

Department of Planning, Housing and Infrastructure

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NSW Employment Lands Development Monitor 2024

January 2025





Acknowledgement of Country

The Department of Planning, Housing and Infrastructure acknowledges that it stands on Aboriginal land. We acknowledge the Traditional Custodians of the land, and we show our respect for Elders past, present and emerging through thoughtful and collaborative approaches to our work, seeking to demonstrate our ongoing commitment to providing places in which Aboriginal people are included socially, culturally and economically.

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NSW Employment Lands Development Monitor 2024

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More information

For more information about the annual Employment Lands Development Monitor, contact the Planning Evidence Centre.

Email: planningevidencecentre@dpie.nsw.gov.au

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Overview

This report provides the key findings on the availability and development of employment land in NSW, as of January 2024.

Employment lands are areas zoned for industrial or similar purposes within NSW planning instruments such as local environmental plans and state environmental planning policies. They are generally lower-density employment areas.

Employment land provides essential space for:

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

The NSW Employment Lands Development Monitor is an annual audit undertaken by the Department of Planning, Housing and Infrastructure to monitor the development and availability of employment land in NSW. It includes data on the zoning, servicing and development status of employment land in the Greater Sydney, Central Coast, Hunter and Illawarra–Shoalhaven regions and 12 cities in regional NSW. For the rest of NSW, the NSW Employment Lands Development Monitor provides information on the total area zoned employment land.

The monitor is a ‘point-in-time’ snapshot of land use status as it was in January 2024. Detailed data is available for download by local government area and precinct, including information on:

- current stock and availability of employment land
- location of serviced employment land that is undeveloped
- location of recently developed employment land
- location of potential future employment land, as identified in strategic plans.

For further detail on the approach, see the section [How we monitor employment land](#) in this report.

Annual monitoring provides the data and evidence that informs future planning, servicing and development decisions. It is a public research tool for NSW Government agencies, councils, businesses, developers, investors and service providers.

Greater Sydney region

Zoned employment land

In Greater Sydney in January 2024 there was a total of 19,533 ha of zoned employment land:

- 10,060 ha of land zoned employment zones E3, E4 and E5
- 353 ha of land zoned supporting zones W4 and SP4
- 5,200 ha of land zoned legacy employment zones
- 3,919 ha of zoned land in the Western Sydney Aerotropolis Area (ENT, AGB and select MU mixed-use).

Of the total zoned employment land, 7,169 ha was undeveloped. Most zoned but undeveloped employment land in Greater Sydney is zoned E4 – General Industrial and Western Sydney Aerotropolis Area zonings ENT, AGB and MU (Figure 1).

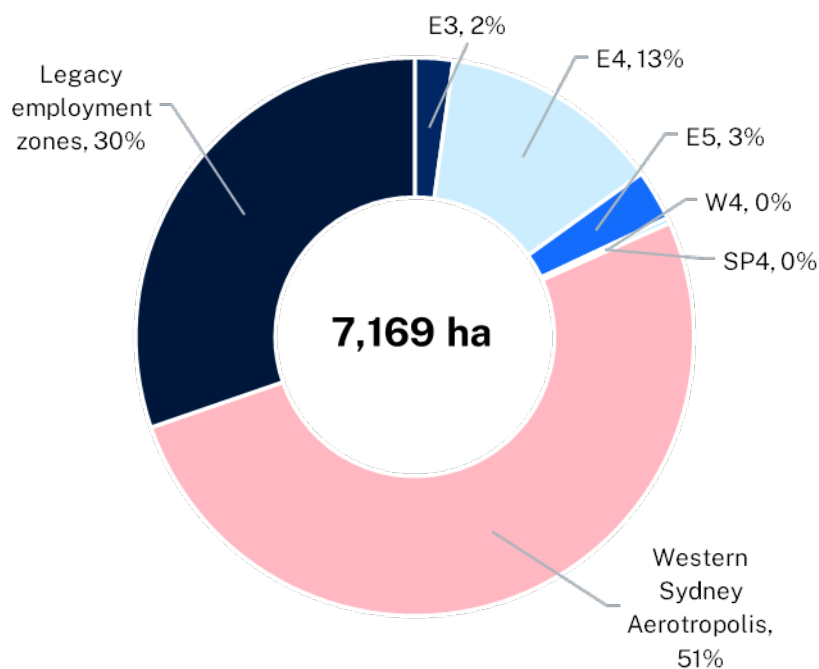


Figure 1: Zoned and undeveloped land in Greater Sydney

Employment land precincts

In January 2024, there was 20,184 ha of zoned land in Greater Sydney employment land precincts. Of these, 7,321 ha (36%) was undeveloped and 615 ha (8%) was serviced by water and sewer lead-in services.

Most of the undeveloped land stock (4,423 ha or 60%) is in lots of more than 10 ha. Most of these lots are in major precincts such as Mamre Road and the Western Sydney Aerotropolis area.

Employment land take-up

The take-up of employment land for industrial development was 228 ha in 2023, 43% higher than the long-term average (Figure 2). Most of the newly developed land (81% or 185 ha) was in Western Sydney.

Development was concentrated mostly in 5 local government areas, which accounted for 93% (213 ha) of the take-up. These areas were Penrith, Blacktown, Liverpool, Fairfield and Camden.

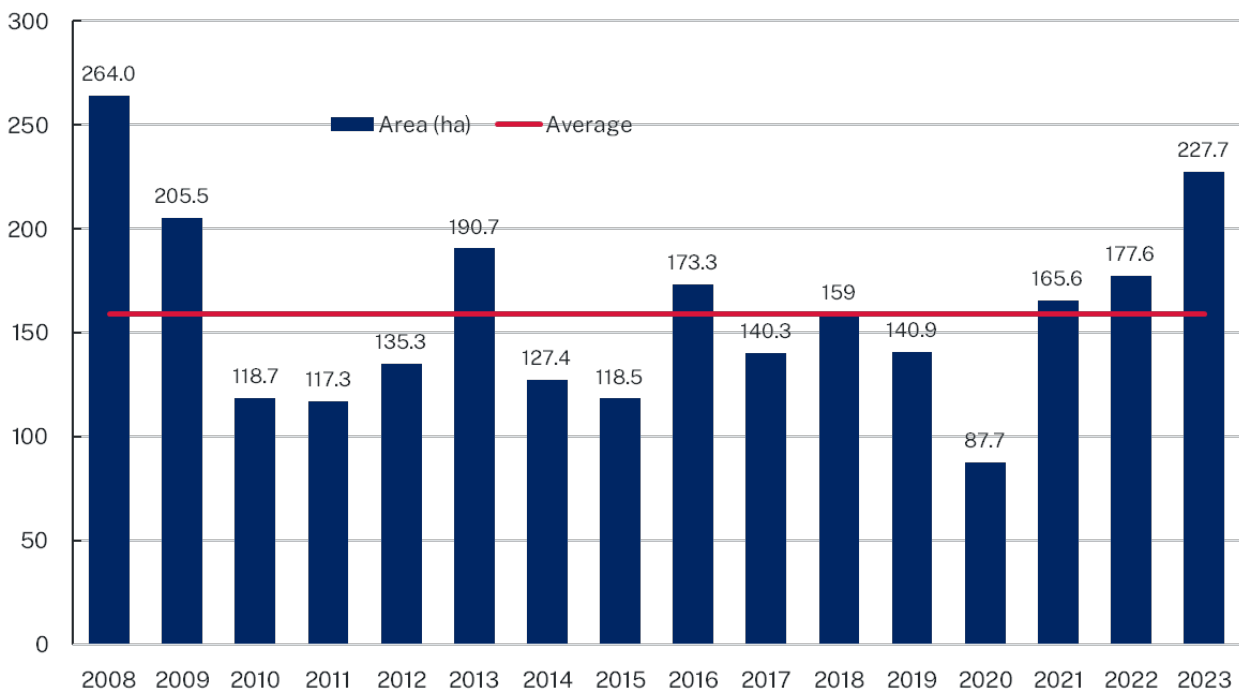


Figure 2: Annual take-up of employment land in Greater Sydney

Change in employment land through rezoning

In the year to January 2024, 47 ha of land was newly zoned in employment land precincts in Greater Sydney. New employment land was rezoned in the Canterbury–Bankstown local government area (4.6 ha) and in Wollondilly (42.3 ha), including in south-east Wilton (17.8 ha), Wilton town centre (15.4 ha) and north Wilton (9 ha).

Some 44 ha of employment land was rezoned for non-employment purposes, including rezoning at Ermington in Parramatta (34.2 ha), the Bushells' site on Burwood Road in Canada Bay (3.9 ha) and Maldon in Wollondilly (2.2 ha). There was also a decrease in zoned land in Macquarie Park (Ryde local government area) due to a data refinement (0.8 ha).

Seven planning proposals received gateway determination to proceed to exhibition in 2023. Finalisation of these proposals would result in a net gain of roughly 3.2 ha of employment land.

Potential future employment land

In January 2024, there was 2,749 ha of potential future employment land in Greater Sydney. Most of the future areas are identified in the:

- South West Growth Centre Structure Plan
- Western Sydney Aerotropolis Precinct Plan – Amendment 2
- Greater Sydney Region Plan, A Metropolis of Three Cities

EMPLOYMENT LAND PRECINCTS GREATER SYDNEY

January 2024

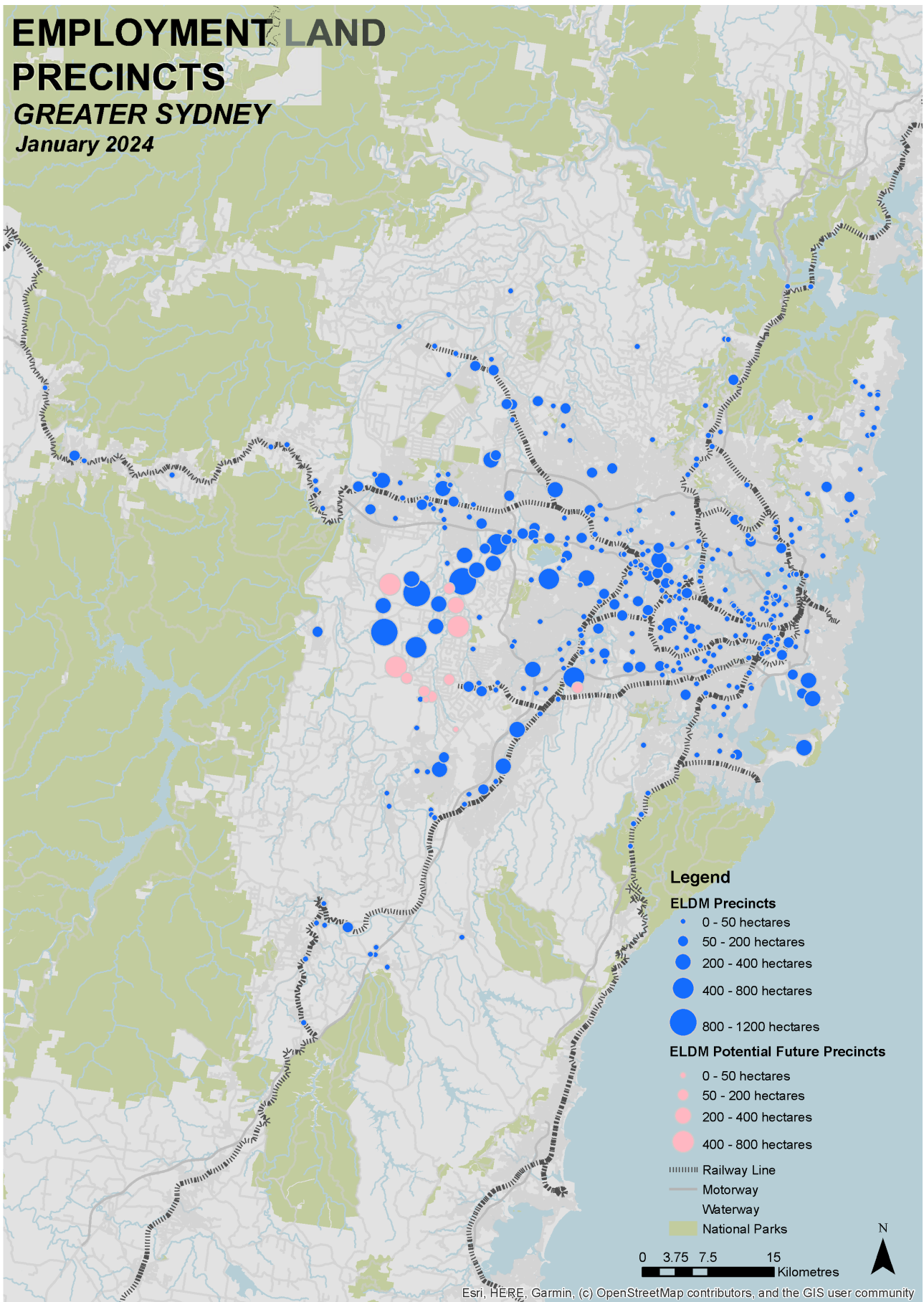


Figure 3: Greater Sydney Employment Land Precincts Map

Central Coast region

Zoned employment land

In January 2024, there was 2,170 ha of total zoned employment land in 34 employment land precincts across the Central Coast. This is a decrease of 4 ha compared to January 2023 and relates to data refinement and cadastre updates. Most of the land is zoned as E3, E4, and E5 (2,070 ha), with 100 ha of land zoned in other supporting zones and legacy employment zones.

There remains 1,128 ha (52%) of undeveloped employment land, of which 355 ha (31%) is serviced by water and sewer lead-in services. Most of the undeveloped employment land in the Central Coast region is zoned E4 General Industrial.

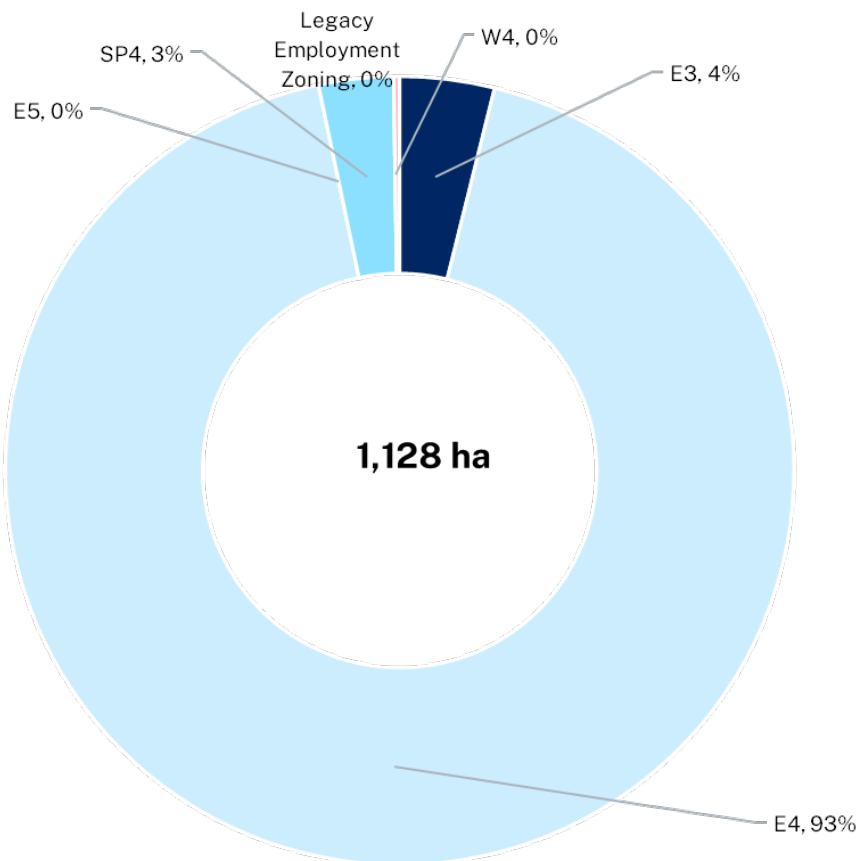


Figure 4: Zoned and undeveloped land in the Central Coast region

Employment land take-up

Take-up of employment land for industrial development was 7 ha in 2023. This is the same amount of take-up as in 2022 and is below the historical average (Figure 5).

The largest proportion of land taken up in the Central Coast region in 2023 was in Somersby.

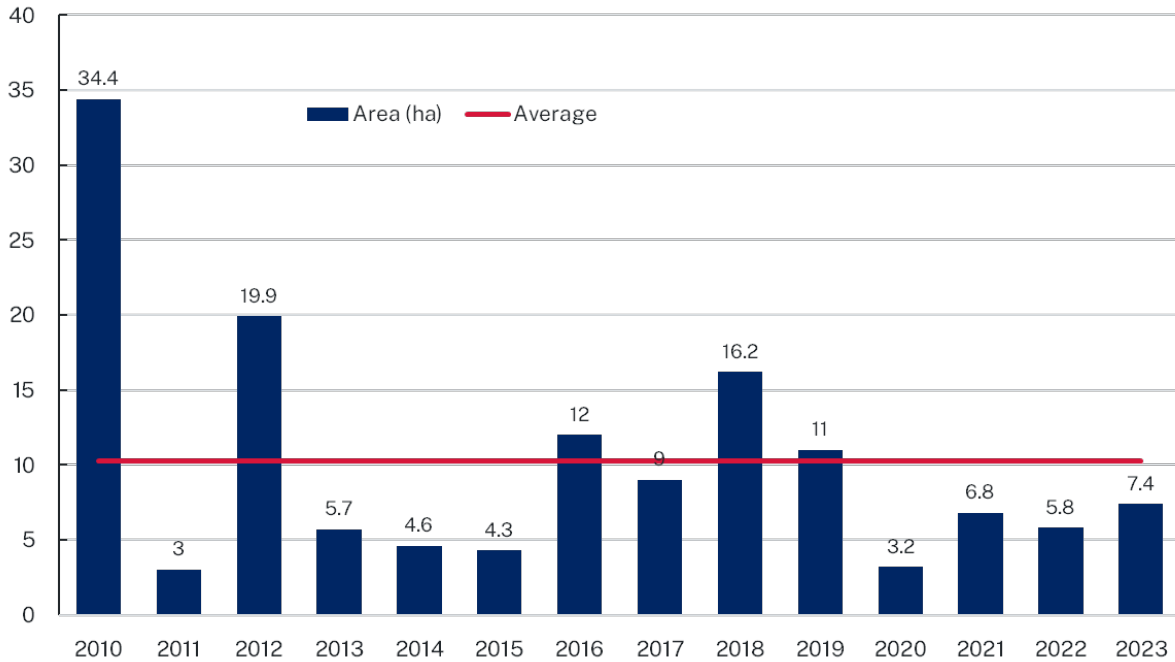


Figure 5: Take-up of employment land in the Central Coast region

Change in employment land through rezoning

In 2023, there were no rezonings in the Central Coast region relating to employment land.

Potential future employment land

There are 467 ha of potential future industrial land identified in the North Wyong Shire Structure Plan.

EMPLOYMENT LAND PRECINCTS CENTRAL COAST January 2024

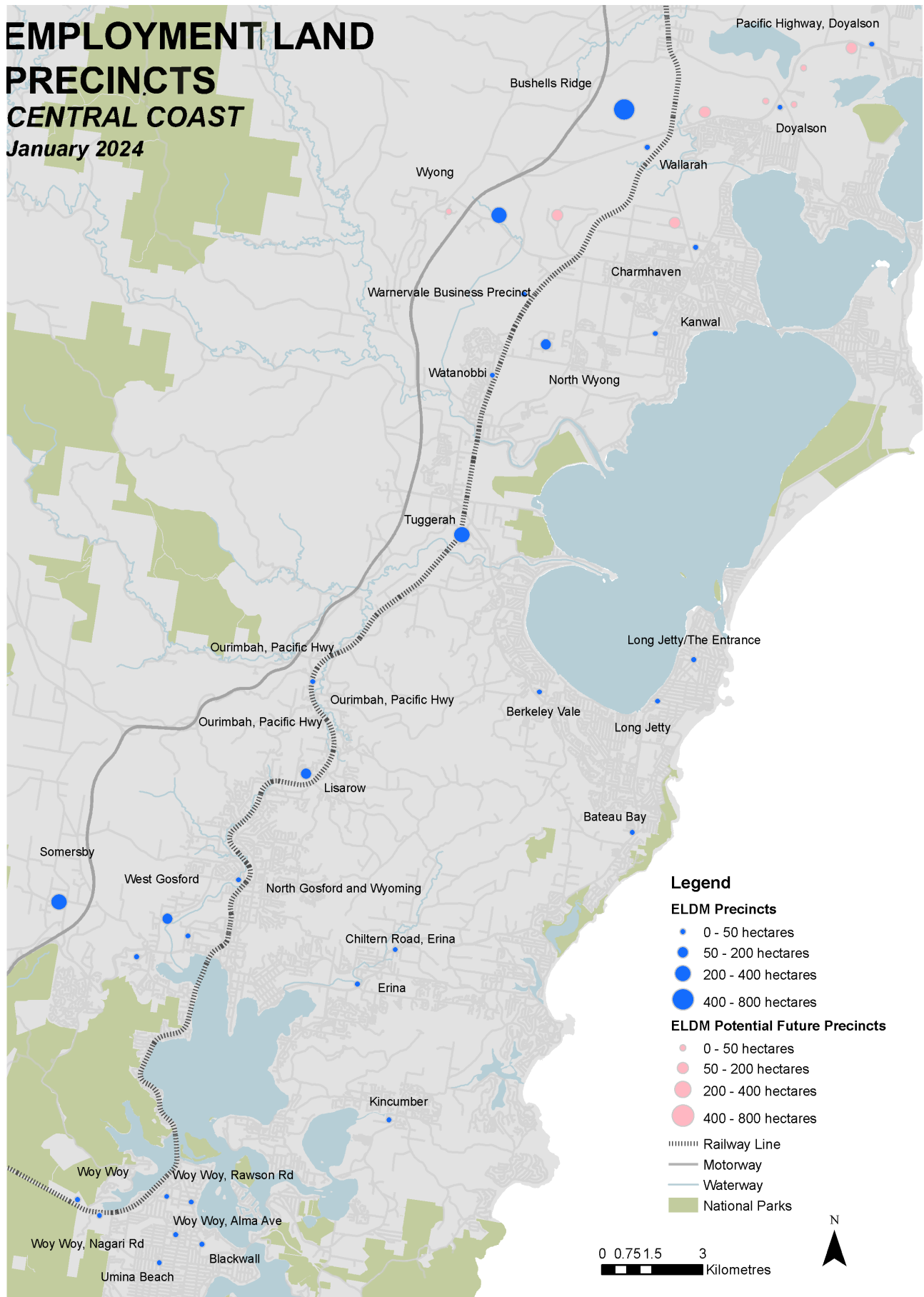


Figure 6: Central Coast Employment Land Precincts Map

Hunter region

Zoned employment land

In January 2024 in the Hunter region, there was:

- 6,392 ha in employment zones
- 37 ha in land zoned SP4 or W4
- 1,596 ha in special-purpose zones
- 459 ha in legacy employment zones.

A total of 4,302 ha of zoned land is undeveloped. This is an increase of 47 ha from January 2023, mostly because of rezoning in Maitland and Cessnock. Most zoned but undeveloped employment land in the Hunter region is E4 General Industrial (Figure 7).

Of the undeveloped land, 77% (3,332 ha) is within the Greater Newcastle metropolitan area (Cessnock, Lake Macquarie, Maitland, Newcastle and Port Stephens local government areas).

There is 1,507 ha of undeveloped land serviced by water services (within 30 metres of a water and sewer main).¹ Undeveloped and serviced land is mostly in the Greater Newcastle metropolitan area (1,185 ha), including Cessnock (659 ha), Newcastle (196 ha) and Port Stephens (192 ha).

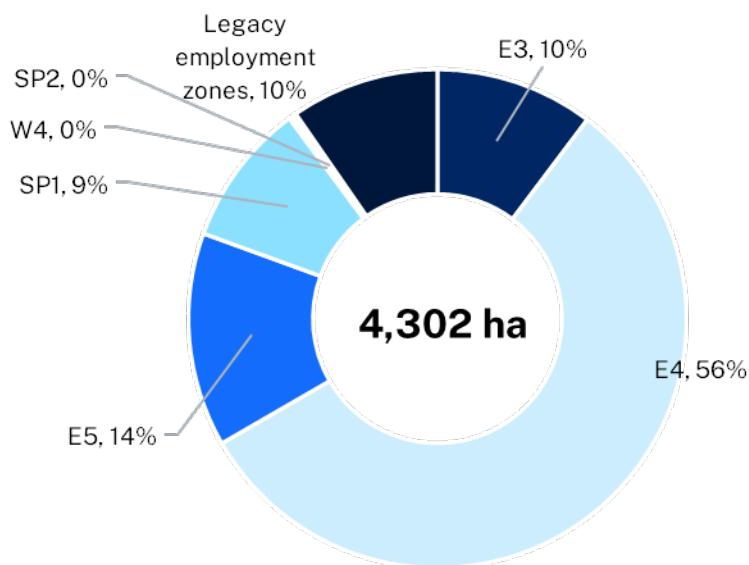


Figure 7: Zoned and undeveloped land in the Hunter region

¹ Where a sewer main is within 30 m for a particular site, we assume that water is also available.

Employment land precincts

In January 2024, there was 6,766 ha of total zoned land contained in 110 employment land precincts across the lower Hunter/Greater Newcastle regions. Of this, 49%, or 3,332 ha was undeveloped.

Employment land take-up

Take-up of employment land for industrial development was 44 ha in 2023. This compares with 41 ha in 2022 and 43 ha in 2021. Most of the land take-up was in the Lake Macquarie (12 ha), Cessnock and Newcastle (both 9 ha) local government areas.

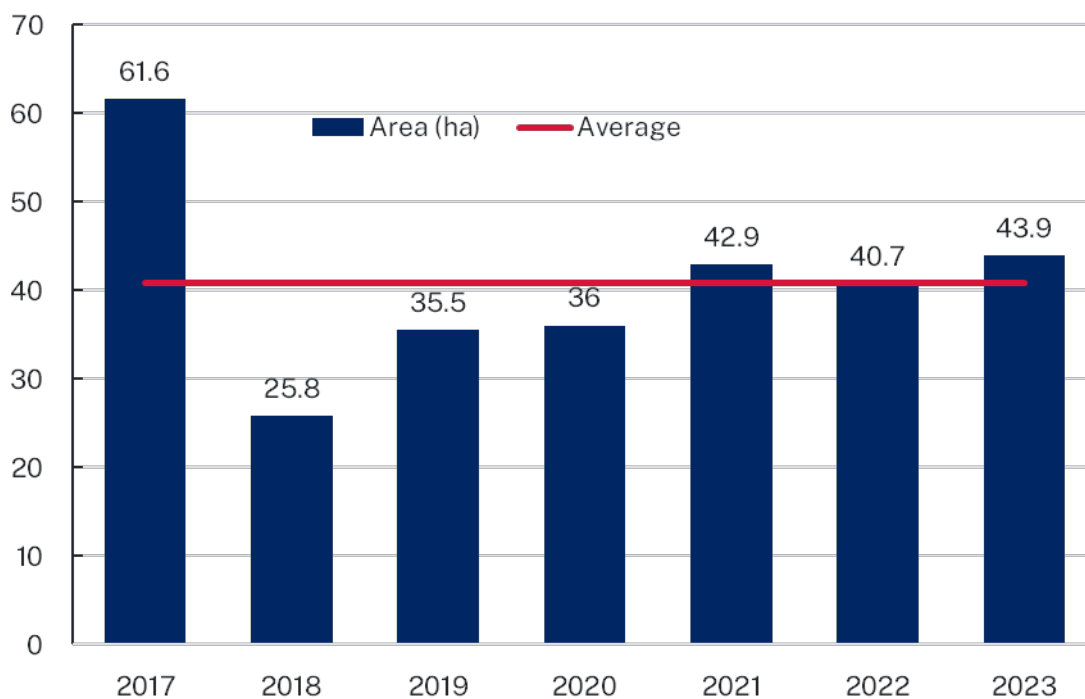


Figure 8: Take-up of employment land for the Hunter region

Change in employment land through rezoning

In the Hunter region in 2023, an additional 100.5 ha of land was rezoned to employment land and 3 ha of employment land was rezoned for non-employment purposes.

In 2023, 2 planning proposals were recorded in the gateway in the Hunter region. Finalising these proposals would result in a net loss of roughly 20.5 ha of employment land.

**EMPLOYMENT LAND
PRECINCTS & SUBURBS
HUNTER REGION**
January 2024

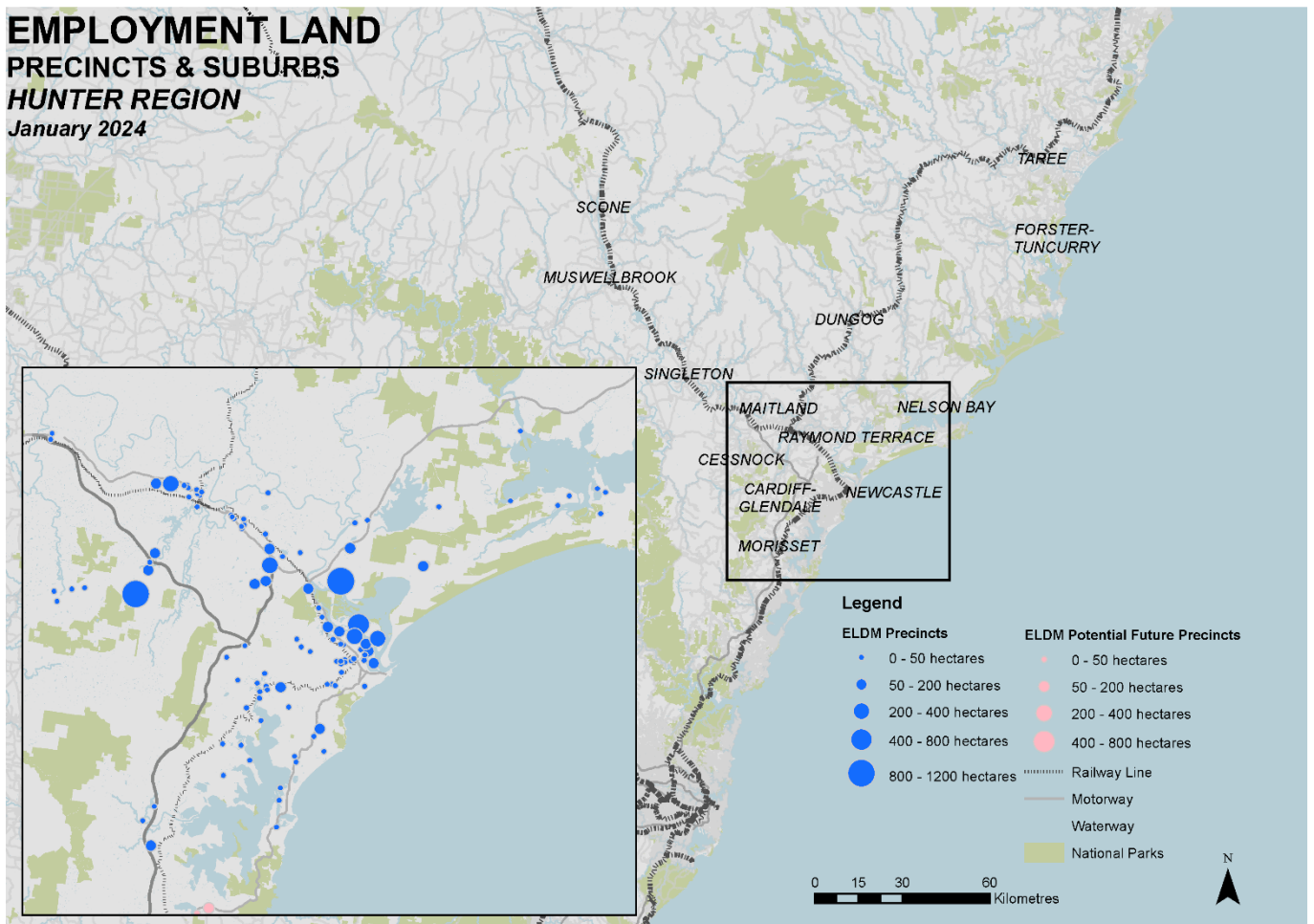


Figure 9: Hunter region Employment Land Precincts Map

Illawarra–Shoalhaven region

Zoned employment land

In the Illawarra–Shoalhaven region in January 2024, there was:

- 1,991 ha of land zoned as employment E3 to E5
- 7 ha of land zoned as SP4 and W4
- 1,484 ha of land zoned as special purpose
- 967 ha of land zoned as legacy employment zonings.

Most of the land in employment zones (E3 to E5) is in Wollongong (1,060 ha), and most of the special-purpose zoned land is in the Shoalhaven area (1,126 ha).

In January 2024, 1,353 ha of zoned land was undeveloped. Most zoned but undeveloped employment land in the Illawarra–Shoalhaven region is zoned E4 General Industrial, followed by SP1 Special Purpose (refer to Figure 10).

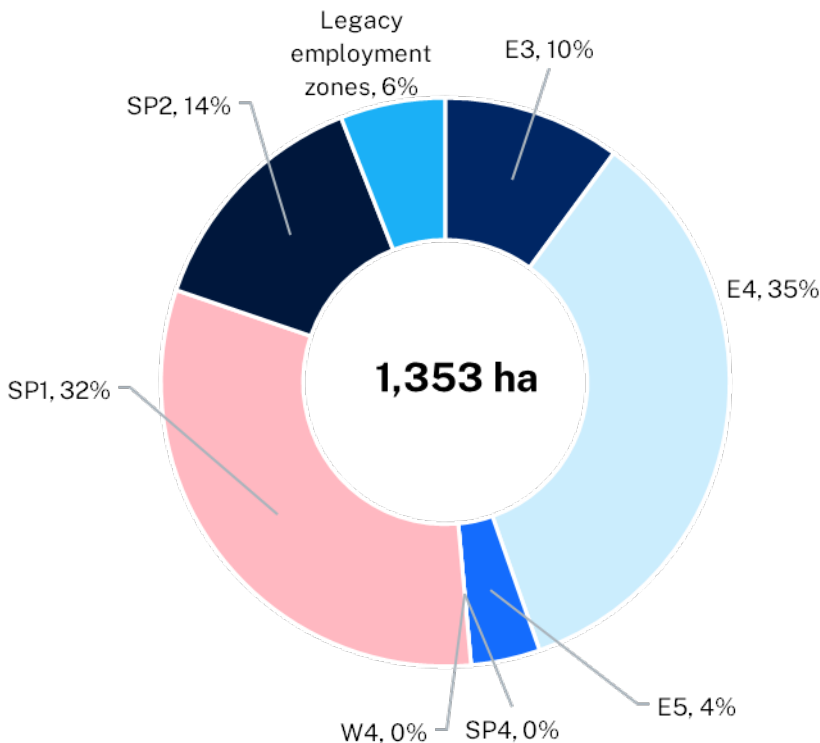


Figure 10: Zoned and undeveloped land in Illawarra–Shoalhaven region

Employment land precincts

In January 2024, there was 4,450 ha of total zoned employment land in 83 employment land precincts across the Illawarra–Shoalhaven region. This is a decrease of 32 ha, mostly because of the rezoning at Shellharbour Airport. Of the total zoned land, 1,353 ha (30%) was undeveloped. This is an additional 20 ha from January 2023.

There was 555 ha of zoned and undeveloped land serviced by water and sewer connections. Most of the serviced land available is in the Shoalhaven local government area (447 ha).

Employment land take-up

Take-up of employment land for industrial development was 7 ha in 2023. This compares with 10 ha in 2022 and 7 ha in both 2021 and 2020. Most of the take-up in 2023 was in the Shoalhaven local government area (5.7 ha).

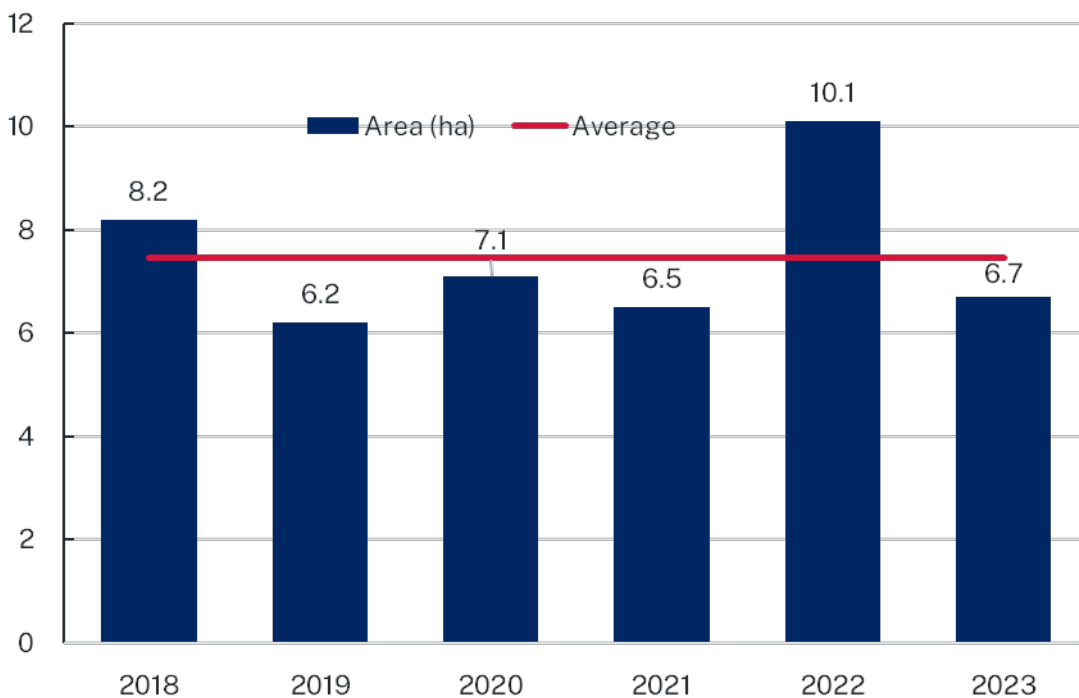


Figure 11: Take-up of employment land in Illawarra–Shoalhaven region

Change in employment land through rezoning

In 2023, there was 40 ha of land rezoned from employment purposes to non-employment purposes in the Shellharbour local government area.

EMPLOYMENT LAND PRECINCTS

ILLAWARRA-SHOALHAVEN

January 2024



Figure 12: Illawarra-Shoalhaven Employment Land Precincts Map

Regional NSW

In regional NSW in January 2024, there was:

- 25,511 ha of land zoned as employment zones E3 to E5
- 873 ha of land zoned as employment support zones SP4 and W4
- 9,971 ha of land zoned as rural enterprise REZ
- 1,354 ha of land zoned as legacy employment zones.

The total employment land was 37,708 ha, an increase of 468 ha from the previous year.

Of this total zoned employment land, 60% (22,458 ha) is in just 10 local government areas (Table 1).

Table 1: Local government areas with the most zoned employment land

Local government area	Total Employment Land (ha)
Parkes	4,925
Goulburn Mulwaree	4,271
Moree Plains	4,049
Dubbo	2,215
Wagga Wagga	1,740
Albury	1,364
Wingecarribee	1,244
Griffith	1,019
Edward River	860
Tamworth	770

Zoned employment land

Across the 12 regional cities in January 2024, there was 9,988 ha of zoned employment land, including:

- 7,962 ha of land zoned as employment zones E3 to E5
- 796 ha of land zoned as supporting zones SP4 and W4
- 1,230 ha of land zoned as REZ rural enterprise zones.

This is an increase of 397 ha from 2023. This was mostly driven by the rezoning in Albury.

Of this total zoned employment land, 59%, or 5,936 ha, of zoned land was undeveloped. Most employment land that is zoned but undeveloped is E4 General Industrial (Figure 13).

Of the undeveloped land, 44% (2,630 ha) is within the Dubbo and Wagga Wagga local government areas.

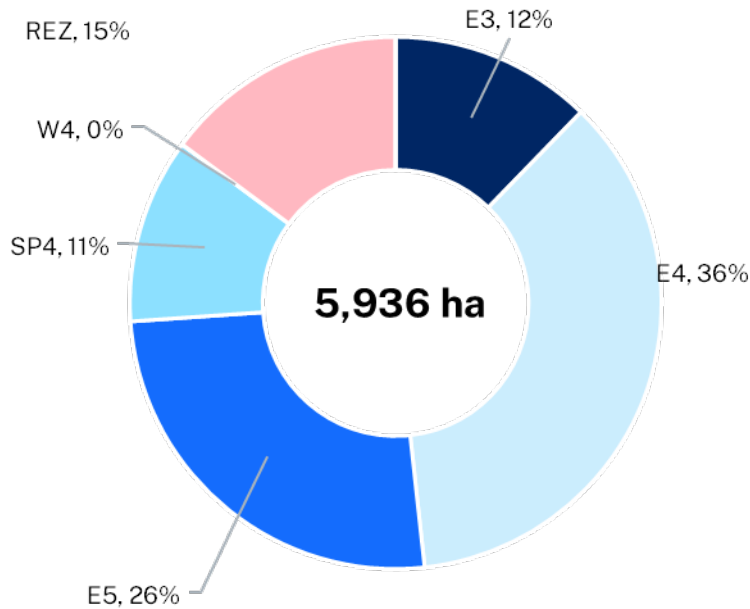


Figure 13: Zoned and undeveloped land in NSW regional cities

Change in employment land through rezoning

In 2023, rezoning in Albury added 422 ha of new employment land to the region, while 23 ha of employment land was rezoned for non-employment purposes (mostly in the Griffith local government area).

Employment land take-up

Take-up of employment land for industrial development was 62 ha in 2023 (Figure 14).

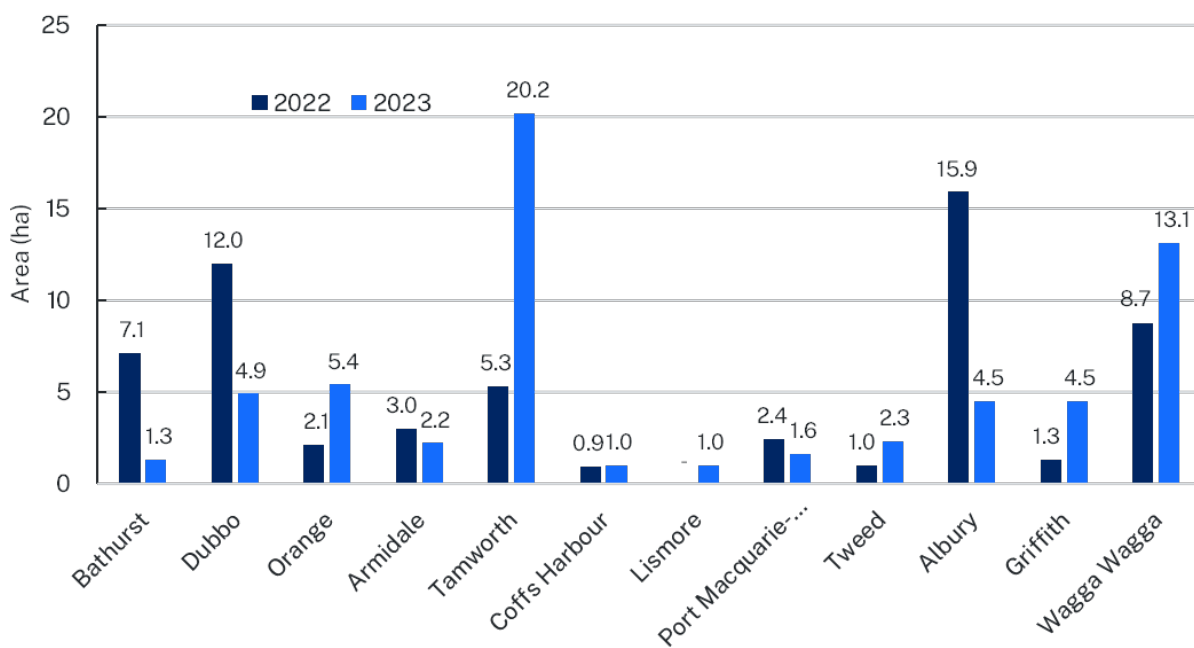
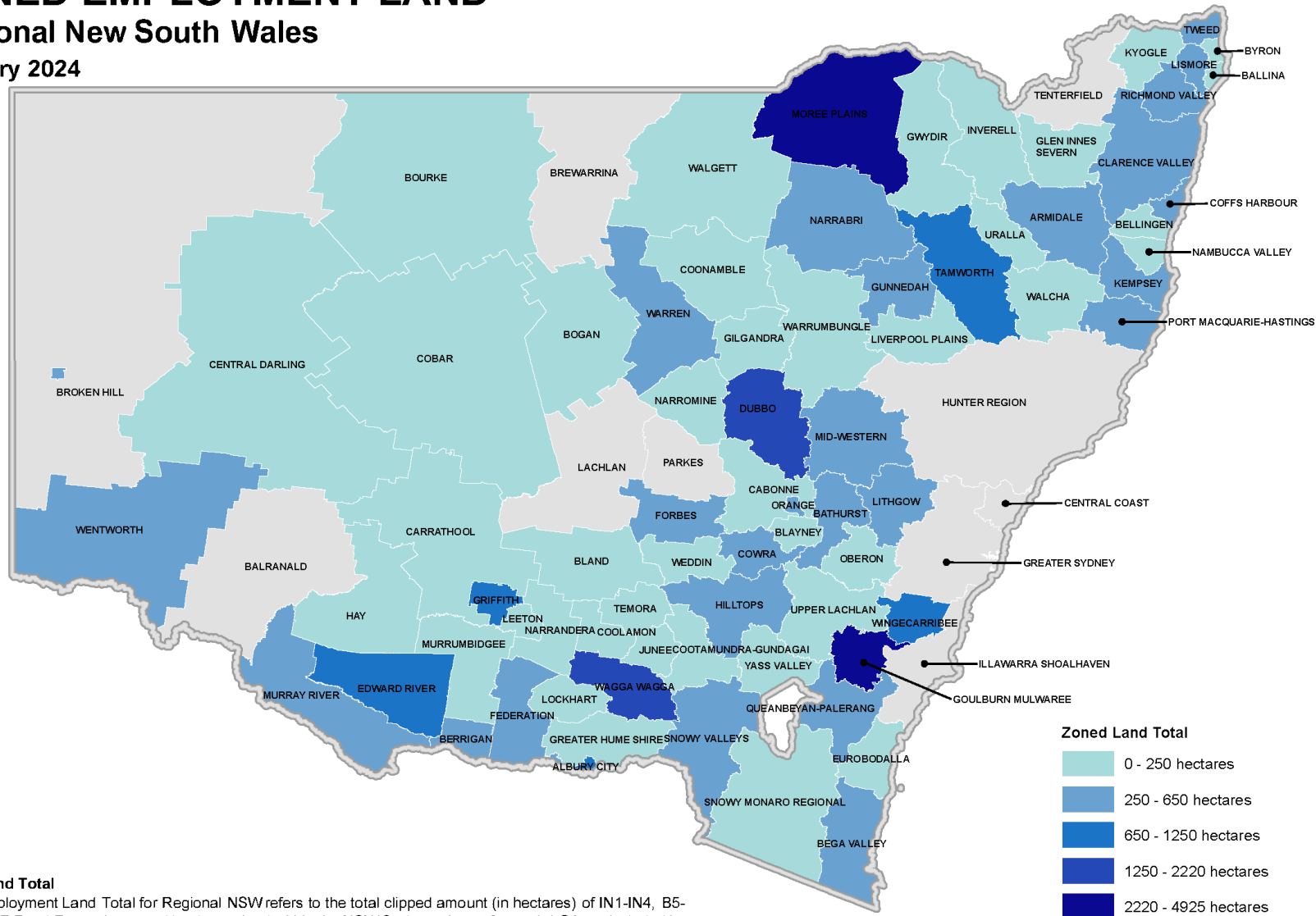


Figure 14: Take-up of employment land in regional cities

ZONED EMPLOYMENT LAND

Regional New South Wales

January 2024



Zoned Land Total

Zoned Employment Land Total for Regional NSW refers to the total clipped amount (in hectares) of IN1-IN4, B5-B7 and REZ Rural Enterprise zoned land contained within the NSW Cadastre Layer for each LGA not included in the Greater Sydney, Central Coast, Illawarra-Shoalhaven and Hunter Regions at a point in time (January 2024)

Figure 15: Zoned Employment Land in Regional NSW

How we monitor employment land

The audit uses NSW Land and Property Information's cadastral data to identify lots. We audit the status of zoned lots as of January each year using data on water servicing. We then validate the changes in development status by analysing aerial imagery to confirm whether development has been completed or commenced.

We monitor the servicing of zoned lots using water and sewage connections data from Sydney Water, Hunter Water and other local authorities.

The take-up analysis monitors lots over 100 m² where development has commenced within the past 12 months. In other words, the land has changed from undeveloped (vacant) to developed (occupied) within the period.

Zones included in the audit

The 2024 NSW Employment Lands Development Monitor includes all land in the NSW cadastre layer boundary that is zoned:

- employment zones E3 (Productivity Support), E4 (General Industrial), E5 (Heavy Industrial)
- SP4 Enterprise
- W4 Working Waterfront
- REZ Regional Enterprise Zone (Special Activation Precincts only)
- Western Sydney Aerotropolis (ENT Enterprise, AGB Agribusiness and MU Mixed Use)

It also includes some SP1 Special Activities zones. These relate to:

- HMAS Albatross
- Port Kembla
- Port Stephens air transport facility
- Port of Newcastle
- Shellharbour air transport facility
- Wollongong Innovation Campus.

The monitor also includes any legacy employment zones that have not yet been translated to new employment zones as part of the self-repealing state environmental planning policies that came into effect in April 2023. Pre-reform zonings include IN1-IN4 and B5-B7.

NSW Employment zones reform

New employment zones in NSW commenced on 26 April 2023. The 5 new employment zones (E1, E2, E3, E4 and E5) and 3 supporting zones (MU1, W4 and SP4) replace previous zonings (IN1 to IN4, B5, B6 and B7).

Further information on [employment zones reform](#) is available on our website.

Precincts included in the audit

The 2024 audit includes 65 new employment land precincts in Greater Sydney and 8 new employment land precincts in the Central Coast region. The NSW Employment Lands Development Monitor now monitors

- 379 Greater Sydney precincts
- 34 Central Coast precincts
- 110 Hunter precincts
- 83 Illawarra–Shoalhaven precincts.

The new precincts replace the previous NSW Employment Lands Development Monitor precincts and business park precincts used since 2008. This provides a single, consistent measure for monitoring industrial activity in employment precincts.

Greater Sydney precincts also include selected other Local Environmental Plan – Standard Instrument zones such as E1 Local Centre, E2 Commercial Centre and DM (deferred matter).

Regional NSW audit

In regional NSW, the audit provides data on employment land lot and development activity in 12 regional cities. The following 12 regional city local government areas account for 26% of the zoned land in NSW:

- Albury
- Coffs Harbour
- Lismore
- Tamworth
- Armidale
- Dubbo
- Orange

- Tweed
- Bathurst
- Griffith
- Port Macquarie–Hastings
- Wagga Wagga.

For areas outside the regional cities, the NSW Employment Lands Development Monitor includes the total number of hectares of employment land only.

Glossary

Term	Meaning
Business parks	<p>Support a mix of manufacturing, logistics, warehousing, research and development and office functions that enable companies to consolidate function</p> <p>In 2024, all business park precincts were allocated to employment land precincts.</p>
Developed employment land	<p>Zoned employment land where development (construction or works) has commenced or where there is a permanent structure in place at the time of data collection</p> <p>The permanent structure may be used for purposes unrelated to employment land, except for rural industry or rural residential living.</p>
Employment land	<p>Land that is zoned for industrial or similar purposes in planning instruments</p> <p>These uses include:</p> <ul style="list-style-type: none"> • manufacturing • transport and warehousing • service and repair trades and industries • integrated enterprises with a mix of administration, production, warehousing, research and development • urban services and utilities.
Employment land precincts	<p>Areas at zoned industrial land (or similar) ranging from less than 1.0 ha to over 500 ha</p>
Greater Sydney region	<p>Includes the following 33 local government areas: Bayside, Blacktown, Blue Mountains, Burwood, Camden, Campbelltown, Canada Bay, Canterbury-Bankstown, Cumberland, Fairfield, Georges River, Hawkesbury, Hornsby, Hunters Hill, Inner West, Ku-ring-gai, Lane Cove, Liverpool, Mosman, North Sydney, Northern Beaches, Parramatta, Penrith, Randwick, Ryde, Strathfield, Sutherland, Sydney, The Hills, Willoughby, Waverley, Wollondilly and Woollahra</p>
Hunter region	<p>Includes the following 10 local government areas: Cessnock, Dungog, Lake Macquarie, Maitland, Mid Coast, Muswellbrook, Newcastle, Port Stephens, Singleton and the Upper Hunter</p>
Illawarra-Shoalhaven region	<p>Includes the following 4 local government areas: Kiama, Shellharbour, Shoalhaven and Wollongong</p>

Term	Meaning
Potential future employment land	<p>Land that has been identified in endorsed NSW Government or council documents (such as the Greater Sydney Region Plan) as future or potential employment land</p> <p>These areas are subject to further investigations as part of precinct planning to assess their suitability for development. Not all potential future employment land will be developed. Precinct planning may identify constraints related to:</p> <ul style="list-style-type: none"> • riparian corridors • topography • vegetation • transport corridors • local roads • lot fragmentation.
Regional NSW	<p>Includes 80 local government areas in regional NSW, which are categorised into 6 planning regions:</p> <ul style="list-style-type: none"> • Central West and Orana • Far West • New England North West • North Coast • South East and Tablelands • Riverina–Murray
Take-up	<p>Number of hectares of zoned employment land that has changed from ‘undeveloped’ (vacant) to ‘developed’ (occupied)</p> <p>Take-up indicates that development has commenced on a site and is monitored using water servicing data and validated using aerial photography and related information.</p>
Undeveloped employment land	<p>Zoned employment land that was not occupied by a permanent structure at the time of data collection – it may be vacant or occupied by another temporary land use</p>
Undeveloped and serviced	<p>Currently zoned undeveloped employment land where a sewerage or potable water service may be available for connection, based on Sydney Water, Hunter Water, Shoalhaven Water and Central Coast Council data</p>
Undeveloped and not serviced	<p>Currently zoned undeveloped employment land where a sewerage or potable water service is not yet available for connection, based on Sydney Water, Hunter Water, Shoalhaven Water and Central Coast Council data</p>

Contact us

For more information about the annual Employment Lands Development Monitor, contact the Planning Evidence Centre within the Department of Planning, Housing and Infrastructure.

Email: planningevidencecentre@dpie.nsw.gov.au