

17-21 Longfield Street, Cabramatta

Economic Zoning Assessment

Prepared for Elton Consulting

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EXECUTIVE SUMMARY

- The 17 – 21 Longfield Street, Cabramatta site was previously zoned 4C Special Industrial under the *Fairfield LEP 1994*. The subject site has recently been zoned B5 Business Development under the *Fairfield LEP 2013*, reflecting the natural change of uses within the area over time. The owner of the site is seeking to rezone the land to allow for a mix of uses including residential development together with associated high demand uses such as childcare, aged care, and ancillary retail/commercial facilities.
- The subject site is located within the Cabramatta North Hume Highway Industrial Area and is bounded by existing residential areas in the south and west. The Cabramatta North Hume Highway Industrial Area incorporates around 16.5 hectares of land and employs some 360 workers, accounting for less than 0.3% of total employment from industrial lands within the Fairfield Local Government Area (LGA).
- The industrial area is primarily an automotive precinct (car yards) together with older manufacturing and warehousing facilities. The provision of industrial facilities is generally low cost, with the majority of stock being dated and not likely to meet the requirements of modern industrial tenants.
- Although the precinct is zoned for industrial/business development uses, only approximately 43% of total tenants are traditional industrial uses, with the precinct including a mix of other uses such as automotive car yards (34%), residential (12%), retail, food catering, a hotel and a religious temple. The natural progression of the western side of the Hume Highway, transitioning from traditional industrial uses to a mixed use precinct signifies the decreasing demand for industrial uses in this precinct.
- Employment lands along the Hume Highway at Cabramatta North generally enjoy direct frontage and access to the major arterial road. This means vehicle and truck movements are not redirected through residential streets. The subject site, however, does not share this characteristic as there is no direct access to the Hume Highway, with vehicle and truck access provided via residential streets (Longfield Street and

Chadderton Street). In this regard, the subject site is considered to be atypical of the surrounding industrial lands.

- The recent zoning change of the subject site and surrounding land indicates that the planning authorities have acknowledged the changing nature of the area and that strictly industrial uses are no longer suitable or appropriate for the subject site in particular.
- The subject site currently employs an estimated 90 workers primarily in warehousing/manufacturing. These businesses are not necessary to serve the convenience shopping and services needs of the local population and could effectively relocate in any industrial precinct. Based on discussions with the owner, the main industries seeking to occupy the site are logistics or manufacturing uses. These uses present a conflict with the surrounding residential uses and there is a long history of land use complaints, primarily due to noise and traffic created by industrial tenants.
- According to the long-term site owner, the site is difficult to lease with most industrial tenants requiring 24 hour, seven days a week, B Double/Triple access. Such access requirements are readily provided at nearby industrial precincts such as Wetherill Park, Smithfield and the future Western Sydney Employment Area (WSEA), which are far superior locations for industrial uses as compared with the subject site. This is because the subject site is primarily surrounded by residential dwellings and, therefore, truck movements would be highly restricted to daylight hours.
- For example, the Wetherill Park Industrial Area is the largest industrial precinct within the Fairfield LGA, comprising 553.3 hectares and employing 15,500 workers (*Fairfield Employment Lands Strategy, 2008, page 100*). The Wetherill Park Industrial Area includes primarily warehousing/distribution and manufacturing uses and is easily accessible via The Horsley Drive. According to the *Fairfield Employment Lands Strategy (2008)*, the precinct is well defined and largely contained with separation from residential areas. Based on an inspection in May 2013, there are currently a number of vacancies within the Wetherill Park Industrial Area (an estimated 8% of total tenants) as

well as a number of large land parcels that have not yet been developed (approximately 5% of total land).

- Land located along The Horsley Drive in the Wetherill Park Industrial Area was also recently rezoned from industrial to B5 Business Development. This land includes a mix of bulky goods, warehousing, car dealerships and retail uses. There are around five vacancies located along The Horsley Drive within the B5 Business Development zone. In particular, the recently developed Greenway Supa Centre includes a number of vacancies within the enclosed centre component.
- The subject site accounts for less than 1% of total industrial/business development land within the Fairfield LGA. This indicates that, excluding the subject site, the Fairfield LGA has a large supply of industrial zoned land that includes modern industrial facilities or is vacant land available for the development of modern industrial facilities to meet demand. There are also a number of proposed industrial developments in the Fairfield LGA that will provide modern facilities that are centrally located to transport infrastructure. For example, the planned WSEA will provide an additional 410 hectares of employment land within the Fairfield LGA and a total of 10,700 hectares throughout the Broader WSEA. Consequently, the rezoning of the subject site will not materially impact the availability of suitable industrial land within the Fairfield LGA. This is particularly the case given the subject site is restricted in its operational uses to industrial/business development, and is not needed given the large supply of industrial zoned land.
- The Fairfield LGA has experienced significant decline in industrial employment over the period from 2006 – 2011, with a declining trend in blue collar workers and decreasing manufacturing employment. This is manifesting in a considerably higher unemployment rate as compared with the New South Wales average. One factor in the progressively worsening Fairfield LGA unemployment rate is the inefficient use of employment lands, which is largely related to the ongoing protection of industrial employment lands which no longer serve a viable or valuable employment service. Future employment lands

should be focused on growing industries such as health care and social assistance as well as education and training.

- According to the *draft Subregional Strategy for the West Central subregion* prepared by the *Department of Planning & Infrastructure*, the Fairfield LGA needs to accommodate 24,000 additional dwellings by 2031. Based on future projected population growth throughout the Fairfield LGA, there is likely to be a projected shortfall of around 18,500 dwellings by 2026 (*forecast.id.*). This indicates increasing demand for residential land within the Fairfield LGA, while at the same time; demand for industrial employment land is decreasing.
- The rezoning of the subject site to facilitate the proposed Cabramatta Intergenerational Community will result in an estimated \$125 million investment in the local Fairfield economy. The proposed rezoning will result in the loss of 90 industrial jobs, but will generate a net increase of approximately 687 construction jobs as well as 219 ongoing retail, childcare and aged care jobs. As a result of supplier induced multiplier effects, a total of 2,058 jobs will be created from the proposed development. It is noted that the current rate of 90 jobs will fall to 60 in the next 1 – 2 years due to the relocation of one tenant (Fairfax) offshore.
- There is strong potential for the proposed childcare and aged care components of the proposed Cabramatta Intergenerational Community, with a significant undersupply of both childcare and aged facilities within the defined catchment areas. The proportion of childcare aged children, including after school care (0 – 13 years), within the Cabramatta area is higher than both the Sydney and Australian benchmarks. In addition, the average age of residents within the Fairfield LGA has increased by 3.0% from 2006 - 2011, double the increase in the Sydney benchmark over the same period. The proposed Cabramatta Intergenerational Community will be highly innovative, reinvigorating the local area and allowing families, including grandparents, parents and children to live and age in the one precinct. This is very important culturally to the ethnically diverse population of Cabramatta.

- As such, the rezoning of the subject site will generate significant employment growth that is consistent with recent industry employment trends in the Fairfield LGA. In addition, while the rezoning of the site would result in a loss of 90 industrial jobs, there are significant future employment lands planned in close proximity at the WSEA and Moorebank Intermodal Terminal, which are projected to employ over 60,000 workers over the next 30 years. These locations are far more suitable for industrial/manufacturing uses as compared with the Longfield Street site, providing modern facilities at lower rental levels in close proximity to transport infrastructure. These locations are also separated from residential land uses, reducing conflict and restrictions on operations.
- Consequently, the industrial/business development zoning no longer represents the 'highest and best use' of the subject site. While it is important that a provision of industrial/business development land remains within the Fairfield LGA, it is equally important to identify those areas that represent the optimal location for industrial facilities. The surrounding industrial area, including businesses fronting the Hume Highway and the larger Lansvale Industrial Area, represents a key employment generator within the Fairfield LGA and should be maintained in the future, however, the subject site itself is not suitable for industrial/business development uses.
- Indeed, reflecting the declining role of industrial employment within the area, there is decreasing need for all existing industrial employment lands within the Fairfield LGA to remain. As such, the subject site is both not suitable for industrial uses but is also not needed as an industrial employment generating land.
- The rezoning of the subject site from industrial/business development to residential uses would form a natural progression in the surrounding precinct, with the shift to more mixed uses, including residential already underway in surrounding areas.
- In addition, the rezoning of the subject site would provide a range of social and economic benefits to the local economy, providing a significant increase in employment

that would be consistent with employment trends throughout the LGA and helping to achieve residential dwellings targets outlined in the *NSW Metropolitan Strategy*.

- The proposed redevelopment of the subject site to include residential, childcare, aged care and local ancillary retail uses would represent an optimal use of land, providing a major employment generator within Fairfield and rejuvenating the surrounding precinct, leading to increased employment and viability in the area, while maintaining the nearby Cabramatta North Hume Highway Industrial Area and the Lansvale Industrial Area in tact as key industrial employment generating areas of Fairfield.

INTRODUCTION

This report presents an independent assessment of the potential rezoning of industrial/business development land to allow for a mix use development at 17 – 21 Longfield Street, Cabramatta (“the site”). The site is located within the Cabramatta North Hume Highway Industrial/Business Commercial Area in the Fairfield LGA of Western Sydney.

This report has been prepared in accordance with instructions received from Elton Consulting. The 17 – 21 Longfield Street, Cabramatta site was previously zoned 4C Special Industrial under the *Fairfield Local Environment Plan (LEP) 1994*. It has recently been zoned B5 Business Development under the *Standard Instrument Fairfield LEP 2013*. The purpose of this study is to determine if industrial/business development remains the optimal use of land. The owner of the site is seeking to rezone the land to allow for a mix of uses including some residential development together with associated high demand uses such as childcare, aged care and small scale retail/commercial facilities. The proposed development will be referred to as the Cabramatta Intergenerational Community for the remainder of this report.

The report is structured and presented in **seven sections** as follows:

- **Section 1** provides an overview of the regional and local context of the site. The history of the site and the current planning framework is also discussed.
- **Section 2** reviews recent trends in the supply of industrial land in the Sydney metropolitan area, and how these trends relate to the subject site.
- **Section 3** presents an audit of vacant industrial zoned land within the Fairfield Local Government Area (LGA). An overview of the key drivers of industrial land generally in the Fairfield LGA, and how these key drivers relate to the subject site is also provided.
- **Section 4** provides an overview of growth in the Fairfield LGA including current and projected population levels over the period to 2026. A review of the socio-economic profile of the Fairfield LGA population by suburb is also undertaken.

- **Section 5** details an assessment of employment trends throughout the Fairfield LGA as well an analysis of the net gain in employment as a result of the rezoning of the subject site from ‘industrial’ to ‘mix use’ under the proposed concept plan.
- **Section 6** provides an analysis of the potential for the planned childcare, aged care and retail facilities at the proposed “Cabramatta Intergenerational Community”.
- **Section 7** presents the keys findings of this analysis.

1 SITE LOCATION & BACKGROUND

This section reviews the regional and local context of the 17 – 21 Longfield Street, Cabramatta site and provides an overview of the history of the site and the current uses. A summary of the planning framework and the proposed development scheme is also provided.

1.1 Regional Context

- i. The south-western Sydney suburb of Cabramatta is located approximately 30 km from the Sydney Central Business District (CBD) within the City of Fairfield LGA (refer Map 1.1).
- ii. The City of Fairfield includes a large residential population as well as significant employment lands around industrial and commercial precincts at Wetherill Park, Smithfield, Fairfield, Cabramatta and Lansvale.
- iii. The Fairfield LGA is a major employment destination in the Sydney metropolitan area. Manufacturing is the highest employing industry at 17.8% (although declining in importance), which compares with the Sydney benchmark of 8.5%.
- iv. Western Sydney encompasses the LGAs of Auburn, Blacktown, Holroyd, Parramatta, The Hills, Bankstown, Camden, Campbelltown, Fairfield, Liverpool and Wollondilly. According to the *Draft Metropolitan Strategy*, Western Sydney will absorb more than 70% of Sydney's additional 1.3 million residents expected by 2031. The Strategy also identifies the creation of an additional 625,000 jobs in Sydney by 2031, with the aim of providing 50% of new employment in Western Sydney.
- v. There are two major future employment generating areas surrounding the Fairfield LGA, including the planned WSEA and Moorebank Intermodal Terminal (MIT) Project, outlined as follows:

WSEA:

- vi. The WSEA is located at the intersection of the M4 and M7 Motorways in Eastern Creek and is partly provided within the Fairfield LGA (410 hectares within the Fairfield LGA out of a total of 10,700 hectares).
- vii. The WSEA has been planned with the aim of providing jobs growth in manufacturing and new technology closer to the homes of the North West and South West Growth Centres. The project will also improve important connections to the M4 and M7 Motorways for Sydney's freight and logistics network.
- viii. The New South Wales Government's vision for the Broader WSEA is to provide well-located, serviced employment lands to secure the state's future productivity and economic growth. The Broader WSEA comprises approximately 10,700 hectares of land, including the 1,700 hectare Commonwealth owned site at Badgerys Creek earlier identified for the second Sydney Airport.
- ix. The *Broader WSEA draft Structure Plan* was released in 2013 and outlines a vision for approximately 57,000 new jobs (21,000 office jobs and 36,000 industrial jobs) provided over the next 30 years, with the potential for up to 212,000 jobs when the area is fully developed.
- x. According to the *Broader WSEA Economic Issues and Drivers Study* prepared by Urbis in April 2013, to appreciate the scale of the WSEA and its potential contribution to the supply of employment land, the additional proposed employment land equates to over 80% of the existing employment land stock in the Sydney region.
- xi. Some 1,800 hectares of land is already zoned for employment purposes in the WSEA, with development of the remainder scheduled to commence in 2016. To achieve the outcomes set by the New South Wales Government, the Broader WSEA has been identified in the *draft Metropolitan Strategy for Sydney* as one of the nine 'city shaping projects' critical to Sydney's growth, helping to meet the aim of providing 50% of Sydney's new jobs in Western Sydney.

xii. The planned WSEA will provide a competitive advantage in attracting development and investment in industrial sectors based on the following key factors:

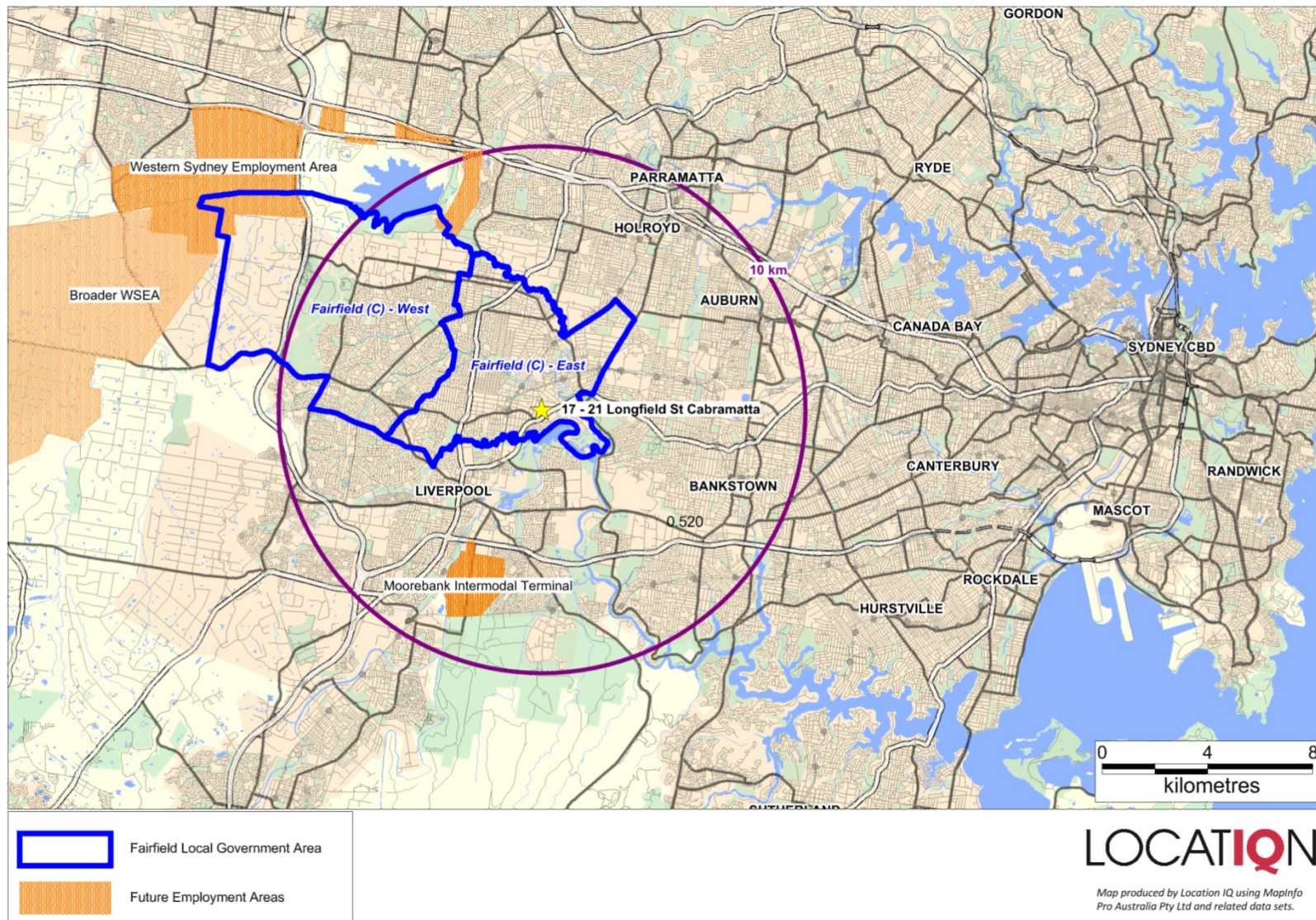
- Accessibility to large sites which are generally limited in supply.
- Excellent transport and motorway infrastructure.
- Lower rental levels due to lower underlying land values.
- Provision of modern industrial facilities allowing the emergence of industry clusters.
- Separation from residential land uses decreasing land use conflicts.

MIT:

xiii. The planned MIT Project is located around 5 km to the south of the Fairfield LGA and encompasses around 220 hectares of Commonwealth owned land. According to the *Moorebank Intermodal Terminal Project Detailed Business Case (February, 2012)* prepared by KPMG, the project would provide approximately 2,625 full time jobs during the construction phase, with an approximate 1,700 jobs likely to result in the operation of the facilities. The Federal Government is currently calling for expressions of interest from private companies to develop and operate the MIT.

xiv. In total, these proposed employment generating lands located partly within and immediately beyond the Fairfield LGA are expected to employ over 60,000 workers over the next 30 years.

MAP 1.1 – REGIONAL CONTEXT



1.2 Local Context

- i. The 17 – 21 Longfield Street site is located within the Cabramatta North Hume Highway Industrial Area and is bounded by existing residential area in the south and west (refer Map 1.2).
- ii. The site is easily accessible via public transport, with the 904 and S1 bus routes passing along Longfield Street. In addition, Cabramatta Railway Station is located around 1 km to the west of the site. Based on *CityRail Statistics (2011)*, some 18,880 commuters pass through the barriers at Cabramatta Railway Station on an average weekday.
- iii. The subject site is located to the west of the Hume Highway, a major arterial road throughout Western Sydney, providing access to Villawood in the north-east and Liverpool in the south. According to the *Roads and Maritime Services (former RTA – 2005 data)*, some 59,717 vehicles travel along the Hume Highway, past the intersection of Quest Avenue, on a daily basis. This intersection is located around 1 km to the north-east of the subject site.
- iv. The Cabramatta North Hume Highway Industrial Area extends west of the Hume Highway and is bounded by Lansdowne Road in the north and Boundary Lane in the south. The precinct incorporates around 16.5 hectares of land and is estimated to employ some 360 workers (*Fairfield Employment Lands Strategy, 2008, p86*). The industrial area is a primarily automotive precinct together with older manufacturing and warehousing facilities. The provision of industrial facilities is generally low cost, with the majority of stock being dated and not likely to meet the requirements of modern industrial tenants. The precinct includes approximately 68 tenants and four vacancies. Of the 68 tenants, only 29 are industrial related (43%). The precinct also includes a large automotive related component/car yards (34%) as well as eight residential dwellings which account for around 12% of total tenants (refer Table 1.1).

- v. The Lansvale Industrial Area is located directly to the east of the Cabramatta North Hume Highway Industrial Area, incorporating around 41.5 hectares and employing some 1,184 workers (*Fairfield Employment Lands Strategy, 2008, p84*).
- vi. Employment lands along the Hume Highway enjoy direct frontage to the major arterial road, experiencing benefits of direct access. This means vehicle and truck movements are not redirected through residential streets. The subject site does not share this characteristic as there is no direct access to the Hume Highway, with vehicle and truck access provided via residential streets (Longfield Street and Chadderton Street). In this regard, the subject site is considered to be atypical of the surrounding industrial land.
- vii. Other key points to note regarding the local context of the 17 – 21 Longfield Street site include:
 - The Ming Quang Buddhist Temple is located directly to the north of the site.
 - 169 Hume is a relatively new mixed use centre located along the Hume Highway that includes My Baby Warehouse, Nails & Beauty Supplies, Holistic Flooring Centre and other bulky goods/warehouse tenants.
 - A number of car dealerships are located along the Hume Highway.
 - Lansvale Shopping Centre is situated to the south of the site (opposite side of the Hume Highway) and includes Australia Post, a convenience store, a newsagency, medical centre and the like. The centre is located adjacent to a McDonalds Quick Service Restaurant.
- viii. There is a significant degree of barrier separation provided by the Hume Highway between the Lansvale Industrial Area and the Cabramatta North Hume Highway Industrial Area. Land uses on the eastern side of the Hume Highway represent a “cluster” of traditional industrial uses such as car dealerships and warehousing. In contrast, the western side of the Hume Highway includes primarily non-industrial

uses, such as retail, bulky goods, food catering, hotels and residential dwellings, even though the land is currently zoned B5 Business Development.

- ix. The natural progression of the western side of the Hume Highway, transitioning to a mixed use precinct as opposed to traditional industrial uses indicates the decreasing demand for industrial uses in this precinct.
- x. The tenants located on the western side of the Hume Highway are primarily light/non-industrial uses. These tenants such as My Baby Warehouse could potentially locate in any industrial location and do not specifically serve the needs of the immediate surrounding population. Indeed, relocation to a larger, more active industrial precinct is likely to present a more beneficial location for a number of tenants in the Cabramatta North Hume Highway Industrial Area.
- xi. Overall, the Longfield Street site is located on the border of the Cabramatta North Hume Highway Industrial Area and established residential area. While the locality is zoned for B5 Business Development uses, the western side of the Hume Highway already includes a number of non-industrial/business development uses, such as restaurants, hotels, residential dwellings, a religious temple and the like.

MAP 1.2 – LOCAL CONTEXT

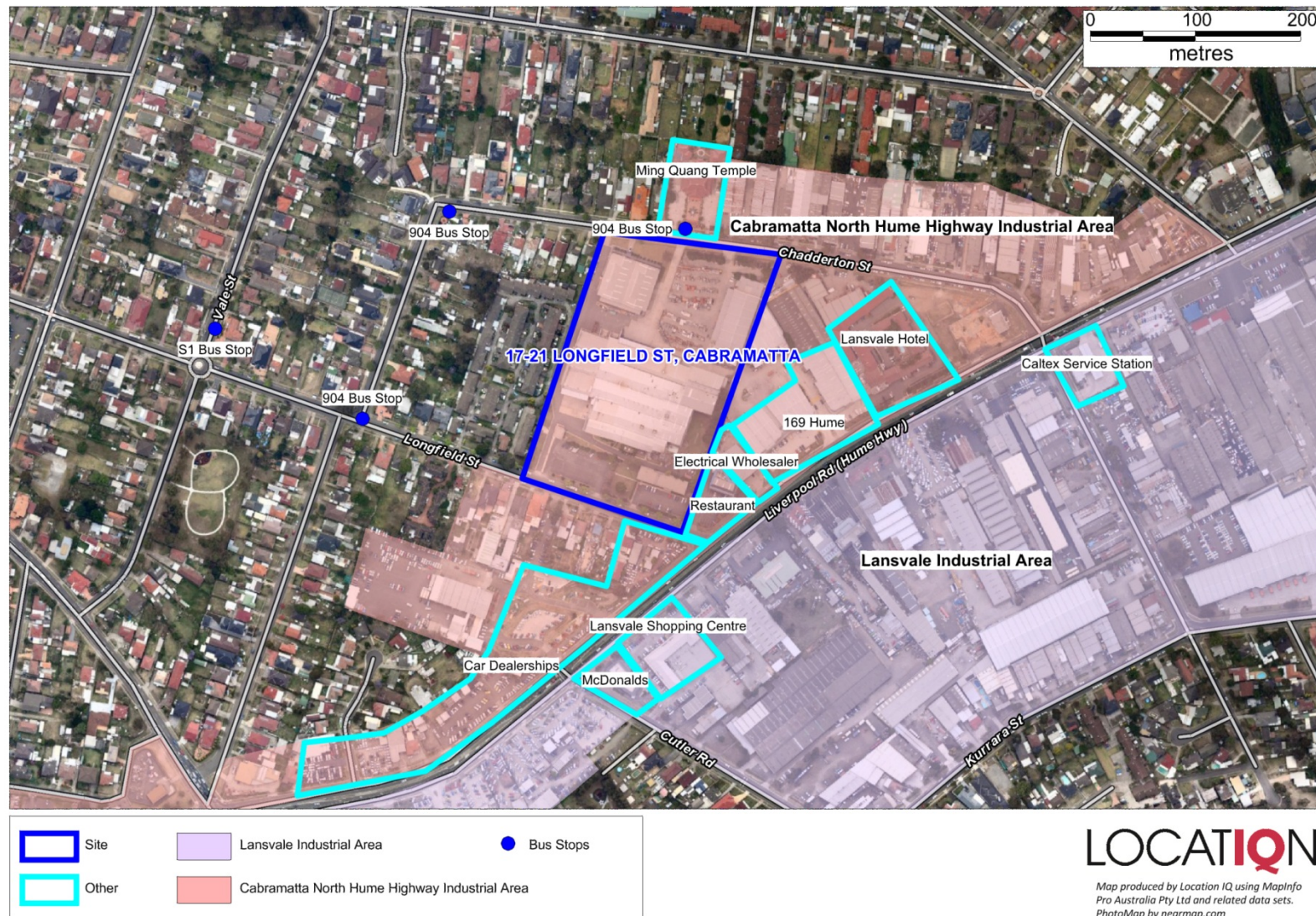


TABLE 1.1 – CABRAMATTA NORTH HUME HIGHWAY INDUSTRIAL/BUSINESS COMMERCIAL AREA

Tenant	Catgeory		Catgeory		Catgeory
Four Wheel Drive sales	Automotive	169 Dragon Plasterboard	Industrial	Security tenant	Industrial
Consignment centre	Automotive	169 Hume Fun Kingdom, Toys, Play Centre	Other	Handcraft Kitchens	Industrial
Best Buys Auto	Automotive	169 Hume Aquarium and Fish Specialist	Industrial	Gartmore Smash Repairs	Automotive
Deluxe Motors	Automotive	169 Hume Le Aquatic Warehouse	Industrial	Dowgrove Pty Ltd Pressing and Parking Services	Industrial
Rock and Roll Car Wash (Window Tinting)	Automotive	169 Nails and Beauty Supplies	Industrial	SK Auto Wreckers	Automotive
Electrical	Industrial	169 Hume Holistic Flooring Centre	Residential	HT Trading Co Scrap Metal Recycling	Industrial
Best Buys Auto	Automotive	Longfield St Residential Dwelling	Residential	Gang Tung Fencing, Aluminium & Security	Industrial
Patterson's Engineering	Industrial	Longfield St Residential Dwelling	Residential	Ming On Building Supplies	Industrial
Patternmakers	Industrial	Longfield St Residential Dwelling	Residential	Ming General Japanese Spares	Automotive
Great Wall	Automotive	Longfield St Residential Dwelling	Residential	Dowan Metal Spinning	Industrial
Isuzu Utes	Automotive	Longfield St Residential Dwelling	Residential	Warehouse tenant	Industrial
TPP Auto Repairs	Automotive	Longfield St Residential Dwelling	Residential	Capital Smart Repairs	Automotive
Hume Hwy Residential dwelling	Residential	169 Hume Winho Trading Co	Industrial	LPG Conversions Auto Works Plus	Automotive
Vacancy (Hume Highway)	Vacancy	Ibis Lansvale incl. restaurant	Hotel	Canopy's Roof Racks	Industrial
Vacancy (Hume Highway)	Vacancy	Vacancy (Hume Highway)	Vacancy	Accessory World	Industrial
Classic Cars Lansvale	Industrial	Vacant Land	Vacancy	Barnes Caravans	Industrial
Australian Fleet Sales	Automotive	Lansvale Auto Care	Automotive	BP Service Station	Highway Retail
Letuan Wholesale Cars	Automotive	Doclap Auto Repairs and Parts	Automotive	Maurine Motors	Automotive
Ambrosia Seafood Restaurant	Food Catering	TH Goods and Services (gardening)	Industrial	Liquor shop & Takeaway Food	Food
Sydney Kitchen Technology	Industrial	VTNGUYEN Hardware	Industrial	Blair Tyres	Automotive
Modern Lights and Electrical Wholesaler	Industrial	Buddist Temple	Other	Mechanical repairs	Automotive
Nails & Hair & Beauty	Industrial	Feng Garage Mechanic and Electrician	Automotive	SSSS Cars	Automotive
169 Hume Imperial Ceramics	Industrial	Kymdan	Industrial	Siba Moduled Care Carpets	Industrial
169 Hume My Baby Warehouse	Bulky Goods	NL Glass Aluminium	Industrial	Coles Express Service Station	Highway Retail

As of May 2013.

1.3 Planning Environment

- i. The overriding planning strategies for the Fairfield LGA in relation to Cabramatta are outlined as follows:

Fairfield Residential Development Strategy (Draft 2009): The Fairfield LGA needs to accommodate an approximate 24,000 additional dwellings by 2031, with an additional 4,500 – 9,000 new dwellings in Cabramatta. Future residential development should be centred on Major Centre and Town Centres sites as well as transportation nodes.

Fairfield Employment Lands Strategy (2008): The existing supply of industrial land within the Fairfield LGA needs to be preserved to provide employment to cater for the needs of future population growth outlined in the *Fairfield Residential Development Strategy*.

- ii. Based on the above strategies, given the strong future population growth projected throughout the Fairfield LGA and, more specifically, Cabramatta, it is important that employment lands are preserved to cater for this growth.
- iii. According to the *Fairfield Local Environment Plan (LEP) 1994*, the 17 – 21 Longfield Street, Cabramatta site was previously zoned 4C Special Industrial (refer Figure 1.1).
- iv. The zoning of the site has recently changed to B5 Business Development under the recently released *Fairfield LEP 2013* (refer Figure 1.2), which would enable a mix of office, retail and warehouse activities.
- v. According to the *Fairfield LEP 2013*, the objectives of the B5 zoning are:
 - “To enable a mix of business and warehouse uses, and bulky goods premises that require a large floor area, in locations that are close to, and that support the viability of centres.”
 - “To encourage the establishment of light industrial uses which are compatible with nearby residential areas and which generate employment and contribute to the economic development of the City of Fairfield.”

- vi. The recent zoning change of the subject site indicates that the planning authorities have acknowledged the changing nature of the Cabramatta North Hume Highway Industrial Area and that traditional industrial uses are no longer suitable or appropriate for the subject site.
- vii. While it is important for employment lands to be maintained within the Fairfield LGA, the subject site does not represent an optimal use of land for 4C Special Industrial or B5 Business Development uses. The site does not benefit from direct highway exposure, impacting its viability as a bulky goods premise. The site is also not appropriate to accommodate *“light industrial uses which are compatible with nearby residential areas and which generate employment and contribute to the economic development of the City of Fairfield” (Fairfield LEP 2013)*. This is because, owing to the size of the site, the site has greater capacity to generate more employment than light industrial uses and, consequently, there is a higher and better use in this scenario. As such, we believe the subject site would be better utilised for residential uses, which will be outlined in the remainder of this report.
- viii. Importantly, while the planning authorities have acknowledged that the subject site is no longer suitable for traditional industrial uses, the *Broader WSEA draft Structure Plan (June 2013)*, outlines the New South Wales Government’s vision to provide a total of 10,700 hectares of employment lands that are appropriately located with excellent access to transport infrastructure and future population growth. As such, the rezoning of the subject site to mixed use would result in the loss of four hectares of employment land, however, an additional 410 hectares of employment land is planned to be provided within the Fairfield LGA as part of the WSEA.

FIGURE 1.1 – FAIRFIELD LEP 1994

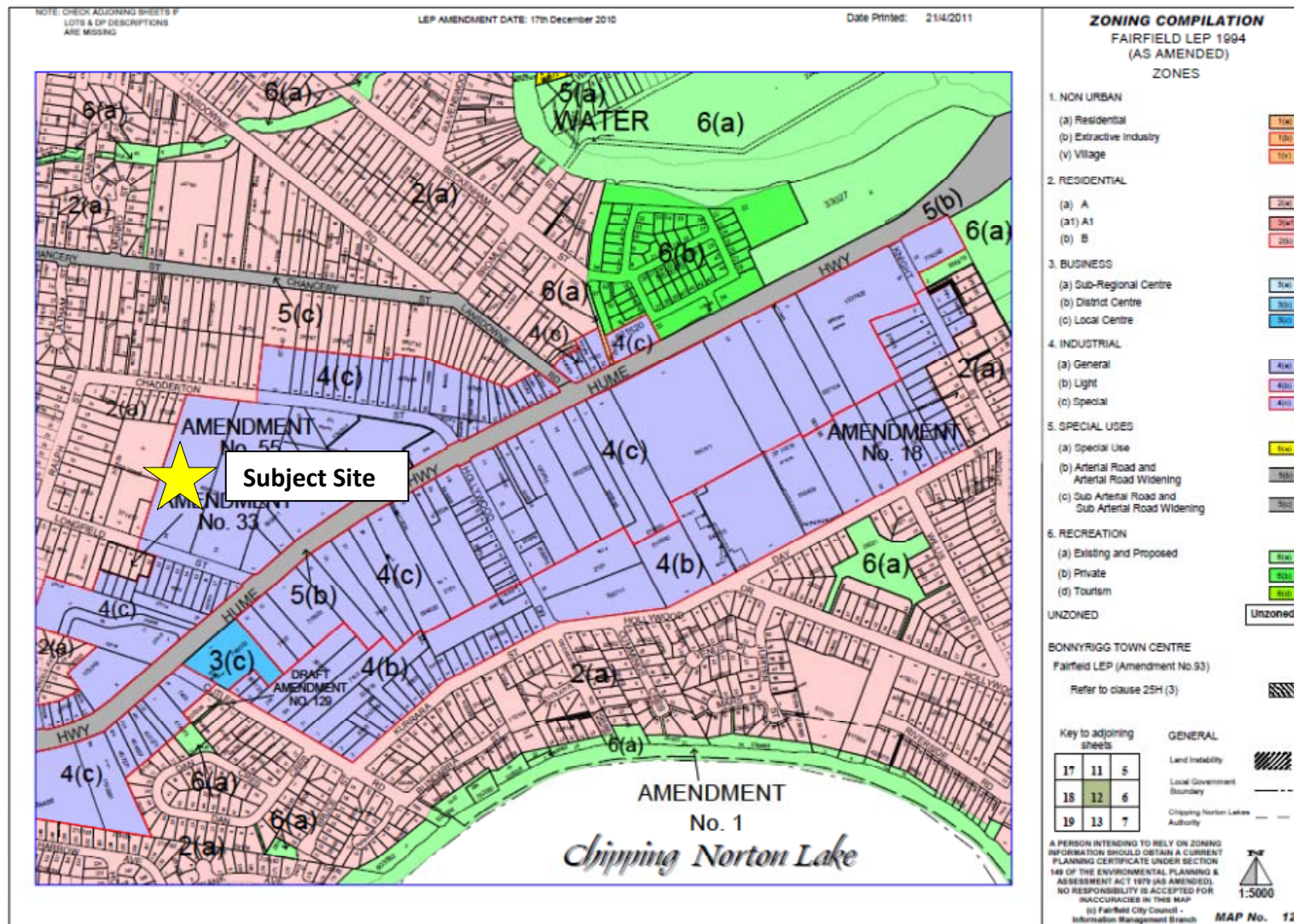
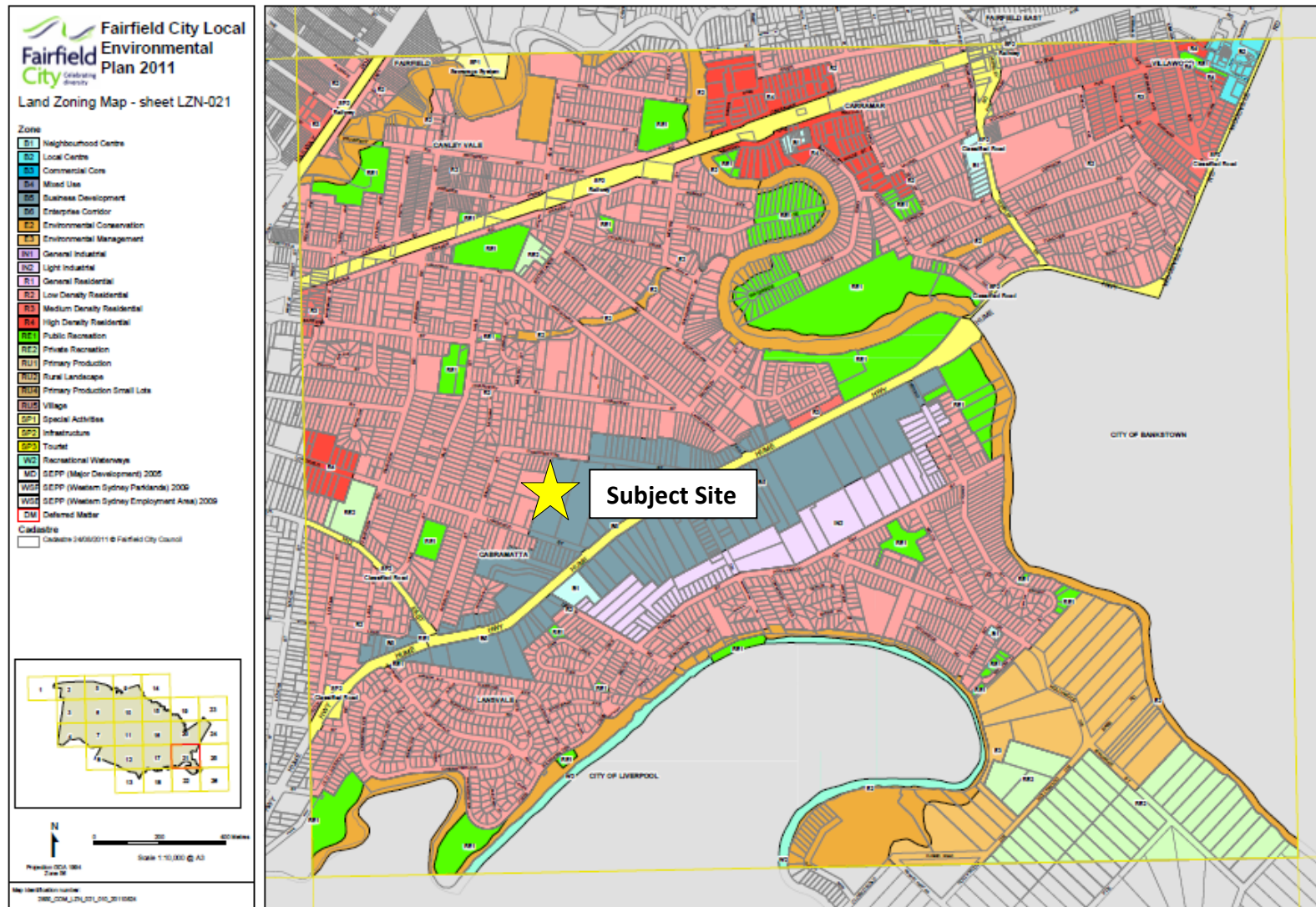


FIGURE 1.2 – DRAFT FAIRFIELD LEP 2011



1.4 Site History and Current Uses

- i. The Longfield Street site is currently occupied by four tenants, outlined as follows:
 - Fairfax: 30 workers. Estimated to close in the next 1 – 2 years as jobs move offshore.
 - Mayvic: 30 workers. Lease expires in January 2014.
 - RMD: 20 workers.
 - T & D: 10 workers.
- ii. Overall, an estimated 90 workers are currently employed at the site.
- iii. Based on discussions with the owner, the main industries seeking to occupy the site are logistics or manufacturing uses. These uses present a conflict with the surrounding residential uses and there is a long history of land use complaints, primarily due to noise and traffic created by industrial tenants.
- iv. The existing composition of tenants at the site is not compatible with the surrounding residential uses given the lack of reasonable separation between the Cabramatta North Hume Highway Industrial Area and the existing residential area of Cabramatta.
- v. According to the owner, the site is difficult to lease with most industrial tenants requiring 24 hour, seven days a week, as well as B Double/Triple access. These requirements are provided at surrounding industrial precincts such as Wetherill Park, Smithfield and the future WSEA. In comparison, the Longfield Street site is generally surrounded by residential dwellings and truck movements are limited to daylight hours.
- vi. The site was purchased from Capral Aluminium on a vacant possession basis, with Capral Aluminium moving to Citiswich Business Park along Ashburn Road in Bundamba, Queensland.

- vii. Walker Corporation's \$1 billion Citiswich Business Park at Ipswich is a 335 hectare industrial precinct, situated in a high profile location at the junction of the Ipswich Motorway and the Warrego and Cunningham Highways. The Citiswich Business Park is over 200 hectares larger than the Cabramatta North and Lansvale Industrial Area, including key industrial tenants such as KSB (global pump and valve maker), The Reject Shop, API, Australian Hardboards, Caltex, Hume Masterpanel and Australian Wood Panels. Citiswich Business Park is a far more appropriate location for Capral Aluminium, with excellent access to transport infrastructure within a larger and more traditional industrial precinct. This compares to the residential nature of the Longfield Street site, which lacks direct access to the Hume Highway.
- viii. The above is also recognition of trends in industrial development not being city specific, but Australia specific, with major industrial firms not only looking for sites within Sydney, but throughout Australia. The improvement in logistics warehousing and transportation has resulted in a very different industrial landscape to what existed in 1994 under the previous zoning for the site.

1.6 Proposed Development

- i. An indicative concept plan for the proposed development at the 17 – 21 Longfield Street site is illustrated in Figure 1.3, known as the Cabramatta Intergenerational Community.
- ii. The proposed Cabramatta Intergenerational Community is planned to occupy the entire subject site and is designed to create a vibrant and co-generational residential and mixed use environment that looks to integrate with the broader community.
- iii. The major components include:
 - 435 residential apartments in various buildings ranging from three levels up to the highest at six levels in the middle of the site, creating sensitive interface to existing surrounding properties.
 - Commercial/retail floorspace of 2,397 sq.m, including a small convenience store, pharmacy, medical centre, food catering tenants and the like.
 - An aged care facility including a 150 bed nursing home of 8,250 sq.m and an Independent Living Unit of 10,552 sq.m.
 - A childcare centre of 500 sq.m, catering for approximately 100 children.
- iv. A pedestrian link is proposed through the site to connect Chadderton Street and Longfield Street, providing a visual connection from both ends and easy access to the Ming Quang Temple. Underground carparking will be provided for residents and visitors.
- v. Overall, the proposed vision for the site is to create a high quality intergenerational residential and mixed use precinct that will reinvigorate the local area, allowing families, including grandparents, parents and children, to live and age in the one precinct. This is very important culturally to the ethnically diverse population of Cabramatta. Furthermore, the proposed development will provide a range of community facilities, including childcare, aged care and local retail to service the day to day needs of local residents, benefiting the local community.

FIGURE 1.3 – URBAN DESIGN REPORT, INDICATIVE CONCEPT PLAN



2 SUPPLY OF INDUSTRIAL LAND

This section of the report provides a review of the recent trends in the supply of industrial land in the Sydney metropolitan area.

2.1 Sydney Industrial Land Trends

- i. Based on a review of industrial land throughout the Sydney metropolitan area, key trends include:
 - Industrial land can be used for a number of purposes, including:
 - Heavy industry such as petrochemical plants at (i.e. Rosehill).
 - Large factory/manufacturing/warehousing (i.e. Silverwater/Lidcombe).
 - Light manufacturing and small factory office warehousing.
 - Research and development parks.
 - Over the past 30 - 40 years, there has been a gradual, yet evident decline in traditional industrial land uses within built up areas of Sydney. These declines have been attributed to a number of factors, including increasing population pressures, lack of vacant land for residential development, rising property prices and State Government urban consolidation policies.
 - This pattern of land use evolution has also occurred in other major cities in Australia, whereby traditional industrial activities are moving to larger and more affordable sites that have better road and rail infrastructure.
 - One of the most notable factors that has led to the change of use of industrial precincts in built up areas of Sydney has been the growth of industrial precincts in outer Sydney areas that possess larger and more affordable sites, superior road and rail transport, and are situated closer to the major population growth centres of Sydney.

- The value of a number of industrial land areas has declined as technological advances have resulted in new facilities being built in terms of supply chain and distribution networks. Consequently, most large factory sites require 24 hour access to major road networks for B double/triple trucks and the like.
- ii. As a result of the above planning and economic factors, a large proportion of land within the Sydney metropolitan area has been converted from industrial to other uses (predominately housing) since the 1980s. Substantial areas have, or are, being redeveloped for commercial (e.g. Macquarie Park in Ryde) or residential/mixed use (such as Green Square and Pyrmont/Ultimo).
- iii. Indicative of these trends, most large surplus industrial sites in built up areas of Sydney have been converted to housing or mixed use developments with residential dwellings above a ground level retail or commercial component.
- iv. Examples of the conversion of former industrial land to residential or mixed uses in Sydney include:
 - Former industrial land with waterfront access, such as Breakfast Point and Ermington, has been redeveloped for residential uses.
 - Similarly, the history of Sydney Olympic Park included the land around Homebush Bay being used for a variety of purposes including State Abattoirs, State Brickworks, chemical factories and ship breaking yards. All these industries have now closed and have been replaced with residential dwellings and the Sydney Olympic facilities.
 - The former industrial lands on the Rhodes peninsula, to the west of the railway line, have now been converted to residential and retail uses.
 - The Meadowbank Employment Area is situated to the south-west of Ryde, adjacent to Meadowbank Railway Station and to the north of the Parramatta River. The area has historically been occupied by heavy industry; however, due to a lack of demand and high vacancy levels, in 2004, the area

was rezoned to permit commercial and medium density residential development. The new Development Control Plan prepared by Ryde Council for the area significantly increases the provision of residential and mixed use land uses.

- A major redevelopment on the old Sunbeam and Victa factory sites at Campsie/Clemton Park by Australand has been approved by the State Government. The \$250 million project is planned to encompass aged care accommodation, a supermarket, retail shops and a childcare centre. This site was formerly a relatively isolated parcel of industrial zoned land with residential dwellings provided on all sides of the site.
 - Green Square, located within the City of Sydney, is recognised as one of Sydney's oldest industrial areas. Traditionally, the area supported manufacturing industries that relied on their close proximity to the CBD, airport and port. The area was also home to the State's largest brickworks. In the 1990s, urban renewal started, led by ongoing gentrification of the inner city and state planning policies that promoted increasing residential densities closer to existing services and infrastructure. The majority of urban renewal in Green Square is focused on redeveloping vacant and unused industrial sites to residential and mixed use dwellings.
 - 797 - 799 Botany Road in Rosebery was a recent multi-million dollar sale of an industrial site, with the developer planning a residential development.
 - Meriton paid \$100 million for an industrial site at 19 – 33 Kent Road in Mascot in early 2013. Meriton plans to develop 1,000 apartments at the site.
- v. Many of these examples incorporate new uses that are in demand in the local area, such as health/medical, aged care and the like. This can often be achieved through Voluntary Planning Agreements (VPA's) or staged development applications.

- vi. At the same time that this industrial land has been rezoned to other uses, large tracts of new industrial land have been rezoned or created in outer suburban areas, such as the WSEA and MIT. Similarly, as discussed previously, other large tracts of industrial land throughout other capital cities such as Citiswich in Western Brisbane have also developed.
- vii. The identified industrial land use trends as witnessed in Sydney and other capital cities of Australia are expected to continue. In particular, the value of inner city industrial land will see industrial uses eventually relocate to outer metropolitan locations, with the vacated space over time being changed to ‘higher order uses’, which typically are not industrial.
- viii. Increasingly so in the industrial sector, purpose built facilities have developed in outer Sydney areas with superior access to road and rail infrastructure at an affordable price. The development of new facilities on the urban fringe and in large industrial estates has freed up industrial land in the built up areas of Sydney for alternative uses.
- ix. The retention of appropriate employment uses in the built up areas of Sydney is important in order to ensure jobs are located close to homes. However, the nature of jobs close to homes in built up areas is changing, with demand for aged care and health care services increasing.

2.2 17 – 21 Longfield Street, Cabramatta Site

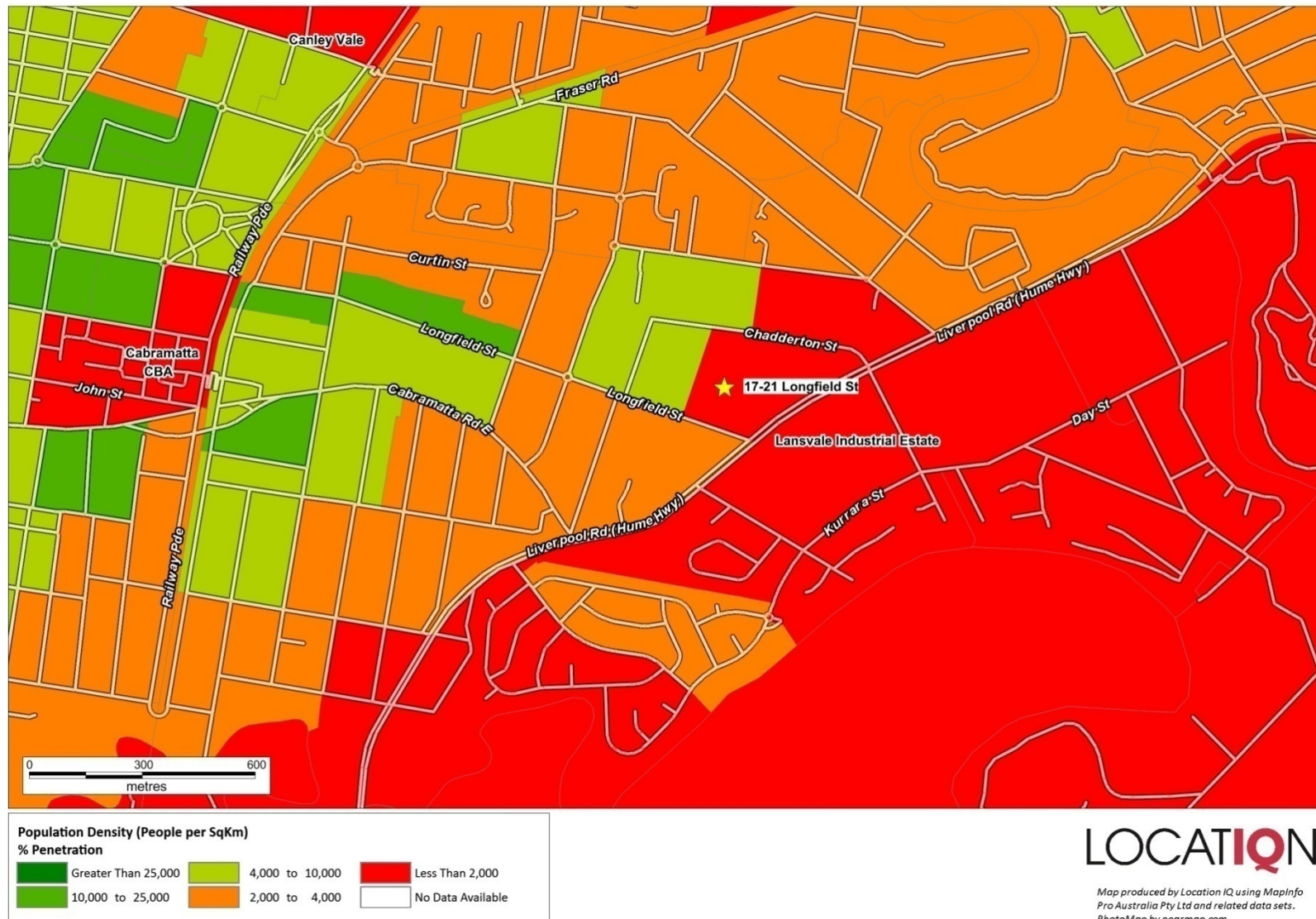
- i. Consistent with recent trends in industrial land supply, the subject site would be better utilised for residential and mixed uses based on the following:
 - Increasing population pressures as outlined in the *Fairfield Residential Strategy*, which identifies the need for an additional 4,500 – 9,000 dwellings in Cabramatta. The proposed Cabramatta Intergenerational Community will include 435 residential apartments, accounting for nearly 10% of the projected lower target of 4,500.

- Lack of land available for residential development in Cabramatta to allow for the dwelling targets outlined in the *Fairfield Residential Strategy* to be achieved.
 - The built up nature of the land surrounding the site, with dense residential land located immediately to the west (refer Map 2.1). This present land use conflicts with industrial uses at the subject site.
 - The change of use from Special Industrial/Business Development to residential uses would form a natural progression in the surrounding precinct, with the shift to more mixed uses, including residential already underway.
 - The nature of the current small scale/non-industrial uses to the west of the Hume Highway in the Cabramatta North Hume Highway Industrial Area. These facilities are not necessary to serve the needs of the local population and could effectively locate in any industrial precinct.
 - The isolated nature of the Cabramatta North Hume Highway Industrial Area. The majority of industrial land within the Fairfield LGA is located in “clusters” around Wetherill Park, Smithfield and Fairfield East, with the Cabramatta North Hume Highway Industrial Area only accounting for approximately 2.1% of total industrial land within the LGA.
 - The planned development of the WSEA, which will be located at the intersection of the M4 and M7 Motorways and will accommodate some 57,000 workers over the next 30 years. The development of the WSEA will fulfil a large proportion of industrial floorspace demand in the Sydney metropolitan area, allowing more built up areas to be utilised for residential.
- ii. Based on the above, the small scale industrial uses located at the subject site would be better located in larger, more active industrial precincts, with better access to transport infrastructure. For example, the industrial tenants currently located at the subject site or other industrial tenants within the surrounding precinct would be far better located within the future WSEA, which would provide critical mass of industrial facilities and a superior location in terms of transport infrastructure. A

location within the WSEA would also serve the significant future population growth of the North West and South West Growth Centres. This would allow the subject site to be used for higher order uses, such as residential, which would help achieve dwelling targets outlined in the *Fairfield Residential Strategy*.

- iii. This is consistent with the submission to the *Draft Metropolitan Strategy For Sydney to 2031* by Fairfield City Council, which states “*Council will need to consider the long term future of industrial estates on the eastern side of the City given their proximity to rail and major road. They are prime sites for brownfield development. Council has summarised the Employment Lands Development Program to consider the impact of other industrial land supply throughout the pipeline across greater western Sydney.*”

MAP 2.1 – CABRAMATTA POPULATION DENSITY



3 FAIRFIELD INDUSTRIAL LAND REVIEW

This section provides a detailed review of the industrial zoned land within the Fairfield LGA. An overview of the key drivers of industrial land generally and how these key drivers relate to the subject site is also provided.

3.1 Industrial Land Review

- i. Map 3.1 illustrates the industrial zoned land in the Fairfield LGA as taken from the *Fairfield Local Environment Plan (2013)*. According to the *Fairfield Employment Lands Strategy (2008)*, there are 13 industrial precincts within the Fairfield LGA (Table 3.1).

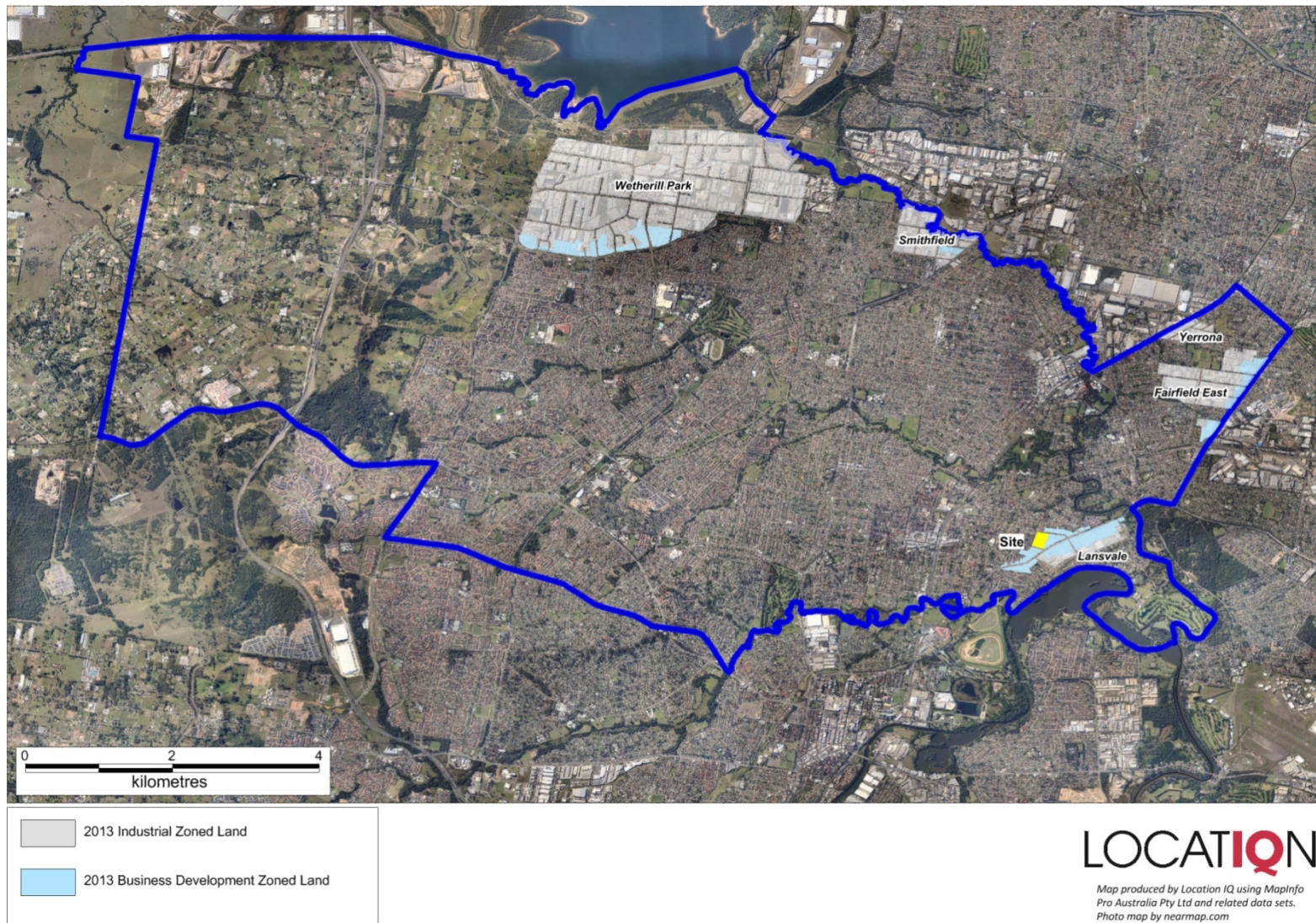
TABLE 3.1 – FAIRFIELD LGA INDUSTRIAL LAND SUPPLY

Precinct	Industrial Area	Building GFA	Size		Workers	
			Ha.	% of Total	No.	% of Total
1.	Bonnyrigg	67,100	10.0	1.3%	413	1.4%
2.	Cabramatta Road	6,724	1.4	0.2%	330	1.1%
3.	Cabramatta 4B	30,897	4.0	0.5%	330	1.1%
4.	Lansvale	273,074	41.5	5.4%	1,184	3.9%
5.	Cabramatta North Hume Highway	100,002	16.5	2.1%	360	1.2%
6.	Canley Vale	12,254	3.2	0.4%	179	0.6%
7.	Fairfield	18,852	5.0	0.6%	310	1.0%
8.	Fairfield East	377,828	59.0	7.6%	6,283	20.7%
9.	Old Guildford	112,889	19.4	2.5%	1,303	4.3%
10.	Smithfield	244,483	40.3	5.2%	1,450	4.8%
11.	Villawood	39,287	6.8	0.9%	987	3.2%
12.	Wetherill Park	2,785,762	553.3	71.4%	15,500	50.9%
13.	Yennora	93,234	14.0	1.8%	1,797	5.9%
	Total	4,162,386	774.4	100.0%	30,426	100.0%

Sources: *Fairfield Employment Strategy, 2008, pages 78 - 105 & 2011 Census*

- ii. A total of approximately 774.4 hectares of industrial land is identified within the Fairfield LGA. The Cabramatta North Hume Highway Industrial Area (approximately 16.5 hectares) accounts for approximately 2.1% of the total. The subject site itself, at around 4 hectares, accounts for less than 1.0% of total industrial land in the Fairfield LGA.

MAP 3.1 – FAIRFIELD LGA INDUSTRIAL ZONED LAND SUPPLY (FAIRFILED LEP 2013)



- iii. According to the *Fairfield Employment Lands Strategy (2008)* and the 2011 Census, industrial lands within the Fairfield LGA employ approximately 30,426 workers. The Cabramatta North Hume Highway Industrial Area employs around 1.2% of this total, with the subject site itself employing less than 0.3% of the total.
- iv. The Cabramatta North Hume Highway Industrial Area is the sixth largest industrial precinct by hectares within the Fairfield LGA. As discussed previously, the precinct includes 62 tenants and four vacancies. Of the 68 total tenants, approximately only 43% are traditional industrial tenants, with the precinct including a large automotive component at around 23 tenants (34%). The remaining tenants include a mix of uses, with eight residential dwellings accounting for 12% of total tenants, a hotel, two restaurants, a child play centre, highway retail and a religious temple.
- v. The major industrial areas within the Fairfield LGA are outlined as follows (refer Appendix):
 - The Wetherill Park Industrial Area is the largest industrial precinct within the Fairfield LGA, encompassing 553.3 hectares and employing 15,500 workers (*Fairfield Employment Lands Strategy, 2008, page 100*). The Industrial Area is located at the geographic centre of Sydney's major industrial zones and sits strategically between the major population and urban growth zones in the North West and South West of Sydney. The precinct includes some 1,557 manufacturing, wholesale, transport and service businesses (*Fairfield Employment Lands Strategy, page 110*).

Based on inspection by this office, there are currently a number of vacancies within the Wetherill Park Industrial Area. Overall, there are an estimated 128 vacancies within the industrial zoned land, accounting for an estimated 8% of total tenants (refer Appendix A and B).

In addition, there are a number of large land parcels that have not yet been developed, which account for an estimated 5% of total Wetherill Park Industrial Area land (refer Map 3.3).

As shown in Map 3.1, the land located along The Horsley Drive in the Wetherill Park Industrial Area was recently rezoned from industrial uses to B5 Business Development. This area includes a mix of bulky goods, warehousing, car dealerships and highway retail uses. There is a large amount of vacant land within the precinct at approximately 13% (refer Map 3.2). In addition, there are around five vacancies, excluding the recently developed Greenway Supa Centre, which includes a number of vacancies within the enclosed centre component.

- The Fairfield East Industrial Area incorporates 59 hectares and employs an estimated 2,683 workers. The precinct primarily includes Local Light Industry and Urban Support uses followed by Light Manufacturing based uses. According to the *Fairfield Employment Lands Strategy (2008)*, several vacancies exist across the precinct. Based on inspection by this office, the vacancy rate is estimated at around 5%, with the majority of vacancies along Seville Street (refer Appendix 3). In comparison to the Cabramatta North Hume Highway Industrial Area, Fairfield East includes much more traditional/large format industrial and warehousing tenants.

Land along Woodville Road was recently rezoned from industrial uses to B5 Business Development, with this precinct including primarily highway based retail (Hungry Jack's, Subway and Dominos).

- The Lansvale Industrial Area encompasses 41.5 hectares and employs an estimated 1,184 workers. The precinct is located on the eastern side of the Hume Highway and predominantly includes automotive related services and older warehousing/manufacturing facilities. According to the *Fairfield Employment Lands Strategy (2008)*, there is a low vacancy rate within the precinct. Based on inspection by this office, there is approximately 140 industrial tenants within the Lansvale Industrial Area (excluding Lansvale Shopping Centre), with an estimated 11 vacancies. This equates to a vacancy rate of around 8% of total tenants (refer Appendix 4 and 5).

- The Smithfield Industrial Area is easily accessible from The Horsley Drive, Victoria Street and the Cumberland Highway. The precinct encompasses around 40.3 hectares and employs some 1,450 workers. According to the Fairfield Employment Lands Strategy, p110, the Smithfield Industrial Area includes 237 businesses. With an estimated 17 vacancies, this equates to a vacancy rate of around 7% (refer Appendix 3). Interestingly, a number of vacancies are present in newer, more modern industrial developments. The development of a Bunnings Warehouse of 15,477 sq.m was recently approved in this industrial area at the intersection of The Horsley Drive and Victoria Street.
- vi. There are also a number of proposed industrial developments throughout the Fairfield LGA, summarised in Table 3.2. In total, an additional 412.4 hectares of industrial floorspace is proposed, including the 410 hectares of employment land in the WSEA. The largest proposed industrial developments include:
- The proposed Oakdale Central Distribution Park by The Goodman Group and Brickworks Limited will be part of the WSEA and will include the progressive development of Oakdale as a regional distribution park of warehouses, distribution centres and freight logistics facilities. The total Oakdale Central Distribution Park will result in approximately 1,300,000 sq.m of industrial floorspace, creating 5,000 jobs upon completion. The major project application was approved by *Planning New South Wales* in 2009. To date, DHL Supply chain has committed to a 20,170 sq.m warehouse and office development with a five year lease at Oakdale, to service a third party logistics contract with Cannon. Cannon will move from their current facility at Goodman's Reservoir Distribution Centre in Wetherill Park in August 2013, to coincide with the completion of the new facility.

The above relocation is an indication of the likely continued vacancy rates which will occur in existing industrial areas as more modern and appropriate logistics/warehouse/industrial areas are developed in more modern precincts.

- The proposed Gazcorp Industrial Estate in Horsley Park is also part of the WSEA and will incorporate a 60,000 sq.m warehouse/distribution facility along Wallgrove Road. The three stage development will comprise warehouse and distribution related facilities and is valued at \$59 million. The major project application has been submitted to *Planning New South Wales* for Stage One, which will include the associated infrastructure required for access and services, including construction of part of the proposed WSEA Southern Link Road.
- vii. In summary, there is a significant supply of industrial land within the Fairfield LGA, with the subject site accounting for less than 1% of the total. In comparison with the larger industrial areas within the Fairfield LGA, the Cabramatta North Hume Highway Industrial Area is significantly smaller and includes smaller scale/non-industrial uses.
- viii. In addition, there is a large amount of additional industrial and employment generating floorspace proposed throughout the area at around 412.4 hectares. The subject site accounts for less than 0.35% of the total existing and proposed industrial floorspace throughout the Fairfield LGA. The proposed industrial estates are generally centrally located within the WSEA, with excellent access to the M4 and M7 Motorways and are not surrounded by existing residential facilities, in-line with recent trends in the supply of industrial land.
- ix. In the instances that industrial zoned land was rezoned to B5 Business Development under the *Fairfield LEP 2013*, this land is generally provided along major arterial roads and includes primarily highway based retail such as petrol stations and fast food outlets. Based on inspection by this office, the B5 Business Development zoned land at Wetherill Park included a number of vacancies.

MAP 3.2 – WETHERILL PARK VACANT LAND

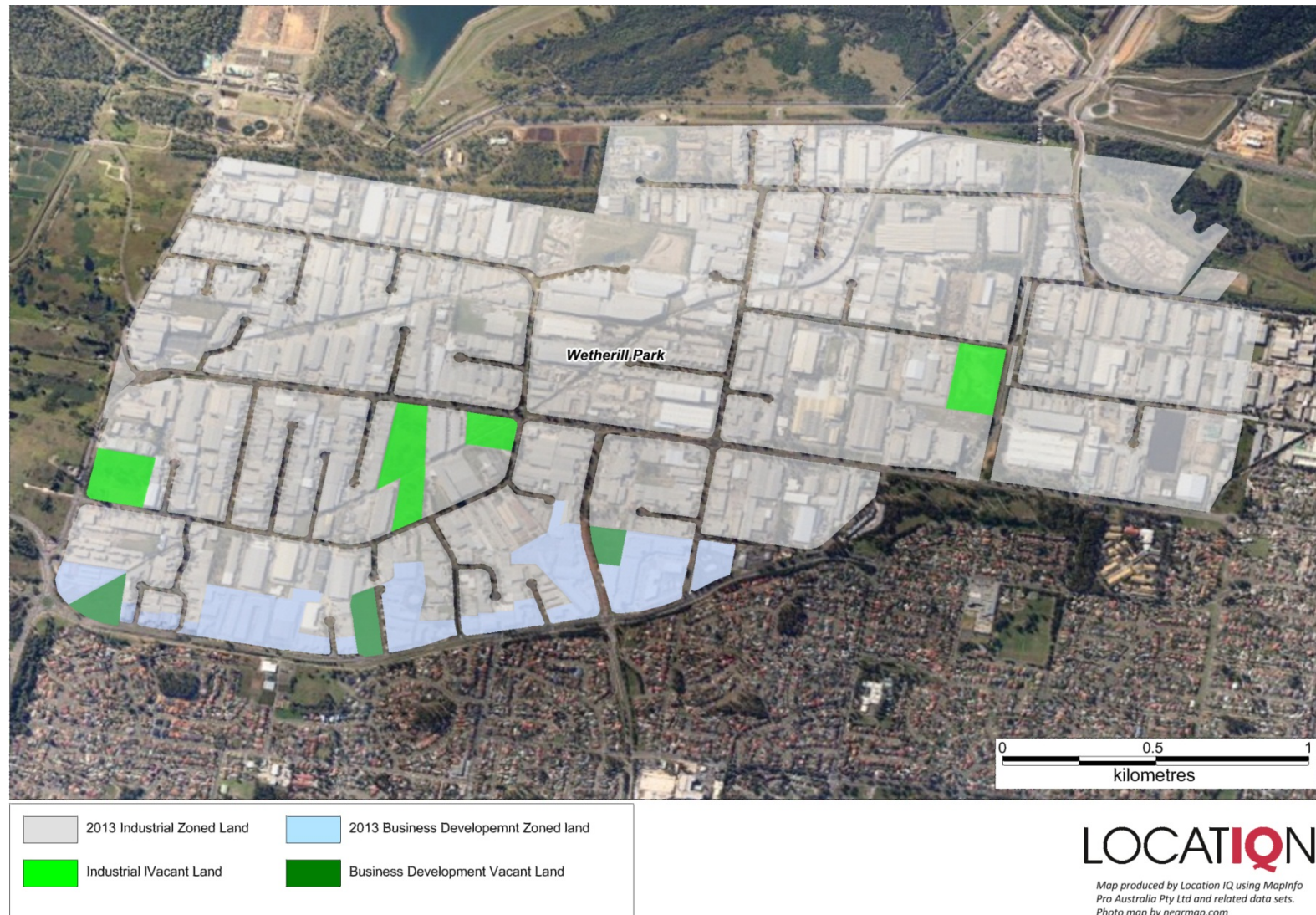


TABLE 3.2 – FAIRFIELD LGA PROPOSED INDUSTRIAL DEVELOPMENTS

Suburb	Development	Size (sq.m)	Land Use	Status
Wetherill Park	Frank St Industrial	9,500	Masters Supply Storage	Under Construction
Horsley Park	Gazcorp Industrial Estate	6,000	Industrial	Early Planning
Horsley Park	The Horsley Park Employment Precinct (Jacfin)	935,000	Industrial	Early Planning
Horsley Park	Oakdale Central Distribution Park	1,300,000	Industrial	Early Planning
Cecil Park	Wallgrove Rd Warehouse	14,708	Warehouse	Approved
				LOCATIONIQ

3.2 Industrial Land Demand – Key Drivers

- i. The key drivers of demand for industrial land include:
 - Strategic location to key transport infrastructure, particularly major roads and rail.
 - 24 hour road access.
 - Strategic location to employment base.
 - Large parcels of land.
 - Similar surrounding facilities/uses.
 - Cheaper rents and lower land values.

3.3 Key Demand Drivers vs. Subject Site

- i. An analysis of the key demand drivers for industrial land as they relate to the subject site is as follows:
 - *Strategic location to key transport infrastructure, particularly major roads:* The subject does not have direct access to the Hume Highway. As such, vehicles and trucks access the site via Longfield Street or Chadderton Street, which are primarily local residential streets. Consequently, the subject site is atypical to surrounding industrial tenants, which enjoy direct frontage to the Hume Highway.
 - *24 hour operation/road access:* The site is generally surrounded by residential dwellings and truck movements are limited to daylight hours. There is the potential for significant truck and car conflict given the prevalence of residents in the surrounding area. The clusters of industrial zoned land on the eastern side of the Hume Highway and also at Wetherill Park are not faced with the same challenges due to the more limited provision of residential dwellings.
 - *Strategic location to employment base:* As will be discussed further in Section 5, the surrounding worker population base in the Fairfield LGA is undergoing significant transformation from blue collar workers to white collar workers. There

has also been significant employment decreases in industrial industries such as manufacturing. This is a strong indicator as to the level of demand for industrial development in the LGA.

- *Size:* In total, some 774.4 hectares of industrial zoned land is provided within the Fairfield LGA. The subject site, accounts for less than 1% of the total. The Cabramatta North Hume Highway Industrial Area is significantly smaller than a number of industrial areas provided in the LGA such as Wetherill Park, Fairfield East and Smithfield.

In addition, the size of the subject site is relatively large in comparison to other sites in the precinct. This means that the site is better suited to accommodate large scale uses (such as distribution/logistics), which is not consistent or sensitive to surrounding residential uses.

- *Similar surrounding facilities/uses:* The eastern side of the Hume Highway contains more traditional industrial lands representing a “cluster” of key facilities. The Hume Highway acts as a significant barrier, with the western side of the Hume Highway including a mix of uses such as retail, bulky goods, a religious temple, food catering and residential uses. Consequently, while the western side of the Hume Highway is zoned as industrial, a large proportion of land is not utilised for traditional industrial facilities. This has represented a natural progression from industrial to mixed uses, reflecting decreasing demand for industrial floorspace within this precinct.
- *Cheaper rents and lower land values:* According to the *Colliers International Sydney Industrial Research and Forecast Report, Second Half 2012*, the average net face rents within the Central West sub-region (which includes the Fairfield LGA) are around \$85 - \$100 per sq.m for secondary grade industrial land. This is consistent with average rents at Wetherill Park of around \$100 per sq.m (refer Table 3.3 which shows recent listings of industrial land according to www.commercialrealestate.com.au). Average rents within the Lansvale Industrial Area are higher than the average at around \$105 per sq.m (refer Table 3.4).

According to the owner, the current average rent at the subject site is approximately \$90 per sq.m, which is lower than both Wetherill Park and surrounding industrial sites at Lansvale. This low rental level indicates a low level of demand for industrial uses at the site.

In addition, this low rental level is likely to be significantly lower than the land value, indicating that the industrial/business development zoning is no longer economically feasible for the owners of the site and consequently does not form the optimal use of land.

- ii. Based on the above, it is clear that the subject site is not suitable for ongoing industrial uses. This is consistent with the submission to the *Draft Metropolitan Strategy For Sydney to 2031* by Fairfield City Council, which states “Council will need to consider the long term future of industrial estates on the eastern side of the City given their proximity to rail and major road. They are prime sites for brownfield development. Council has summarised the Employment Lands Development Program to consider the impact of other industrial land supply throughout the pipeline across greater western Sydney.”
- iii. As indicated previously, the subject site accounts for less than 1% of total industrial land within the Fairfield LGA. This indicates that, excluding the subject site, there is a large supply of industrial zoned land throughout Fairfield that includes modern industrial facilities or is available for the development of modern industrial facilities. In addition, there are a number of proposed industrial developments throughout the Fairfield LGA and greater western Sydney that are centrally located to transport infrastructure such as the broader WSEA.
- iv. Consequently, the rezoning of the subject site will not materially impact the availability of suitable industrial land within the Fairfield LGA. This is particularly the case given that the subject site is not suitable for ongoing industrial uses, or needed given the large supply of existing and proposed industrial zoned land.

TABLE 3.3 – WETHERILL PARK AVERAGE RENTS PER SQ.M

Address	Annual Rent (\$)	Size (sq.m)	Rent/sq.m (\$)
19 Newton Road, Wetherill Park, NSW 2164	103,200	1,032	100
Unknown Wetherill Park Address	n.a.	n.a.	105
2 Davis Road, Wetherill Park, NSW 2164	n.a.	n.a.	105
396 Victoria Street, Wetherill Park, NSW 2164	n.a.	n.a.	100
Unknown Wetherill Park Address	301,500	3,350	90
Unknown Wetherill Park Address	1,422,331	12,587	113
Unknown Wetherill Park Address	116,000	1,065	109
Unknown Wetherill Park Address	191,400	1,914	100
Unknown Wetherill Park Address	133,000	1,480	90
Unknown Wetherill Park Address	114,950	1,045	110
Unknown Wetherill Park Address	260,108	4,000	65
Unknown Wetherill Park Address	36,300	330	110
Unknown Wetherill Park Address	205,500	2,055	100
Unknown Wetherill Park Address	61,275	645	95
Unknown Wetherill Park Address	228,000	2,074	110
140 Hassall Street, Wetherill Park, NSW 2164	61,000	610	100
Unknown Wetherill Park Address	126,630	1,266	100
Unknown Wetherill Park Address	533,280	4,848	110
Unknown Wetherill Park Address	71,400	714	100
Unknown Wetherill Park Address	41,895	399	105
Unknown Wetherill Park Address	69,500	724	96
Unknown Wetherill Park Address	158,700	1,587	100
Unknown Wetherill Park Address	<u>191,710</u>	<u>2,018</u>	<u>95</u>
Average	221,384	2,187	100

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TABLE 3.4 – LANSVALE AVERAGE RENTS PER SQ.M

Address	Annual Rent (\$)	Size (sq.m)	Rent/sq.m (\$)
286 Hume Highway, Lansvale, NSW 2166	65,000	1,080	60
11-17 Longfield Street, Lansvale, NSW 2166	913,750	33,000	28
Unit 3, 169-173 Hume Highway, Lansvale, NSW 2166	96,000	600	160
Unit 7, 169-173 Hume Highway, Lansvale, NSW 2166	78,720	492	160
Unit 4, 169-173 Hume Highway, Lansvale, NSW 2166	88,200	588	150
4/68 Hume Highway, Lansvale, NSW 2166	30,800	270	114
4/76 Hume Highway, Lansvale, NSW 2166	36,500	319	114
8/68 Hume Highway, Lansvale, NSW 2166	28,000	270	104
178 Hume Highway, Lansvale, NSW 2166	24,000	250	96
178 Hume Highway, Lansvale, NSW 2166	52,800	498	106
Unknown Lansvale Address	120,000	4,000	30
178-180 Hume Highway, Lansvale, NSW 2166	165,000	1,214	136
Average	141,564	3,548	105

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4 FAIRFIELD LGA POPULATION ANALYSIS

This section provides an overview of the Fairfield LGA population, including current and projected population levels. A review of the socio-economic profile of the Fairfield LGA population by Statistical Local Area (SLA) is also provided.

4.1 Fairfield LGA Population

- i. Table 4.1 details the current and projected Fairfield LGA population levels based on population forecasts prepared by *forecast.id.* for the City of Fairfield.
- ii. The Fairfield LGA population is currently estimated at 197,996 in 2013, including 124,769 persons within the Fairfield East SLA. The Fairfield LGA population is projected to increase to 212,306 by 2026, representing an additional 14,310 persons or an average annual growth rate of approximately 0.5% over the forecast period.
- iii. The additional 14,310 persons over the forecast period would require in-excess of 5,500 new dwellings as a minimum to be provided by 2026. This allows for a more conservative average household size, based on the Australian average of 2.6 persons per household.
- iv. According to *the Department of Planning's Subregional Strategy for the West Central subregion*, the Fairfield LGA needs to accommodate an approximate 24,000 additional dwellings by 2031. This is in keeping with Fairfield LGA growing at a much faster rate than outlined by *forecast i.d.* at closer to 1.0% - 1.5% per annum. On this basis, this indicates a shortfall of around 18,500 dwellings by 2026.
- v. Overall, significant future population growth is planned for the Fairfield LGA by the State Government. However, population growth has not been as strong as predicted, with a significant shortfall in the number of developed dwellings projected to occur.
- vi. This partly relates to the difficulty in encouraging residential development in established residential areas of Sydney, particularly middle ring suburbs of the metropolitan area, where a combination of land price, difficulty to acquire and

consolidate land as well as a range of other factors mean that redevelopment can be economically unviable.

- vii. Given that the planned residential development at the subject site will comprise 435 apartments located around 1 km to the east of Cabramatta Town Centre and Cabramatta Railway Station, the proposed development is consistent with the submission to the *Draft Metropolitan Strategy for Sydney to 2031* by Fairfield City Council which states *“Housing growth in Fairfield should therefore primarily be focused on the renewal of urban areas that are located within, say 1 – 2 km from railway stations and/or established centres within the aim of achieving urban consolidation and good urban design outcomes that are responsive to the local context of the area. Consideration should be given to the dual occupancy, multi-unit housing, courtyard housing and residential flat buildings, rather than detached dwellings, as an appropriate form of housing typologies”*.

TABLE 4.1 – FAIRFIELD LGA POPULATION, 2006 – 2026

Trade Area Sector	Estimated Resident Population		Forecast Population			
	2006	2011	2013	2016	2021	2026
Statistical Local Areas						
• Fairfield (C) - East	114,664	123,316	124,796	127,016	131,266	135,316
• Fairfield (C) - West	<u>72,590</u>	<u>73,340</u>	<u>73,200</u>	<u>72,990</u>	<u>75,290</u>	<u>76,990</u>
Fairfield LGA	187,254	196,656	197,996	200,006	206,556	212,306
Average Annual Change (No.)						
		2006-2011	2011-2013	2013-2016	2016-2021	2021-2026
Statistical Local Areas						
• Fairfield (C) - East		1,730	740	740	850	810
• Fairfield (C) - West		<u>150</u>	<u>-70</u>	<u>-70</u>	<u>460</u>	<u>340</u>
Fairfield LGA		1,880	670	670	1,310	1,150
Average Annual Change (%)						
		2006-2011	2011-2013	2013-2016	2016-2021	2021-2026
Statistical Local Areas						
• Fairfield (C) - East		1.5%	0.6%	0.6%	0.7%	0.6%
• Fairfield (C) - West		<u>0.2%</u>	<u>-0.1%</u>	<u>-0.1%</u>	<u>0.6%</u>	<u>0.4%</u>
Fairfield LGA		1.0%	0.3%	0.3%	0.6%	0.6%
<i>Australian Average</i>		<i>1.5%</i>	<i>1.5%</i>	<i>1.4%</i>	<i>1.3%</i>	<i>1.2%</i>
<i>All figures as at June</i> <i>All figures are based on 2011 SA1 boundary definition with the exception of 2006 which is based on 2006 CCD boundary definition. 2006 and 2011 ERP is calculated using 2011 enumeration factor.</i> <i>Sources : ABS; forecast .id</i>						

4.2 Socio-economic Profile

- i. Table 4.2 summarises the socio-economic characteristics of the Fairfield LGA population by SLA compared with the Sydney metropolitan and Australian benchmarks. This information is based on the 2011 Census of Population and Housing. Key points to note include:
- The Fairfield LGA is characterised by a less affluent population, with residents earning average household incomes that are 27.5% lower than the benchmark. The Fairfield West population is more affluent, earning average household incomes of \$88,939, as compared with Fairfield East residents (\$63,154).
 - The average household size at 3.2 persons per household is higher than the Sydney metropolitan benchmark of 2.7 persons per household.
 - The average age of residents is younger than the benchmark at 36.5 years.
 - The proportion of home ownership is in-line with the average.
 - The main trade area is characterised by an ethnically diverse population, with only 44.6% of residents being Australian born. This compares with the Sydney average of 63.7%. More specifically, there is a considerably higher proportion of Asian born residents. Asian populations typically include a higher proportion of multi-generational households, which is reflective of the large main trade area household size. As shown in Table 3.4, 14.6% of residents originate from Vietnam, which compares with the Sydney average of 1.6%. The proportion of Vietnamese born residents increased from 13.7% from 2006 – 2011. In addition, there is a high proportion of Iraq born residents at 7.7%.
 - There are a high proportion of couples comprising traditional families (i.e. couples with dependent children). In addition, the proportion of single parents with dependent children is higher than the benchmark, particularly in the Fairfield East SLA.

- ii. Overall, the Fairfield population is typical of an outer suburban residential area, comprising younger, less affluent, ethnically diverse families.

TABLE 4.2 – FAIRFIELD LGA SOCIO-ECONOMIC CHARACTERISTICS, 2011 CENSUS

Characteristics	SLAs		Fairfield LGA	Syd Metro Average	Aust Average
	Fairfield (C) - East	Fairfield (C) - West			
Income Levels					
Average Per Capita Income	\$20,291	\$25,909	\$22,387	\$36,941	\$34,201
Per Capita Income Variation	-45.1%	-29.9%	-39.4%	n.a.	n.a.
Average Household Income	\$63,154	\$88,939	\$72,195	\$99,586	\$87,928
Household Income Variation	-36.6%	-10.7%	-27.5%	n.a.	n.a.
Average Household Size	3.1	3.4	3.2	2.7	2.6
Age Distribution (% of Pop'n)					
Aged 0-14	21.2%	18.9%	20.3%	19.2%	19.3%
Aged 15-19	7.3%	8.2%	7.6%	6.3%	6.5%
Aged 20-29	14.1%	14.9%	14.4%	14.7%	13.8%
Aged 30-39	13.5%	12.1%	13.0%	15.3%	13.8%
Aged 40-49	14.2%	13.9%	14.0%	14.2%	14.2%
Aged 50-59	12.4%	15.2%	13.4%	12.3%	12.8%
Aged 60+	17.5%	16.8%	17.2%	18.0%	19.6%
Average Age	36.4	36.7	36.5	37.2	37.9
Housing Status (% of H'holds)					
Owner/Purchaser	61.6%	79.2%	68.2%	67.4%	69.3%
Renter	38.4%	20.8%	31.8%	32.6%	30.7%
Birthplace (% of Pop'n)					
Australian Born	41.9%	49.2%	44.6%	63.7%	73.9%
Overseas Born	58.1%	50.8%	55.4%	36.3%	26.1%
• Asia	30.1%	16.1%	24.9%	13.7%	7.6%
• Europe	7.0%	10.9%	8.5%	9.1%	9.4%
• Other	21.0%	23.7%	22.0%	13.6%	9.1%
Family Type (% of Pop'n)					
Couple with dep't children	47.2%	50.2%	48.3%	48.2%	45.3%
Couple with non-dep't child.	10.3%	17.1%	12.8%	9.1%	7.7%
Couple without children	13.9%	13.6%	13.8%	20.1%	23.0%
Single with dep't child.	14.5%	9.9%	12.8%	8.5%	9.2%
Single with non-dep't child.	6.1%	5.4%	5.8%	3.9%	3.5%
Other family	1.6%	1.0%	1.4%	1.2%	1.1%
Lone person	6.4%	2.9%	5.1%	9.0%	10.2%
Sources : ABS Census of Population and Housing 2011			LOCATION		

TABLE 4.3 – FAIRFIELD LGA BIRTHPLACE, 2011 CENSUS

Top 10 Birthplace	2006			2011		
	Fairfield LGA		Syd Metro	Fairfield LGA		Syd Metro
	No.	%	%	No.	%	%
Vietnam	24,697	13.7%	1.5%	27,441	14.6%	1.6%
Iraq	10,475	5.8%	0.5%	14,551	7.7%	0.7%
Cambodia	6,404	3.6%	0.2%	7,028	3.7%	0.1%
Italy	4,715	2.6%	1.1%	4,146	2.2%	1.0%
China	3,819	2.1%	2.6%	3,962	2.1%	3.4%
Croatia	2,548	1.4%	0.4%	2,444	1.3%	0.3%
Lebanon	2,374	1.3%	1.3%	2,387	1.3%	1.3%
New Zealand	2,050	1.1%	2.0%	2,355	1.3%	1.9%
Phillipines	2,140	1.2%	1.3%	2,260	1.2%	1.4%
Serbia/Montengto (fmr Yugoslavia)	2,694	1.5%	0.4%	2,135	1.1%	0.3%

Sources : ABS Census of Population and Housing 2011

LOCATION

iii. Table 4.4 provides a summary of the key changes to the socio-economic profile of the Fairfield LGA population compared with the change in the Sydney metropolitan benchmarks over the period from 2006 – 2011. Key results include the following:

- Average household incomes have increased at a faster rate (22.5%) as compared with the benchmark (21.0%).
- The average age of residents within the Fairfield LGA has increased by 3.0%, double the increase in the Sydney average (1.5%). This indicates a rapidly aging population, reflecting wider trends across the Sydney metropolitan area.

TABLE 4.4 – SOCIO-ECONOMIC PROFILE KEY CHANGES, 2006 CENSUS – 2011 CENSUS

Characteristics	Fairfield LGA			Syd Metro Benchmark		
	2006	2011	Change (%)	2006	2011	Change (%)
Income Levels						
Average Per Capita Income	\$18,475	\$22,387	21.2%	\$30,938	\$36,941	19.4%
Average Household Income	\$58,922	\$72,195	22.5%	\$82,316	\$99,586	21.0%
Age						
Average Age	35.4	36.5	3.0%	36.6	37.2	1.5%
Birthplace (% of Pop'n)						
Australian Born	44.7%	44.6%	0.0%	65.6%	63.7%	-1.9%
Overseas Born	55.3%	55.4%	0.0%	34.4%	36.3%	1.9%
Household Size & Structure						
Average Household Size	3.2	3.2	1.1%	2.7	2.7	1.3%
Couple with dep't children	49.7%	48.3%	-1.3%	47.9%	48.2%	0.3%
Housing Status (% of H'holds)						
Owner/Purchaser	68.7%	68.2%	-0.6%	67.5%	67.4%	-0.1%
Renter	31.3%	31.8%	0.6%	32.5%	32.6%	0.1%
Sources : ABS Census of Population and Housing 2006 & 2011				LOCATION		

5 EMPLOYMENT

This section of the report presents an assessment of employment trends throughout the Fairfield LGA as well as an analysis of the net gain in employment as a result of the rezoning of the subject site from industrial uses to a mix of uses under the proposed concept plan.

5.1 Fairfield LGA Employment Analysis

- i. Table 5.1 details the breakdown of white collar and blue collar employment within the Fairfield LGA over the period from 2001 to 2011.
- ii. According to the ABS, white collar workers include Managers, Professionals, Community and Personal Service Workers, Clerical and Administrative Workers and Sales Workers. Blue collar workers are those categorised as Technicians and Trade Workers, Machinery Operators and Drivers and Labourers.
- iii. The Fairfield LGA has experienced a significant decline in industrial employment in recent years. Key points to note include:
 - 44.5% of the Fairfield population are employed in blue collar jobs (2011), which is almost double the Sydney benchmark of 25.8%.
 - While there is a significantly higher proportion of workers employed in blue collar jobs as compared with the Sydney metropolitan benchmark, there is a decreasing trend in blue collar employment within the Fairfield LGA and an increased number of persons employed in white collar jobs.
 - The proportion of white collar jobs within the Fairfield LGA increased from 52.9% in 2006 to 55.5% in 2011 (increase of 2.6), which compares with the increase in the Sydney benchmark from 72.7% in 2006 to 74.2% in 2011 (increase of 1.5).

TABLE 5.1 – WHITE COLLAR VS. BLUE COLLAR, 2001 – 2011

Occupation	Fairfield LGA			Change 2006-11	Sydney Metropolitan			Change (%) 2006-11
	2001	2006	2011		2001	2006	2011	
White Collar	50.7%	52.9%	55.5%	2.6	71.1%	72.7%	74.2%	1.5
Blue Collar	49.3%	47.1%	44.5%	-2.6	28.9%	27.3%	25.8%	-1.5
Total	100.0%	100.0%	100.0%	n.a.	100.0%	100.0%	100.0%	n.a.
Sources : ABS Census of Population and Housing 2001 - 2011								

LOCATION

iv. Table 5.2 presents similar information in relation to trends in occupation of residents of the Fairfield LGA as compared with the Sydney averages.

- Reinforcing the declining trend in blue collar workers within the area, the proportion of Professionals has increased from 11.6% in 2006 to 13.0% in 2011. The proportion of Managers as well as Community and Personal Service Workers has also increased over the intercensal period.
- The proportion of Technicians and Trade Workers as well as Machinery Operators and Drivers has decreased over the intercensal period, with the largest decline experienced in Labourers, decreasing from 15.9% in 2006 to 14.8% in 2011.

TABLE 5.2 – OCCUPATION, 2006 – 2011

Occupation	Suburb of Lansvale		Fairfield LGA		Greater Sydney	
	2006	2011	2006	2011	2006	2011
Managers	8.3%	8.9%	7.5%	7.6%	13.2%	13.3%
Professionals	11.8%	13.1%	11.6%	13.0%	23.8%	25.5%
Technicians and Trades Workers	17.1%	16.9%	16.8%	15.8%	12.7%	12.2%
Community and Personal Service Workers	8.8%	11.2%	6.9%	8.7%	8.0%	8.8%
Clerical and Administrative Workers	16.9%	14.8%	15.5%	15.2%	16.7%	16.2%
Sales Workers	9.5%	8.0%	9.6%	9.3%	9.5%	9.0%
Machinery Operators And Drivers	12.4%	11.7%	12.7%	12.5%	6.0%	5.7%
Labourers	11.1%	13.6%	15.9%	14.8%	8.1%	7.3%
Inadequately described or Not stated	4.2%	1.9%	3.4%	3.1%	2.1%	2.0%
Source: Profile i.d.						

LOCATION

- v. Table 5.3 presents detailed information on employment trends by industry throughout the Fairfield LGA as compared with Greater Sydney.
- The largest employing industry within the Fairfield LGA is Manufacturing at 17.8% as compared with the Sydney average of 8.5% (refer Chart 5.1).
 - Employment within the Manufacturing industry has decreased from 20.2% in 2006 to 17.8% in 2011, once again reinforcing the declining importance of industrial employment within the Fairfield LGA and, therefore, the declining need for industrial employment lands.
 - Future employment lands should be focused on growing industries such as Health Care and Social Assistance (increased from 7.4% in 2006 to 8.6% in 2011), Education and Training (increased from 3.8% in 2006 to 4.2% in 2011) and as well as Accommodation and Food services (increased from 5.5% in 2006 to 6.2% in 2011).

CHART 5.1 – FAIRFIELD LGA EMPLOYMENT BY INDUSTRY, 2006 – 2011

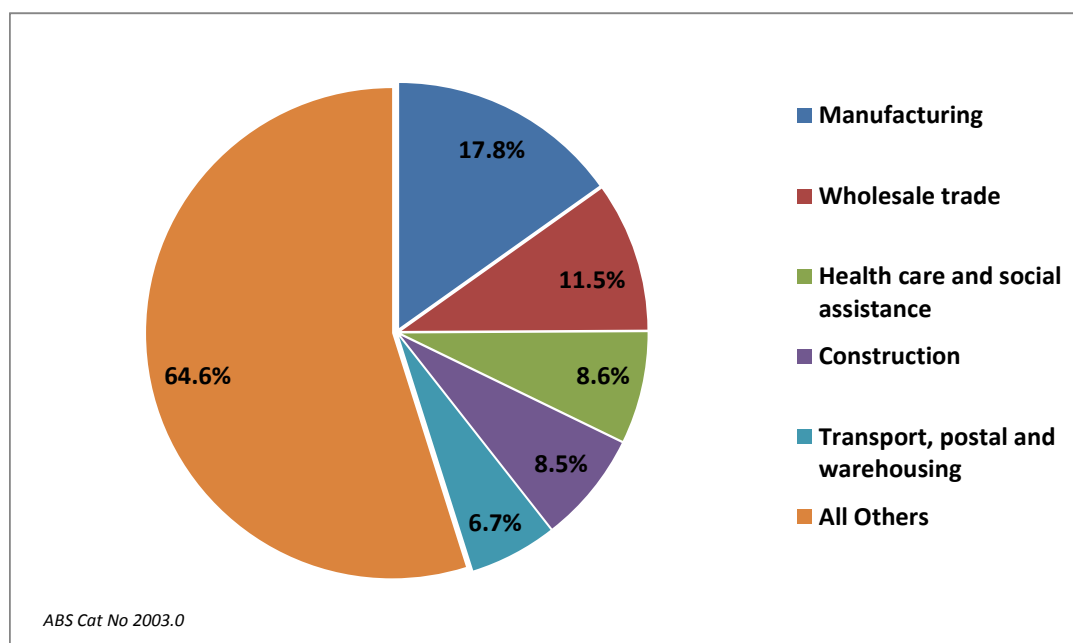
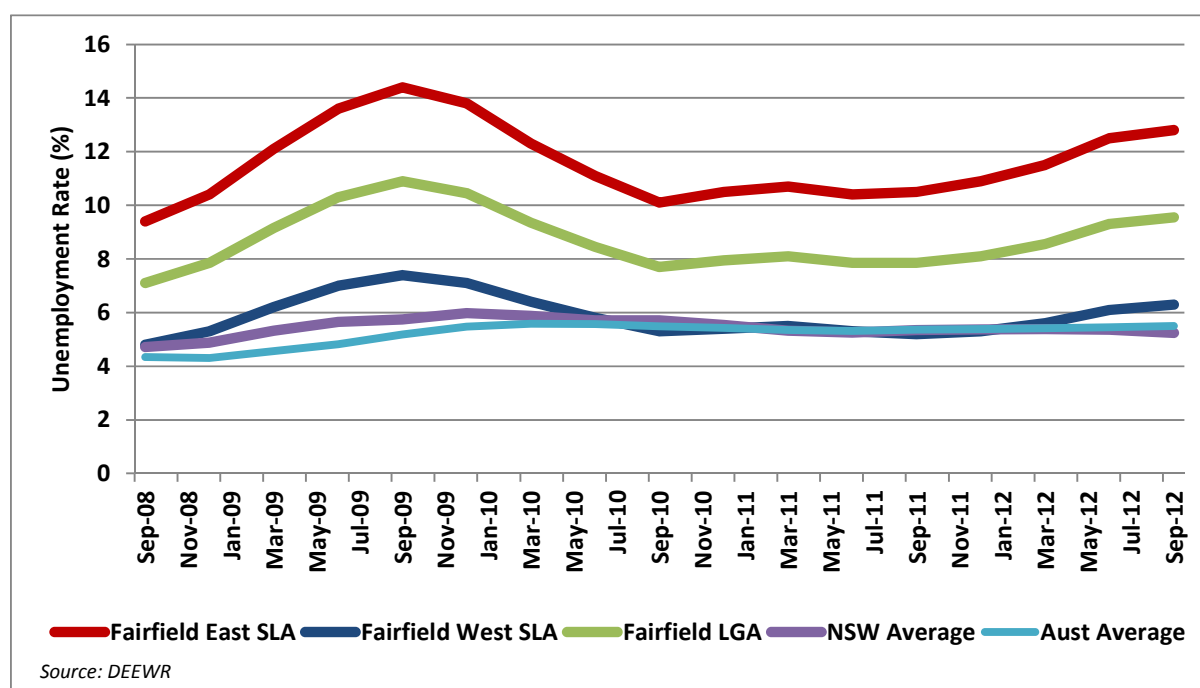


TABLE 5.3 – EMPLOYMENT BY INDUSTRY, 2006 – 2011

Industry	Fairfield LGA				Greater Sydney	
	2006 Persons	%	2011 Persons	%	2006	2011
Agriculture, forestry and fishing	300	0.5%	359	0.5%	0.4%	0.4%
Mining	45	0.1%	44	0.1%	0.2%	0.2%
Manufacturing	13,268	20.2%	12,234	17.8%	9.7%	8.5%
Electricity, gas, water and waste services	428	0.7%	519	0.8%	0.8%	0.9%
Construction	5,752	8.8%	5,863	8.5%	7.1%	7.1%
Wholesale trade	7,606	11.6%	7,921	11.5%	10.5%	9.8%
Retail Trade	3,930	6.0%	3,790	5.5%	5.6%	5.3%
Accommodation & Food Services	3,613	5.5%	4,236	6.2%	6.0%	6.2%
Transport, postal and warehousing	4,286	6.5%	4,617	6.7%	5.4%	5.3%
Information media and telecommunications	1,196	1.8%	1,149	1.7%	3.0%	3.0%
Financial and insurance services	2,874	4.4%	3,186	4.6%	6.4%	6.6%
Rental, hiring and real estate services	854	1.3%	807	1.2%	1.9%	1.8%
Professional, scientific and technical services	2,927	4.5%	3,143	4.6%	8.9%	9.6%
Administrative and support services	2,262	3.5%	2,338	3.4%	3.4%	3.5%
Public administration and safety	2,480	3.8%	2,771	4.0%	5.6%	5.6%
Education and training	2,467	3.8%	2,910	4.2%	7.2%	7.6%
Health care and social assistance	4,881	7.4%	5,885	8.6%	10.0%	10.9%
Art and recreation services	584	0.9%	713	1.0%	1.4%	1.6%
Other Services	2,752	4.2%	3,112	4.5%	3.7%	3.7%
Not accurately described/Not Stated	3,039	4.6%	3,011	4.4%	2.8%	2.6%
Total	65,544	100%	68,608	100%	100%	100%

Source: Profile i.d.

- vi. Chart 5.2 presents a comparison of the unemployment rate within the Fairfield LGA as compared with the New South Wales and Australian averages.
- vii. The declining role of the industrial sector within the Fairfield LGA, supported by a reduction in blue collar workers, an increasing number of Professionals and decreasing Manufacturing employment, is manifesting in a considerably higher unemployment rate.
- viii. The Fairfield LGA unemployment rate was approximately 9.2% as of December 2012, which compares with the New South Wales average of 5.2%. The unemployment rate within the Fairfield East SLA (the location of the subject site) was even higher at 12.3%.
- ix. The unemployment rate within the Fairfield LGA was only 2.4% higher than the New South Wales average in September 2008. As of December 2012, the unemployment rate within the Fairfield LGA was 3.9% higher than the average, indicating that the unemployment rate is deteriorating. This is likely to partly be the result of an inefficient use of land within the Fairfield LGA from an employment point of view.

CHART 5.2 – UNEMPLOYMENT RATE, SEPTEMBER 2008 – DECEMBER 2012

- x. Table 5.4 indicates that the majority of residents within the Fairfield LGA work outside the LGA (61.4%). This also reflects the inefficient use of employment lands within the LGA, given the large provision of industrial employment lands, however, a declining industrial workforce.

TABLE 5.4 – EMPLOYMENT LOCATION OF RESIDENTS, 2011 CENSUS

Employment Location of Residents Fairfield LGA	Fairfield LGA	
	Number	%
Live and work in the area	18,074	38.6%
• Live and work in the same SLA	1,260	27.1%
• Live in the area and work in different SLA	5,404	11.5%
Live in the area but work outside	28,756	61.4%
Total employed residents	46,830	100.0%

Source: Profile i.d.

LOCATION

- xi. Table 5.5 summarises the residential location of workers within the Fairfield LGA by SLA (i.e. where workers employed in Fairfield are coming from). As shown a large number of workers reside in the surrounding areas of Liverpool and Penrith. Both of these locations are likely to experience a considerable redirection of employment in the future as a result of the planned WSEA and MIT.

TABLE 5.5 – RESIDENTIAL LOCATION OF FAIRFIELD LGA WORKERS, 2011 CENSUS

Residential Location of Workers by SLA	Fairfield LGA		Residential Location of Workers by SLA	Fairfield LGA	
	Number	%		Number	%
Fairfield (C) - East	9,467	20.2%	Camden (A)	1,046	2.2%
Fairfield (C) - West	8,607	18.4%	Blacktown (C) - North	1,020	2.2%
Liverpool (C) - West	3,633	7.8%	Bankstown (C) - North-West	968	2.1%
Liverpool (C) - East	2,470	5.3%	Campbelltown (C) - South	894	1.9%
Holroyd (C)	1,798	3.8%	Auburn (C)	608	1.3%
Penrith (C) - East	1,546	3.3%	The Hills Shire (A) - Central	590	1.3%
Blacktown (C) - South-West	1,188	2.5%	Parramatta (C) - Inner	540	1.2%
Campbelltown (C) - North	1,169	2.5%	Wollondilly (A)	455	1.0%
Blacktown (C) - South-East	1,131	2.4%	Canterbury (C)	447	1.0%
Penrith (C) - West	1,071	2.3%	Parramatta (C) - South	439	0.9%

Source: Profile i.d.

LOCATION

- xii. Overall, the need for industrial land in the Fairfield LGA to provide blue collar jobs locally is becoming less important and relevant overtime. Consequently, the demand for traditional industrial employment lands is decreasing. Alternatively, the need to provide housing and employment in growing industries is becoming more important.

5.2 Employment and Consumer Impacts

- i. The 17 - 21 Longfield Street site currently employs approximately 90 workers.
- ii. The proposed rezoning of the Longfield Street site from industrial uses to a mix of uses to allow for the planned Cabramatta Intergenerational Community will result in a range of important economic benefits which will be of direct benefit to the local community. These key positive employment and consumer impacts will include the following:
 - The provision of an intergenerational community, allowing grandparents, parents and children to live and age in the one location. The proposal is similar to the US and European models of retirement care also known as Continuous Care Retirement Communities, which focus on integrating retirement residents with the broader community. This is very important to the ethnically diverse population of Cabramatta, including a large proportion of Asian born residents. Asian populations typically have a high proportion of multi-generational households, reflective of the large main trade area average household size at 3.2 persons per household.
 - The innovative design of the proposed concept plan allows open access to the Buddhist Temple located directly to the north and would integrate with surrounding residential uses.
 - The proposed development will create a substantial number of additional jobs for the Fairfield economy, including construction jobs and in related industries during the construction period, but also in retail, childcare and health/aged care due to the ongoing operation of the project.

Construction Employment

- i. The estimated total capital costs for the construction of the development are \$125 million. By using the appropriate ABS Input/Output Multipliers that were last produced in 1996/97 and a deflated estimated total capital cost of construction of \$98.2 million (i.e. in 1996/97 dollars), it is estimated that the construction period of the proposed development would create some 687 jobs (refer Table 5.6).
- ii. The additional construction jobs (687), will result in a further 1,101 jobs in the broader community based on ABS Input/Output Multipliers. As a result, in total some 1,788 jobs are likely to be created both directly and indirectly as a result of the construction of the proposed Cabramatta Intergenerational Community.

TABLE 5.6 – ESTIMATED CONSTRUCTION EMPLOYMENT IMPACT

Original Stimulus	Estimated Capital Costs (\$M) ¹	Direct Employment	Supplier Employment Multiplier Effects	Total	
Construction of Project	98.2	687	1,101	1,788	Job Years ²
<i>* Employment totals include both full-time and part-time work</i> <i>1. Adjusted by inflation and productivity to 1996/97 Dollars</i> <i>2. Indicates the estimated number of jobs over the life of the construction project plus ongoing multiplier effects, for the equivalent of one year</i> <i>Source : Australian National Accounts: Input-Output Tables 1996-97</i>					

LOCATION

Retail Employment

- i. The proposed Cabramatta Intergenerational Community will include 2,397 sq.m of retail/commercial floorspace, which will be convenience based, serving the day to day, “top up” shopping needs of local residents. Assuming around 1,000 sq.m of this floorspace is traditional retail floorspace (allowing the remaining 1,397 sq.m for non-retail floorspace, including post office, real estate agent, medical and the like), the retail component of the development is projected to employ around 60 persons as summarised in Table 5.7. Taking a conservative view and allowing for an estimated 10% of the total increase to be as a result of reduced employment at existing retail facilities, the net additional jobs are estimated at 54.

- ii. The additional 54 permanent retail employees would earn an average annual wage of around \$28,800 as sourced from the ABS. This represents an additional \$1.6 million in salary and wages for the local economy, directly as a result of the retail component of the proposed development.
- iii. Further jobs would be created from the supplier induced multiplier effects as a result of the on-going running of the retail component. Jobs created are full-time equivalent jobs, which may include both full-time and part-time positions. In total, some 51 jobs are projected to be created in the broader community, based on ABS Input/Output Multipliers (refer Table 5.8).

TABLE 5.7 – ESTIMATED PERMANENT RETAIL EMPLOYMENT

Type of Use	Estimated Employment Per '000 sq.m	<u>Centre Name</u>	
		Change in GLA (sq.m)	Employment (persons)
Retail Specialty Shops	60	1,000	60
Total Centre¹		1,000	60
Net Increase²			54
1. Excludes non-retail components. 2. Net increase includes an allowance for reduced employment levels at impacted centres estimated at 10% of the total increase			

LOCATION

TABLE 5.8 – ESTIMATED RETAIL EMPLOYMENT IMPACT

Original Stimulus	Direct Employment	Supplier Employment Multiplier Effects	Total
Centre Employment ¹	54	51	105
* Employment totals include both full-time and part-time work 1. Indicates the estimated number of net additional ongoing jobs as a result of the proposed development Source : Australian National Accounts: Input-Output Tables 1996-97			

LOCATION

Childcare:

- iv. According to the *Australian Children's Education and Care Quality Authority*, the following staff to child ratios are recommended:
 - Birth to 24 months = 1:4

- 24 months to 36 months: 1:5
 - Over 36 months: 1:11
- v. Based on discussions with child care providers, typically a 500 sq.m child care centre employs approximately 15 staff.
- vi. Taking the above into account, assuming 25% of children at the childcare facility are aged 0 – 24 months, 25% of children are aged 24 – 36 months and 50% of children are aged over 36 months, this would indicate that approximately 15 staff would be employed by the facility. This does not include cleaners, gardeners and other staff needed in the general running and maintenance of the childcare centre.

Aged Care:

- vii. There is no mandated staff to resident ratio in aged care facilities in Australia. However, based on discussions with Domain Principal Group (a major national aged care provider), the staff to resident ratio at typical aged care facilities is 1:1 due to the 24 hour, seven days a week care required.
- viii. The proposed Cabramatta aged care facility will include a 150 bed nursing home, indicating that approximately 150 staff will be employed by the facility based on the staff to resident ratio of 1:1.
- ix. An Independent Living Unit is also proposed, which would require minimal staff including a manager and general maintenance staff.
- x. The provision of health care jobs within the Fairfield LGA is particularly important given the growth in health care industry employment from 2006 – 2011 (21% increase).

5.3 Summary

- i. The proposed rezoning of the subject site from industrial uses to a mix of uses, allowing for the redevelopment of the site under the proposed concept plan, will result in an estimated \$125 million investment in the local Fairfield economy.

- ii. Table 5.9 summarises future employment at the subject site by component. The redevelopment of the subject site will result in an additional 906 permanent positions (construction, retail, childcare, aged care), resulting in a further 1,152 jobs as a result of supplier induced multiplier effects. As such, total employment generated from the redevelopment of the subject site is estimated at 2,058.
- iii. Total employment from the ongoing operation of the Cabramatta Intergenerational Community (retail, childcare, aged care) is estimated at 219, which is more than double the current employment level at the subject site.

TABLE 5.9 – ESTIMATED EMPLOYMENT BY COMPONENT

Development Component	Employment
Construction of Project	
• Construction	687
• Multiplier Effects	1,101
Retail	
• Ongoing Operation of Retail	54
• Multiplier Effects	51
Ongoing operation of Childcare*	15
Ongoing operation of Aged Care**	150
Total Employment from Redevelopment	2,058
Total Employment Excluding Multiplier Effects	906
Total Employment from Ongoing Operation	219
<i>* Assumes 25% of children aged 0 - 24 months, 25% aged 24 - 36 months & 50% aged over 36 months.</i> <i>** Assumes staff to patient ratio of 1:1.</i>	

- iv. The site is currently estimated to employment some 90 workers. Table 5.10 summarises the net gain in employment at the subject site from the development of the Cabramatta Intergenerational Community.
- v. As shown, total employment from the redevelopment of the subject site will result in a net gain of 2,058 positions, with total employment from the ongoing operation of the facilities representing a net gain of 129 permanent positions (excluding employment from construction and multiplier effects).

TABLE 5.10 – NET GAIN IN EMPLOYMENT

Development Component	Current Employment	Future Employment	Net Gain
Total Employment from Ongoing Operation	90	219	129
Total Employment from Redevelopment (Option 3)	0	2,058	2,058
Total Employment Excluding Multiplier Effects	0	906	906
LOCATION			

- vi. It is important to note that these employment figures do not include any employment as a result of the proposed commercial floorspace. Supplier induced multiplier effects from the employment generated by the childcare and health care components are also not included. As such, the employment generated by the Cabramatta Intergenerational Community is a conservative estimate.
- vii. From 2006 – 2011, the Fairfield LGA has experienced a significant decline in industrial related employment, decreasing the demand for industrial employment land. The Fairfield LGA has experienced growth in industries including Health Care and Social Assistance as well as Education and Training.
- viii. The proposed rezoning of the subject site from industrial uses to a mix of uses to allow for the redevelopment of the site to include residential, retail, childcare and aged care facilities, will result in the loss of 90 industrial jobs, however, will result in a net increase of approximately 816 construction, retail, childcare and aged care jobs. As such, the rezoning of the subject site would allow for significant employment growth that is also more consistent with recent industry employment trends in the Fairfield LGA. In addition, the increase in employment at the site is consistent with the submission to the *Draft Metropolitan Strategy for Sydney to 2031* by Fairfield City Council which states “The NSW Government, in partnership with Local Councils, needs to develop a targeted active business attractive campaign to influence the tenancy mix of the employment land and achieve a higher employment density other than that afforded by the warehousing, transport and logistics industries”.

- ix. Consequently, the industrial/business development zoning no longer represents the 'highest and best use' of the subject site.
- x. The change of zoning at the subject site to allow for the proposed Cabramatta Intergenerational Community will result in a range of positive social and economic impacts on the local Fairfield economy, forming the optimal use of land, which is also more in line with current industrial land trends both throughout Sydney and within the Fairfield LGA. These benefits include:
 - The proposed development at the subject site will provide a range of community services for families and the aging population.
 - The proposed development will integrate with the existing surrounding uses at the subject site.
 - The redevelopment of the subject site will help to reduce unemployment, which is currently a social and economic issue within the Fairfield LGA. As of December 2012, the unemployment rate within the Fairfield LGA was 9.2%, as compared with the New South Wales average of 5.2%. The unemployment rate has become progressively more problematic over time, with the Fairfield LGA unemployment rate 2.4% above the New South Wales average in September 2008, increasing to 3.9% above the New South Wales average in December 2012.

6 POTENTIAL FOR CHILDCARE, AGED CARE & RETAIL FACILITIES

This section of the report assesses the potential for the proposed childcare, aged care and retail facilities at the planned Cabramatta Intergenerational Community.

6.1 Childcare Facilities

- i. The proposed Cabramatta Intergenerational Community is planned to include a childcare centre of around 500 sq.m catering for approximately 100 children.
- ii. Map 6.1 illustrates the defined catchment area for the proposed childcare facility at the Cabramatta site. As shown, the catchment area extends approximately 2 – 3 km around the site and is bounded by Prospect Creek in the north and east, the Hume Highway in the south and Orange Grove Road in the west.

Demand for Childcare Facilities

- i. Table 6.1 provides a summary of the number of childcare aged children (0 – 13 years) and family structure within the defined catchment area (2011 Census). Key points to note include:
 - There are 3,609 children aged between 0 - 6 years, with 3,762 children aged between 7 – 13 years.
 - 9% of the total population catchment is under the age of six years old, which is higher than both the Sydney metropolitan and Australian benchmarks of 8.9% and 8.8%, respectively.
 - The proportion of children aged 7 – 13 years within the catchment area at 9.4% compares with the Sydney metropolitan benchmark of 8.2%.
 - The catchment area is characterised by a traditional family based population (i.e. couples with dependent children), which is in-line with the Australian benchmark. There is also a significantly higher proportion of singles with dependent children at 16.5%, which is around double the Sydney metropolitan benchmark.

- ii. Reflecting the outer suburban location of Cabramatta, the area is likely to remain a key destination for families with children in the future. Over the period from 2006 – 2011, the average household size within the catchment area increased by 3.2%, which compares with the increase in the Sydney metropolitan benchmark of only 1.3%. In addition, the proportion of couples with dependent children remained the same over the intercensal period.

Supply of Childcare Facilities

- i. Childcare facilities should be provided in an easily accessible location for the surrounding population, in close proximity to residents' homes or their place of work.
- ii. There are currently 13 childcare facilities provided within the defined catchment area as summarised in Table 6.2. As shown, there are no childcare facilities provided within less than 1 km of the subject site.
- iii. There are three childcare facilities located around 1 km from the subject site, including Cuc's Family Day Care, Cabramatta Community Centre and Vattana Early Learning Centre. According to *careforkids.com.au*, both Cuc's Family Day Care and Cabramatta Community Centre currently have no vacancies, with Vattana Early Learning Centre only having limited places (no vacancies on Thursday and Friday for children aged 6 weeks – 2 years and 3 – 5 years).
- iv. Four other childcare centres within the catchment area also include no vacancies.
- v. Overall, out of the 13 childcare facilities within the catchment area, only three facilities have all weekdays free, which are all located more than 2 km from the subject site.

Recommendations

- i. The defined catchment area includes a higher proportion of childcare aged children as compared with the Sydney metropolitan and Australian benchmarks. There are also a large proportion of couples and singles with dependent children.

- ii. The proportion of singles with dependent children is around double the Sydney metropolitan benchmark. Single parent households are likely have a higher level of demand for childcare facilities, particularly for working parents.
- iii. There is a low vacancy rate for childcare facilities within the catchment area, particularly for facilities located around 1 km of the subject site. This low vacancy level indicates that there is likely to be further demand for childcare facilities within the Cabramatta catchment area.
- iv. Given the family based population within the catchment area, with no childcare facilities provided less than 1 km of the subject site, the proposed Cabramatta Intergenerational Community would be an ideal location for additional childcare facilities. The subject site is located in close proximity to Lansvale Public School (200 metres to the north) and Cabramatta Public School (600 metres to the west), providing a high degree of convenience for local families. The site is also located in close proximity to the Cabramatta North Hume Highway and Lansvale industrial precincts, which will further add to demand for childcare facilities at the subject site.

MAP 6.1 – CABRAMATTA CATCHMENT CHILDCARE FACILITIES

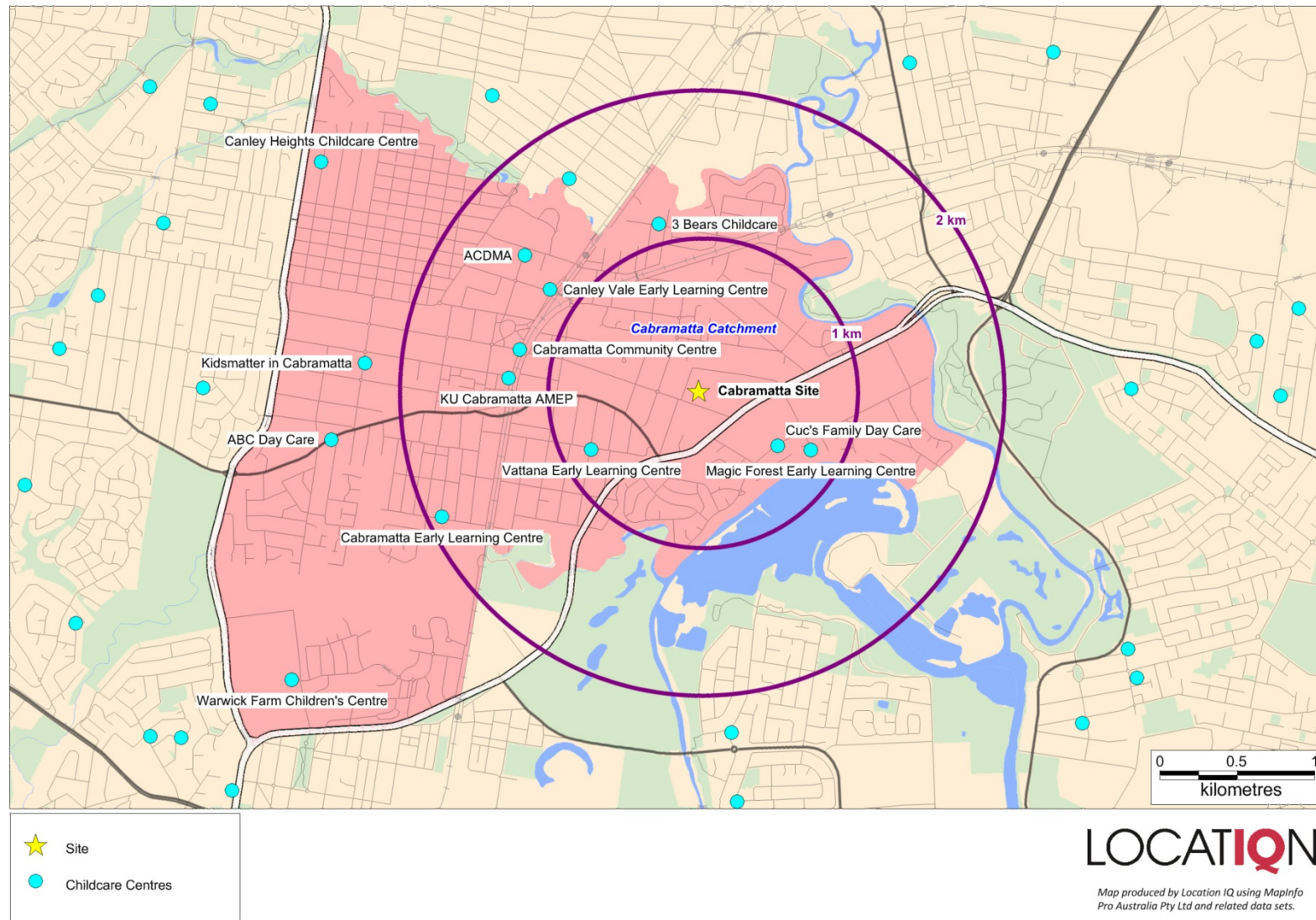


TABLE 6.1 – CABRAMATTA CATCHMENT CHILDREN AGED 0 – 13 YEARS & FAMILY TYPE

Characteristics	Cabramatta Catchment	Syd Metro Average	Aust Average
No. of Children			
Aged 0-4 years	2,595	n.a.	n.a.
Aged 5 years	487	n.a.	n.a.
Aged 6 years	527	n.a.	n.a.
Total Aged 0-6 years	3,609	n.a.	n.a.
% of Total Catchment Population	9.0%	8.9%	8.8%
Aged 7-13 years	3,762	n.a.	n.a.
% of Total Catchment Population	9.4%	8.2%	8.5%
Family Type (% of Pop'n)			
Couple with dep't children	45.2%	48.2%	45.3%
Couple with non-dep't child.	9.2%	9.1%	7.7%
Couple without children	13.8%	20.1%	23.0%
Single with dep't child.	16.5%	8.5%	9.2%
Single with non-dep't child.	6.4%	3.9%	3.5%
Other family	2.0%	1.2%	1.1%
Lone person	6.9%	9.0%	10.2%
Sources : ABS Census of Population and Housing 2011			

TABLE 6.2 – SUPPLY AND AVAILABILITY OF CHILDCARE FACILITIES

Childcare Facility	Distance from subject site (km)	Places Available				
		Monday	Tuesday	Wednesday	Thursday	Friday
<u>Cuc's Family Day Care</u>	<u>1.0</u>					
• All ages		No	No	No	No	No
<u>Cabramatta Community Centre Pre-school</u>	<u>1.0</u>					
• 2 yrs to 3 yrs		No	No	No	No	No
• 3 yrs to 5 yrs		No	No	No	No	No
<u>Vattana Early Learning Centre</u>	<u>1.0</u>					
• 6 wks to 2 yrs		Yes	Yes	Yes	No	No
• 2 yrs - 3 yrs		Yes	Yes	Yes	Yes	Yes
• 3 yrs - 5 yrs		Yes	Yes	Yes	No	No
<u>Magic Forest Early Learning Centre</u>	<u>1.2</u>					
• 2 yrs - 6 yrs		Yes	Yes	Yes	No	Yes
<u>KU Cabramatta AMEP Childcare Centre</u>	<u>1.5</u>					
• 6 wks to 6 yrs		No	No	No	No	No
<u>Cabramatta Early Learning Centre</u>	<u>2.0</u>					
• 3 yrs to 5 yrs		Yes	No	Yes	Yes	Yes
<u>Canley Vale Early Learning Centre</u>	<u>2.0</u>					
• 6 wks to 2 yrs		No	No	No	No	No
• 2 yrs - 3 yrs		Yes	No	No	No	No
• 3 yrs - 5 yrs		Yes	Yes	Yes	Yes	Yes
<u>ACDMA Childcare & Pre-school</u>	<u>2.0</u>					
• 2 yrs - 5 yrs		Yes	Yes	Yes	Yes	Yes
<u>ABC Day Care Pre-school</u>	<u>2.5</u>					
• 2 yrs to 5 yrs		Yes	Yes	Yes	Yes	Yes
<u>Kidsmatter in Cabramatta</u>	<u>2.5</u>					
• 3 yrs to 5 yrs		No	No	No	No	No
<u>3 Bears Childcare Centre</u>	<u>3.0</u>					
• All ages		No	No	No	No	No
<u>Canley Heights Childcare Centre</u>	<u>3.5</u>					
• 2 yrs to 5 yrs		Yes	Yes	Yes	Yes	Yes
<u>Warwick Farm Children's Centre</u>	<u>4.5</u>					
• 6 wks to 6 yrs		No	No	No	No	No
Source: careforkids.com.au						

6.2 Aged Care Facilities

- i. The proposed Cabramatta Intergenerational Community will include an aged care facility of 18,802 sq.m, including a 150 bed, high care nursing home (8,250 sq.m) and an Independent Living Unit (10,552 sq.m).

Catchment Population and Socio-Economic Profile

- i. Typically, aged care facilities within metropolitan locations serve a population catchment within a 5 km radius. For the purposes of this analysis, an aged care catchment has been defined generally around this radius, incorporating the Fairfield East SLA but restricted by natural barriers in the south (refer Map 6.2).
- ii. Table 6.3 provides a summary of the current and projected population levels within the defined catchment area according to official state population projections. Key points to note include:
 - The population aged 75 years and over is estimated at 10,970 in 2011 and is projected to increase to 13,520 persons by 2026, representing an average annual growth rate of around 1.2% over the forecast period.
 - The total population is estimated at 192,190 persons in 2011 and is projected to increase to 201,140 by 2026, representing an average annual growth rate of around 0.3%.
 - This indicates that the catchment area will experience stronger population growth for persons aged over 75 as compared with total population growth.
 - The number of persons aged 75 years or older increased from 9,605 in 2006 to 10,970 persons in 2011. This represents an increase of around 1,365 persons or an average annual growth rate of around 2.7%. This is significantly higher than the growth in the Sydney metropolitan population aged 75 years and older of around 1.3% per annum over the intercensal period.

- Based on recent trends in population growth of persons aged 75 years and older, future population growth is likely to be stronger and the forecasts outlined in Table 6.3 are considered very conservative.
- iii. Table 6.4 provides a summary of the socio-economic profile of the catchment population based on the 2011 Census, compared with the Sydney metropolitan benchmarks. Key points to note include:
- The proportion of the population accommodated within the catchment that is aged 75 years or older at 5.7% is lower than the Sydney benchmark of 6.1%.
 - However, by 2026, the proportion of persons aged 75 years or older within the catchment is projected at 6.7%, well above the current Sydney metropolitan benchmark.

Supply and Demand of Aged Care Facilities

- i. Based on information sourced from the *Department of Health and Ageing (DOHA)*, there are some 23 residential aged care facilities currently provided within the defined catchment (refer Map 6.2). Table 6.5 provides a summary of these facilities and the total number of places currently offered. As highlighted, there are a total of some 2,166 places provided.
- ii. Table 6.6 presents an indicative assessment of the current and projected over/under supply of residential aged care places within the defined catchment area.
- iii. For the purposes of this analysis, 20% of the population aged over 75 years is assumed to reside within an aged care facilities. This is supported by the following:
 - According to Section 3.1 of the *Productivity Commission enquiry: Caring for Older Australians (August 2011)*, the need for aged care services expands rapidly after people reach the age of 85 years, but starts most relevantly at ages 75 and above. According to the report, some 53 in every 1,000 residents aged 75 – 84 reside in permanent residential accommodation, with this increasing to some 235 per

- 1,000 residents aged 85 and over in Australia. This indicates that approximately 20% of the population aged over 75 years reside within an aged care facility.
- Dividing the number of aged care places within Australia according to DOHA by the total Australian population aged over 75 indicates that approximately 18% - 19% of people aged over 75 reside within an aged care facility.
- iv. Within the catchment area, some 19% of the population aged 75 years and older reside within a residential aged care facility (2013 population of 11,130 divided by supply of 2,116 aged care places). Full occupancy is assumed for the purposes of this assessment.
- v. There is currently estimated to be an indicative undersupply of around 110 places, which is projected to increase to an undersupply of around 588 places by 2026 if supply does not increase over this period.
- vi. Based on the projected growth in the population aged 75 years or above, there is expected to be demand for an additional 478 places over the period to 2026 assuming 20% of the population aged 75 years and older are accommodated in residential aged care facilities.

Productivity Commission

- i. According to the Productivity Commission's enquiry '*Caring for Older Australians*' (August 2011), reform is needed to the Australian aged care system to meet the challenges of an older and increasingly diverse population. The report identifies a key future challenge in the increasing diversity among older Australians and their preferences and expectations, including a greater desire for independent living and culturally relevant care. This is particularly important for culturally and linguistically diverse communities such as Cabramatta.
- ii. The key points in relation to the Productivity Commission report and the proposed Cabramatta Intergenerational Community at the subject site are:

- The proposal is a residential aged care community which will allow ‘aging in place’, which is providing a range of both independent living and assisted care in the one community where residents are able to take advantage of the services on site throughout their life stages.
- The proposal will add to the supply of residential aged care living, of which there is a recognised under supply.

2013 Federal Budget

- i. The proposed development is also consistent with the recent *2013 Federal Budget*, which proposes the movement of seniors from their typically larger existing homes to more manageable, down-sized housing.
- ii. From July 2014, those claiming age pensions and who have lived in their current home for at least 25 years, can downsize and invest the additional funds, capped at \$200,000, in a special account. The funds invested and any interest earned will be exempt from asset and income testing for up to 10 years.
- iii. The key challenge for retirees seeking to improve their standard of living is to release some of their home equity wealth without having to move away from established and supportive social networks. The proposed aged care facility at the subject site would allow local residents of the Cabramatta area to downsize their home while also staying in close proximity to family and social networks.

Summary

- i. Overall, the above analysis indicates that there is currently an undersupply of aged care facilities within with the defined Cabramatta catchment.
- ii. The proposed aged care facility is similar to the US and European models of retirement care, allowing grandparents, parents and children to live and reside in the one location. Such facilities are also known as Continuous Care Retirement Communities, which focus on integrating retirement residents with the broader community. This is very important to the ethnically diverse population of

Cabramatta, including a large proportion of Asian born residents. Asian populations typically have a higher proportion of multi-generational households, reflecting the importance of providing aged care facilities in close proximity to family members.

- iii. The subject site enjoys a number locational benefits that support the continuing provision of aged care facilities. These include:
- The subject site is centrally located to community facilities and is positioned directly to the south of a local religious temple. The site is located around 1 km to the east of the Cabramatta Town Centre, which includes a range of retail and non-retail facilities.
 - The close proximity and availability of hospitals, including Liverpool Hospital, located around 4 km to the south.
 - Public transport infrastructure, including Cabramatta Railway Station (1 km to the west) and bus stops located along Longfield Street and Chadderton Street.
 - A conveniently located provision of retail shops and services at Lansvale Shopping Centre along the Hume Highway. A provision of retail floorspace is also proposed at the Cabramatta Intergenerational Community, serving the needs of local residents.
 - The outer suburban location of the subject site given inner city land constraints resulting in a higher number of aged care facilities in more suburban locations where more land is available for facilities and services.
- ii. The proposed aged care facility at the subject site is consistent with the Productivity Commission and the 2013 Federal Budget, which outline a recognised under supply of aged care facilities, particularly for ethnic and linguistically diverse communities.

MAP 6.2 – CABRAMATTA AGED CARE FACILITIES CATCHMENT (DOHA)

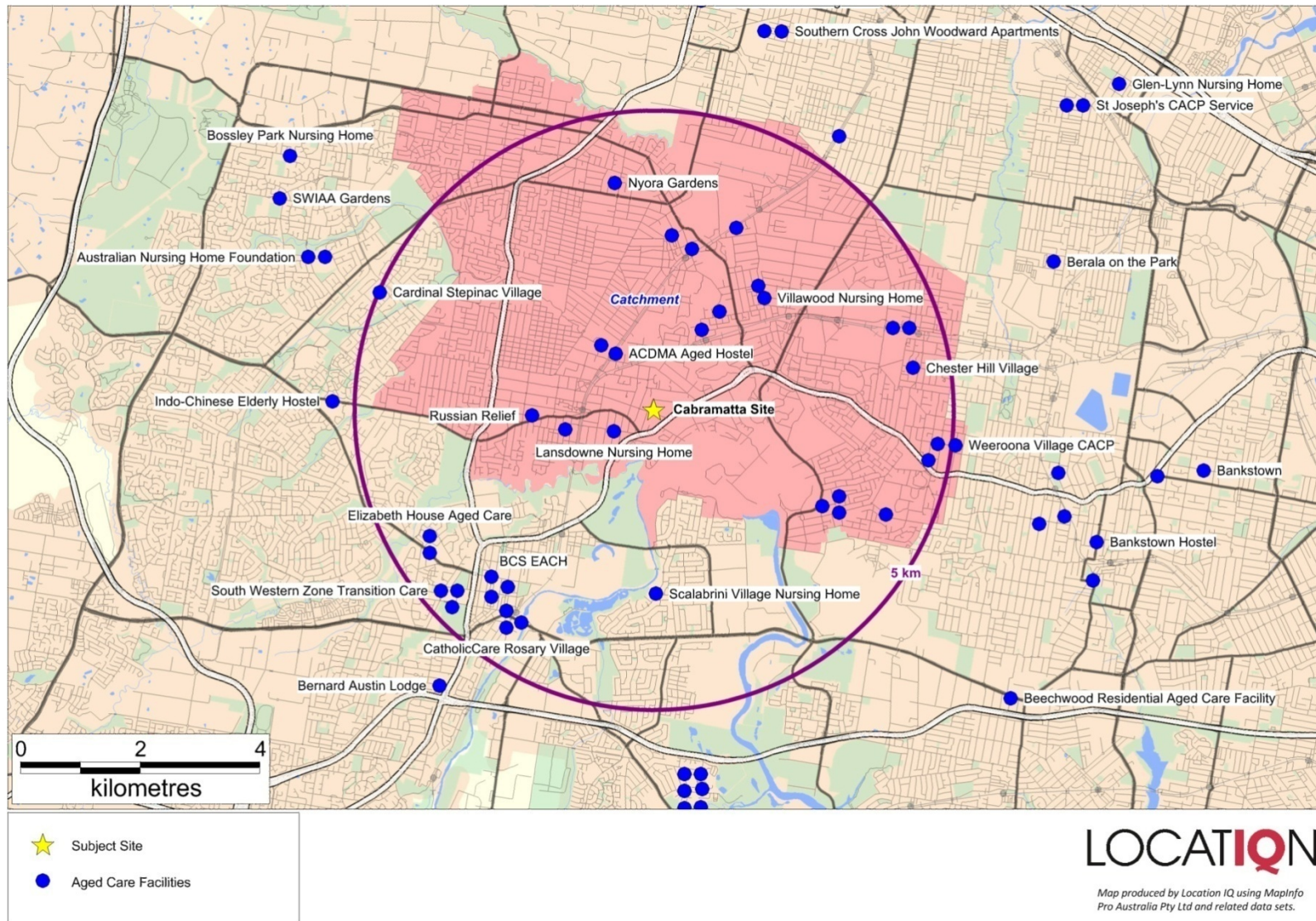


TABLE 6.3 – CABRAMATTA CATCHMENT POPULATION, 2006 – 2026

Trade Area Sector	Estimated Resident Population		Forecast Population			
	2006	2011	2013	2016	2021	2026
Population over 75	9,605	10,970	11,130	11,370	12,120	13,520
Total Population	179,600	192,190	192,870	193,890	198,040	201,140
% over 75	5.3%	5.7%	5.8%	5.9%	6.1%	6.7%
Average Annual Change (No.)						
	2006-2011	2011-2013	2013-2016	2016-2021	2021-2026	
Population over 75		273	80	80	150	280
Total Population		2,518	340	340	830	620
% over 75		10.8%	23.5%	23.5%	18.1%	45.2%
Average Annual Change (%)						
	2006-2011	2011-2013	2013-2016	2016-2021	2021-2026	
Population over 75		2.7%	0.7%	0.7%	1.3%	2.2%
Total Population		1.4%	0.2%	0.2%	0.4%	0.3%
% over 75		1.3%	0.5%	0.5%	0.9%	1.9%
<i>Australian Average</i>		1.5%	1.5%	1.4%	1.3%	1.2%
<i>All figures as at June</i> <i>All figures are based on 2011 SA1 boundary definition with the exception of 2006 which is based on 2006 CCD boundary definition. 2006 and 2011 ERP is calculated using 2011 enumeration factor.</i> <i>Sources : ABS; NSW Department of Planning</i>						

TABLE 6.4 – SOCIO-ECONOMIC PROFILE, 2011 CENSUS

Characteristics	Cabramatta Catchment	Syd Metro Average
Income Levels		
Average Per Capita Income	\$22,290	\$36,941
Per Capita Income Variation	-39.7%	n.a.
Average Household Income	\$67,253	\$99,586
Household Income Variation	-32.5%	n.a.
Average Household Size	3.0	2.7
Age Distribution (% of Pop'n)		
Average Age	36.6	37.2
Persons Aged 75+	5.7%	6.1%
Housing Status (% of H'holds)		
Owner/Purchaser	61.2%	67.4%
Renter	38.8%	32.6%
Birthplace (% of Pop'n)		
Australian Born	45.2%	63.7%
Overseas Born	54.8%	36.3%
• Asia	25.0%	13.7%
• Europe	8.6%	9.1%
• Other	21.2%	13.6%
Family Type (% of Pop'n)		
Couple with dep't children	47.0%	48.2%
Couple with non-dep't child.	10.7%	9.1%
Couple without children	14.7%	20.1%
Single with dep't child.	13.3%	8.5%
Single with non-dep't child.	5.8%	3.9%
Other family	1.4%	1.2%
Lone person	6.9%	9.0%
Sources : ABS Census of Population and Housing 2011		LOCATION

TABLE 6.5 – CATCHMENT AGED CARE FACILITIES (DOHA)

Service Name	Suburb	Care Type	Number of Places				Approved Provider
			Community Care	Residential High Care	Residential Low Care	Transition Care	
Liverpool CACP Program	Fairfield East	Community	80	0	0	0	South Western Sydney Local Health District
Fairfield Nursing Home	Fairfield	Residential	0	93	0	0	Fairfield Nursing Home Holdings Pty Ltd
Heiden Park Lodge	Carramar	Residential	0	0	85	0	United Protestant Association of NSW Limited
Multicultural Community Care Services	Fairfield	Community	143	0	0	0	Cabramatta Community Centre Inc
Nyora Gardens	Smithfield	Residential	0	90	0	0	Stelcom Pty Limited
Rosary Village Hostel	Yennora	Residential	0	0	141	0	Trustees of Catholic Aged Care Sydney
Villawood Nursing Home	Fairfield East	Residential	0	88	0	0	Villawood Aged Care Pty Ltd
Abel Tasman Village	Chester Hill	Residential	0	0	62	0	The Abel Tasman Village Association Ltd
Abel Tasman Village Community Care Package	Chester Hill	Community	58	0	0	0	The Abel Tasman Village Association Ltd
Chester Hill Village	Chester Hill	Residential	0	0	50	0	Bankstown City Aged Care Ltd
Multicultural Community Care Services	Cabramatta	Community	30	0	0	0	Cabramatta Community Centre Inc
Canley Gardens	Canley Vale	Residential	0	124	0	0	E E W Investments Pty Ltd
Lansdowne Nursing Home	Cabramatta	Residential	0	161	0	0	Ark Health Care (Lansdowne) Pty Ltd
Ruby Manor	Carramar	Residential	0	0	90	0	The Sisters of Our Lady of China Health Care (2) Pty Ltd
Russian Relief Association of St Sergius of Radonezh	Cabramatta	Residential	0	97	51	0	Russian Relief Association of St Sergius of Radonezh
Weeroona Village Aged Care Centre	Bass Hill	Residential	0	60	44	0	The Salvation Army (NSW) Property Trust
Bass Hill Residential Aged Care Facility	Bass Hill	Residential	0	70	0	0	LL Aged Care Pty Ltd
ACDMA Aged Hostel	Canley Vale	Residential	0	0	45	0	Australian Chinese & Descendants Mutual Association Inc
Weeroona Village CACP	Bass Hill	Community	21	0	0	0	The Salvation Army (NSW) Property Trust
Bankstown Home Based Services	Georges Hall	Community	132	0	0	0	Bankstown City Aged Care Ltd
Advantaged Care at Georges Manor	Georges Hall	Residential	0	72	72	0	Advantaged Care Pty Ltd
Bankstown Home Based Services - EACHD	Georges Hall	EACH Dementia	6	0	0	0	Bankstown City Aged Care Ltd
Gillawarna Village	Georges Hall	Residential	0	50	101	0	Bankstown City Aged Care Ltd
Total Residential Aged Care Places			470	905	741	0	

Source: DOHA Listing as at June 2011

TABLE 6.6 – AGED CARE FACILITY SUPPLY AND DEMAND ASSESSMENT

Component	2013	2016	2026	2013-2026
(A) Population Aged 75 and older	11,130	11,370	13,520	2,390
(B) Supply of Residential Aged Care Places	2,116	2,116	2,116	n.a.
(A)/(B) = (C) Proportion of Persons in Aged Care Facilities (%)	19.0%	18.6%	15.7%	n.a.
(D) Proportion of Persons Typically in Residential Aged Care Facilities (%)	20.0%	20.0%	20.0%	20.0%
(A)/(D) = (E) Persons Typically in Residential Aged Care Facilities (No.)	2,226	2,274	2,704	478
Under/Over Supply of Residential Aged Care Places				
(B) - (E) = (F)	-110	-158	-588	-478
Source: ABS; NSW Department of Planning; DOHA Listing as at June 2011				

6.3 Retail Floorspace

- i. The proposed Cabramatta Intergenerational Community is planned to include a mix of uses, including some 435 residential apartments (around 1,131 persons) as well as retail/commercial floorspace of 2,397 sq.m.
- ii. The retail/commercial component is likely to comprise a mix of both retail and non-retail uses, including a small convenience store/supermarket, pharmacy, medical centre, food catering tenants and the like. It is estimated that the retail/commercial component will include around 1,000 sq.m of retail floorspace in addition to non-retail tenants such as a medical centre, dentist and the like.
- iii. The retail component of the development will be highly convenience focused, primarily including food based/retail tenants and only serving the needs of the local population. It would also be possible to incorporate a restaurant and/or café use to generate some activity and service the needs of residents of the surrounding area.
- iv. In Australia, there is around 2.2 sq.m of retail floorspace provided for every resident. This is the generally accepted standard provision used throughout the Australian retail industry.
- v. Table 6.7 details the demand for retail floorspace at the planned Cabramatta Intergenerational Community, indicating that the future population at the site of

around 1,131 persons could support retail floorspace of 2,488 sq.m at a rate of 2.2 sq.m per person.

TABLE 6.7 – RETAIL FLOORSPACE DEMAND

Factor	Unit	
Proposed Residential Apartments	(No.)	435
Total Local Population*	(No.)	1,131
Retail Floorspace Demand (@ 2.2 sq.m per person)	(Sq.m)	2,488
Proposed Retail/Commercial Floorspace	(Sq.m)	2,397
* Assuming average household size at 2.6 in line with Australian average.		LOCATION

vi. Given the demand for the proposed retail floorspace which will only serve the local population within the Cabramatta Intergenerational Community, there is unlikely to be any significant impact on surrounding retail facilities.

vii. The nearest retail facilities to the subject site are located around 200 metres to the south-east at Lansvale Shopping Centre. The centre includes a provision of retail floorspace and one vacancy on the ground level, with seven non-retail tenants located on the upper level. Tenants located on the ground level include:

- Porters Liquor
- Newsagency
- Lansvale Village Pharmacy
- Vacancy
- TAB
- Australia Post
- Charcoal Chicken
- Lucky Seven Convenience Store
- Family Medical Centre
- Chinese Takeaway
- Designer Label Brands
- True Beauty Day Spa

viii. The planned retail offer at the Cabramatta Intergenerational Community, which will primarily include convenience and food based tenants, would only compete with

around five of the retail tenants at Lansvale Shopping Centre, including the newsagency, pharmacy, convenience store and takeaway food outlets.

- ix. Indeed, the planned retail floorspace at the subject site is likely to include tenants that are not currently provided at Lansvale Shopping Centre such as a bakery, video store, dry cleaners and the like. As such, the proposed retail floorspace at the subject site would complement the existing offer at Lansvale Shopping Centre.
- x. It is important to note that Lansvale Shopping Centre is located along the Hume Highway and within the Lansvale Industrial Area. Consequently, the centre would serve a substantial number of workers and passing traffic. In contrast, the proposed retail floorspace at the subject site would only serve the day to day, “top up” shopping needs of the future local population at the Cabramatta Intergenerational Community and immediate surrounding residents.
- xi. There will be no adverse impact on the Cabramatta Town Centre, which is located around 1 km to the west of the subject site and includes a range of retail and non-retail facilities, serving the higher order shopping needs of residents throughout the Cabramatta area. The Cabramatta Town Centre at an estimated 15,000 sq.m is significantly larger than the proposed retail/commercial floorspace at the subject site of 2,397 sq.m (over six times larger). The Town Centre is well located around the Cabramatta Railway Station and was identified in the State Government Metropolitan Strategy as a potential Major Centre for the future. As such, investment in the Cabramatta Town Centre is likely to continue.
- xii. Given the critical mass of retail and non-retail facilities, the Cabramatta Town Centre has a wide draw throughout the Fairfield region. The proposed retail/commercial floorspace at the Cabramatta Intergenerational Community will complement the Cabramatta Town Centre by providing convenience based retail in close proximity to residents’ homes. Indeed, the proposed retail/commercial floorspace at the Cabramatta Intergenerational Community is likely to support the Cabramatta Town Centre by providing more residents within walking distance.

7 KEY FINDINGS

- i. The Cabramatta North Hume Highway Industrial Area is a primarily automotive precinct together with older manufacturing and warehousing facilities. Even though the precinct is zoned for industrial/business development uses, approximately only 43% of total tenants are traditional industrial uses. The natural progression of this precinct, transitioning to a mix of uses as opposed to traditional industrial uses, indicates the decreasing demand for industrial uses in this precinct. The rezoning of the subject site from industrial/business development to a mix of uses (including a significant supply of aged care facilities) would form a natural progression in the surrounding precinct.
- ii. The main industries currently seeking to occupy the site are logistics or manufacturing uses. These businesses are not necessary to serve the needs of the local population and could effectively relocate in any industrial precinct within the Fairfield LGA. These uses also present a conflict with surrounding residential uses due to noise/traffic created by industrial tenants.
- iii. The site is difficult to lease with most industrial tenants requiring 24 hour, seven days a week, B Double/Triple access. These requirements are provided at surrounding industrial precincts such as Wetherill Park, Smithfield and the future WSEA. In comparison, the subject site is bounded by residential dwellings in the south and west, with limited hour truck movements.
- iv. The subject site accounts for less than 1% of total industrial/business development land within the Fairfield LGA. There is a large supply of industrial zoned land throughout Fairfield that includes modern industrial facilities or is available for the development of modern industrial facilities. There are also a number of proposed developments in the area that are centrally located to transport infrastructure. Consequently, the rezoning of the subject site will not materially impact the availability of suitable industrial land within the Fairfield LGA. This is particularly the case given that the subject site is restricted in its operational uses to

industrial/business development, and is not needed given the large supply of existing and proposed industrial zoned/employment generating land.

- v. The Fairfield LGA has experienced a significant decline in industrial employment over the period from 2006 – 2011. There are also a number of vacancies/vacant land throughout other industrial zoned areas within the Fairfield LGA, reflecting decreased demand for industrial employment in built up areas, which is consistent with broader trends in New South Wales and Australia.
- vi. Based on future population growth, there is likely to be a shortfall of around 18,500 dwellings by 2026 in the Fairfield LGA as compared with targets outlined in the *Metropolitan Strategy*. This indicates increasing demand for residential land within the Fairfield LGA, while at the same time; demand for industrial employment land is decreasing.
- vii. The rezoning of the subject site to allow for the proposed Cabramatta Intergenerational Community will result in an estimated \$125 million investment in the local Fairfield economy, resulting in a net increase of approximately 156 ongoing retail, childcare and aged care jobs.
- viii. The proposed Cabramatta Intergenerational Community will be highly innovative, reinvigorating the local area and allowing families, including grandparents, parents and children to dwell and age in the one precinct. This is very important culturally to the ethnically diverse population of Cabramatta.
- ix. Consequently, the industrial/business development zoning of the subject site no longer represents the 'highest and best use' of the site. While it is important that a provision of industrial/business development land remains within the Fairfield LGA, it is equally important to recognise which areas would represent the optimal location for these types of facilities. It is clear that the surrounding industrial area represents a key employment generating area within the Fairfield LGA and this should be maintained in the future, however, the subject site itself is not suitable for industrial/business development uses.

- x. Indeed, reflecting the declining role of industrial employment within the area, there is decreasing need for all industrial employment lands within the Fairfield LGA to remain in their current dated built form and limited access arrangement. As such, the subject site is both not suitable for industrial uses but is also not needed as an industrial employment generating land. Notwithstanding, the rezoning proposal represents a unique opportunity to revitalise the site, facilitate aged care and other employment generating uses and represents a local brownfield revitalisation project.

APPENDICES

APPENDIX 1 WETHERILL PARK (NORTH OF VICTORIA ST)

For Sale/Lease/Vacant	For Sale/Lease/Vacant	For Sale/Lease/Vacant
For Sale Victoria St 1.3 hectares	For Lease Redfern St 202 sq.m	For Lease Victoria St 2,074 sq.m
For Lease Walter St 1,266 sq.m	For Lease Redfern St 3,250 sq.m	For Lease Victoria St 2,455 sq.m
For Lease Walter St 1,480 sq.m	For Lease Redfern St 3658 sq.m	For Lease Victoria St 484 sq.m
For Lease Victoria St 1,744 sq.m	For Lease Redfern St 870 sq.m	For Lease Victoria St 484 sq.m
For Lease Hassal St 610 sq.m	For Lease Redfern St 2,267 sq.m	For Lease Victoria St 485 sq.m
For Lease Bushells Place 726 sq.m	For Lease Redfern St 383 sq.m	For Lease Walter St
For Lease Elizabeth St 100 sq.m	For Lease Redfern St 922 sq.m	For Lease/Sale Victoria St 1,124 sq.m
For Lease Elizabeth St 329 sq.m	For Lease Ross Pl 485 sq.m	For Lease/Sale Victoria St 1,189 sq.m
For Lease Elizabeth St 519 sq.m	For Lease Ross Pl 555 sq.m	For Lease/Sale Victoria St 270 sq.m
For Lease Elizabeth St 526 sq.m	For Lease Ross Pl 349 sq.m	For Lease/Sale Victoria St 649 sq.m
For Lease Elizabeth St 229 sq.m	For Lease Ross Pl 469 sq.m	For Lease/Sale Victoria St 379 sq.m
For Lease Elizabeth St 266 sq.m	For Lease Ross Pl St 1,065 sq.m	For Sale Walter St 619 sq.m
For Lease Elizabeth St 300 sq.m	For Lease Victoria St 1,138 sq.m	For Sale 75 sq.m Lunch Shop
For Lease Elizabeth St 347 sq.m	For Lease Victoria St 1,194 sq.m	For sale Newton Road 1,353 sq.m
For Lease Hexman Pl St 3,178 sq.m	For Lease Victoria St 1,704 sq.m	For sale Newton Road 2,937 sq.m
For Lease MacLaey Cl 3,205 sq.m	For Lease Victoria St 101 sq.m	For sale Newton Road 506 sq.m
For Lease Newton Rd St 1,800 sq.m	For Lease Victoria St 147 sq.m	For Sale Ross Pl 14,670 sq.m
For Lease Newton Rd St 190 sq.m	For Lease Victoria St 202 sq.m	For Sale Victoria St 1,356 sq.m
For Lease Newton Rd St 335 sq.m	For Lease Victoria St 3,000 sq.m	For Sale Victoria St 7,160 sq.m
For Lease Newton Rd St 783 sq.m	For Lease Victoria St 412 sq.m	For Sale Victoria St 567 sq.m
For Lease Redfern St 10,050sq.m	For Lease Victoria St 450 sq.m	For Sale Victoria St 141 sq.m
For Lease Redfern St 10,120 sq.m	For Lease Victoria St 500 sq.m	For Sale Victoria St 90 sq.m
For Lease Redfern St 10,300sq.m	For Lease Victoria St 1,794 sq.m	For Sale/Lease Redfern St 399 sq.m
For Lease Redfern St 2,204sq.m	For Lease Victoria St 138 sq.m	Vacancy Ross Place 4,000 sq.m
As of May 2013.		LOCATION

APPENDIX 2 WETHERILL PARK (SOUTH OF VICTORIA ST)

For Sale/Lease/Vacant	For Sale/Lease/Vacant	For Sale/Lease/Vacant
For Lease Victoria St 252 sq.m	For Lease McIlrath St 92 sq.m	For Sale Bentley St 320 sq.m
For Lease Victoria St 599 sq.m	For Lease McIlrath St 632 sq.m	For Lease Halstrom Pl 290 sq.m
For Lease Victoria St 494 sq.m	For Lease McIlrath St 330 sq.m	For Sale Halstrom Pl 319 sq.m
For Sale Victoria St 252 sq.m	For Lease McIlrath St 320 sq.m	For Sale Halstrom Pl 280 sq.m
For Lease Victoria St 381 sq.m	For Lease McIlrath St 277 sq.m	For Lease Halstrom Pl 1,111 sq.m
For Lease Elizabeth St 103 sq.m	For Lease McIlrath St 1,045 sq.m	For Lease Dirian Pl 169 sq.m
For Lease Elizabeth St 188 sq.m	For Sale Newton Rd St 1,470 sq.m	For Sale Newton Rd 280 sq.m
For Lease Elizabeth St 454 sq.m	For Sale Newton Rd St 538 sq.m	For Lease Newton Rd 363 sq.m
For Lease Alan St St 836 sq.m	For Lease Tilly St 1,450 sq.m	For Lease Newton Rd 305 sq.m
For Lease Elizabeth St 2,160 sq.m	For Lease Tilly St 1,455 sq.m	For Sale Newton Rd 17,044 sq.m
For Lease Victoria St 3,629 sq.m	For Lease Tilly St 848 sq.m	For Lease Victoria St 436 sq.m
For Lease Canley Vale Rd St 3,629 sq.m	For Lease Tilly St 455 sq.m	For Lease Victoria St 507 sq.m
For Lease Canley Vale Rd St 821 sq.m	For Lease Newton Rd 2,500 sq.m	For Sale Victoria St 436 sq.m
For Lease/Sale Newton Rd St 2,108 sq.m	For Lease Newton Rd 4,000 sq.m	For Lease Ormsby Pl 4,500 sq.m
For Sale Newton Rd St 3,414 sq.m	For Lease Bentley St 724sq.m	For Lease Cowpasture Rd 2,779 sq.m
For Sale Newton Rd St 182 sq.m	For Sale Bentley St 1,171 sq.m	For Lease Cowpasture Rd 3,300 sq.m
For Lease Newton Rd St 105 sq.m	For Lease Bentley St 1,530 sq.m	For Lease Cowpasture Rd 6,079 sq.m
For Lease Newton Rd St 166 sq.m	For Lease Bentley St 1,530 sq.m	For Lease Cowpasture Rd 150 sq.m
For SLease Newton Rd St 632 sq.m	For Lease Bentley St 1,857 sq.m	For Lease Cowpasture Rd 300 sq.m
For Lease Newton Rd St 330 sq.m	For Lease Bentley St 1,320 sq.m	
As of May 2013.		LOCATION

APPENDIX 3 WETHERILL PARK B5 ZONING, SMITHFIELD, FAIRFIELD EAST

Wetherill Park B5 Zoning	Smithfield	Fairfield East
For Lease Cowpasture Road 254sq.m	For Lease Cumberland Hwy 622 sq.m	For Lease Woodville Rd (1,650 sq.m - 12,370 sq.m)
For Lease The Horsley Drive 80 sq.m	For Lease Cumberland Hwy 580 sq.m	For Sale Woodville Rd (218 - 325 sq.m)
For Lease The Horsley Drive 890 sq.m	Cumberland Hwy Vacancy	Vacancy Woodville Rd
Large vacant land next to Aaron's Furniture.	Cumberland Hwy Vacancy	For Lease Seville St (4,184 sq.m)
For Sale The Horsley Drive 830 sq.m	Cumberland Hwy Vacancy	Vacancy Seville St
For Lease The Horsley Drive 714 sq.m	83Victoria St Vacancy	Zing Feng Group Vacancy
	For Lease Victoria St 3,760 sq.m	Vacancy Seville St
	For Lease Victoria St & Market St	For Lease Seville St (3,350 sq.m)
	For Lease Victoria St 1,436 sq.m	For Lease Seville St (2,187 sq.m)
	For Lease Victoria St 1,477 sq.m	Vacancy (Mandarin & Lisbon St)
	For Sale Victoria St (Vacant land)	For Lease Fairfield Rd (10,000 sq.m)
	For Sale Victoria St (Vacant land)	For Lease Fairfield Rd (2,300 sq.m)
	For Sale/Lease Chiefly St 9,000 sq.m	
	For Lease Victoria St 500 sq.m	
	For Lease Victoria St 1,300 sq.m	
	For Lease Victoria St 100 sq.m	
	For Lease Victoria St 200 sq.m	
As of May 2013.		

APPENDIX 4 LANSVALE INDUSTRIAL AREA

Tenant	Tenant	Tenant
7 Eleven Service Station Julie's Country Collection Jumbo Office Furniture Dunrit Linings High Tech Digital CCTV High Tech International Homewares Pty Ltd Buu Buu Childrenswear and accessories General Furniture Pty Ltd Boon Ma Pty Ltd Chung Fashion Fussy's Motor Performance FMP All Japs Automotive all mechanical repai Diamond Nails, Beauty and Hair Supplies New Life Distribution Tams Auto Care DIY Do It Yourself Home Improvement Wong Sang Co Weave Octopus GTI Films PGH Bricks and Pavers Tiles and Bricks Veet Face TV Australia Pty Ltd Bethel Shopfitting World Vacancy Hollywood Road Dynamic Plant Hire M & H Smash Repairs Famous for Kitchens Achilles Tyre Technology	Deacon Inverter Technology Hume Plasterboard General Furniture Pty Ltd Reef Octopus Australia JTI Films Intrigue Fashion Intrigue Fashion Saveway Enterprises General Furniture Pty Ltd Diamond Nails Superstore King Flooring Centre ABL Australia Building Link Club Piling Contractors NSW Plant Facility Blue Haven Pools and Spas JJ Auto Parts Cole Western Sheds Stegbar Hume Doors and Timber Petra Stainless Steel Gillan Motors W & J Global Pty Ltd Wei Wah International Trading Caltex Service Station Vacancy Knightbridge Business Park Vacancy Knightbridge Business Park Vacancy Knightbridge Business Park Vacancy Knightbridge Business Park Prestige Motor Sport	Hume Automotive Services Repairs Hume Smash Repairs Carla Holt Harvey Corrugated Packing My Games Room GNF Joinery Supplies House of Pays SSM Seekers Security TNL Car Body Repairs Wire Works Australia Advance Co Pty Ltd Importer Wholesale Super Start Batteries Tec Poly Prints Col Western Sheds Fanyo Foods Hermans Dutch Croquet Mason Paul Furniture Designs ACE Australian Lighting Garrets Catering AQL Scrap Metal Recycling JZ Spares Mechanical Repairs Autos Super Detailing All West Autos Best Buys Autos Bathroom Basement Trade Link Quality Used Cars Fat Smash Repairs
As of May 2013.		LOCATION

APPENDIX 5 LANSVALE INDUSTRIAL AREA

Tenant	Tenant	Lansvale Shopping Centre
Sunrise Smash Repair Wood Turning Kitchen Cabinets Ashflex Holdings Red's Global Vacany Hume Highway Maersk Sea Land AccuweiHg Ipex Pipeline Systems Automatic Transmission Specialists Roseland Import and Export Vacancy Hume Highway Bright Kitchens Atlantis Pools Cranes Storing Morrison Office Furniture A1 Auto Transport A1 Auto McDonald's All West Autos Self Storage Tyre Wizards Select Plant Hire Vacancy Cutler Road Sydney's Best Performance Used Car Centre CTM Ceramic Tile Market Narvar Best Buys Auto Milano Courtyard Restaurant	Vacancy Hollywood Road Pro Beat Smash Repairs Forever Motors Ashbrook Farms B & B Billard Tables Westside Ceramics Highway Car Sales N & K Motor Group Buy and Sell Autos Best for Less Autos OC Automotive Tyre King Liberty Motors For Sale Hume Highway (Vacancy) For Sale Hume Highway (Vacancy) For Sale Hume Highway (Vacancy) SIS Design Furniture Showroom Ursula Kitchens Universal Clearance Shift Performance Parts ACE Corp Australia Go Go Electrical Woot Mechanical Top Shelf Warehousng Liberty Motors Holden Lansvale Used Cars	International School of Music Porters Liquor HD Tutoring Centre TAB Newsagency Lansvale Village Pharmacy Australia Post Gifts and wrapping Charcoal Chicken Lucky Seven Convenience Store Family Medical Centre Chinese Takeaway Designer Labels Brands True Beauty Day Spa Grantley Homes Bikini and Associates HD Select Tutoring Centre You Can Pty Ltd Etland Taxation Accounting Services Dental surgery Vacany
As of May 2013.		LOCATION

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