

Employment lands development monitor

What are employment lands?

Employment lands are areas zoned for industrial or similar purposes in planning instruments. They are generally lower density employment areas, and provide essential space for the delivery of:

- utilities and urban services, including depots, repair trades and service centres,
- goods, from the research, design and manufacturing of goods to their warehousing, distribution and sale.

The industries and business that situate themselves in these spaces support jobs growth and development, as well as generate significant economic benefits for the community. They are crucial to the functioning of cities; it is critical that there is enough land in the right places for this to occur.

What is the Employment Lands Development Monitor (ELDM)?

The ELDM is a comprehensive annual snapshot and analysis of industrial lands and business parks across the Greater Sydney, Central Coast, Hunter and Illawarra–Shoalhaven regions. It also provides an overview of employment lands in the rest of Regional NSW.

It provides information on the:

- current stock and availability of employment lands
- location of serviced employment lands that are ready for development
- location of recently developed employment lands and where planning proposals have been lodged
- location of potential future employment lands as identified in strategic plans.

Figure 1. Employment lands at Ingleburn.



Employment lands

Employment Lands Development Monitor 2022 summary report



The ELDM provides the data and evidence necessary to inform the planning delivery and servicing of employment lands. It is a research tool for NSW Government agencies, councils, businesses, developers, investors, and service providers. The ELDM is an annual snapshot taken at a point in time (January 2022).

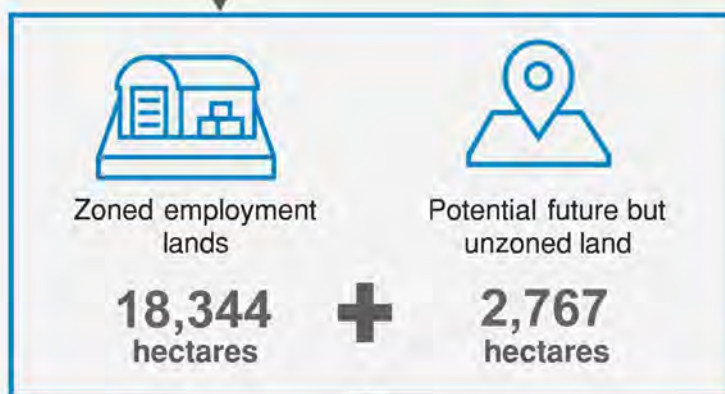
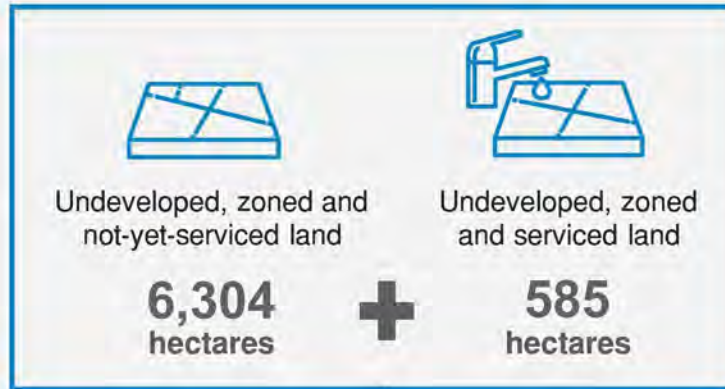
For the first time in 2021, the scope of the ELDM was expanded to capture an overview of the total zoned employment land in the 80 regional NSW LGAs not covered in the regions that make up the existing ELDMs. The level of information and analysis provided for Regional NSW areas was expanded upon in 2022, with a Lot Audit being undertaken for the 12 LGAs that represent a Regional City. These 12 Regional LGAs are; Albury, Armidale, Bathurst, Coffs Harbour, Dubbo, Griffith, Lismore, Orange, Port Macquarie-Hastings, Tamworth, Tweed and Wagga Wagga.

Employment lands precincts

Since 2008, employment lands in Greater Sydney and the Central Coast have been categorised into precincts. These employment land precincts were initially defined along industrial zone boundaries. Due to the implementation of the Standard Instrument – Principal Local Environmental Plan, these precincts may now include other business zones that permit industrial uses. Employment land precincts are tracked separately from all zoned employment lands (referred to as the Employment Land Supply Monitor). This historical record provides a comprehensive understanding of employment land changes.

Employment lands

Employment Lands Development Monitor 2022 summary report



Total employment land supply
21,111 hectares

Greater Sydney region

Employment land precincts

At January 2022 there were 18,344 hectares of total zoned employment land in *employment land precincts* across Greater Sydney. Of these, 38%, or 6,889 hectares, were undeveloped. This is a decrease of 165 hectares from the previous year, which is primarily driven by take-up during 2021.

Of the total undeveloped land within employment land precincts, 585 hectares were serviced with water and sewer lead-in services.

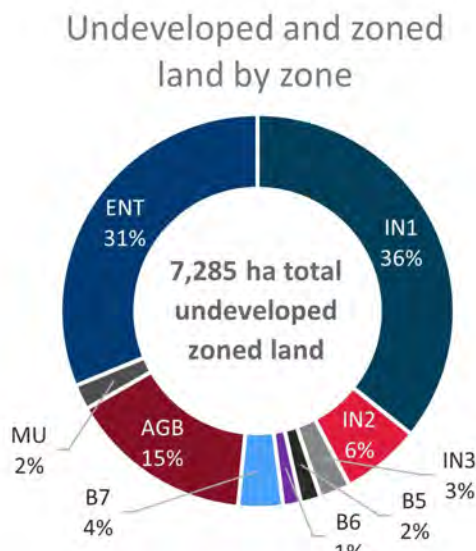
More than 62% (4,287 hectares) of the total undeveloped zoned land stock is in 156 lots of more than 10 hectares. Most of these lots are in the key precincts of Mamre Road and the precincts within the Western Sydney Aerotropolis area, and are predominantly zoned IN1 General Industrial, ENT (Enterprise) and ABG (Agribusiness).

Zoned employment lands

Zoned employment lands include all land zoned for industrial uses, including zoned industrial land outside employment land precincts. At January 2022 there were 13,131 hectares of industrial zoned land and 2,540 hectares of B5, B6, and B7 zoned land in Greater Sydney. Additionally, there were 3,814 hectares of ENT, AGB and select MU Mixed Use zoned land in the Western Sydney Aerotropolis Area. This is an increase of 42.5 hectares from January 2021, largely as a result of rezoning new precincts at Prospect South and Cecil Park as well as additional rezoning at Lowes Creek Maryland.

Of this total zoned employment land, 7,285 hectares of land was undeveloped. Most zoned, but undeveloped employment lands in Greater Sydney are zoned IN1 – General Industrial.

Figure 3. All undeveloped and zoned lands¹ (zones IN1–IN4, zones B5–B7, AGB, ENT and MU)



¹ Including all undeveloped and zoned land, in and outside employment land precincts.

Employment land rezoning and planning proposals

In the year to January 2022, 30.3 hectares of additional employment land was added through rezoning in *employment land precincts* across Greater Sydney. This occurred in new precincts at Elizabeth Drive, Cecil Park in Liverpool (10.6 hectares) and Prospect South in Blacktown (11.8 hectares), as well as additional land being rezoned at Mulgrave/Vineyard in Hawkesbury (4.7 hectares), Castle Hill in The Hills (2.9 hectares) and Austral in Liverpool (0.3 hectares).

In 2021, 18.9 hectares of employment land was rezoned for non-employment purposes at Yarrunga/Prestons in Liverpool (10.2 hectares), Rhodes, Leeds Street in Canada Bay (6.4 hectares), Croydon Park in Canterbury-Bankstown (1.5 hectares), Emu Plains in Penrith (0.4 hectares), North Penrith in Penrith (0.2 hectares) and Campbelltown, Blaxland Road in Campbelltown (0.2 hectares).

In 2021, there were 8 planning proposals approved at the gateway (the gateway is where the Minister or delegate decides whether a planning proposal can proceed). Finalising these proposals would result in a net loss of approximately 58.6 hectares of employment land.

In 2021, there were three proposals lodged, but not yet determined, relating to employment lands. If finalised, these proposals would result in the net loss of approximately 4.7 hectares of employment land.

Potential future employment lands

In addition to existing zoned employment lands, there were 2,767 hectares of potential future employment lands as at January 2022. Most of these future areas are identified in the South West Growth Centre structure plan, the Western Sydney Aerotropolis Plan and The Metropolis of Three Cities and District plans. This figure is the total gross potential future employment land. This will reduce as it moves through various planning stages (for example, released, rezoned, subdivided, serviced) to become development ready.

Not all these lands may be developable. These areas are subject to further investigations at the precinct planning stage to assess suitability for development. This will consider a range of constraints such as riparian corridors, topography, vegetation, transport corridors, local roads and lot fragmentation.

Employment lands take up

Take-up of employment lands is the quantity in hectares of zoned Employment Lands which has changed from 'undeveloped' (vacant) to 'developed' (occupied) over a 12-month period, between January 2021 and January 2022.

Take-up of employment land for industrial development was 163 hectares in 2021. This compares with 86 hectares in 2020, 140 hectares in 2019 and 146 hectares in 2018. The majority of the land take-up (91% or 149 hectares) occurred in Western Sydney², including 119 hectares in the Western City District.

Take-up activity was primarily concentrated in the precincts of Penrith, Liverpool, Blacktown and Fairfield, with these four LGA's accounting for 84% (or 137 hectares) of the take-up that occurred within precincts during 2021.

Figure 4. Take-up of employment lands for Greater Sydney by year to 2021



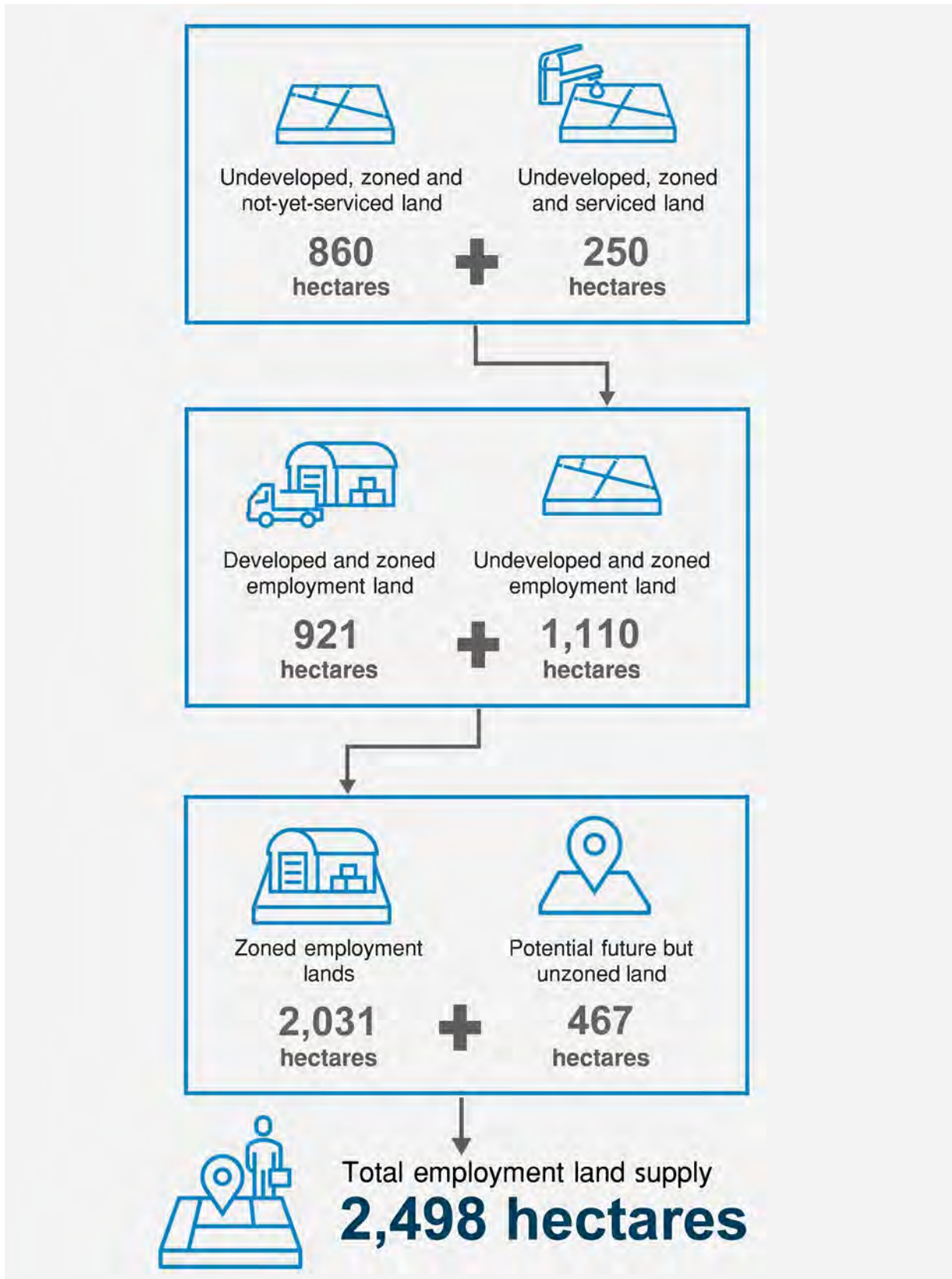
² Western Sydney is defined as the Central City and Western City Districts, as identified in the Greater Sydney Commission's *Central City District Plan* and *Western City District Plan*.

Employment lands

Employment Lands Development Monitor 2022 summary report



Figure 5. Central Coast employment land precincts at a glance



Central coast region

Employment land precincts

As at January 2022, there were 2,031 hectares of total zoned employment land contained *in employment land precincts* across the Central Coast, same as last year. Of these 55%, or 1,110 hectares were undeveloped, a decrease of 2 hectares from the previous year.

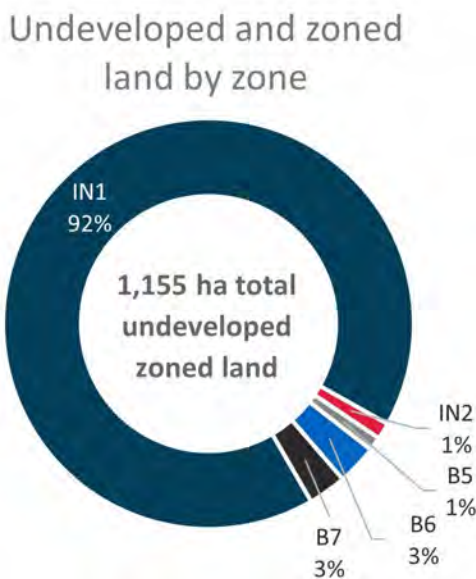
Of the total undeveloped zoned land, 250 hectares were serviced with water and sewer lead-in services.

Zoned employment lands

As at January 2022, there were 1,876 hectares of industrial zoned land and 297 hectares of B5, B6, and B7 zoned land in the Central Coast region. These figures remain unchanged from January 2021.

Of this total zoned employment land, 1,155 hectares of zoned land was undeveloped. Most zoned but undeveloped employment lands in the Central Coast region are zoned IN1 General Industrial.

Figure 6. All undeveloped and zoned land³ (zones IN1–IN4 and zones B5–B7) for the Central Coast region



Employment land rezoning and current planning proposals

In 2021, there were no rezonings in the Central Coast relating to employment lands.

In 2021, there was one planning proposals approved at the gateway (the gateway is where the Minister or delegate decides whether a planning proposal can proceed). Finalising this proposal would result in an increase of approximately 1.4 hectares of employment land.

³ Including all undeveloped and zoned land, in and outside employment land precincts.

Employment lands

Employment Lands Development Monitor 2022 summary report



Potential future employment lands

In addition to existing zoned employment lands, there are 467 hectares of potential future industrial land identified in the North Wyong Shire Structure Plan.

Not all these lands may be developable. There will be further investigation into these areas at the precinct planning stage to assess suitability for development. This will consider a range of constraints, such as riparian corridors, topography, vegetation, transport corridors, local roads and lot fragmentation.

Employment land take-up

Take-up of employment land for industrial development was 7 hectares in 2021. This is higher than the take-up in 2020 but still lower than its historical average. The largest proportion of land taken up in the Central Coast in 2021 was in Somersby and Tuggerah.

Figure 7. Take-up of employment lands for the Central Coast region by year to 2021

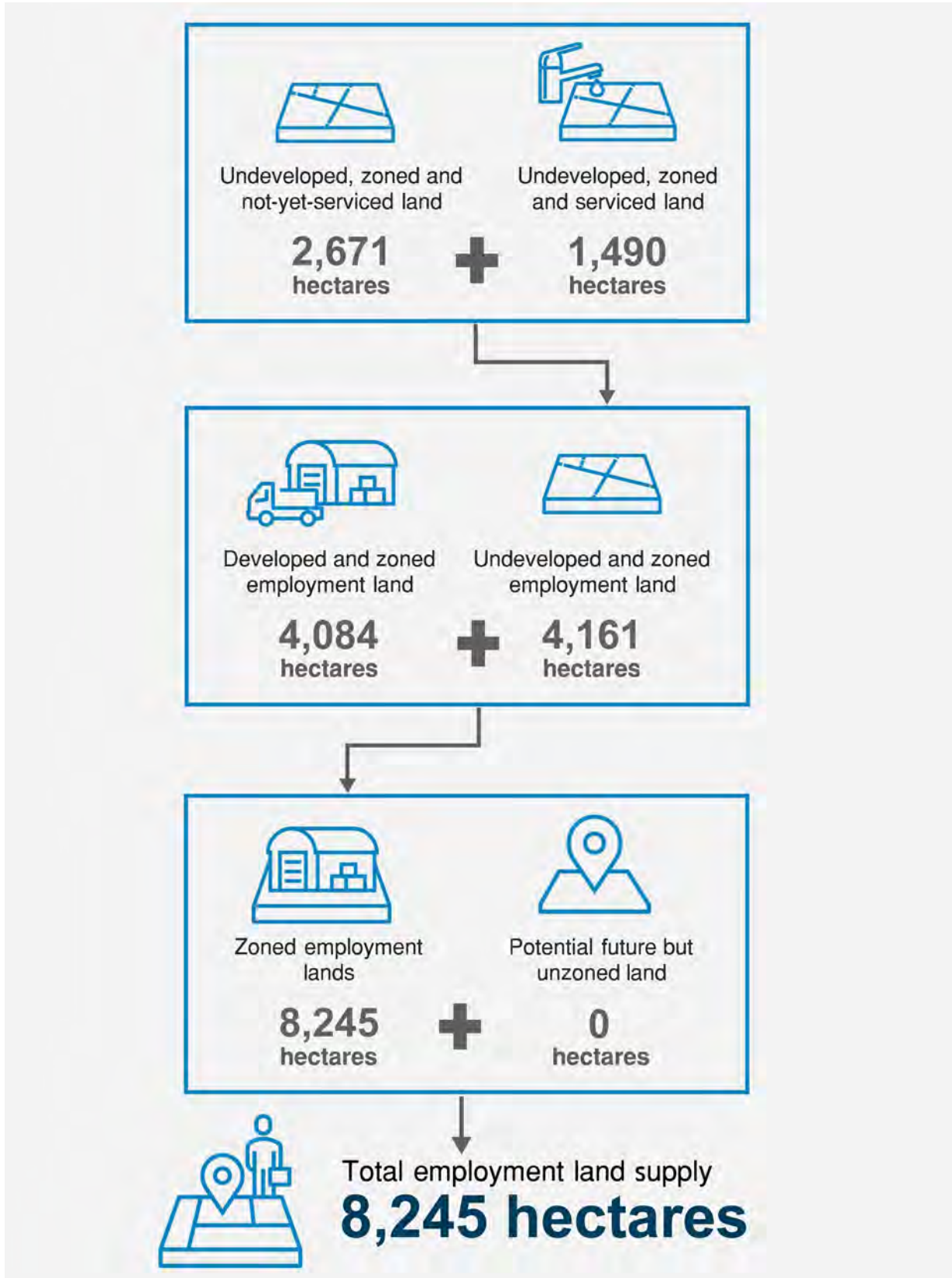


Employment lands

Employment Lands Development Monitor 2022 summary report



Figure 8. Hunter region employment lands at a glance



Hunter region

The Hunter region comprises 10 LGAs: Cessnock, Dungog, Lake Macquarie, Maitland, MidCoast, Muswellbrook, Newcastle, Port Stephens, Singleton and the Upper Hunter. It includes all industrial, B5 Business Development, B6 Enterprise Corridor and B7 Business Park zoned land, as well as select special-purpose zones relating to the Newcastle Port and Port Stephens air transport facility. No individual employment land or business park precincts have been identified.

Zoned employment lands

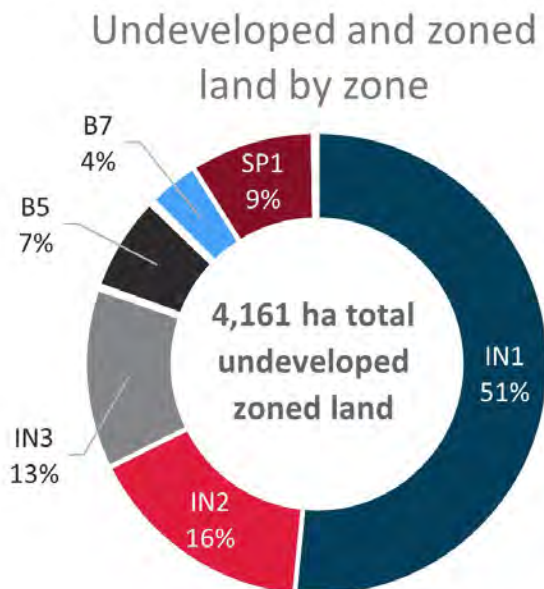
At January 2022, there were 5,649 hectares of industrial zoned land; 1,051 hectares of B5, B6 and B7 zoned land; and 1,544 hectares of special-purpose zones in the Hunter region.

Of this total zoned employment land, 4,161 hectares was undeveloped. This is an increase of 64 hectares from January 2021, largely as a result of rezoning in MidCoast, Port Stephens and Upper Hunter LGAs. Most zoned, but undeveloped employment lands in the Hunter region are zoned IN1 General Industrial.

Of the undeveloped land, 77% (3,206 hectares) is within the Greater Newcastle metropolitan area (Cessnock, Lake Macquarie, Maitland, Newcastle and Port Stephens LGAs).

Of the total undeveloped zoned land, 1,490 hectares were serviced with water services (within 30 metres of a water and sewer⁴ main). Most of this land was in the Greater Newcastle metropolitan area (1,169 hectares), including Cessnock (661 hectares), Port Stephens (202 hectares) and Newcastle (179 hectares).

Figure 9. All undeveloped and zoned land (zones IN1–IN4, zones B5–B7 and select special purpose, SP1, zones) for the Hunter region



⁴ Where a sewer main is within 30 metres for a particular site, we assume that water is also available.

Employment lands

Employment Lands Development Monitor 2022 summary report



Figure 10. Industrial area in Carrington, Newcastle



Employment land rezoning and current planning proposals

In 2021 in the Hunter region, there was an additional 89.4 hectares of land rezoned to employment land which occurred in MidCoast (81.7 hectares), Port Stephens (5.2 hectares) and Upper Hunter (2.5 hectares).

There were no planning proposals lodged or approved at the gateway in 2021 relating to employment lands in the Hunter region.

Employment land take-up

Take-up of employment land for industrial development was 43 hectares in 2021. This compares with 36 hectares in both 2020 and 2019, and 26 hectares in 2018. Most of the land take-up was in the Newcastle (17 hectares), Lake Macquarie (13 hectares), and Maitland (7 hectares) LGAs.

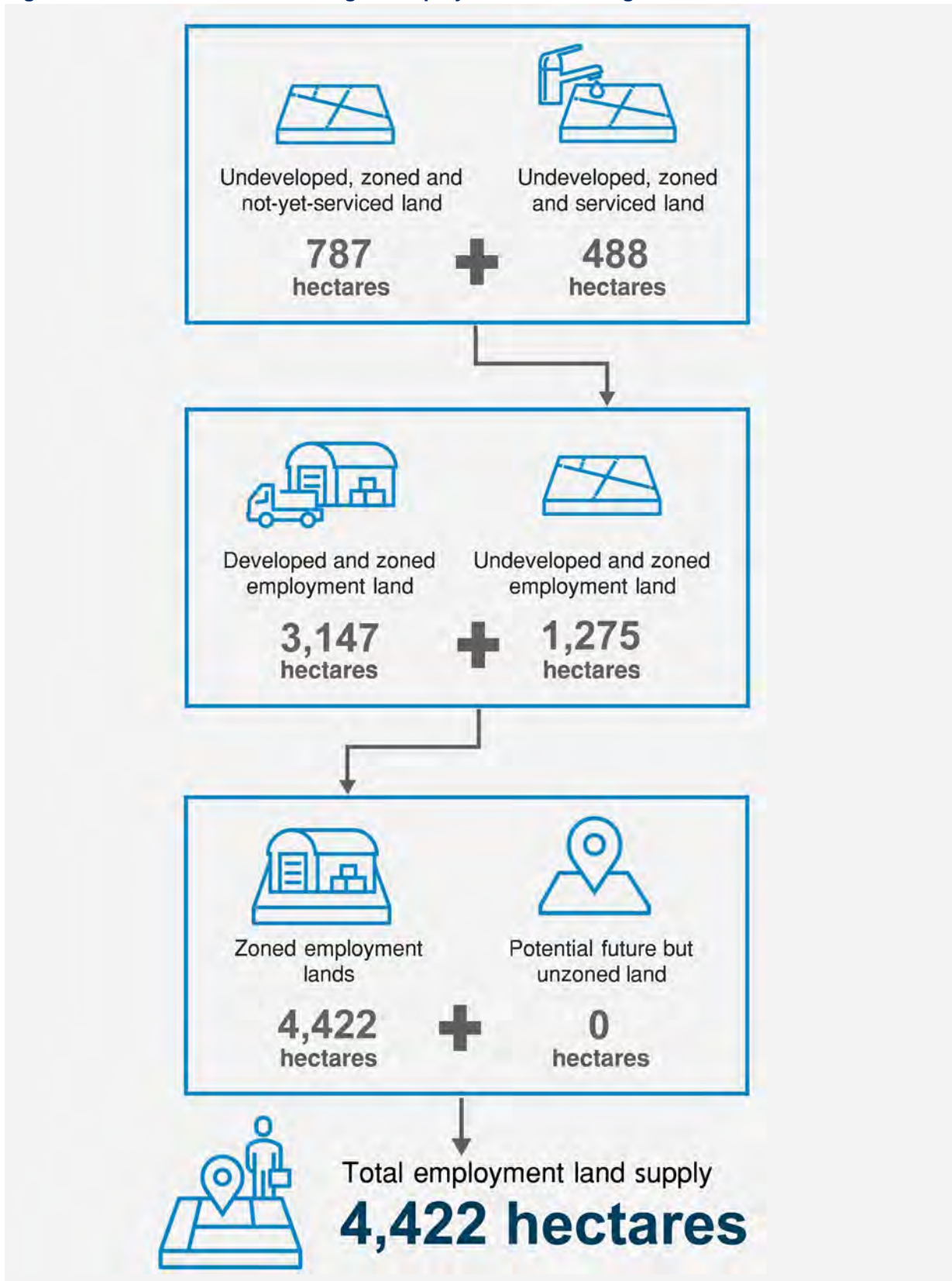


Employment lands

Employment Lands Development Monitor 2022 summary report



Figure 12. Illawarra–Shoalhaven region employment lands at a glance



Illawarra–Shoalhaven region

The Illawarra–Shoalhaven region comprises the four LGAs: Kiama, Shellharbour, Shoalhaven and Wollongong. It includes all industrial, B5 Business Development, B6 Enterprise Corridor and B7 Business Park zoned land, as well as select special-purpose zones relating to the Wollongong Innovation Campus, Shellharbour air transport facility, Port Kembla and HMAS Albatross. No individual employment land or business park precincts have been identified.

Zoned employment lands

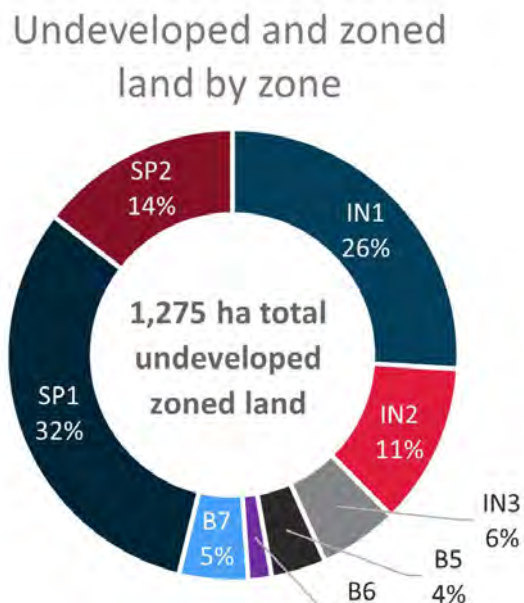
At January 2022, there were 2,559 hectares of industrial zoned land, 386 hectares of business zoned land and 1,477 hectares of special-purpose zoned land in the Illawarra–Shoalhaven region. This represents a slight decrease from January 2021.

72% (1,842 hectares) of total zoned industrial land is in the Wollongong LGA, and 50% (192 hectares) of the business zoned land and 76% (1,119 hectares) of select special-purpose zoned land is in the Shoalhaven LGA.

Of this total zoned employment land, 1,275 hectares were undeveloped. Most zoned, but undeveloped employment lands in the Illawarra–Shoalhaven Region is zoned SP1 Special Purpose, followed by IN1 General Industrial.

Of the total undeveloped zoned land, 484 hectares were serviced with water and sewer. Most of this land was in the Shoalhaven LGA (415 hectares).

Figure 13. All undeveloped, zoned land (zones IN1–IN4, zones B5–B7 and select special-purpose, SP1 and SP2, zones) for the Illawarra–Shoalhaven region



Employment lands

Employment Lands Development Monitor 2022 summary report



Employment land rezoning and current planning proposals

In 2021, there were 7.2 hectares of land rezoned from employment purposes to non-employment purposes in the Shoalhaven LGA.

In 2021, there were two planning proposals approved at the gateway relating to employment land in the Illawarra-Shoalhaven region. Finalising these proposals would result in a net gain of approximately 7.1 hectares of employment land.

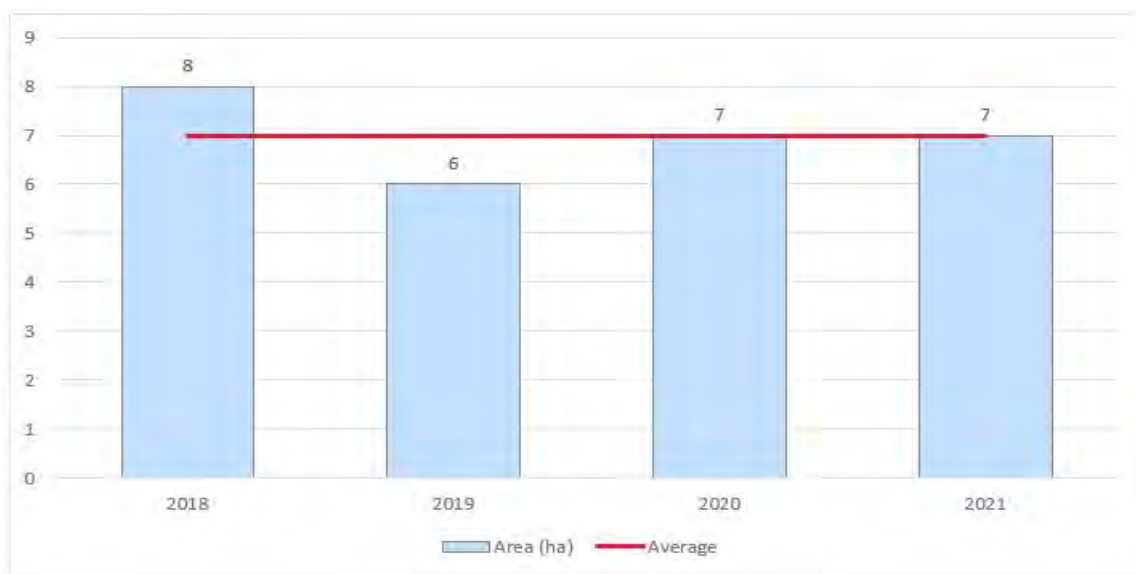
There was one proposal lodged, but not yet determined, relating to employment lands. If finalised, this proposal would result in the gain of approximately 12.2 hectares of employment land.



Employment land take-up

Take-up of employment land for industrial development was 7 hectares in 2021. This compares with 7 hectares in 2020, 6 hectares in 2019 and 8 hectares in 2018. Most of the land take-up was in the Shoalhaven LGA (6 hectares).

Figure 15. Take-up of employment lands for the Illawarra–Shoalhaven region by year to 2021



Employment lands

Employment Lands Development Monitor 2022 summary report



Rest of Regional NSW

In previous years the ELDM has covered Greater Sydney, Central Coast, Hunter and Illawarra-Shoalhaven Regions. In 2021, a new high-level land audit across the rest of Regional NSW not previously covered was included. The area includes 80 LGAs in Regional NSW which are categorised into six planning regions: Central West and Orana, Far West, New England North West, North Coast, South East and Tablelands and Riverina-Murray.

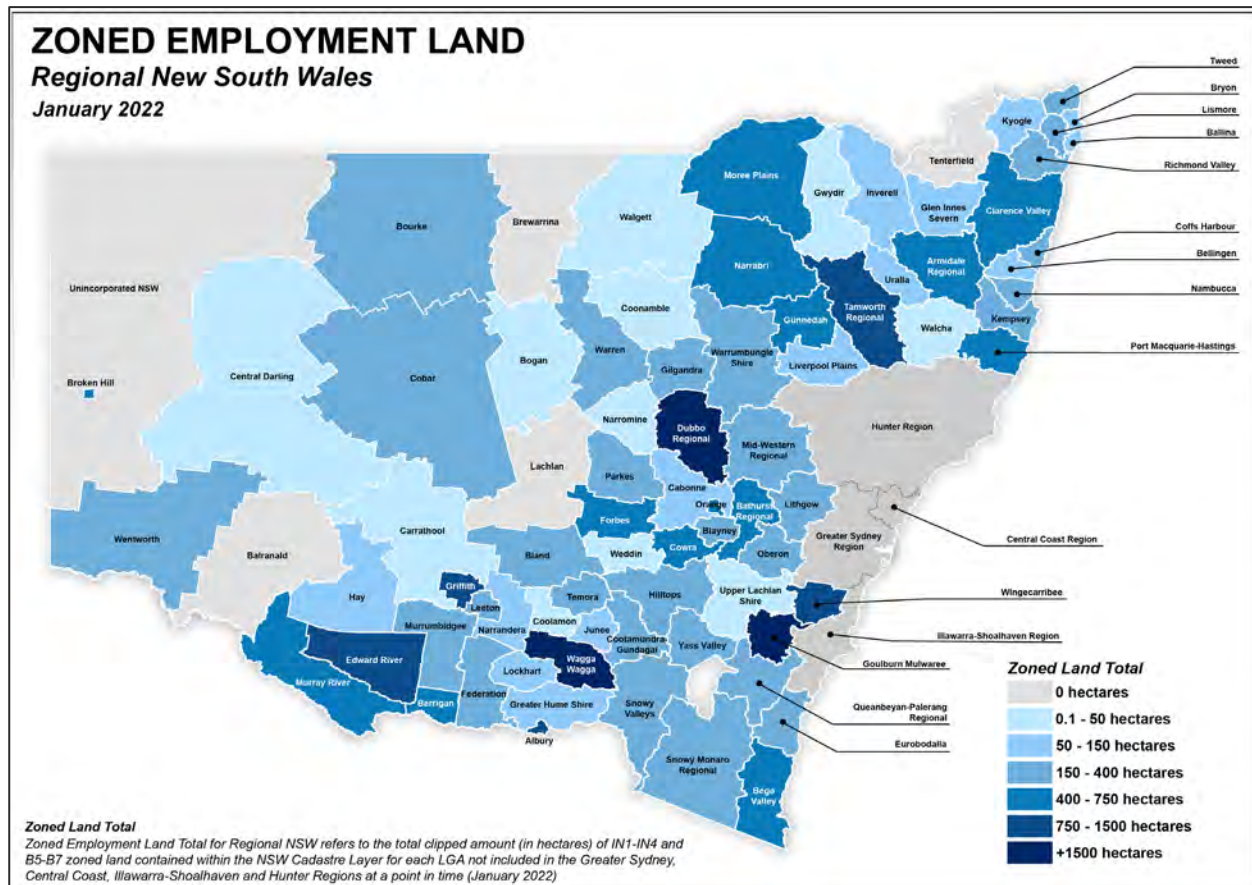
In 2022, the process of this high-level audit was refined slightly to include all industrial, B5 Business Development, B6 Enterprise Corridor and B7 Business Park zoned land that is contained within the NSW Cadastre layer boundary.

Additionally, in 2022 the scope of the rest of Regional NSW ELDM was expanded, including a lot audit of the 12 LGAs which represent a Regional City: Albury, Armidale, Bathurst, Coffs Harbour, Dubbo, Griffith, Lismore, Orange, Port Macquarie-Hastings, Tamworth, Tweed and Wagga Wagga.

As at January 2022, there were 26,783 hectares of industrial and 2,700 hectares of business zoned land in the rest of Regional NSW. This is a reduction of 2,288 hectares from the figures reported in 2021, which is a result of the refined process to only include zoned land contained within the NSW LPI Cadastre layer.

Of this total zoned employment land, 50% (14,745 hectares) is contained in just 10 LGAs: Goulburn Mulwaree, Dubbo, Wagga Wagga, Wingecarribee, Griffith, Albury, Edward River, Tamworth, Berrigan and Moree Plains.

Figure 16. Map of total zoned land (zones IN1-IN4 and zones B5-B7) for Regional NSW



Regional Cities ELDM Pilot

In 2022 the scope of the rest of Regional NSW ELDM was expanded to include a lot audit of the 12 LGAs which represent a Regional City: Albury, Armidale, Bathurst, Coffs Harbour, Dubbo, Griffith, Lismore, Orange, Port Macquarie-Hastings, Tamworth, Tweed and Wagga Wagga.

The 12 Regional City LGAs account for 34% of the zoned land identified in the Regional NSW Overview, identifying that they represent a strong proportion of the zoned employment land stock of the Rest of Regional NSW

This was done as the next stage of expanding the coverage of the ELDM, in order to provide a more comprehensive snapshot of employment land activity in these cities and to bring reporting for the regional cities closer to what is provided for the existing ELDM Regions.

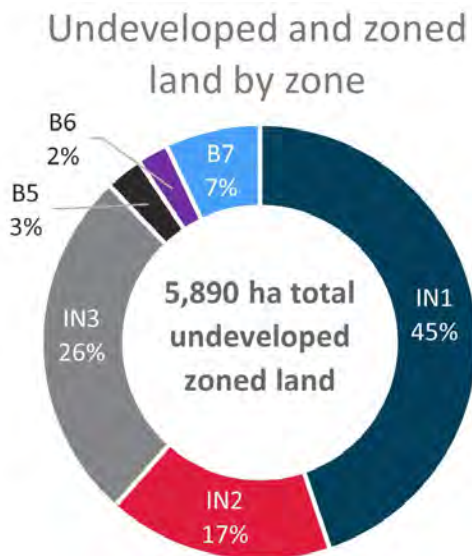
Zoned employment lands

As at January 2022, there were 8,742 hectares of industrial zoned land and 1,328 hectares of B5, B6, and B7 zoned land across the 12 regional cities.

Of this total zoned employment land, 5,890 hectares of zoned land was undeveloped. Most zoned but undeveloped employment lands are zoned IN1 General Industrial.

Of the undeveloped land, almost 50% (2,923 hectares) is contained within the Dubbo and Wagga Wagga LGAs.

Figure 17. All undeveloped and zoned land (zones IN1–IN4 and zones B5–B7) for the 12 Regional Cities



DPE Jobs Insights Tool

NSW Jobs Insights Tool is a new spatially oriented digital tool to enable user to understand economic development in their region of interest. The tool is designed to be a single source of truth on future jobs and their drivers, including employment land supply. The focus is on jobs and employment measure at location or place of work. NSW Jobs Insights may be found at <https://pp.planningportal.nsw.gov.au/job-insights> in the **APIs & Reporting** selection.

Planning reforms in employment lands

The NSW Government is committed to supporting a productive economy by enabling businesses and jobs in the locations where they are needed and delivering on the vision for an area outlined with local and state strategic plans.

The Department of Planning and Environment is currently pursuing a suite of reforms which includes the delivery of a simplified employment zones framework that suits the future of work, is fit for purpose, supports productivity and jobs growth while facilitating delivery of strategic plans and planning priorities.

The reform of employment zones aims to support long-term economic recovery through job creation and encourage increased productivity in NSW.

In December 2021, the reform of the employment zones was finalised with the introduction of 5 new employment zones and 3 supporting zones into the Standard Instrument (Local Environment Plans) Order 2006.

The Department is now implementing the employment zones with proposed amendments to individual local environment plans (LEPs) across NSW.

The employment zones will be in place within individual LEPs by 1 December 2022 when the Business and Industrial zones will be repealed.

For more information, please see <https://www.planning.nsw.gov.au/Policy-and-Legislation/Planning-reforms/Employment-Zones-Reform>

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