction	Ministry of Health	The delivery of a new hospital will provide emergency facilities as well as a mental health unit and ambulatory care to cater for the needs of a growing and changing population.
Coraki HealthOne Care Centre	1-5 years	NSW Budget (partially funded)	Funded	Ministry of Health	This centre will integrate primary and community health care services to improve access and health outcomes for disadvantaged and vulnerable groups, as well as provide aged care services to meet the needs of an ageing population. It will also reduce demands for hospital care by providing chronic disease management in the community.
Ballina District Hospital Upgrade	1-5 years	NSW Budget (partially funded)	Funded	Ministry of Health	The delivery of a new hospital will provide emergency facilities as well as a mental health unit and ambulatory care to cater for the needs of a growing and changing population.

	Project or Program	Timing	Funding Status	Project Status	Delivery Agency	Strategic Justification
Education	Pottsville Beach Public School Upgrade	1-5 years	NSW Budget (partially funded)	Funded	Department of Education and Communities	The upgrades will support the delivery of secondary education by providing facilities for up to 1,000 students.
	New Ballina High School	1-5 years	Rebuilding NSW fund	Project planning phase	Department of Education and Communities	The provision of a new school will support the delivery of secondary education.
Emergency Services	New Tweed Heads Police Station	1-5 years	NSW Budget (partially funded)	Currently under construction	NSW Police Force	The delivery of a new station will allow for the expansion of services to respond to the demands of a growing population and ensure its safety.
	New Ballina Fire and Rescue Station	1-5 years	NSW Budget (partially funded)	Currently under construction	Fire & Rescue NSW	The new station will ensure the area continues to be well- serviced by emergency services infrastructure for the safety of existing and future populations.
Electricity	Mullumbimby Zone Substation upgrade	1-5 years	NSW Budget	Currently under construction	Essential Energy	Upgrading the zone substation will increase power supply capacity to accommodate a growing demand for electricity.
	Lismore to Mullumbimby via Ballina upgrade	1-5 years	NSW Budget	Currently under construction	Essential Energy	Upgrading of the network will increase power supply capacity to meet the growing demand for electricity in the Ballina Shire, Byron Shire and Lismore City Local Government Areas and improve the reliability of supply.