



Gosford City Council Employment Lands Investigation

December 2010





Disclaimer

The Gosford Employment Lands Investigation was commissioned to inform future planning in relation to employment lands and investigate the demand and supply of industrially zoned lands within the Gosford LGA. Its intention is to guide future possible strategic investigations into land use activities and should not be construed as advocating or supporting the rezoning of any particular land or area.

This document should not be used as a basis for investment or other private decision making in relation to land purchases, sales or other land uses. Council recommends that it not be used by anyone in this way.



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Executive Summary

Gosford City Council, with funding from the Department of Planning, has engaged GHD and AECgroup to undertake an Employment Lands Investigation for the Gosford Local Government Area (LGA).

The *Central Coast Regional Strategy* (CCRS) (DoP, 2008) identified the need to create the *Central Coast Regional Economic Development and Employment Strategy 2009* (REDES). The REDES seeks to boost local economy and increase employment and aims to achieve capacity for more than 45 000 new jobs on the Central Coast over the next 25 years with a target of 18,000 jobs in the Gosford LGA. Within the Gosford sub-region, jobs provided by designated employment lands are to reach 3000 by 2031. Council is obliged to address employment capacity targets set by these policies as part of its LEP review. As such, this Employment Lands Investigation is consistent with the CCRS and REDES and provides guidance to achieving the actions identified in these strategies.

For the purposes of this investigation employment lands, in accordance with the *Central Coast Regional Strategy 2006-31* (DoP, 2008) are defined as lands that are currently zoned for industrial purposes.

- ▶ The employment lands are concentrated within the eastern portion of Gosford LGA at Lisarow, North Gosford and Wyoming, Erina, Somersby, West Gosford and Mount Penang, with smaller areas at Woy Woy and Kincumber.
- ▶ According to the ABS estimated resident population series, there were an estimated 166,626 persons residing in the Gosford LGA in 2009, equating to growth of 1.2% from 2008.
- ▶ The NSW Department of Planning, as part of the *Central Coast Regional Strategy*, projects that the Central Coast population will grow from approximately 305,000 in 2006 to 405,000 in 2031. This represents an average annual increase of 4,000 residents per year. The NSW Department of Planning's SLA projections predict slightly lower growth of 94,000 additional residents in the Central Coast between 2006-31. This includes the Gosford LGA population growing by 27,000 from 162,100 in 2006 to 189,100 in 2031.
- ▶ In terms of the current distribution of industrial land by lot size, 28.7% of the total properties in the zoned industrial areas are sized between 4,000 and 10,000 sqm. Around 23% are under 1,000 sqm in size, while 19.1% are sized between 1,000 and 2,000 sqm. Just 6.5% are larger than 1 ha.
- ▶ Of the developed/occupied industrial land in Gosford LGA, manufacturing users are the largest occupiers (125.5 ha), followed by general industry (31.4 ha) and warehousing (13.8 ha).
- ▶ Over the last 20 years, take up rates within the Somersby Industrial Park have averaged 6.1 hectare per annum. Take up rates in employment precincts outside Somersby have fluctuated in recent years from 0.4 ha in 2005 to 6.5 ha in 2007 with an average of 2.4 ha per year over the last five years. LGA wide take up rates have averaged 8.2 ha per year.
- ▶ The employment lands investigation is to ensure that, there will be an ongoing supply of industrial zoned land to cater for forecast demand for the next 26 years. There is currently

128.08 ha supply of land zoned for employment lands and yet to be developed. The anticipated demand is expected to be between 138 ha to 213 ha (low scenario workforce method and land take up rate scenario) between 2010 and 2036. Therefore there is need to identify between a minimum of 10.5 ha to 85 ha of additional employment lands in Gosford to meet demand. A conservative approach would be to take the higher figure of 85 ha of employment lands to ensure that a shortage does not occur. This equates to about 3.3 ha per year on average (26 year period).

- ▶ There are many factors to consider when identifying and assessing potential sites for new industrial land development. Gosford is subject to a number of environmental constraints which affect the ability of land to be used for employment purposes. Using this information on constraints and opportunities a land suitability analysis was undertaken for Gosford LGA. The methodology used in this investigation aims to identify and evaluate a range of constraints, which will impact upon the ability of Gosford to accommodate further employment lands development.
- ▶ Using the land suitability analysis in this report and the scoping studies, site analysis and strategic work undertaken previously by Gosford Council as well as the *Central Coast Regional Strategy* (DoP, 2008) there are a number of areas, subject to further investigation, which may be suitable for rezoning to accommodate future employment growth.
- ▶ Some employment lands precincts have undergone a significant transition over the last decade with numerous bulky goods and commercial businesses moving in. This has changed the character of the precinct from a predominantly industrial area into a precinct with a distinct commercial nature. This has resulted in the loss of employment lands at the expense of commercial uses. Bulky goods retail should be discouraged within industrial areas. This report supports the draft Gosford LEP 2009 prohibiting bulky goods retailing in the IN1 General Industrial Zone. Bulky goods clusters should be zoned B5 Business Development under the *draft Gosford LEP 2009*.
- ▶ Many areas within Gosford have also been experiencing the predation of traditional industrial land within industrial zones for non industry uses such as places of public worship, gyms, childcare centres, funeral homes, brothels and entertainment areas. These are often high traffic volume generating developments with distinct peak flows. It is for this reason they are often not be permitted within residential areas. Protecting major employment areas such as Somersby, West Gosford, North Gosford and Lisarow from such uses will ensure that traditional industrial uses will be protected and encouraged. It is for this reason that uses in the IN1 General Industrial Zone should be reviewed to ensure that non industrial land uses are complementary to employment generating land uses. Inappropriate uses that may encourage more commercialisation of industrial areas should be excluded whilst ensuring there is sufficient land to accommodate service industries e.g. trade, car repairs etc
- ▶ Industrial zoned lands are a finite resource in the Gosford LGA and critical to growing the local economy.

PART A

INTRODUCTION AND CONTEXT



1. Introduction

1.1 Background

Gosford City Council, with funding from the Department of Planning, has engaged GHD and AECgroup to undertake an Employment Lands Investigation for the Gosford Local Government Area (LGA).

The Central Coast Regional Strategy (CCRS) (DoP, 2008) guides future growth in the central coast from 2006 to 2031. The CCRS (DoP, 2008) identified the need to create the *Central Coast Regional Economic Development and Employment Strategy 2009* (REDES). The REDES seeks to boost local economy and increase employment and aims to achieve capacity for more than 45 000 new jobs on the Central Coast over the next 25 years with a target of 18,000 jobs in the Gosford LGA. Within the Gosford sub-region, jobs provided by designated employment lands are to reach 3000 by 2031.

Council is obliged to address employment capacity targets set by these policies as part of their LEP review. As such, this Employment Lands Investigation is consistent with the CCRS and REDES and provides guidance to the actions identified in these strategies. The aim of the project is to investigate employment generating lands within the LGA (with a focus on industrial land) including review existing land supply, identify future employment land needs and inform future amendments to planning controls.

An adequate supply of well-located, serviced and affordable industrial land is a key factor in the future economic prosperity of Gosford. If a supply is ready, when needed by the market, it will provide Gosford with a competitive advantage as an investment destination. The main purpose of this project is to take a long term approach to identifying the optimal location for land to be developed for employment purposes in the Gosford LGA subject to appropriate investigations.

Previous research has found that Gosford has volatile levels of unemployment and a very large number of people commute outside the region to work. Further investment in Gosford will provide new employment and business opportunities for the many people who choose to live in and enjoy the environment and the lifestyle opportunities the area offers.

In order to meet the strategic goal of facilitating sustainable economic development Council considers it necessary to maintain a level of zoned land available and development ready. This report will assist with that important goal.

1.2 What are Employment Lands?

For the purposes of this investigation employment lands, in accordance with the *Central Coast Regional Strategy 2006-31* (DoP, 2008) , are defined as lands that are currently zoned for industrial purposes and have been identified by the NSW Department of Planning. The *Central Coast Regional Strategy* defines employment lands as encompassing:

“clusters of major construction, manufacturing, light industry, transportation and storage activities. They include distribution centres, factories, warehouses and other industrial uses and should have high quality access to major strategic transport corridors.”

Employment lands therefore do not include business-commercial lands.

The *Central Coast Regional Strategy 2006-31* outlines a hierarchy of centres and strategic

employment land nodes. These centres have been defined based on considerations of several characteristics that include centre role, scale, built form, employment type and employment numbers for the various centre types as well as the transport, services and connections that should be available in these centres.

1.3 Project Objectives

The major objectives of the Gosford Employment Lands Investigation are to:

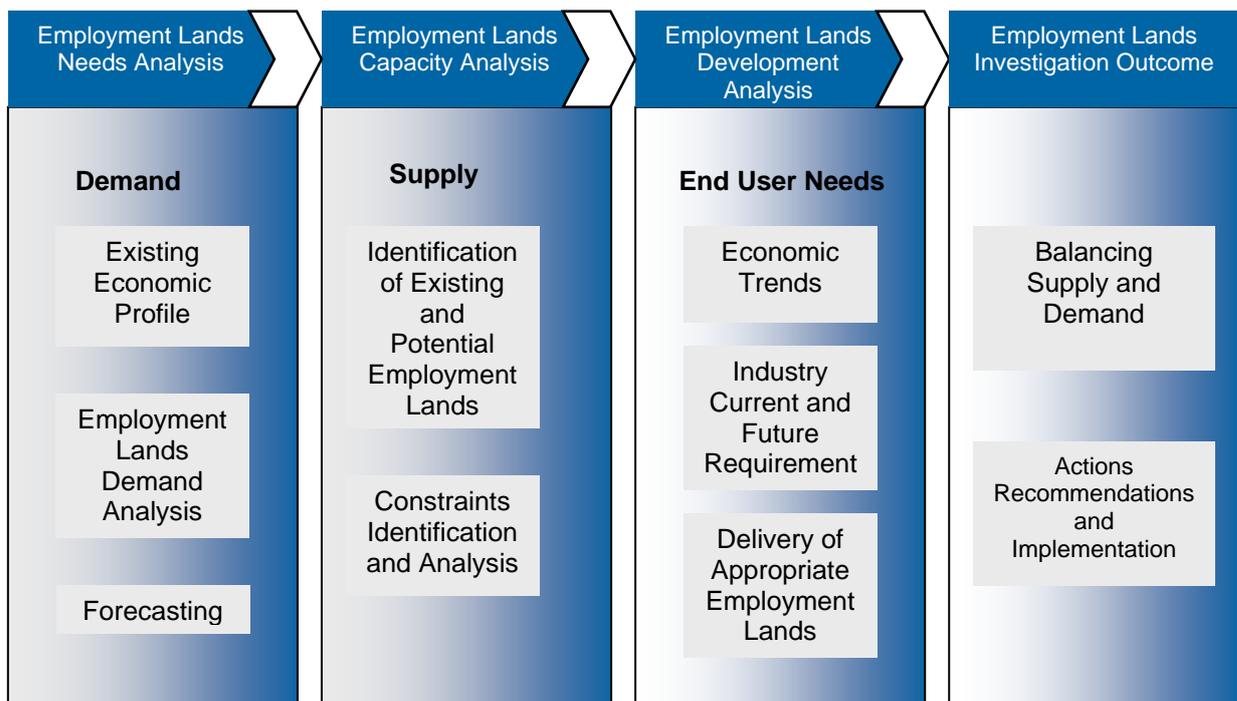
- ▶ Identify the extent of Gosford's existing supply of employment land (industrially zoned).
- ▶ Identify trends in industrial land including identifying likely demand.
- ▶ Identify future employment land opportunities so that a minimum of 3000 jobs by 2031 can be met and additional jobs provided for up to 2036.
- ▶ Recognise the challenges to maintaining Gosford's economic position and regional location in proximity to Sydney.
- ▶ Determine if there are any particular sectors that should be encouraged or attracted to the area.
- ▶ Identify possible employment land opportunities such as Somersby.
- ▶ Identify where Council can best facilitate and influence outcomes.
- ▶ Investigate and respond to opportunities for the reuse and possible intensification of under-utilized industrial sites as appropriate.
- ▶ Develop strategies, policies and programs that will guide the future of industrial precincts.
- ▶ Acknowledge the overlap between technology and knowledge-based business, business parks, bulky goods and offices. Ensure that new policies affecting these sectors are coordinated to provide clear outcomes and develop strategies to identify and foster an appropriate balance between industrial and office activities within business parks and appropriate locations for bulky goods retailing.
- ▶ Provide clear direction to Gosford business community and potential investors regarding Council's vision for its employment lands.
- ▶ Develop recommendations on the future land use and zoning of Gosford's industrial zoned land.
- ▶ Suggest any recommendations for modifications to planning provisions as may be appropriate.

1.4 Methodology

An extensive amount of previous research has been undertaken for the CCRS and REDES as well as the draft Gosford LEP 2009, to better understand the current employment lands circumstances. In addition, Gosford City Council has undertaken an Employment Lands Audit prior to the development of this report.

This Employment Lands Investigation combines the recent Employment Lands Audit, historical consumption trends and likely future demand for industrial land over the next 25 years. It uses multi-criteria mapping methodology to identify potential employment lands. Potential sites can then be prioritised and a market analysis used to ascertain what current and potential industrial land users and owners need in the Gosford LGA. The methodology for this investigation is represented in Figure 1 below.

Figure 1 Gosford Employment Lands Investigation Methodology



1.5 Timeframe and Review

This Employment Lands Investigation provides for the projected long term employment growth through a staged release over the next 26 years to 2036 (in line with census periods).

In accordance with the principles of 'intergenerational equity', this investigation will not limit the ability of future generations to be able to have their say on the planning for Gosford. To allow for this and to ensure that planned development under this plan aligns with any changes in community values and thinking, a review should be undertaken every 5 years.



1.6 Structure

The Gosford Employment Lands Investigation is developed in three separate but complementary phases, as follows:

- Part A -** Introduction and Context: provides background to the project, location context as well as a strategic and statutory context.
- Part B-** Situational Analysis: describes the current situation with regards employment lands, including identification of opportunities and weaknesses, provides the economic context, identifies current market trends, and discusses opportunities and challenges affecting employment,
- Part C-** Supply and Demand Analysis: identifies future employment land needs based and how those needs could be satisfied.
- Part D -** Strategy and Implementation: provides a detailed strategy that outlines a policy framework and implementation program to provide for an adequate supply of employment lands for Gosford to 2036.

2. Relevant Planning and Economic Documentation

2.1 Roles of Government and the Private Sector in Employment Lands

The overarching body responsible for land use planning and development in NSW is the Department of Planning. State and Local Government have a very significant role in employment lands as they can build on existing strengths of a region such as Gosford, through good planning policy. This can provide opportunities for appropriate economic growth and recognise the need for local employment in order to sustain settlement populations and ensure their economic wellbeing (GHD, 2009).

Council's capacity to promote development opportunities and diversification of activities can be inhibited by a lack of available and appropriately located land. A scarcity of land available for employment opportunities could deter investment in local areas, stifling economic growth and employment opportunities. Good planning policy should ensure that land is available for development and is adequately serviced by infrastructure, and responsive to economic trends. It should provide for different land uses to cater for different needs, encourage competition and provide the flexibility required by industries to develop in appropriate locations (GHD, 2009).

Private industry input includes the sharing of information and providing a business perspective to policy. Employment lands are still predominantly brought to the market by private land developers and this requires investors to have confidence that returns on capital will be the equivalent or better than less risky alternatives. It also includes public / private partnership approaches to land and infrastructure development, and strategic planning activities (Property Oz, 2007).

Table 1 Roles of Government and the Private Sector in Employment Lands

Sector	Role
State and Local Government	<p>Ensuring that there is an on going supply of land available for industrial use and to monitor market demands based on the monitoring of land consumption rates and development.</p> <p>In performing this role, government has the ability to:</p> <ul style="list-style-type: none"> ▶ identify future employment land through ongoing supply and demand monitoring and analysis; ▶ zone land promptly through LEP's to ensure it is protected and available for use and is market ready; ▶ facilitate the required infrastructure to ensure land is ready for use; ▶ respond to locational requirements such as large lot or heavy industry.
Private Sector	<p>The private sector is involved in the employment land market by:</p> <ul style="list-style-type: none"> ▶ purchasing, developing and selling land; ▶ developing or upgrading infrastructure; ▶ providing advice to land owners, developers, governments and industrialists; ▶ property and tenant management.

2.2 Planning Documents

There is a hierarchy of statutory planning instruments and policies affecting urban development in the Gosford City, including:

- ▶ Environmental Planning and Assessment Act, 1979 (EP&A Act)
- ▶ State Environmental Planning Policies (SEPPs);
- ▶ Local Environmental Plans (LEPs);
- ▶ Development Control Plans (DCPs); and
- ▶ Section 117 directions from the Minister for Planning.

At the regional and local level there are several planning Strategies that guide the implementation of these statutory and policy documents as they apply to Gosford City.

These include:

- ▶ State Plan – NSW Government;
- ▶ City of Cities A Plan for Sydney’s Future Metro Plan – NSW Government, 2005;
- ▶ Central Coast Regional Strategy, 2008;
- ▶ NSW Coastal Policy, 1997;
- ▶ Draft Gosford Centres Strategy, Gosford City Council;
- ▶ Draft Gosford Residential Strategy, Gosford City Council;
- ▶ Draft Gosford Land Use Strategy , Gosford City Council;
- ▶ Central Coast Regional Economic Development and Employment Strategy, Gosford City Council, 2009;
- ▶ Draft Gosford City Centre Master Plan, Gosford City Council 2009;
- ▶ Draft Economic Development Program, Gosford City Council 2008;
- ▶ Peninsula Urban Directions Strategy, Gosford City Council 2005;
- ▶ Gosford Strategic Studies, SGS, 2006;
- ▶ Central Coast Employment Lands Study , Background and Issues Report, PB, 2004;
- ▶ Gosford Vision 2025 A Strategic Direction for the Future, Gosford City Council 2004;
- ▶ Draft The Gosford Challenge , Gosford City Council 2010;
- ▶ A Focus on Business, CARE 2008 ; and
- ▶ Quality of Life Strategy 2007 -2010, Gosford City Council.

These documents are explained in detail in Appendix A.

3. Study Area Context

This section provides an overview of the regional and local context and the particular employment lands examined in this investigation.

3.1 Regional Context

Gosford City Council (shown below in Figure 2) is located on the New South Wales Central Coast between Sydney and Newcastle. The Central Coast region extends from the southern portions of Lake Macquarie in the north to the northern banks of the Hawkesbury River in the south. It contains the regional city of Gosford and major centres of Tuggerah and Wyong. The Gosford LGA is located within the 'Sydney surrounds' and shares borders with Wyong Shire Council and Cessnock City Council to the north, Hawkesbury City Council to the west and The Hills and Hornsby Shire Council's to the south, separated by the Hawkesbury River.

Figure 2 Gosford LGA in a Regional Context

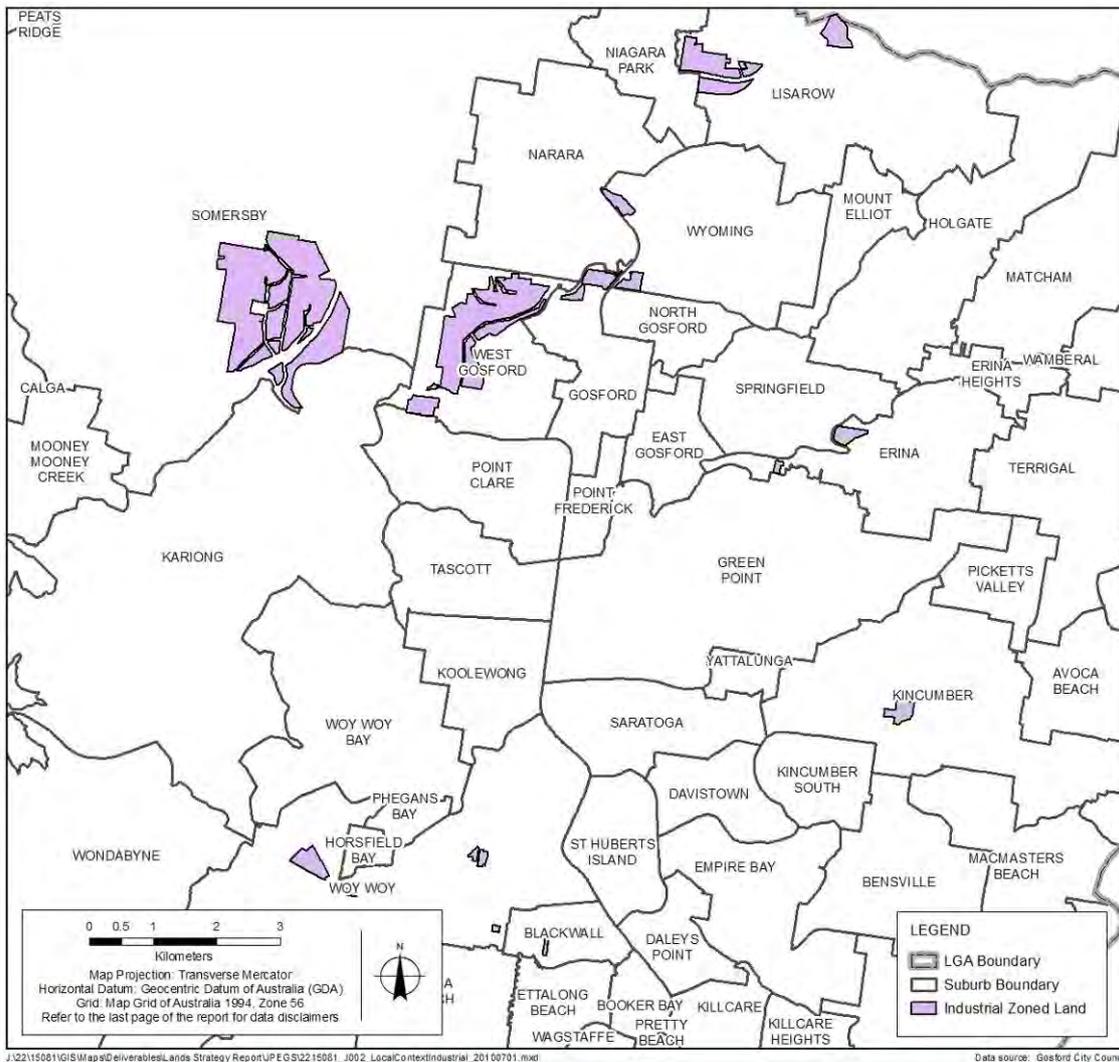


Source: Gosford City Council (2002)

3.3 Employment Lands

The employment lands are concentrated within the eastern portion of Gosford City at Lisarow, North Gosford and Wyoming, Erina, Somersby, West Gosford and Mount Penang.

Figure 4 Existing Employment Lands Location in Gosford



PART B

SITUATIONAL ANALYSIS

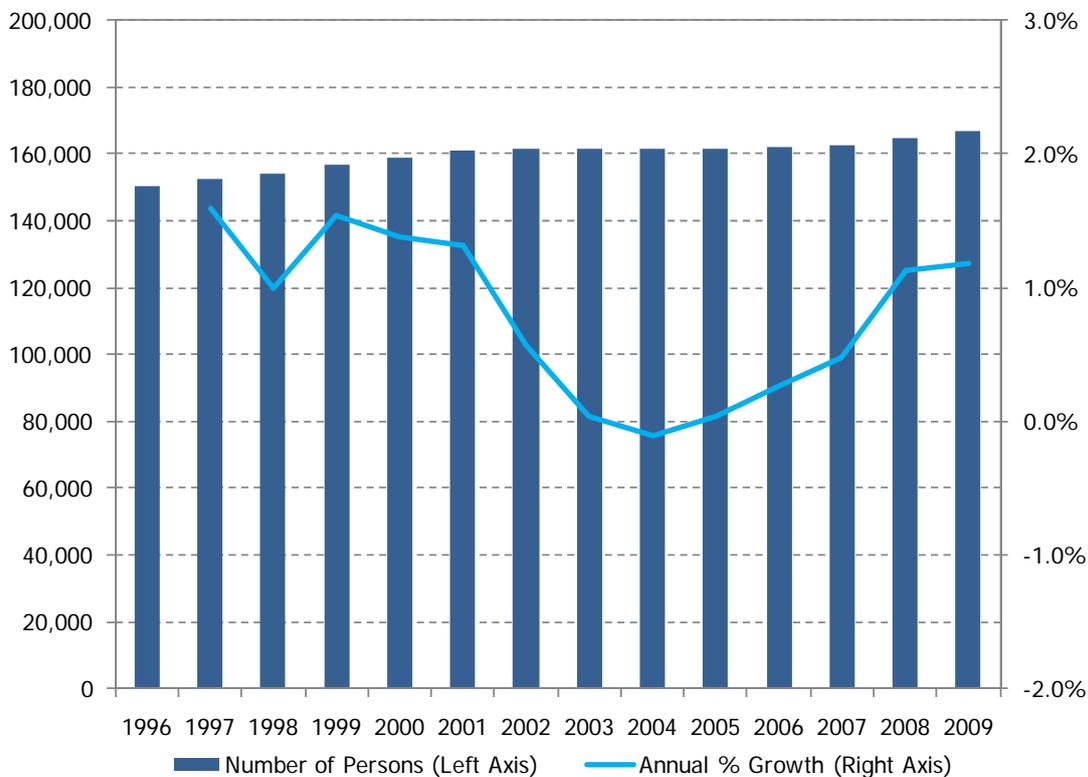


4. Socio- Economic Profile and Population Projections

4.1 Population

According to the ABS estimated resident population series, there were an estimated 166,626 persons residing in the Gosford LGA in 2009, equating to growth of 1.2% from 2008. Over the last five years, the population growth rate has increased after recording a decline in 2004 (see Figure 5).

Figure 5 Estimated Resident Population, Gosford LGA



Source: ABS (2010)

4.2 Demographics

The demographic profiling in this section provides an overview of 2006 Census demographic characteristics for the Gosford LGA based on place of usual residence. A summary of the key demographic characteristics is provided below with benchmarks to the Central Coast region and NSW.

- Age:** The average age of the resident population was 40.0 years in 2006, above the NSW average of 37.5 years. This can be explained by the popularity of the region for retirees and 'empty nesters'. Over the last decade the average age of residents has increased, consistent with national trends of an ageing population, brought about by a number of social trends, including lower fertility rates and improving life expectancy. The proportion of persons aged over 65 years accounts for 18.2% of the population, well above the State

average.

- ▶ **Ethnicity:** The proportion of people born overseas living in the Gosford LGA was recorded at 15.7% in 2006, below the State average of 25.6%.
- ▶ **Language:** The proportion of residents speaking a language other than English was 4.5% in 2006, well below the State average of 21.3%.
- ▶ **Households:** Couple families with children accounted for 30.2% of households in 2006, below the State average of 33.5%. Couple families without children accounted for 27.2% of households while lone person households accounted for 26.4%.
- ▶ **Employment:** The unemployment rate in the Gosford LGA was recorded at 6.2% in 2006, above the NSW average (5.9%). The unemployment rate is significantly higher in the younger age groups. The participation rate of 56.1% was also below the State average (58.9%) and reflects the older age demographic in the region and higher proportion of retirees.
- ▶ **Finances:** The average weekly income in the Gosford LGA was \$1,145 in 2006, well below the NSW average of \$1,264. Average monthly home repayments were \$1,662 in 2006, below the State average (\$1,706), while average weekly rent of \$214 was also below the State average (\$232).
- ▶ **Qualifications:** The proportion of residents with a bachelor degree or higher was 11.8% in 2006, below the NSW average 16.5%, while the proportion of residents with a certificate or diploma of 28.1% in 2006 was above the NSW average 24.2%.

Table 2 Demographic Indicators by Place of Usual Residence, 2006

Indicator	Gosford LGA	Central Coast Region	NSW
Age Distribution			
0-14 years	19.6%	20.4%	19.8%
15-24 years	12.3%	12.1%	13.3%
25-64 years	50.0%	49.2%	53.0%
65+ years	18.2%	18.2%	13.8%
Average age (years)	40.0	39.6	37.5
Ethnicity & Language			
Born in Australia	84.3%	85.7%	74.4%
Born overseas	15.7%	14.3%	25.6%
Speaks English only	95.5%	95.9%	78.7%
Speaks other language	4.5%	4.1%	21.3%
Household Characteristics			
Couple family with children	30.2%	29.9%	33.5%
Couple family without children	27.2%	27.3%	26.1%
One parent family	12.5%	13.2%	11.7%

Lone person household	26.4%	26.0%	23.8%
Average persons per household	2.48	2.49	2.59
Housing Tenure			
Fully owning home	36.6%	36.6%	34.8%
Purchasing home	33.4%	33.1%	31.9%
Renting	25.0%	25.8%	29.5%
Socio-Economic Characteristics			
Unemployment rate (% labour force)	6.2%	7.1%	5.9%
Participation rate (% of population > 15 years)	56.1%	54.8%	58.9%
Average weekly household income	\$1,145	\$1,071	\$1,264
Average monthly housing loan repayment	\$1,662	\$1,612	\$1,706
Average weekly rent repayment	\$214	\$206	\$232
Non School Qualifications			
% of persons with non-school qualification	39.9%	37.2%	40.7%
Bachelor degree or higher	11.8%	9.4%	16.5%
Certificate or Diploma	28.1%	27.9%	24.2%

Source: ABS (2007)

4.3 Labour

The Gosford LGA recorded an unemployment rate of 5.6% in the December Quarter 2009. This is below the New South Wales (6.1%) and in line with the Australian (5.6%) averages. These figures have to be treated with some caution due to the small sample sizes at the LGA level and significant standard errors. There is potential that the Gosford LGA figures are underestimated as anecdotal evidence indicates that the Gosford LGA has an unemployment rate above the State and national averages. There were an estimated 4,432 unemployed persons in Gosford in the December Quarter 2009. Trend analysis suggests the number of unemployed persons has increased resulting in the unemployment rate increasing from 4.0% in December 2008. The increase in the unemployment rate was felt similarly across both the State and Australia as a whole.

Table 3 Unemployment Rate Trends

	Dec-08	Mar-09	Jun-09	Sep-09	Dec-09
Gosford LGA	4.0%	4.6%	5.2%	5.3%	5.6%
Central Coast	5.2%	6.0%	6.8%	6.7%	7.2%
NSW	4.8%	5.2%	5.7%	5.9%	6.1%
Australia	4.2%	4.6%	5.0%	5.3%	5.6%

Source: DEEWR (2010)

4.4 Population Projections

There have been several population projections prepared for the Gosford LGA and the Central Coast Region including the *Central Coast Regional Strategy* and the NSW Department of Planning SLA projections. The NSW Department of Planning, as part of the *Central Coast Regional Strategy*, projects that the Central Coast population will grow from approximately 305,000 in 2006 to 405,000 in 2031. This represents an average annual increase of 4,000 residents per year. The NSW Department of Planning's SLA projections project slightly lower growth of 94,000 additional residents in the Central Coast between 2006-31. This includes the Gosford LGA population growing by 27,000 from 162,100 in 2006 to 189,100 in 2031.

Table 4 NSW Department of Planning Population Projections

	Population		Change(2006-31)	
	2006	2031	Total	Average Per Year
Central Coast Regional Strategy				
Central Coast Region	305,000	405,000	100,000	4,000
NSW DoP SLA Projections				
Gosford	162,100	189,100	27,000	1,080
Wyong	142,700	210,100	67,400	2,696
Central Coast Region	304,800	399,200	94,400	3,776

Source: DoP (2008a), DoP (2008b)

For the purposes of this investigation population projections prepared for the Gosford LGA between 2006 to 2036 at five year intervals based on the *Central Coast Regional Strategy* and the NSW Department of Planning's SLA projections (see Table 5). AECgroup has projected that the Central Coast regional population will increase to approximately 430,400 in 2036 with a breakdown between the Gosford and Wyong LGAs based on the NSW Department of Planning's SLA projections. For the purposes of this document the Gosford LGA's population is projected to increase by 36,777 to almost 200,000 in 2036.



Table 5 Adjusted Population Projections

	2006	2011	2016	2021	2026	2031	2036	Total	Av Per Year
Gosford	162,100	169,795	175,388	180,580	185,982	191,577	198,877	36,777	1,226
Wyong	142,700	155,045	169,492	184,340	198,978	213,423	231,523	88,823	2,961
Central Coast	304,800	324,840	344,880	364,920	384,960	405,000	430,400	125,600	4,187

Source: DoP (2008a), DoP (2008b), AECgroup (2010)

5. Opportunities and Competitive Assessment

5.1 Employment Lands Sector

The planning for, and analysis of supply and demand of, employment land requires the adoption of a set of industry definitions that are related to both available industry data and the Standard Instrument – Principal Local Environmental Plan definitions.

There is no universally accepted methodology to categorise employment land uses to assess projected demand. As discussed in the introduction, the *Central Coast Regional Strategy* defines employment lands as encompassing:

“clusters of major construction, manufacturing, light industry, transportation and storage activities. They include distribution centres, factories, warehouses and other industrial uses and should have high quality access to major strategic transport corridors.”

For the purpose of this study, the employment land sector has been categorised into the following sub-sectors:

- ▶ Heavy general industry:
 - Petroleum, coal, chemical and associated product manufacturing
 - Non-metallic mineral product manufacturing
 - Metal product manufacturing
 - Other noxious and hazardous uses;
- ▶ Modern general industry:
 - Food, beverage and tobacco manufacturing
 - Textile, clothing, footwear and leather manufacturing
 - Wood and paper product manufacturing
 - Printing, publishing and recorded media
 - Machinery and equipment manufacturing
 - Other manufacturing;
- ▶ Transport, warehousing & storage:
 - Wholesale trade
 - Transport & storage; and
- ▶ Other supporting industry:
 - Depot and service facilities for the construction industry
 - Communications facilities (e.g. call centres)
 - Retail outlets for manufactured goods or servicing the industrial estate
 - Financial and property service providers supporting industry; and
 - Personal services.

Together, the first three categories generally aggregate to the three broad industry sectors of manufacturing, wholesale trade and transport, postal & warehousing as defined by the Australian and New Zealand Standard Industrial Classifications (ANZSIC), 2006.

Light, general and heavy industry are the preferred uses in industrial zones in most planning

instruments. In the past, similar site requirements by large format and bulky goods retailers and warehouses has meant these business types have located in industrial zones. The Standard LEP Template for NSW defines Enterprise Corridor and Business Development zones for such commercial land uses.

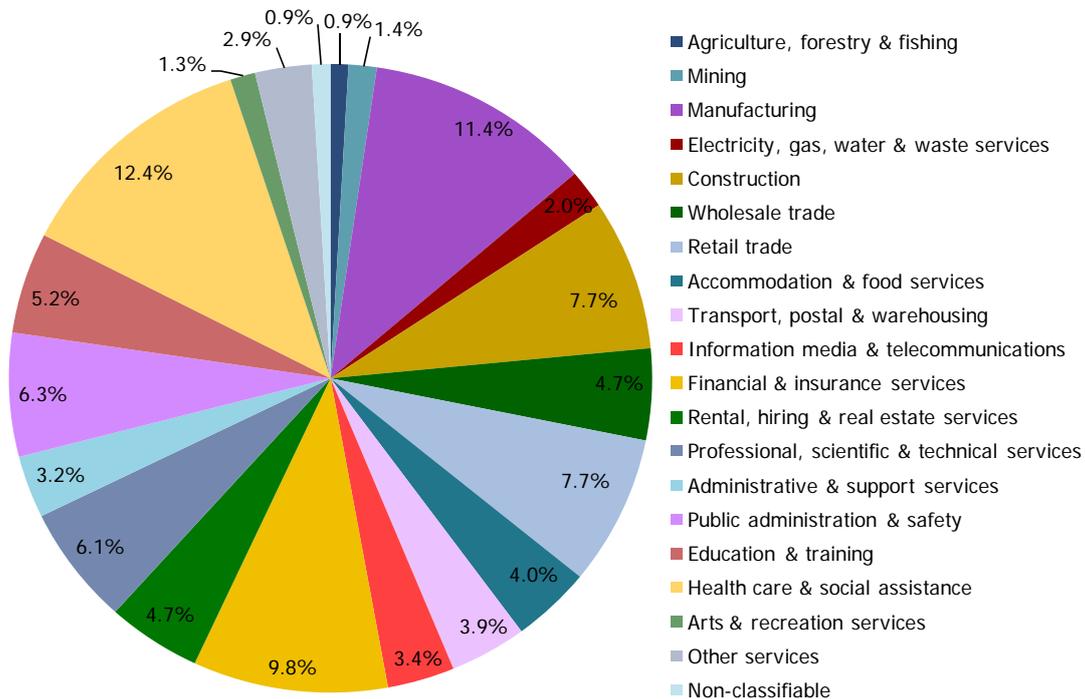
5.2 Economic Significance and Opportunities

5.2.1 Economic Size and Structure

Gross Regional Product (GRP) is a measure of a region's economy representing the total market value of final goods and services produced in a given region in a given period. The total GRP of the Gosford LGA was estimated at \$5.70 billion in 2008-09, equating to approximately 1.4% of the NSW economy.

The health care and social assistance sector contributed the largest value add to the Gosford economy (\$586.5 million or 12.4%), followed by manufacturing sector (\$538.6 million or 11.4%), finance and insurance services (\$463.2 million or 9.8%) and construction (\$365.1 million or 7.7%).

Table 6 Industry Contribution to GRP at Current Prices, 2008-09



Source: AECgroup (2010)

5.3 Employment

5.3.1 Employment by Industry

Employment by industry analysis provides an insight into which are the major employers of workers in the Gosford LGA and therefore which industries foster employment in the Gosford LGA.

The health care and social assistance sector was the largest employer in Gosford with an estimated 8,507 workers in 2006 which equated to 17.1% of total employment. This was significantly higher than the state average of 10.7% and reflects the significant retired population in Gosford. The other major industries of employment are retail trade (7,847 or 15.8%), manufacturing (4,686 or 9.4%) and accommodation and food services (3,939 or 7.9%).

Table 7 Employment by Industry, by Place of Work, 2006

Industry	Employment	% of Total			
	Gosford LGA	Gosford LGA	Central Coast	Sydney SD	NSW
Agriculture, forestry & fishing	522	1.1%	1.0%	0.4%	2.8%
Mining	115	0.2%	0.3%	0.2%	0.7%
Manufacturing	4,686	9.4%	10.5%	10.1%	9.7%
Electricity, gas, water & waste services	371	0.7%	1.2%	0.9%	1.0%
Construction	3,064	6.2%	6.6%	5.3%	7.1%
Wholesale trade	1,834	3.7%	3.5%	5.9%	4.8%
Retail trade	7,847	15.8%	16.5%	10.9%	11.3%
Accommodation & food services	3,939	7.9%	8.5%	6.1%	6.6%
Transport, postal & warehousing	1,364	2.7%	3.1%	5.3%	5.0%
Information media & telecommunications	730	1.5%	1.2%	3.1%	2.4%
Financial & insurance services	1,306	2.6%	2.5%	6.9%	5.2%
Rental, hiring & real estate services	1,096	2.2%	2.2%	2.0%	1.8%
Professional, scientific & technical services	2,530	5.1%	4.5%	9.4%	7.5%
Administrative & support services	1,256	2.5%	2.4%	3.2%	3.1%
Public administration & safety	3,241	6.5%	5.9%	5.9%	6.0%

Education & training	3,852	7.8%	8.3%	7.6%	7.8%
Health care & social assistance	8,507	17.1%	15.3%	10.3%	10.7%
Arts & recreation services	686	1.4%	1.4%	1.5%	1.4%
Other services	2,280	4.6%	4.3%	3.8%	3.9%
Inadequately described/Not stated	463	0.9%	0.9%	1.3%	1.2%
Total	49,689	100.0%	100.0%	100.0%	100.0%

Sources: ABS (2007)

5.3.2 Place of Work v Place of Residence

The ABS Census reports data on where respondents usually reside, with some data also reported on where respondents work. This data allows for a comparison of the industry structure in the Gosford LGA in relation to where residents live and where they work. This section provides an overview of the movement of workers by presenting the net balance (workers living in the Gosford LGA less workers employed in Gosford) of employment in each industry.

The Gosford LGA records a significant net outflow of employment with 17,168 more workers living in Gosford than work in Gosford. There is a net outflow of workers from Gosford in every industry with the largest outflows in the construction, property and business services, finance and insurance and transport, postal and warehousing sectors.

Table 8 Gosford Workers, 2006

Industry of Employment	Live in Gosford	Work in Gosford	Net Balance
Agriculture, forestry & fishing	566	522	-44
Mining	160	115	-45
Manufacturing	5,649	4,686	-963
Electricity, gas, water & waste services	679	371	-308
Construction	6,074	3,064	-3,010
Wholesale trade	2,608	1,834	-774
Retail trade	8,701	7,847	-854
Accommodation & food services	4,317	3,939	-378
Transport, postal & warehousing	2,735	1,364	-1,371
Information media & telecommunications	1,585	730	-855
Financial & insurance services	2,658	1,306	-1,352
Rental, hiring & real estate services	1,332	1,096	-236
Professional, scientific & technical services	4,069	2,530	-1,539
Administrative & support services	2,027	1,256	-771
Public administration & safety	4,298	3,241	-1,057
Education & training	4,969	3,852	-1,117
Health care & social assistance	9,156	8,507	-649
Arts & recreation services	985	686	-299
Other services	2,785	2,280	-505
Inadequately described/Not stated	1,504	463	-1,041
Total	66,857	49,689	-17,168

Sources: ABS Census (2007)

5.3.3 Journey to Work

As previously discussed, there is a significant outflow of workers from the Gosford LGA. In 2006, there were 66,859 employed persons residing in Gosford with approximately 37,320 working in Gosford, 14,390 in Sydney and 5,615 in the neighbouring Wyong LGA. This indicates that there is a significant leakage of workers with 20% of workers travelling to Sydney to work each day.

In 2006, there were 11,010 industrial workers residing in Gosford with approximately 5,000 working in Gosford, 3,500 in Sydney and 1,175 in the neighbouring Wyong LGA. This indicates that there is a significant leakage of residents travelling to Sydney to work each day.

Table 9 Place of Work of Gosford Residents, 2006

Location	Industrial Workers ^(a)	Total
Gosford	5,001	37,320
Wyong	1,176	5,615
Hunter	154	850
Sydney	3,502	14,387
Elsewhere	776	5,794
Not Stated	401	2,893
Total	11,010	66,859

Note: (a) People employed in the manufacturing, wholesale trade and transport, postal and warehousing industries.
Sources: ABS Census (2007)

The majority of industrial workers in Gosford also reside in Gosford (5,000 or 63%) with 2,263 or 29% residing in the Wyong LGA.

Table 10 Place of Residence of People Working in Gosford, 2006

Location	Industrial Workers ^(a)	Total
Gosford	5,001	37,320
Wyong	2,263	9,496
Hunter	296	1,289
Sydney	241	1,064
Elsewhere	93	522
Total	7,894	49,691

Note: (a) People employed in the manufacturing, wholesale trade and transport, postal and warehousing industries.
Sources: ABS Census (2007)

5.3.4 Employment Forecasts and Targets

The *Central Coast Regional Strategy* outlines an employment target of an additional 45,000 new jobs in the Central Coast between 2006 and 2031. A key issue identified for the Central Coast over the next 25 years is to increase the current level of employment self containment. Historically, local employment growth has not kept pace with increases in population. Improving economic development and increasing local employment is fundamental to maintaining or reducing the proportion of workers commuting out of the Region over the next 25 years.

The employment target for the Gosford LGA is 18,000 additional jobs by 2031 with a third in the Gosford City Centre, half in the smaller centres and 3,000 in employment (industrially zoned) lands.

Table 11 Central Coast Employment Capacity Targets (jobs) by LGA and Hierarchy, 2006-31

Centre Type	Gosford LGA	Wyong LGA
Regional City – Gosford	6,000	0
Major Centre – Tuggerah-Wyong	0	5,500
Other Centres	9,000	9,000
Employment Lands	3,000	2,000
North Wyong Structure Plan	0	10,500
LGA Totals	18,000	27,500
Regional Total	45,000	

Sources: DoP (2008a)

The Central Coast Regional Economic Development and Employment Strategy also targets an additional 45,000 jobs in the region by 2031.

The Central Coast Regional Strategy predicts the following sectors as having potential for employment growth including:

- ▶ Business and professional services such as accounting, financial management, IT and legal services;
- ▶ Manufacturing and logistics;
- ▶ Retail;
- ▶ Health and social services;
- ▶ Education;
- ▶ Light industrial;
- ▶ Tourism and culture; and
- ▶ Home based businesses.

The *Gosford Draft Economic Development Program 2008/10* outlines that the *draft Gosford LEP 2009* has a capacity of an additional 53,005 jobs. This includes 4,111 jobs in employment land with:

- ▶ 3,000 in Somersby;
- ▶ 894 in West Gosford; and
- ▶ 217 in other precincts.

This investigation has accepted the employment target of 45,000 additional jobs in the Central Coast region by 2031 as outlined in the *Central Coast Regional Strategy* and *Central Coast Regional Economic Development and Employment Strategy*. In order to achieve these targets, Gosford will have to increase its containment rate by reducing the outflow of residents who work in Sydney and neighbouring areas. This will be crucial as an ageing population in the region is also likely to see the workforce participation rate decline further over time.

This investigation has taken the minimum target of 3,000 additional jobs for employment lands in Gosford by 2031, as outlined in the *Central Coast Regional Strategy* and expanded through

to 2036 in a low and high scenario:

- ▶ Low: An additional 3,115 jobs to be created in employment lands in the Gosford LGA by 2036. This is based on a minimum target of 3,000 additional for employment lands in Gosford by 2031, as outlined in the *Central Coast Regional Strategy*, and projected population growth of 3.8% between 2031 and 2036 in Gosford.
- ▶ High: An additional minimum target of 3,600 jobs to be created in employment lands in the Gosford LGA by 2036. This is based on a minimum target of 3,000 additional for employment lands in Gosford by 2031, as outlined in the *Central Coast Regional Strategy*. This equates to 120 jobs per year which corresponds to 3,600 jobs over the 30 years between 2006 and 2036.

5.4 Employment Lands Business Sector Profile

According to the ABS Count of Australian Businesses, there were 13,464 active businesses located in Gosford in June 2007. Property and business services (3,801) and construction (3,039) businesses accounted for over half of the total. There were an estimated 1,611 industrial businesses in Gosford including 645 manufacturing, 519 transport and storage and 447 wholesale trade.

The Central Coast region has been successful in attracting large businesses in the food processing, manufacturing and logistics sectors with these businesses generally being part of national or global enterprises. Major businesses currently located in the Gosford LGA include:

- ▶ Boral;
- ▶ Borg Manufacturing;
- ▶ CSR Hebel;
- ▶ Inghams;
- ▶ Sara Lee;
- ▶ Theiss Recycling; and
- ▶ Toll.

Table 12 Businesses in Gosford, June 2007

Industry	Businesses	% of Total
Agriculture	399	3.0%
Mining	21	0.2%
Manufacturing	645	4.8%
Electricity, Gas & Water Services	21	0.2%
Construction	3,039	22.6%
Wholesale Trade	447	3.3%
Retail Trade	1,542	11.5%
Accommodation, Cafes & Restaurants	327	2.4%
Transport & Storage Services	519	3.9%
Communications Services	144	1.1%
Finance & Insurance Services	750	5.6%
Property & Business Services	3,801	28.2%
Education	135	1.0%
Health & Community Services	828	6.1%
Cultural & Recreation Services	408	3.0%
Personal & Other Services	438	3.3%
Total	13,464	100.0%

Note: 1993 ANZSIC
Sources: ABS (2008)

5.4.1 Significance of Employment Lands Sector

As previously discussed, the employment lands sector can be categorised by the three broad industry sectors of manufacturing, wholesale trade and transport, postal and warehousing. The total value add of these sectors was estimated at \$942.7 million in Gosford in 2008-09, accounting for 16.5% or about one sixth of the total. This percentage of economic contribution was below the NSW average of 17.8%.

The contribution of the industrial sector in terms of employment and businesses is lower than value add indicating a relatively higher value add per employee in these sectors. The industrial sector accounted for 15.9% of total employment in Gosford and 12.0% of businesses. Based on a value add of \$942.7 million and employment of 7,884, the average industrial worker in Gosford contributed almost \$120,000 in value add to the regional economy.

Table 13 Economic Significance of Industrial Sector in Gosford

Industry	Industry Value Add		Employment in Gosford ^(a)		Businesses	
	\$M	%	No.	%	No.	%
Manufacturing	\$538.6	9.4%	4,686	9.4%	645	4.8%
Transport, Postal & Warehousing	\$182.7	3.2%	1,364	2.7%	519	3.9%
Wholesale Trade	\$221.5	3.9%	1,834	3.7%	447	3.3%
Total Industrial	\$942.7	16.5%	7,884	15.9%	1,611	12%
Total Economy	\$5,699.7	100%	49,689	100%	13,464	100%

Note: (a) 1993 ANZSIC
Sources: ABS (2007), ABS (2008), AECgroup (2010)

5.5 Industry Location Quotients

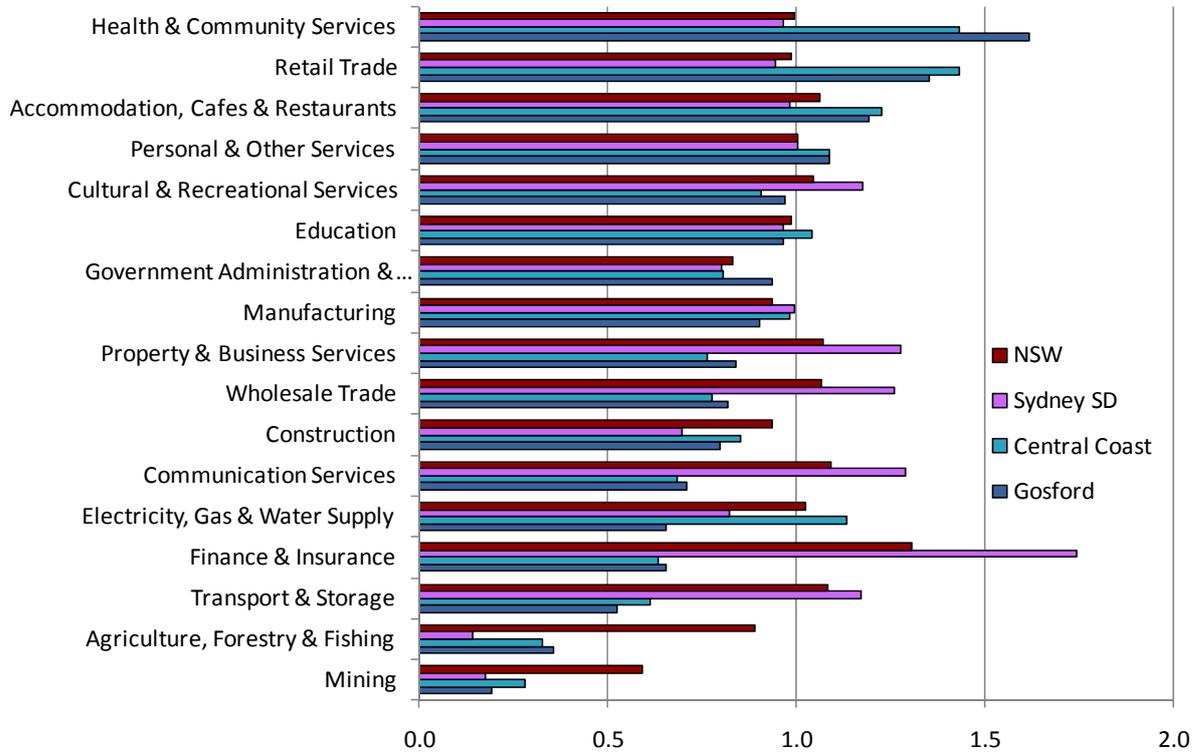
In order to demonstrate the specialisation of labour in the region, location quotients based on employment have been calculated. The location quotients demonstrate the degree to which a local or regional economy is specialised; by examining the proportion of employment in an industry sub-sector compared to a larger economy (Australian economy). Location quotients can be used to indicate strengths and weaknesses of a local or regional workforce, which can be a competitive advantage. These competitive advantages can then be considered in relation to the other advantages of the region and broader industry/economic trends to determine opportunities for the industry growth.

For this project, the location quotient analysis has compared the Gosford LGA, the Central Coast region, the Sydney metropolitan region (represented by the Sydney Statistical Division) and New South Wales with the Australian economy. A location quotient of “1” means that the economies being compared have an equal share of employment compared to Australia (or the national average) for a specific industry sector, thus no potential advantage either way. A location quotient above “1” indicates a specialisation of labour and therefore an area of potential competitive advantage. If the location quotient is below “1”, the area has a relative weakness in this particular industry sector.

As demonstrated in the figures below, Gosford and the Central Coast have significant strengths in the service sectors including health & community services, retail trade, accommodation, cafes & restaurants and personal & other services. This reflects the significant tourism sector in the region and the relatively higher proportion of retirees.

Overall, the industrial sectors including manufacturing (0.9), wholesale trade (0.8) and transport & storage (0.5) account for a lower proportion of employment compared to the national average. While transport & storage has a relatively low proportion of employment, indicating a competitive disadvantage, the sector represents a growth opportunity as discussed later in the chapter.

Figure 6 Location Quotient by 1-Digit 1993 ANZSIC Codes, Gosford



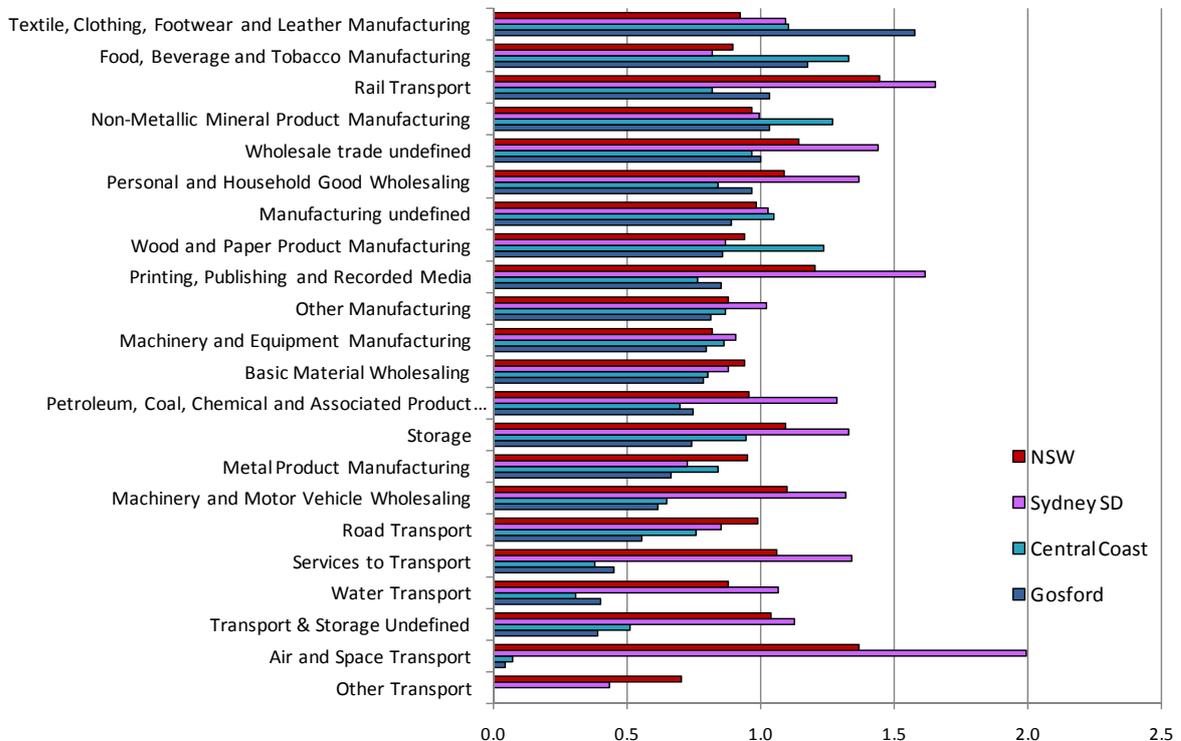
Sources: ABS (2007)

As demonstrated above, Gosford has a location quotient below “1” for manufacturing, wholesale trade and transport & storage sectors, indicating a limited specialisation of labour (a competitive disadvantage) in these sectors.

When the subsectors of the industrial sector are analysed at the more detailed 2 digit ANZSIC level, Gosford has relative strengths (and competitive advantages) in the following sub-sectors:

- ▶ Textile, clothing, footwear and leather manufacturing;
- ▶ Food, beverage and tobacco manufacturing;
- ▶ Rail transport; and
- ▶ Non-metallic mineral product manufacturing.

Figure 7 Location Quotient by 2-Digit 1993 ANZSIC Codes, Gosford, Manufacturing, Wholesale Trade and Transport & Storage



Sources: ABS (2007)

As demonstrated below in Figure 8 the proportion of employment in the Gosford LGA is above the national average for 12 subsectors. The sector with the highest location quotient is textile product manufacturing (4.2). This strength is largely due to the significant operations and workforce of Albany International, which manufacturers textiles for the paper and fibre-cement manufacturing sectors. Albany International has closed operations in Gosford which will significantly reduce the sectors location quotient.

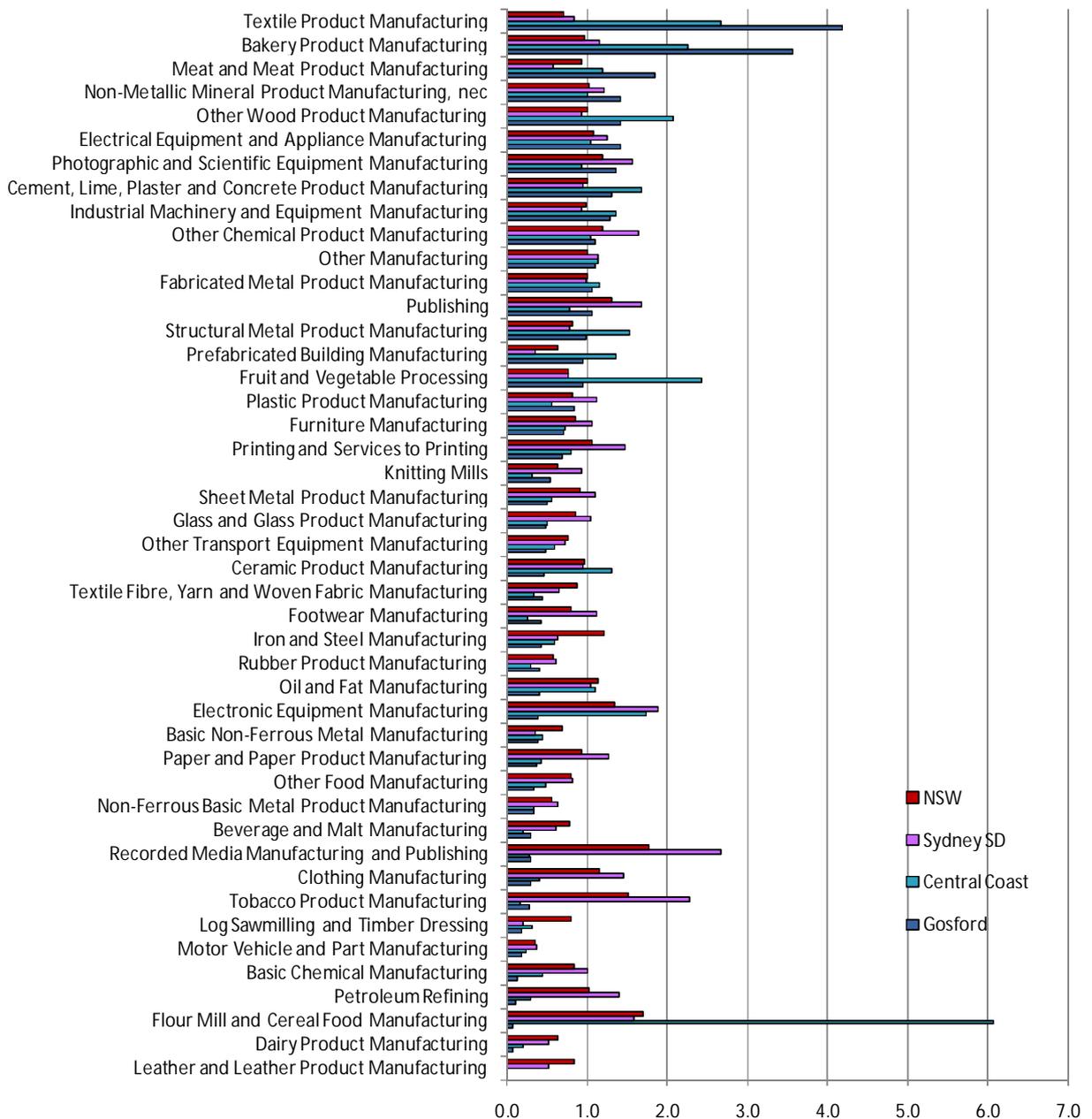
Bakery product manufacturing has a location quotient of 3.6 which indicates a very strong presence.

Gosford has a location quotient of above “1” for the following 3 digit ANZSIC manufacturing sectors, demonstrating a strong presence and capability in these industries:

- ▶ Textile product manufacturing;
- ▶ Bakery product manufacturing;
- ▶ Meat and meat product manufacturing;
- ▶ Other wood product manufacturing;
- ▶ Electrical equipment and appliance manufacturing;
- ▶ Photographic and scientific equipment manufacturing;
- ▶ Cement, lime, plaster and concrete product manufacturing;
- ▶ Industrial machinery and equipment manufacturing;
- ▶ Other chemical product manufacturing;

- ▶ Other manufacturing;
- ▶ Fabricated metal product manufacturing; and
- ▶ Publishing.

Figure 8 Location Quotient by 3-Digit 1993 ANZSIC Codes, Gosford, Manufacturing

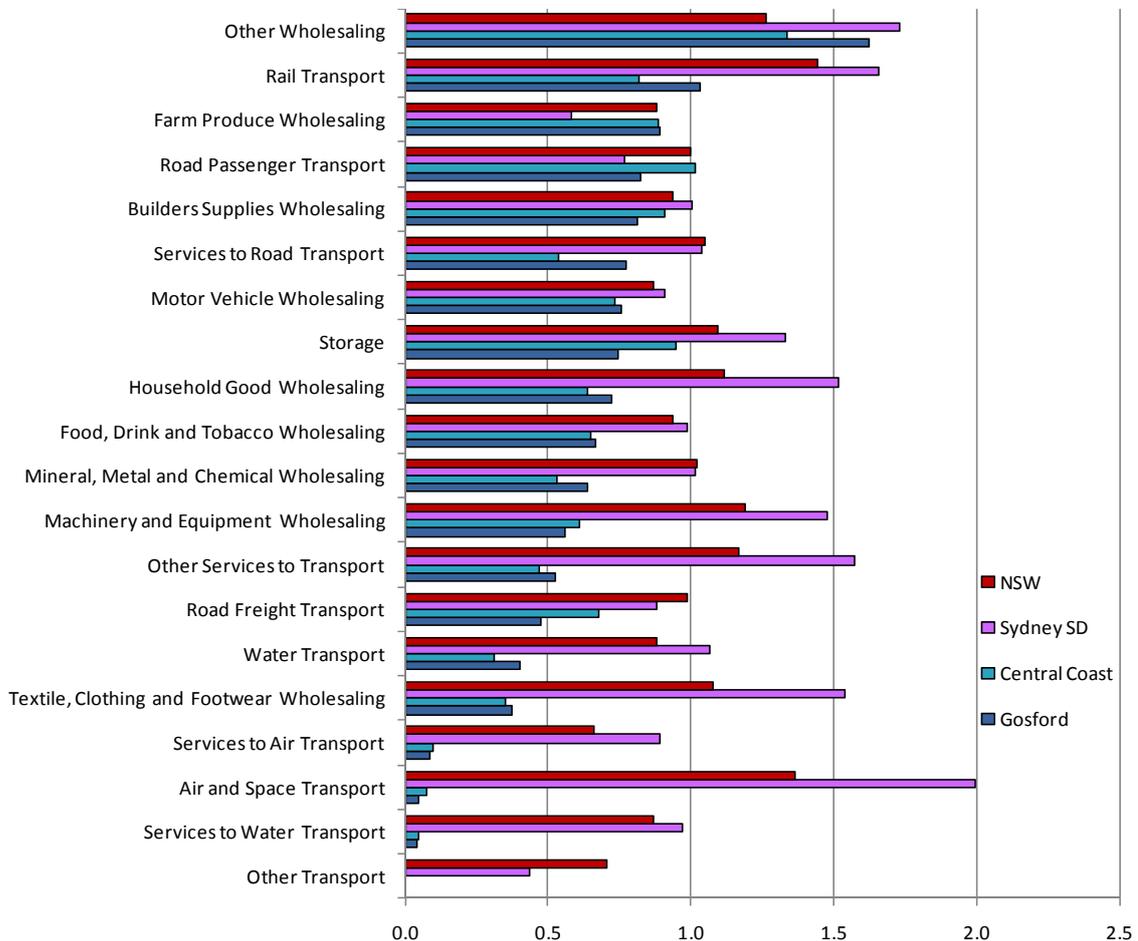


Sources: ABS (2007)

As demonstrated in Figure 9 below, Gosford records employment below the national average in most wholesale trade and land-based freight sectors which demonstrates a lower level of capacity in those sectors. Gosford records a location quotient of above “1” for two 3 digit ANZSIC wholesale trade and transport & storage sectors which include other wholesaling and rail transport. While the majority of wholesale trade and transport & storage sectors have a relatively low proportion of employment, indicating a competitive disadvantage, the sector

represents a growth opportunity as discussed later in the chapter.

Figure 9 Location Quotient by 3-Digit 1993 ANZSIC Codes, Gosford, Transport & Storage and Wholesale Trade



Sources: ABS (2007)

5.6 Competitive Strengths and Weaknesses

An assessment of the other competitive strengths and weaknesses of the economy builds further on the location quotients to identify assets and constraints that will impact on economic growth opportunities in the industrial sector.

A strategic asset assessment of Gosford confirms that there are a number of locational, geographical and industry characteristics to support future economic development in the industrial sector including:

- ▶ **Availability of Industrial Zoned Land:** According to the audit of industrial zoned land by Gosford City Council there is a significant availability of industrial zoned land including the Somersby Industrial Park which has major land parcels and good access to transport infrastructure.
- ▶ **Existing Industrial Base:** Gosford has an established industrial sector including manufacturing, transport and wholesale trade including the presence of well-developed supply companies and maintenance services. These well-established supply chains are a

significant asset for further industrial development.

- ▶ **Resident Workforce:** Gosford has an extensive resident workforce of approximately 70,000 with a significant proportion in the industrial sector. This represents a large pool of potential workers for industrial businesses across the manufacturing, transport and wholesale trade sectors.
- ▶ **Transport Infrastructure and Accessibility:** Gosford is strategically located between Sydney and Newcastle on the Eastern Seaboard of Australia in close proximity to Australia's largest consumer markets. This includes good access to road infrastructure such as the F3 and rail corridors.
- ▶ **Agricultural Sector:** The Central Coast has a well established agricultural sector with significant production in the Central Coast Plateaus and Wyong Valley. This supports a significant food processing and support sector in the region.
- ▶ **Proximity to Education Facilities:** The TAFE – Hunter Institute has three campuses throughout the Central Coast including the Gosford campus. The University also has a major presence in the Central Coast with their campus at Ourimbah.

The strategic asset assessment also identified weaknesses of the industrial land sector in the Gosford LGA including:

- ▶ **Employment:** While the large resident workforce is a competitive strength of the Gosford LGA, some of the key characteristics of the workforce are a weakness. These include:
 - Regional Outflow: There is a significant outflow of residents each day who travel outside the region to work. This involves a significant proportion of residents travelling to Sydney each day. While this is a weakness of the local economy, it also represents an opportunity as there is a large pool of potential workers.
 - Participation: The Gosford LGA has a lower labour force participation rate than the State and national averages. This is largely a function of the relatively older population and number of retirees.
 - Unemployment: The Gosford LGA has traditionally had higher unemployment levels than the State and national averages. This is particularly a problem for younger people reflecting a shortage of entry level jobs and lower education levels in the region.
- ▶ **Land Costs:** There are indications that the cost of industrial land is relatively high with some prime locations in line with Sydney prices. This is constraining investment as the market views some land as overpriced with owners happy to hold onto their land holdings in the short-term.
- ▶ **Estates at Capacity:** Some industrial precincts are at (or near) capacity which can be seen as an impediment to investment where businesses want to service a local area.

5.7 Industry Trends

Strong population and residential growth is resulting in urban expansion and encroachment on industrial land. Many traditional employment land precincts in the inner suburbs of Sydney, such as Botany and Silverwater, have very limited expansion potential due to the encroachment of residential and other land uses. This means that companies have limited capacity to expand their operations on-site and are looking to move operations to the outer suburbs of Sydney where there are suitable parcels of land. This has also resulted in industrial businesses

considering new locations such as the Central Coast. Residential encroachment also poses other problems such as increased traffic congestion and the sharing of roads between trucks and residents. As discussed below, good road access is very important to a lot of industrial businesses.

Access to transport infrastructure is becoming increasingly important in the employment lands sector with strong growth in the transport and logistics sector and the importance of distribution. Businesses are increasingly reassessing their distribution networks and relocating operations based on efficiency gains from an improved location. This is reflected by the success of new industrial estates such as the Erskine Business Park and Eastern Creek employment land precincts in Western Sydney which have good access to major road arterials.

A trend affecting the demand for employment lands has been the emerging trend towards business parks. This includes companies consolidating operations into a single site that combines head office, back office, manufacturing, warehouse and distribution activities. These parks are generally located away from centres on large sites with more space, landscaping, visually pleasing office buildings, and more onsite car parking.

The manufacturing sector in Australia has been undergoing significant change in the last two decades. Established manufacturing operations in Australia have been experienced significant pressure from other countries where the cost of labour and operation is considerably lower. This has seen a lot of 'lower value add' manufacturers move overseas to take advantage of lower costs. Gosford has experienced this with Albany International announcing in 2009 that it would be closing down its Lisarow operations and moving to China.

As the 'lower value add' manufacturers move offshore, the Australian manufacturing sector has been transforming with growth in the advanced high value sector. The expanding sector is characterised by significant investment in innovation, research and development which sets it apart from other countries.

5.8 Industry Growth Opportunities

When identifying key industry sector opportunities for growth, it is important to consider existing industry strengths, leveraging the competitive strengths of the region and trends across the employment lands sector. Specific industry sectors for growth include:

- ▶ **Equipment and machinery manufacturing:** The metal fabrication and machinery manufacturing sector is well established in Gosford with a strong workforce. Opportunities for Gosford include metal fabricators manufacturing building, roofing and aluminium products to help meet demand for new housing in the region.
- ▶ **Food processing and beverages:** Food processing already represents a competitive strength of the Gosford economy. There are significant parcels of rural lands west of the F3 across the mountains area and Wyong Valley which generally have good soils and rainfall. Further, the importance of this area is recognised with SREP8 – CC Plateau areas that aim to facilitate primary production (now a deemed SEPP). On the back of growth in agricultural production there is potential for growth in food processing which benefits from being in close proximity to production to minimise transport time and costs. Potential sectors include:
 - Poultry and meat product processing;
 - Fruit and vegetable processing;
 - Bakery product manufacturing and packaged foods; and

- Beverage production such as brewing, distillery and other drink products.
- ▶ **High value-add manufacturing:** As previously discussed, the manufacturing industry in Australia is evolving with a higher focus on operations leveraging innovative research and new technologies. Well established industries and businesses are closing down as competitive cost pressures from overseas become too strong to ignore. The closure of Albany International operations will result in approximately 50 lost jobs which will have an impact on the local economy in relation to increased unemployment. There will be opportunities for skills transference and greater training with demand for staff with specific skills. Potential industries could include advanced plastics, moulded products, medical devices, glass products and optical equipment.
- ▶ **Transport, warehousing and logistics:** The transport and logistics sector is one of the fast growing industries in Australia with opportunities for Gosford to attract business investment. This strong growth will create opportunities even though the proportion of employment in the industry in Gosford is below national averages. Growth in the sector is also supported by Gosford's strategic location between Sydney and Newcastle with good access to road infrastructure such as the F3 and rail corridors. Potential opportunities could include:
 - Distribution centres for large retailers;
 - Road freight companies;
 - Warehouses; and
 - Logistics and distribution operations servicing the Eastern Seaboard of Australia.
- ▶ **Industrial services:** Industrial business and population growth in the Central Coast will drive demand for support services. This could include small scale retail, mechanics and fleet related services.

PART C

SUPPLY AND DEMAND ANALYSIS



6. Employment Lands Supply

In order to assess the future employment land needs of Gosford LGA an analysis of the existing supply of zoned employment land is an important step.

6.1 Existing Employment Land Precincts

There are eight employment land precincts currently located in the Gosford LGA a summary of each is outlined below.

6.1.1 Somersby

The Precinct Area

The Somersby precinct is the biggest industrial area in the Gosford LGA comprising a total area of 296.5 ha zoned industrial under Gosford LEP No 22 (refer to Figure 11). The employment lands are located adjacent to the Kariong Interchange of the Sydney – Newcastle Freeway about 6 kilometres to the west of the Gosford City Centre. The Somersby Precinct is bisected by the Sydney Newcastle F3 Freeway.

There are 197 lots within the precinct with an average size of 14,472.2 sqm. This includes 56 lots over 1 ha in size with 39 over 2 ha. The landownership is fragmented with the majority of land uses linked to manufacturing. Other uses include vehicle show rooms at the entrance to the site. Companies located there include CSR Hebel, Sulo, Wier Engineering, Harvey Norman, Aluminium Shape Makers, Scholastic Books, Sapphire Aluminium Industries, Delta Laboratories and Coles Logistics.

This area is zoned 4(a1) General Industrial under the *Gosford LEP No 22* and is proposed to be zoned IN1 General Industrial under the *draft Gosford LEP 2009*. An additional 14.3 ha of Industrial land is proposed to be zoned IN1 General Industrial under the draft Gosford LEP 2009 (total zoned land in Somersby Precinct is 310.8 ha). The additional areas are the rationalisation of some lands currently zoned special use. Within the park there is a small area of commercially zoned land which is proposed to be rezoned as B5 Business Development (currently zoned 3(a2) Business under the *Gosford LEP No 22*). The purpose of this zone to provide a range of commercial and retail uses to support the park.

A Plan of Management for Somersby Industrial Park was adopted in 2005. Items of indigenous and ecological significance have been identified in the area and the POM aims at balancing conservation and development objectives and increases land owners and investment certainty through a series of management zones and controls (refer to Appendix A for more information).

The precinct has a maximum elevation of 220 m AHD falling to around 120 m to the south. Piles Creek runs through the precinct which flows in a north south direction and is joined by a number of tributaries (GCC, 2005).

A flora and fauna study was undertaken for the Plan of Management for Somersby Industrial Park (GCC, 2005). The study found that Somersby contains vegetation and fauna species that are threatened and afforded the protection of NSW and Commonwealth legislation. The Somersby vegetation communities provide habitat that remains of significance to threatened fauna species and therefore have been identified to be protected. However, there are

significant areas in the precinct which are cleared, or contain heavily modified vegetation.

The Gosford area is identified by the Darkinjung Local Aboriginal Land Council as being significant to their history of occupation in the area. The Somersby Plan of Management (GCC, 2005) identified sites within the precinct that comprise of Aboriginal objects in particular rock art. The POM established management zones and controls to retain all rock art and a representative sample of grinding grooves within the precinct.

Several areas within this precinct have been identified a bushfire prone vegetation category 1 and 2. In addition there are several sites within this precinct which have been identified as having potential contamination.

Surrounding the site to the north and west is rural land use (proposed to be zoned RU1 primary production). The majority of this land has been cleared for grazing; however, there are pockets of dense vegetation throughout it. Bounding the site to the east is dense vegetation which is proposed to be zoned RU2 Rural Landscape under the *draft Gosford LEP 2009* some of which forms Western Coastal Open Space System (COSS). Beyond the rural land use to the west is the Brisbane Water National Park. This area provides a visual backdrop to the Somersby Precinct as shown in Figure 10.

Bounding the site to the south west is the now closed 'Old Sydney Town' theme park. This site is 64.5 ha and is relatively cleared of vegetation with some dense vegetation to the south and north west. A proportion of this site has been identified as a heritage item. The Australian Reptile Park is also located within this area.

Entering the precinct from the Central Coast Highway is a large car showroom. The Mount Penang Parklands is located direct adjacent to the north and east of these showrooms.

Figure 10 Somersby Precinct – view to the west



Mount Penang Parklands

The Mount Penang Parklands is a 196 hectare government-owned and controlled development located to the south east of the Somersby Industrial Park. DCP 144 - Mount Penang Festival Development Site was adopted by Council on the 7 March 2000 (refer to Appendix A for more information). Mount Penang has been continuously used for a Juvenile Justice Centre since 1912 and has cultural and social heritage values as well as some rare and endangered flora and fauna. The DCP was developed to guide the orderly development of the site.

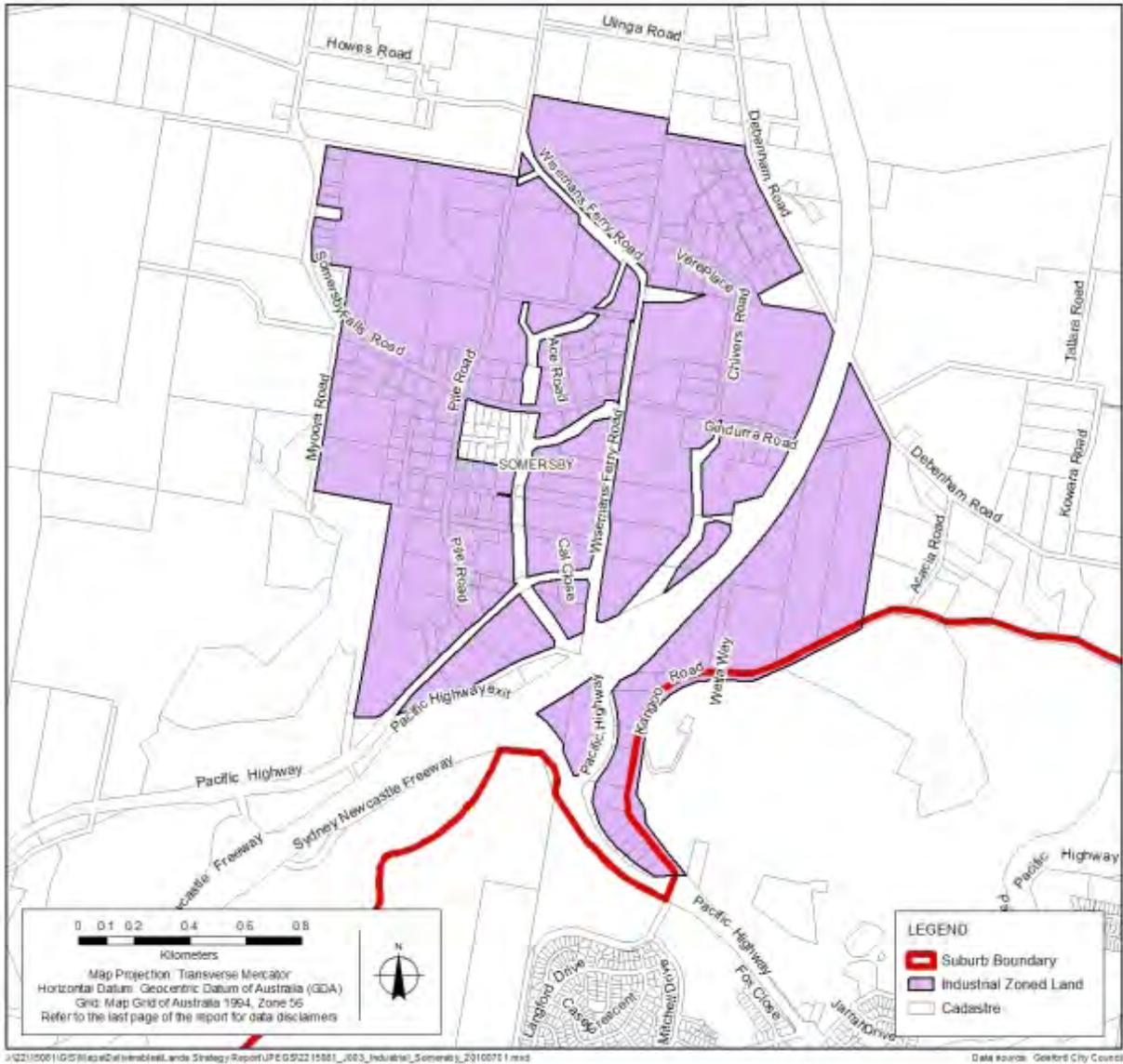
The DCP also provides a concept plan for the site including a festival precinct, sports precinct, a mixed use precinct, permanent gardens and bushland. It is understood that a new Masterplan is in the course of preparation, aligned with the listing of the site as a potentially state significant site.

However, within the festival precinct the Department of Education and Training acquired and developed a high school. The high school was opened in 2010 with a cohort of Years 7 and 8 students and will be fully established (Yrs 7-12) by 2014. Due to the acquisition of the site for the high school the event park was relocated to the west of the Mt Penang gardens.

The concept plan also identified an area for potential industrial and commercial uses on the western side of the site (Kangoo Road Precinct). This area is remote from the heritage precincts and covers an area of approximately 27 hectares. This precinct is described as gently sloping with open grassland and pockets of dense bushland. The concept plan envisions a corporate business park for the precinct which is intended to comprise of several 2 to 3 storey buildings with a total floor area of around 120,000 sqm.

The remainder of the site has either indigenous or non indigenous heritage values or vegetation management constraints. A large area to the east comprises of extensive landscaped gardens, recreational facilities and a substantial area of bushland.

Figure 11 Somersby Employment Lands Precinct



6.1.2 West Gosford Precinct

The West Gosford industrial precinct is located approximately 2 km west of the Gosford City Centre. Manns Road dissects the precinct which extends north from the Pacific Highway on either side of Manns Road for approximately 2.5 kms. This elongated precinct is Zoned 4(a) Industrial under the Gosford Planning Scheme Ordinance and is proposed to be zoned IN1 General Industrial under the *draft Gosford LEP 2009*.

The precinct comprises 281 lots with a total area of 129.5 ha. The majority of lots (113) are between 4,000 – 10,000 sqm with 90 between 2,000 – 4,000 sqm and 62 between 1,000 – 2,000 sqm.

Bounding the precinct to the east is Narara Creek, to the west is a large escarpment with dense vegetation which is proposed to be zoned E2 Environmental Protection under the *draft Gosford*

LEP 2009. This area wraps around to bound the precinct to the north with a low density residential area beyond this. The precinct is fairly flat, however the western side of the precinct slopes slightly towards the escarpment to the west. Due to its proximity to Narara Creek this precinct is affected by sea level rise as well to some degree the 1 in 100 year flood levels. In addition some lots adjacent to Narara Creek have been identified as having a risk of acid sulfate soils.

Adjacent to the precinct to the south is land zoned for commercial use (B5 Business Development) along the Pacific Highway. The commercial uses are accessed from the Pacific Highway and include a furniture store, a motel, service station, take away food and mixed business development.

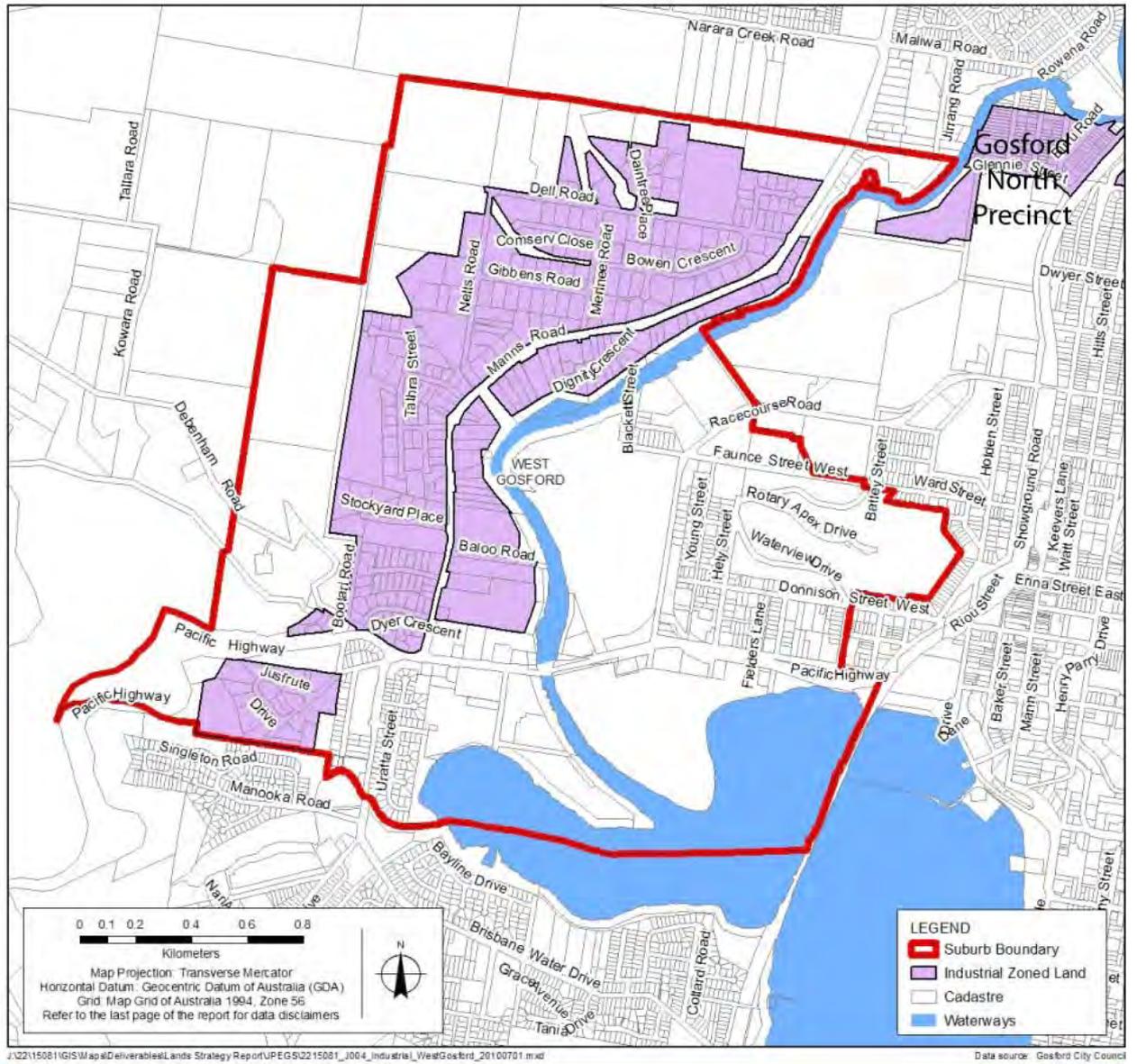
The precinct has undergone a significant transition over the last decade with the predation of numerous sites by bulky goods and commercial businesses. Within this precinct, it is noted that a bulky goods development has occurred opposite Stockyard Place. This development was facilitated by way of an enabling clause on part of what was the former abattoir site, with a limitation on floor area of 12,000 m² (refer to LEP 387 gazetted in 2000). The proximity of this bulky goods development to business zoned land located on the Pacific Highway has lead to a high degree of speculation as to appropriateness of zoning of the land located between the two areas.

Figure 12 West Gosford – Photo 1: Bulky goods retailing

Photo 2: Narara Creek provides a natural boundary



Figure 13 West Gosford Employment Lands Precinct



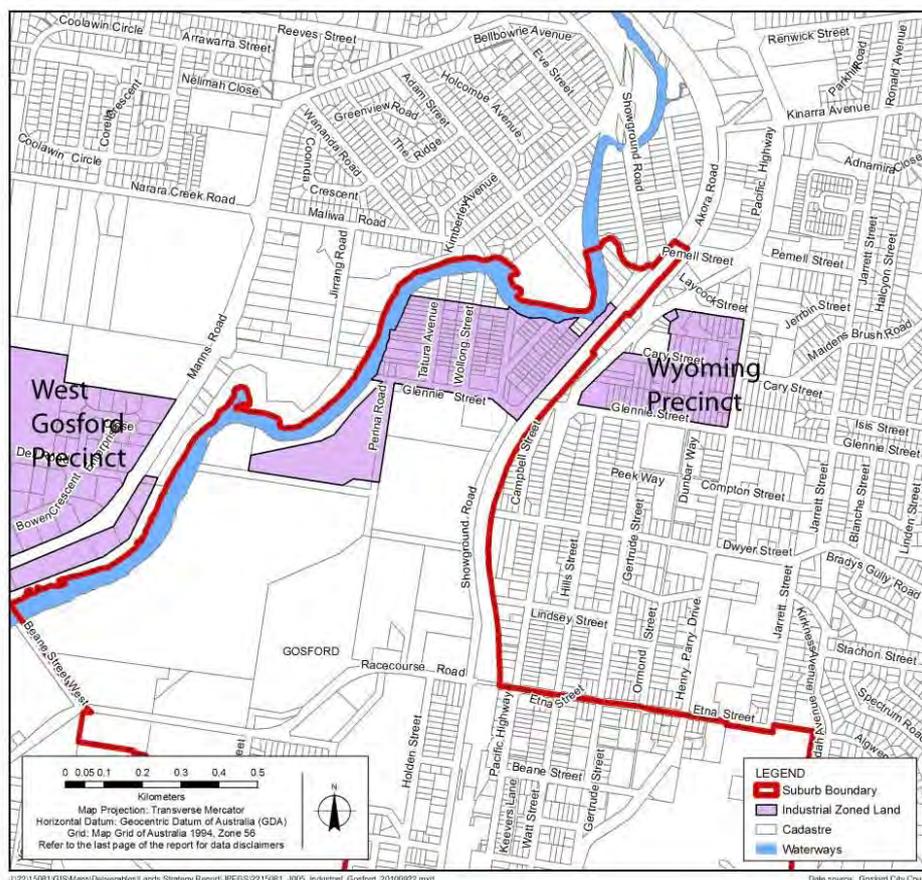
6.1.3 Gosford (North)

Gosford (north) is a relatively old industrial precinct located approximately 1 km north of the Gosford City Centre adjacent to Gosford showground (refer to Figure 14). This area is located less than 500 metres from the West Gosford employment lands precinct, however, is physically separated from it by Narara Creek. Gosford (north) precinct is Zoned 4(a) Industrial under Gosford Planning Scheme Ordinance and is proposed to be zoned IN1 General Industrial under the *draft Gosford LEP 2009*.

The precinct is located to the east of the Pacific Highway and the railway track which may have caused the area not to have a definable focal point. The precinct is fragmented with a comparatively diverse mix of uses. Glennie Street and Birru Street are the main definable streets though the precinct. The precinct comprises of 133 lots with a total area of 12.4 ha zoned industrial under Gosford Planning Scheme Ordinance 2008, which includes 23 lots (totalling 2.1 ha) that are proposed to be rezoned to RE1 Public Recreation in the *draft Gosford LEP 2009*.

The land uses are mostly light industrial operations including car repairs, storage and plumbing. This area has a mix of relatively new redeveloped buildings as well as older industrial sites. The *draft Gosford LEP 2009* has also proposed to rezone a site bounding the precinct to the south to IN1 General Industrial. This site was an old sewage treatment plant that is now developed for aquaculture, and is currently zoned as 1(a) Rural to reflect this use. The site has potential to accommodate new industrial development.

Figure 14 Gosford (North) Employment Lands Precinct



6.1.4 Lisarow

This precinct is a relatively small employment node. The precinct comprises 86 lots with a total area of 66.5 ha zoned industrial under Gosford Planning Scheme Ordinance and can be categorised into 3 sub-districts including:

- ▶ **Railway Crescent:** Located on the northern side of Railway Crescent and comprises 11 lots with 27.2 ha.
- ▶ **Pacific Highway:** Located on the southern side of the Pacific Highway and comprises 24 lots with 14.8 ha (including the Albany International site).
- ▶ **Cutrock Road:** Large 14.5 ha lot currently occupied by Inghams (chicken processing/cooking plant).

The Pacific Highway sub district is surrounded either by the Pacific Highway or the railway line. Beyond this is low density residential dwellings and a small commercial area to the north east. This area consists of a mix of uses such as Albany International (paper product producer), telecommunications, and self storage. Albany International which is situated on a 7.6 ha site, recently announced the companies relocation from this site.

Railway Crescent is sited north of the railway track is surrounded by low density residential and environmental lands. This area consists of a mix of light industrial business type uses including Sara Lee (food production), powder coating, Ashton Scholastic and mail distribution centre (light industrial businesses).

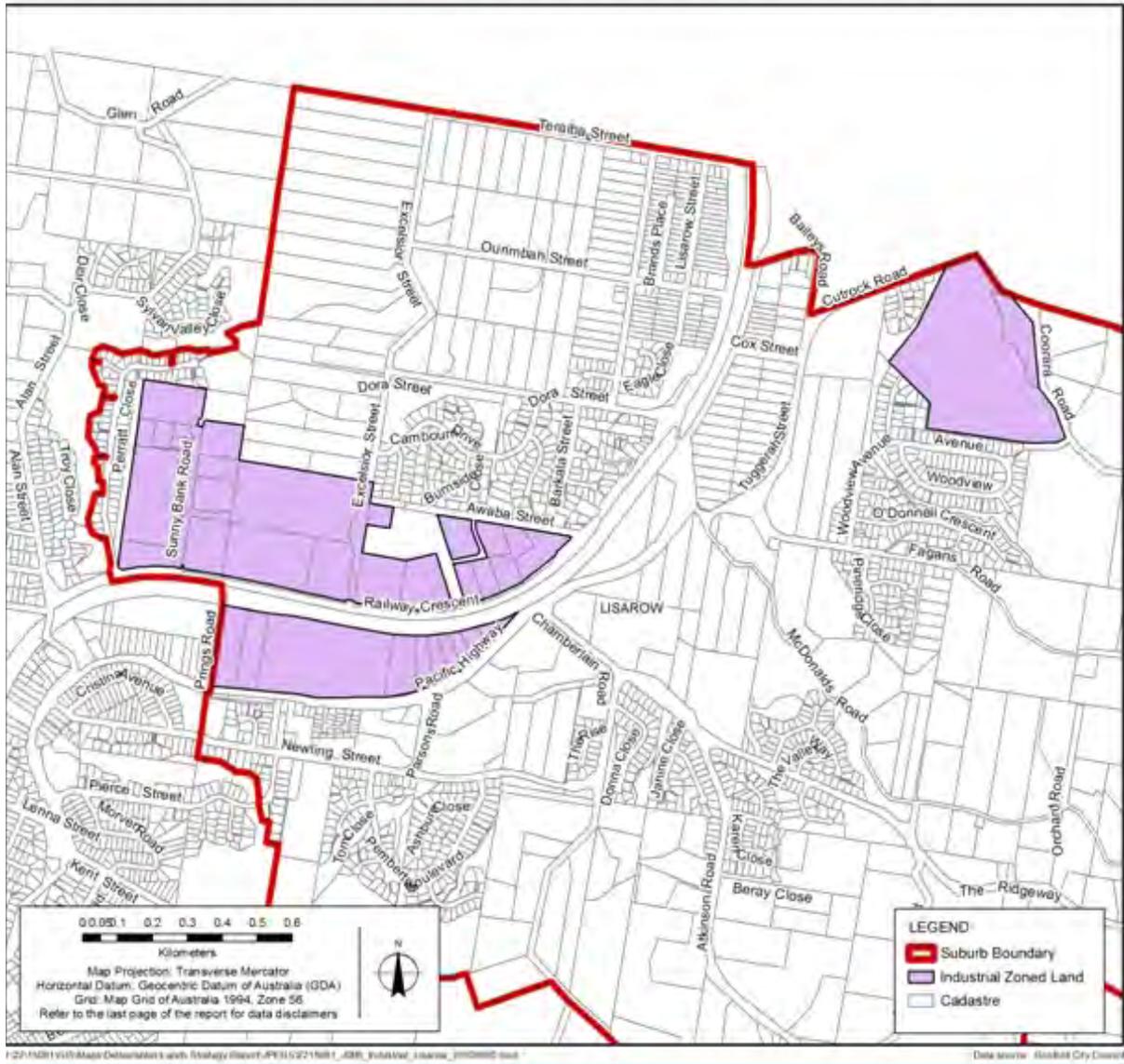
Located over 1 km away from the above 2 areas is the Chickadee foods company. This area is surrounded by residential dwellings to the south and environmental management zones to the east and west and borders Wyong Council LGA to the north. Its zoning reflects the use of the site, and if the operation were to cease it is considered likely that a change of its zone may be sought to allow residential development.

The Lisarow precinct is relatively free of constraints and is generally characterised by large buildings with open, large landscaped areas. The areas are fairly flat with only bushfire prone land - buffer area affecting the precinct. There are however, small areas of dense vegetation bounding Pacific Highway North. It is noted that there have been instances of land use conflict between industrial activities and residential development in the vicinity of Awaba Street. This highlights the need for adequate buffers between employment lands and other uses.

Figure 15 Lisarow – the planned closure of Albany International



Figure 16 Lisarow Employment Lands Precinct



6.1.5 Erina

Located approximately 5km east of Gosford City Centre, the Erina employment lands are located to the north of the Central Coast Highway behind a strip of commercial lands on the highway. The employment lands are located approximately 0.5 km from the Erina Fair Shopping Centre.

The precinct is located adjacent to a commercial area facing the Central Coast Highway which is proposed to be rezoned B5 Business Development under the *draft Gosford LEP 2009*. Bounding the precinct to the west and south is Erina Creek. Bounding the precinct to the north are fibro/ weather board single dwellings as well as some public recreational uses.

The Erina precinct is Zoned 4(a) Industrial under the Gosford Planning Scheme Ordinance and is proposed to be zoned IN1 General Industrial under the *draft Gosford LEP 2009*.

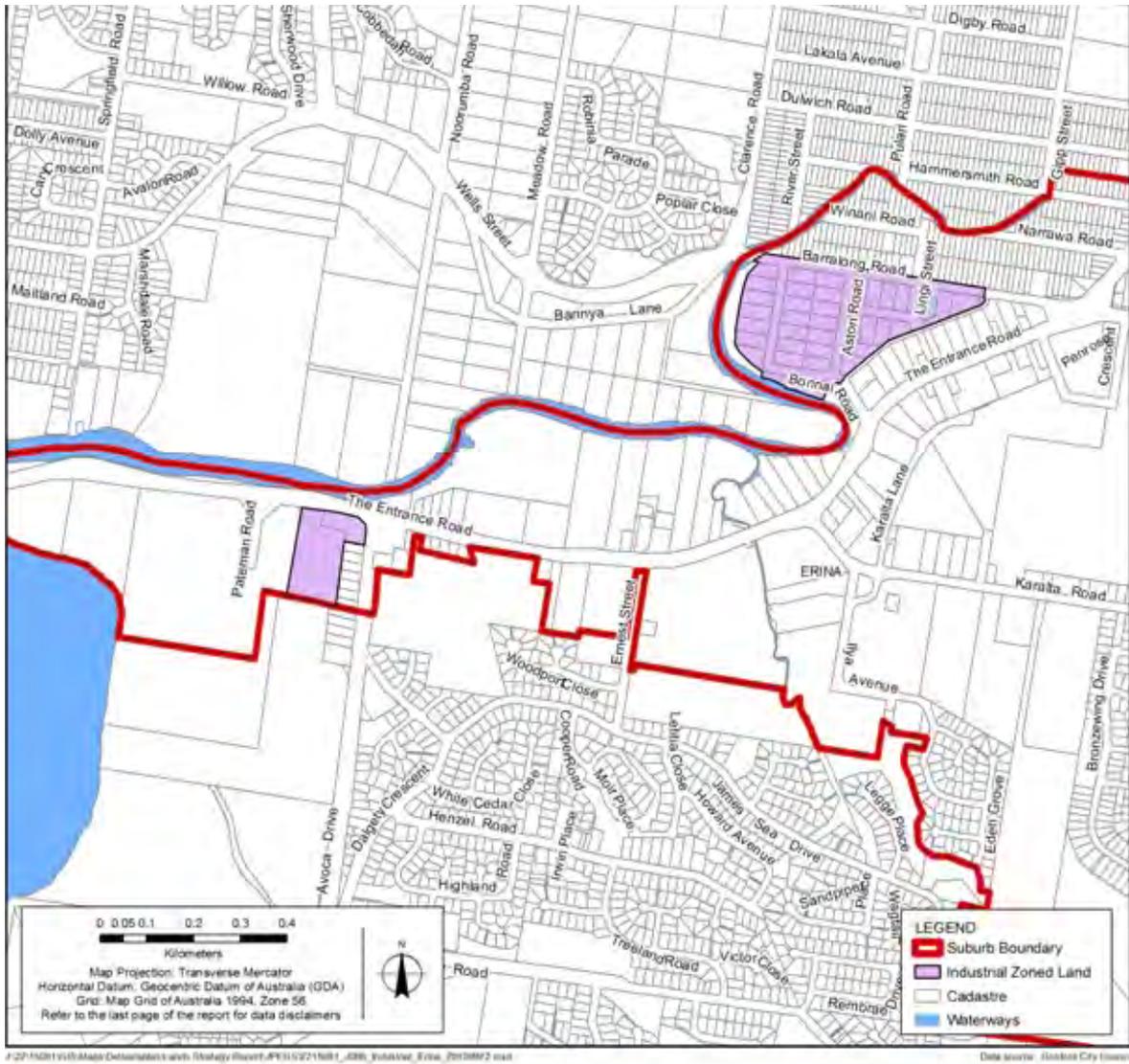
The precinct comprises 39 lots with a total area of 10.6 ha. The precinct has an average lot size of 2,721.2 sqm with almost 75% of lots between 1,000-2,000 sqm. The precinct is characterised by a mixture of land uses ranging from service businesses (such as plumbing supplies, car repair facilities etc), bulky goods and retail services to small scale light industrial operations. Due to the areas characteristics any future development is likely to have a strong attraction for retailing and commercial land uses rather than industrial use.

To the north of the precinct there has been some leakage into the adjoining single dwellings with several dwellings already being used for home occupations including surveyors, drafting, electrical engineers. This is an exploitation of existing planning provisions along Barralong Road, arising out of its proximity to Erina Fair and highly visible and accessible location.

Figure 17 Erina Employment Lands Precinct - Single Dwelling to the north of the precinct



Figure 18 Erina Employment Lands Precinct



6.1.6 Kincumber

A small industrial precinct located off Empire Bay Drive approximately 11 km by road from the Gosford City Centre. Kincumber is Zoned 4(a) Industrial under the Gosford Planning Scheme Ordinance and is proposed to be zoned IN1 General Industrial under the *draft Gosford LEP 2009*. The precinct comprises 29 lots with a total area of 9.1 ha.

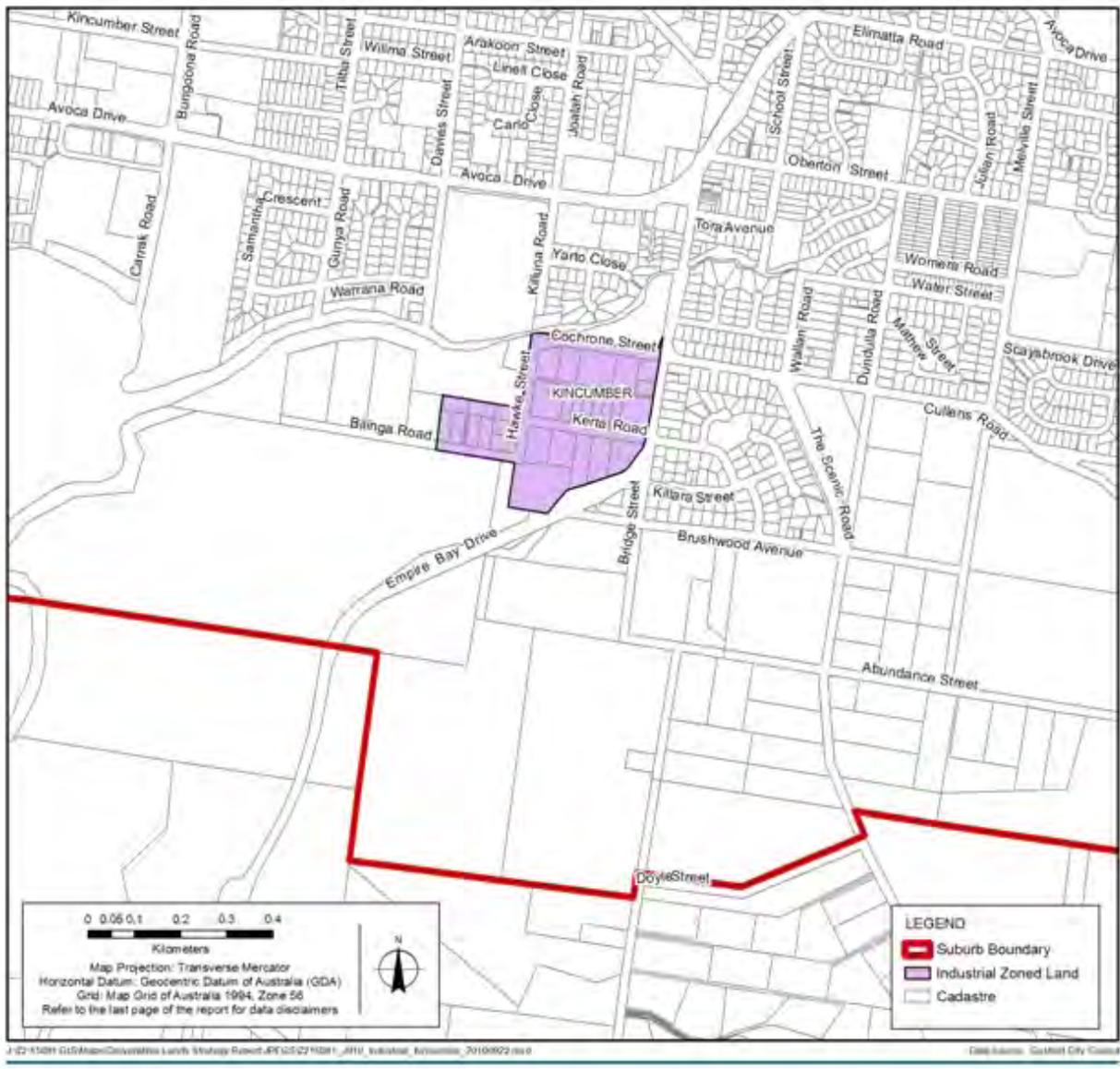
Bounding the precinct to the north, west and south of the precinct is public recreation, to the east and south is Empire Bay Road and a small area to the west is environmental protection. Beyond this road to the east are low density residential dwellings and a sewage treatment plant.

The land uses within this precinct are a mixture of uses which largely are support services for the local area as well as some heavy industry uses such as a Boral concrete. However, there are a number of non-industrial operations such as churches, preschools, swim centres, gyms and sports facilities. These uses highlight how non-industrial land uses have potential to sterilise land for employment generating uses.

Figure 19 Kincumber Employment Lands Precinct – Mixture of Land Uses



Figure 20 Kincumber Employment Lands Precinct

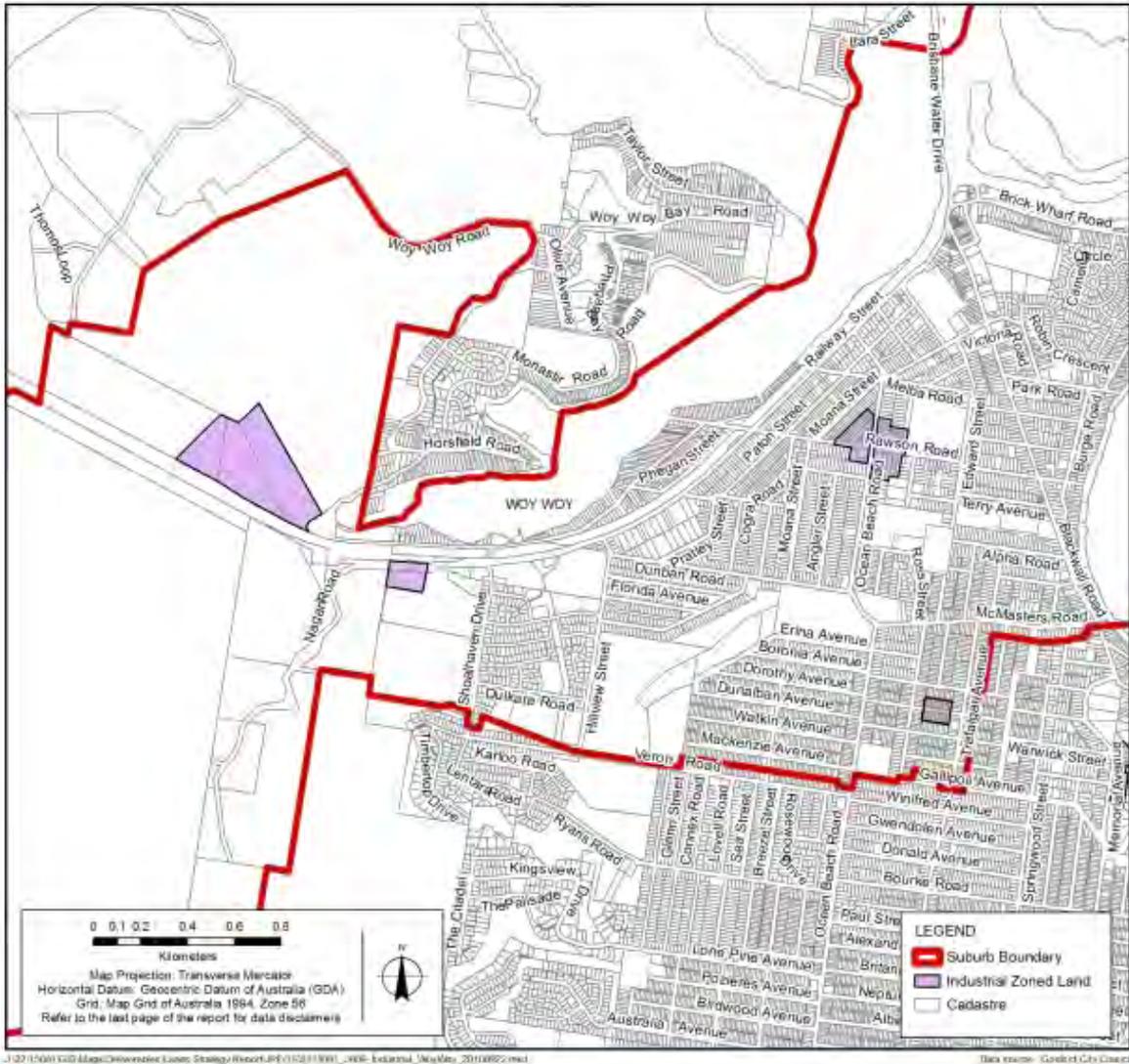


6.1.7 Woy Woy

Industrial land in Woy Woy comprises 90 lots with a total area of 42.3 ha zoned industrial under Gosford Planning Scheme Ordinance, which includes 4 lots (totalling 1.4 ha) that are proposed to be rezoned to Public Recreation RE1 in the *draft Gosford LEP 2009*. Industrial land in Woy Woy is contained in four precincts including:

1. Rawson Road and Ocean Beach Road, Woy Woy: Comprising primarily automotive repair operations, warehousing and building suppliers with 51 lots with a total area of 43,800m². This area is surrounded by low density residential uses.
2. Alma Avenue, Woy Woy: Comprising primarily automotive repair operations and retail sales with 18 lots totalling 8600m². This area is surrounded by low density residential uses with a small neighbourhood centre and open space area located to the east of the precinct.
3. Memorial Drive, Blackwall: Light industrial and service precinct comprising 17 lots with a total of 43,800m². This area is bounded to the west by Memorial Drive and to the east by Blackwall Mountain. There are four lots in this precinct that are proposed to be rezoned from industrial to RE1 Public Recreation under *draft Gosford LEP 2009* due to their environmental characteristics.
4. Nagari Road, Woy Woy: Comprises four lots with a 21 ha vacant site that was previously an abattoir. This is bounded to the north east and west by E1 Environmental Protection under the *draft Gosford LEP 2009*. The majority of this site is proposed to be rezoned E2 Environmental Conservation. The remainder of the site where the abattoir was located is proposed to be zoned as IN1 General Industrial under the *draft Gosford LEP 2009*. To the south east of this site is another lot which contains an electricity substation. This lot is surrounded by recreational uses and environmentally sensitive land as well as a landfill and water treatment plant to the south.

Figure 21 Woy Woy Employment Lands Precinct



6.1.8 Wyoming

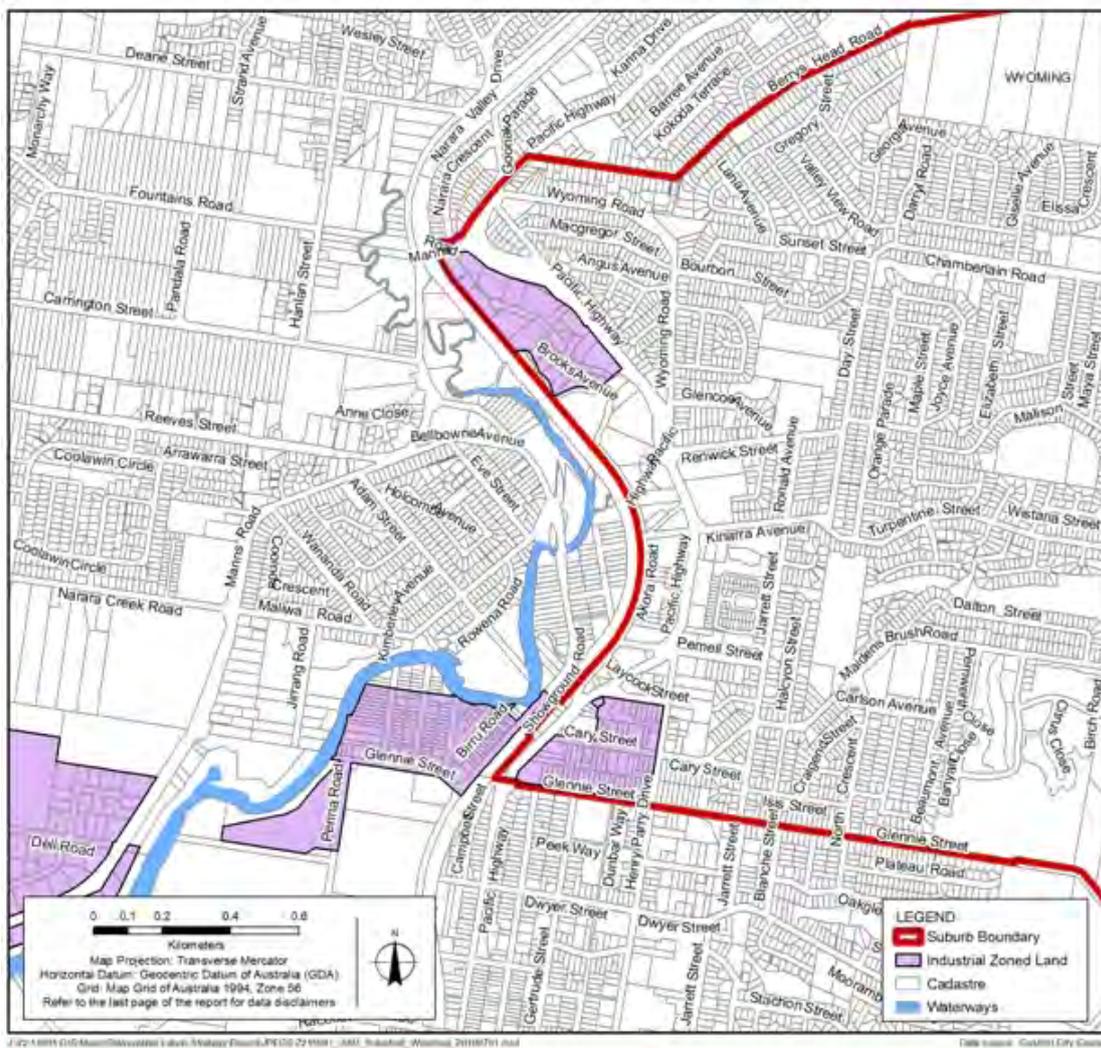
Wyoming Precinct is located along the Pacific Highway approximately 3 km north of the Gosford City Centre. This precinct is divided into a north and south precinct.

- North: Brooks Ave dissects the precinct. The precinct is a mixed use precinct with 24 lots totalling 8.4 ha zoned industrial under Gosford Planning Scheme Ordinance. The majority of the buildings have large floor spaces ranging from 2000 m² to 8000 m². The majority of the land uses facing the Pacific Highway comprise of showrooms or storage facilities. Within the precinct the land uses are varied, with entertainment uses, gyms and wholesalers also present.

The site is bounded to the north and east by the Pacific Highway and to the west by the railway line. To the south the site is bounded by E2 Environmental Conservation under the *draft Gosford LEP 2009*. Beyond the railway line is Narara Creek. This site is also constrained by the 1 in 100 year flooding as well as a low occurrence of acid sulfate soils. Given the surrounding environment this precinct does not have any areas for expansion.

- South: Glennie Street/Cary Street: Comprising 62 lots with a mix of manufacturing, wholesale and showrooms with a range of other service operations. Located in the suburb of Wyoming. This precinct is located on the eastern side of the Pacific Highway, this area is located behind some commercial zoned uses (between the railway and the Pacific Highway) which includes a car dealership. The lots overlooking the Pacific Highway also contain car dealerships. Walker Bros Timber and Building supplies is contained on a large site to the east of the car dealerships. The remainder of the precinct contains fibro / weatherboard single dwellings that are approaching the end of their expected life span. The sites containing residential dwellings are between 600 m² to 1000 m² in size.

Figure 22 Wyoming Employment Lands Precinct



6.1.9 Constraints on Existing Industrial Land Supply

A number of factors impact on supply. These include the following:

- ▶ *Environmental Constraints and Infrastructure Issues:* Flora and fauna issues within or in proximity to industrial areas. The provision of major utilities, services and adequate transport infrastructure on the surrounding network.
- ▶ *Land Ownership:* Availability of sites in private ownership will largely depend on economic decisions by landowners, not all of whom choose to either sell or develop their land in the short-term.
- ▶ *Withholding Issues:* There are several types of withholding. In some instances existing industry is holding land for future expansion or buffering.
- ▶ *Best Use of Land:* A small amount of land uses occurring in industrial zones are not industrial, particularly in older and established industrial zones. Draft Gosford LEP 2009 still allows non-industrial uses in IN1, General Industrial Zone, however Department of Planning requires this to be reviewed.
- ▶ *Residential Development:* Increases in residential density in some suburbs have placed pressure on existing nearby industries to change their activities or reduce their external impacts. In some instances this has led to industry relocation. There is a need to consider surrounding land uses as part of the land use planning process to provide adequate separation distances between incompatible land uses.
- ▶ *Unsuitable:* industrial zoned land which has low market appeal due to issues such as topography, poor access or land use interface conflicts.
- ▶ *Zoning:* not enough zoned industrial land on the market to meet the demand.

The majority of the 4(c) Industrial (extractive) zone under the *Gosford Planning Scheme Ordinance 2008* (23.5 ha) is proposed to be rezoned as a rural zone under the *draft Gosford LEP 2009*.

The difference between the *draft Gosford LEP 2009* and the current zoned land is generally due to the rezoning of land in Gosford (North) and Woy Woy from industrial to RE1 Public Recreation and E2 Environmental Conservation as well as including additional industrial land in Somersby.

The Somersby Industrial Park is the biggest industrial area in the Gosford LGA comprising a total area of 296.5 ha under the *Gosford LEP No 22*. An additional 14.3 has of Industrial land is proposed to be zoned IN1 General Industrial under the *draft Gosford LEP 2009* (total zoned land in Somersby Precinct is 310.8 ha). The increase in the amount of land to be zoned IN1 under *draft Gosford LEP 2009* can be attributed to the zoning of some sites that are currently zoned 5(a) Special Uses.

Within the Somersby Industrial Park a significant amount of land is also affected by cultural or ecological significance and is therefore constrained (40.76 ha). An employment lands audit found almost 100.98 ha of vacant employment lands (not affected by significant archaeological or environment constraints) were located in the Somersby precinct equating to over 70% of the vacant land in the Gosford LGA.

Within West Gosford the total area zoned for employment lands is 129.4 ha under the *Gosford Planning Scheme Ordinance* and 153.9 ha of IN1 General Industrial under the *draft Gosford*

LEP 2009. The draft Gosford LEP 2009 proposes to zone two lots on Dell Road West Gosford to employment lands. Both lots are currently surrounded by industrial uses and one lot is currently zoned for rural purposes under the Gosford Planning Scheme Ordinance. This investigation supports these rezonings due to the lack of constraints on the land and relationship to surrounding zones.

Within Gosford (North) precinct, on the western side of the railway line, there is currently several sites vacant totalling 0.4 ha. However, these sites are unsuitable for industrial development due to their flood liability and presence of ecologically endangered /regionally significant vegetation. The sites zoning to RE1 under the draft Gosford LEP 2009 reflects its ownership by Council. These are discounted from the analysis as they are unlikely to be developed.

Within the Wyoming Precinct, on the eastern side of the highway, lots with older housing stock have development potential due to its age and location. The total amount of land that has development potential is 2.6 ha.

Land at Woy Woy is also owned by Council and highly constrained, forming part of the Blackwall Mountain landform. The other site within Woy Woy is the former abattoir site and part of this site is to be zoned E2 under the *draft Gosford LEP 2009* as it has high conversation values (elevated, vegetated, steep, subject to high bushfire hazard and relatively inaccessible) and is surrounded by National Park. Surrounding residential areas limit the utility of its road access. Due to ecological constraints on the land only 15.4 hectares are likely to be developed. At the time of developing this report the existing owners have expressed a desire to develop a crematorium on the site. Although this particular use is neither endorsed or opposed by this employment lands investigation a “one off” use such as this is probably the best option for the long term. As the site is unlikely to be developed for industrial purposes and is discounted from the analysis.

There is limited capacity at Lisarow though the recent closure of the Albany International operations will result in the availability of a 7.7 ha site. Therefore given the sites, pending availability during the life of this investigation it will be included a part of the current supply.

The Kincumber, Wyoming and Erina employment lands precincts are currently at capacity.

The total supply of zoned employment lands under the *draft Gosford LEP 2009* is 613.6 ha (as shown below on Table 14). Of the zoned land 470.1 ha or 76% is developed and/or constrained land. Of the undeveloped land 15.4 ha in Woy Woy has also been discounted (as explained above) as it is unlikely to be developed for industrial purposes and is discounted from the analysis.

Once the areas stated above have been discounted this leaves 128.08 ha (or 20%) as zoned and undeveloped land.

Table 14 Gosford Current Employment Lands Supply (based on the employment lands audit)

Industrial Estate	Area (ha)			
	Total Zoned Employment Land*	Developed Land / Constrained Land (including significant lands)	Undeveloped Land	Discounted Undeveloped Land
Somersby	310.8	209.8	100.98	100.98
West Gosford	153.9	137.1	16.8	16.8
Gosford (north)	23.4	20.8	2.6	2.6
Woy Woy	25.3	9.9	15.4	0
Erina	11.8	11.8	0	0
Wyoming	9.1	9.1	0	0
Kincumber	11.1	11.1	0	0
Lisarow	68.3	60.6	7.7	7.7
Total Industrial Land	613.6	470.1	143.48	128.08

Source of zoned and vacant land: Gosford Industrial Lands Audit, 2009

* - area under the draft Gosford LEP which may be different from Gosford PSO and LEP 22.

6.2 Development Status

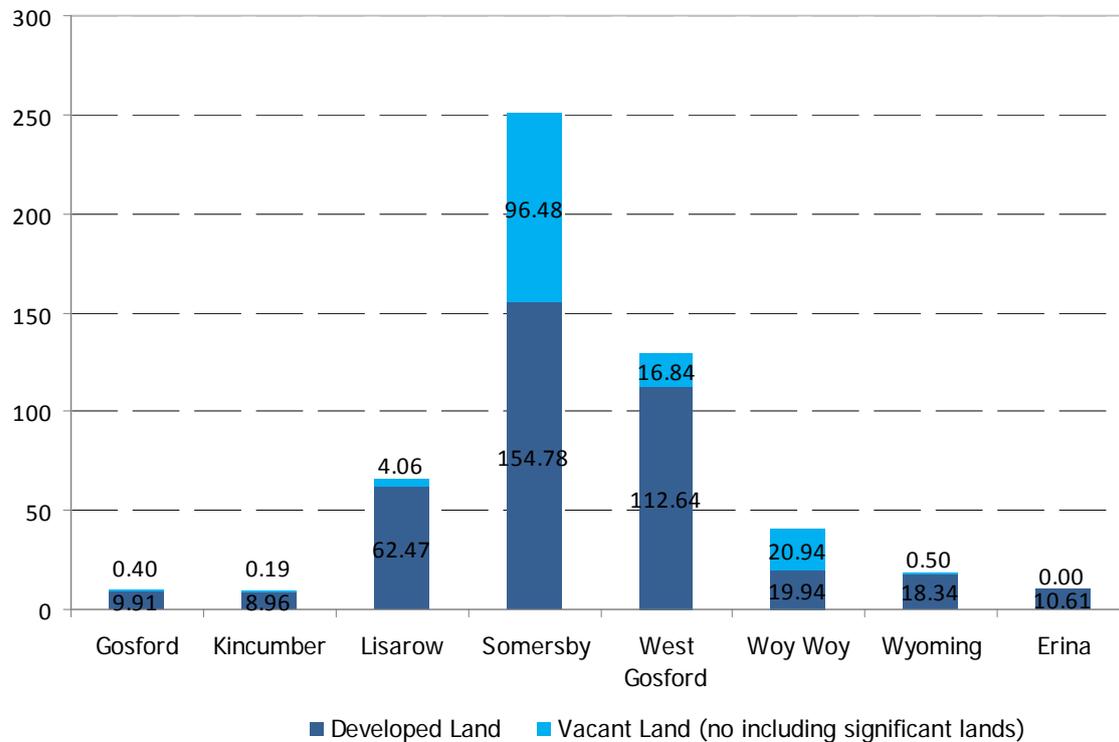
Gosford City Council prepared an industrial land inventory in 2009 to assess the characteristics of industrial zoned land in Gosford LGA. The inventory counted only the existing zoned areas not any of those proposed under the *draft Gosford LEP 2009*. This explains the difference in areas. Of the 574 ha zoned under existing planning instruments Council estimated that 396.6 ha (or 69%) was developed with the remaining 178 ha (or 31%) vacant.

As shown in Figure 23, (under the *Gosford LEP* No. 22), almost 96.48 ha of vacant zoned industrial land is located in the Somersby precinct equating to over 54% of the vacant land in the Gosford LGA.

There is also significant parcels of vacant land located within Woy Woy (20.9 ha) and West Gosford (16.8 ha) precincts. The reason for the large parcel of vacant land at Woy Woy as described above, is that it is the former abattoir site. Part of this site is to be zoned E2 under the *draft Gosford LEP 2009* as it has high conservation values (elevated, vegetated, steep, subject to high bushfire hazard and relatively inaccessible) and is surrounded by National Park.

It should also be noted that the Albany International operations in Lisarow are proposed to close down in 2010. This will result in the 7.7 ha site (with 20,000 sqm building) located on the Pacific Highway becoming vacant.

Figure 23 Development Status of Industrial Land, Gosford LGA, 2009



Source: Gosford City Council (2009)

6.2.1 Land Uses

As shown in Figure 24 and Table 15 of the developed/occupied industrial land in Gosford, manufacturing users are the largest occupiers (125.5 ha), followed by general industry (31.4 ha) and warehousing (13.8 ha).

Note, the total zoned areas in this 2009 study undertaken by Council were for lands zoned industrial under Gosford PSO and LEP 22. They are slightly different from the areas to be zoned industrial under *draft Gosford LEP 2009*. Notwithstanding that the areas do not correlate exactly the general trends of land use remain useful.

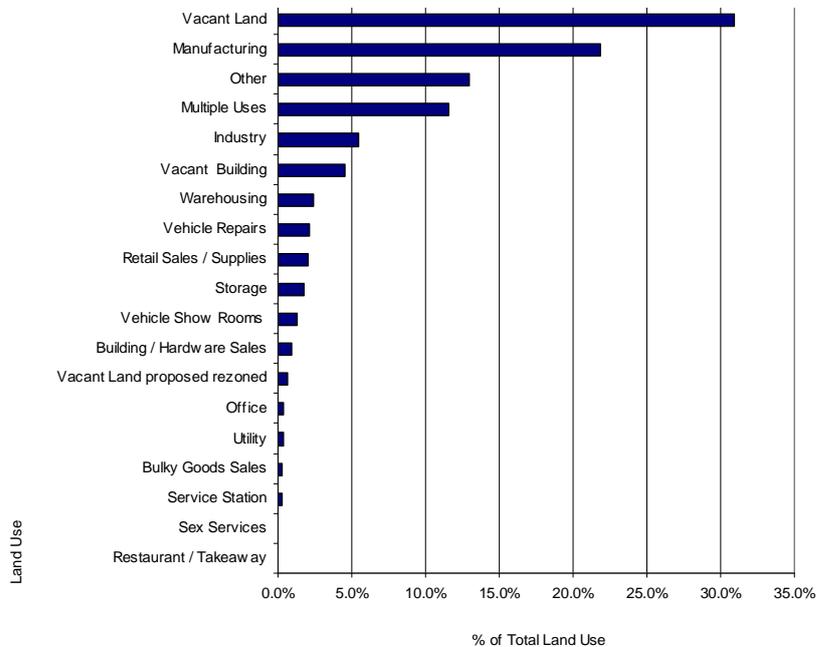
Table 15 Industrial Zoned Land by Use (Hectares)

Land Use	Gosford (north)	Kincumber	Lisarow	Somersby	West Gosford	Woy Woy	Wyoming	Erina	Total
Bulky Goods Sales	0	0	0	0	1.66	0	0	0	1.66
Manufacturing	2.14	0.19	17.78	81.79	18.78	0.28	4.48	0	125.45
Warehousing	0.42	0	4.07	1.13	7.94	0	0	0.19	13.75
Vehicle Show Rooms	0.04	0	0	4.16	1.73	0	1.67	0	7.61
Vehicle Repairs	1.08	0	0.21	0.26	7.95	1.45	1.15	0.36	12.45

Vacant Land proposed RE1	2.06	0	0	0	0	1.43	0	0	3.49
Vacant Land	0.40	0.19	4.06	134.83	16.84	20.94	0.50	0	177.77
Vacant Building	0.61	0.16	7.41	11.47	4.16	0.10	1.67	0.46	26.05
Multiple Uses	0.69	3.92	1.91	7.17	42.37	1.63	2.70	6.25	66.64
Restaurant / Takeaway	0	0	0	0	0.28	0.15	0	0	0.43
Building / Hardware Sales	0.09	0.49	0	0	4.24	0.40	0	0.19	5.40
Utility	0.19	0	0	1.20	0.03	0.70	0.00	0	2.12
Storage	0.64	0.39	2.48	0	2.60	1.64	1.79	0.34	9.89
Service Station	0	0	0	0	1.07	0.55	0	0	1.62
Other	3.01	3.41	4.11	38.84	10.86	7.69	4.72	1.57	74.20
Office	0.13	0.00	0.00	0.00	1.85	0.10	0.10	0	2.18
Sex Services	0.04	0	0	0	0.59	0	0	0	0.63
Retail Sales / Supplies	0.31	0.41	0.97	0.00	3.71	4.90	0.05	1.26	11.62
Industry	0.50	0	23.53	4.25	2.79	0.35	0	0	31.43
Total	12.37	9.15	66.53	285.10	129.48	42.31	18.84	10.61	574.39

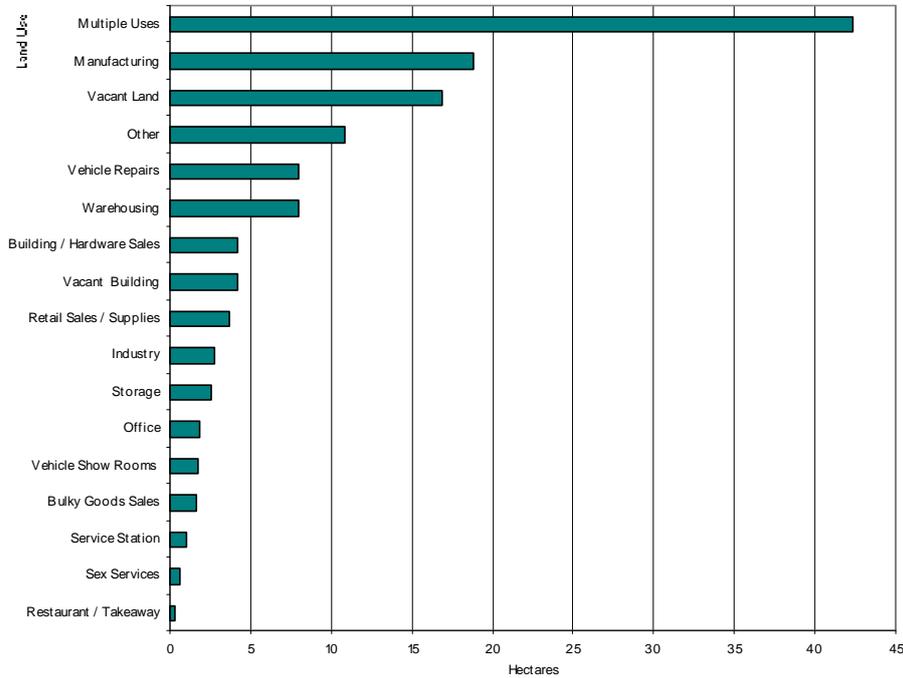
Sources: Gosford City Council (2009))

Figure 24 Gosford LGA - Employment Lands – Land Uses



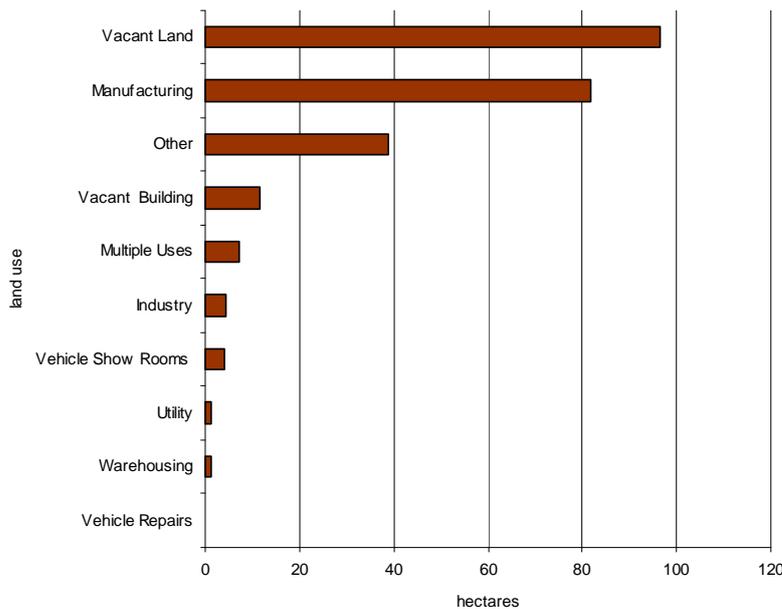
As shown in Table 15 and demonstrated below in Figure 24, there has been, in recent times, an increase in the infiltration of non-industrial uses in industrial zones including Woy Woy, West Gosford and Erina in particular. In Gosford LGA these includes retail sales/supplies (11.6 ha), building/hardware sales (5.4 ha), office (2.2 ha) and bulky goods (1.7 ha).

Figure 25 West Gosford Employment Lands – Land Uses



Within Somersby (refer to Figure 26) the predominant land use of the developed/occupied industrial land is manufacturing (81.79 ha), as well as vehicle show rooms and multiple uses. This demonstrates that Somersby has kept with its traditional industrial uses with the majority of industrial land users being small medium enterprises (SMEs), particularly in the manufacturing and construction sectors.

Figure 26 Somersby Employment Lands – Land Uses



Note: Vacant land does not include land affected by significant lands.

6.2.2 Lot Sizes

In terms of the current distribution of industrial land by lot size, 28.7% of the total properties in the zoned industrial areas are sized between 4,000 and 10,000 sqm. Around 23% are under 1,000 sqm in size, while 19.1% are sized between 1,000 and 2,000 sqm. Just 6.5% are larger than 1 ha.

The various industrial estates in the region record different distributions of lot sizes. Lisarow and Somersby record the largest lot sizes with an average lot size of 18,480 sqm and 14,472 sqm respectively.

Industrial estates including Gosford (north), Wyoming, Woy Woy and Erina are characterised by smaller lots with each having 50% or greater under 2,000 sqm. West Gosford and Kincumber are both made up primarily of mid range lot sizes. With the erosion of industrial land for higher end uses in these areas, such as retail and commercial, larger lots are scarce as they have been subdivided into smaller size lots to make them more affordable. This has been the case particularly in the past decade.

The general increase in the service industrial sector has resulted in an increase in demand for smaller industrial lots. Also affecting demand are non-industrial type uses, such as retail and office, which are increasingly encroaching on traditional industrial areas, and particularly in West Gosford and Gosford (north).

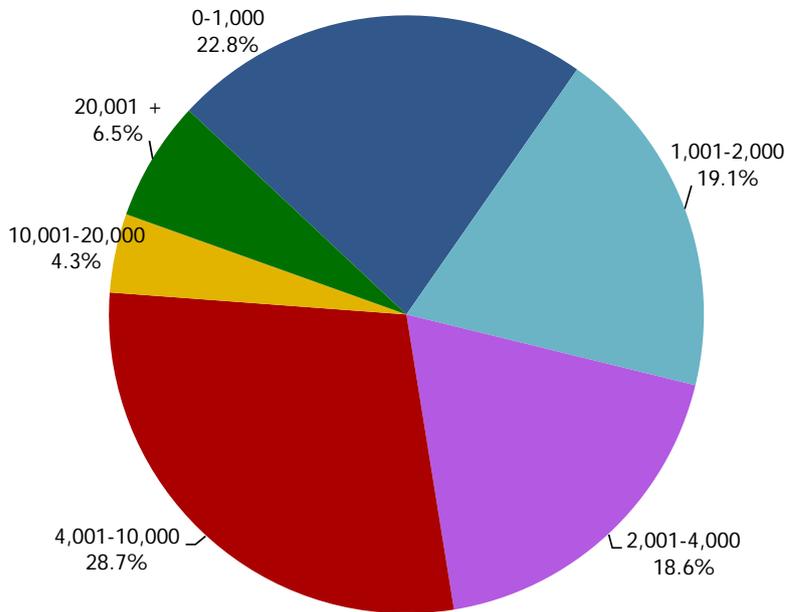
Generally, the broad range of industrial activity, from manufacturing to service provision and warehousing, means a variety of lot sizes, shapes and layouts are required. It is also important that there be efficient internal road networks, access to major arterial transport routes, controlled intersections and unimpeded access/ egress for large vehicles.

Table 16 Industrial Lot Sizes by Precinct

Precinct	0-1,000	1,001-2,000	2,001-4,000	4,001-10,000	10,001-20,000	20,001 +	Avg. Lot Size (sqm)
Gosford	114	14	3	1	0	1	929.9
Kincumber	0	13	7	8	1	0	3,154.7
Lisarow	0	2	4	12	9	9	18,480.1
Somersby	1	1	41	98	17	39	14,472.2
West Gosford	2	62	90	113	8	6	4,607.1
Woy Woy	65	18	1	2	1	3	4,701.3
Wyoming	19	32	15	20	0	0	2,190.7
Erina	2	28	5	2	2	0	2,721.2
Total	203	170	166	256	38	58	6,446.4

Sources: Gosford City Council (2009)

Figure 27 Industrial Lot Size Distribution, Gosford LGA



Source: Gosford City Council (2009)

The provision of a variety of lot sizes is viewed as a vital characteristic to the long term sustainability of industrial land by end users, as it will enable relocation and expansion of businesses within the same area rather than having to find alternative locations to suit their growing needs.

On the other hand the lack of sufficient large development-ready industrial lots can have a major potential loss of inbound investment to Gosford. There is therefore still a need to retain areas with larger lots to preserve them for large scale, industry end users.

6.3 Competing Locations

There are several competing locations to the Gosford LGA in relation to attracting business investment in industrial land. These include:

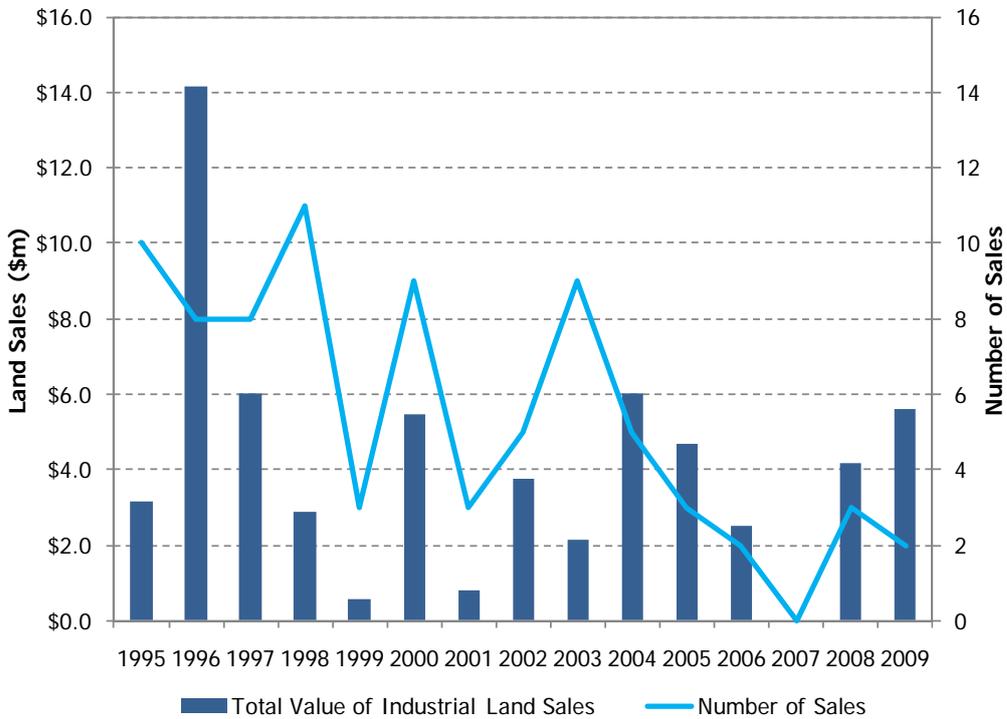
- ▶ **Wyong:** Located approximately 30km north, Wyong represents a major competitor to Gosford. Wyong is similar to Gosford in terms of its location north of Sydney and access to labour force. Major industrial estates in Wyong include:
 - Wyong Employment Zone;
 - Charmhaven;
 - Tuggerah Business Park;
 - Tuggerah; and
 - North Wyong.
- ▶ **Metropolitan Sydney:** Gosford is located approximately 75km north of the Sydney and competes with the Metropolitan area by attracting industrial businesses that need access to the Metropolitan area though don't necessarily need to be located within it. Major industrial estates in the Sydney Metropolitan area include:

- Erskine Business Park;
 - Eastern Creek;
 - Chullora;
 - Seven Hills;
 - Ingleburn;
 - Prestons;
 - Smithfield;
 - Penrith; and
 - Minto.
- ▶ **Newcastle:** Competes with Gosford for industrial businesses looking to locate outside the Metropolitan Sydney area, while remaining in close proximity and having access to a significant workforce. Major industrial estates in Newcastle include:
- Beresfield;
 - Thornton; and
 - Steel River.
- ▶ **Wollongong:** Competes with Gosford for industrial businesses looking to locate outside the Metropolitan Sydney area, while remaining in close proximity and having access to a significant workforce. Major industrial estates in Wollongong include:
- Kembla Grange; and
 - West Dapto.

6.4 Industrial Sales

There were 81 industrial sales in Somersby between 1995 and 2009 with a total value of approximately \$62 million. The number of sales has trended down over the last 15 years from a high of 11 in 1998 to an average of 2 over the last 5 years. This may indicate that owners have been happy to hold onto their landholdings in recent years or due to broader economic considerations.

Figure 28 Industrial Sales, Somersby, 1995-2009



Note: Land used for general industrial.
Source: RP data (2010)

Table 17 provides an overview of sales prices per sqm of industrial lots in Somersby between 1995 and 2009. Due to the relatively small number of sales, caution must be taken when analysing the data as the site characteristics of individual sales may have a considerable impact on annual averages. The average value of sales of smaller lots increased rapidly in 2005 to \$479/sqm as a result of one sale. The value of sales from 2006 to 2009 averaged over \$300/sqm, indicating a significant rise from the previous decade. The average value of sales of larger lots have remained relatively stable over the last 15 years, with the two sales in 2009 increasing to an average of \$137/sqm.

Table 17 Industrial Sales (\$/sqm), Somersby, 1995-2009

Industrial Sector	Lots < 10,000sqm	Lots >10,000sqm
1995	\$34	\$30
1996	\$46	\$133
1997	\$28	\$102
1998	\$52	\$40
1999	\$69	N.a
2000	\$100	\$122
2001	\$56	N.a
2002	\$124	\$55
2003	\$49	\$38
2004	\$144	\$118
2005	\$479	\$71
2006	\$271	N.a
2007	N.a	N.a
2008	\$364	N.a
2009	N.a	\$137

Note: Caution must be taken in interpreting data due to low number of sales.

Source: ABS (2007)

6.5 Regional Planning

The *Central Coast Regional Strategy* and *Central Coast Regional Economic Development and Employment Strategy* outline a target for an additional 45,000 jobs in the region by 2031. The strategies outline the need to ensure that there is sufficient employment lands in appropriate locations to accommodate growth in existing businesses and facilitate the attraction of new businesses to the region. The *Central Coast Regional Strategy* defines employment lands as encompassing:

“clusters of major construction, manufacturing, light industry, transportation and storage activities. They include distribution centres, factories, warehouses and other industrial uses and should have high quality access to major strategic transport corridors.”

Built form includes industrial type warehouses, factories and other industrial and light industrial use buildings. Employment lands are expected to have an employment density of between 10 to 50 jobs per hectare and have access to major strategic transport corridors such as the F3 Sydney to Newcastle Freeway and Sydney to Newcastle rail freight corridor.

The *Central Coast Regional Strategy* also defines business parks as an important form of employment lands to ensure the Central Coast remains competitive. Business parks are defined

as out of centre commercial activity that allow companies to consolidate operations into a single site that combines head office, back office, manufacturing, warehouse and distribution activities.

As shown in Figure 29 **Error! Reference source not found.**, the major investigation area for employment land is Wyong which has a greater supply of potential land. The Wyong Employment Zone is a future employment lands precinct strategically located between the Warnervale Town Centre and the F3 Freeway. The Wyong Employment Zone is expected to generate 6,000 jobs and to set aside important conservation areas. The NSW Government has declared the Employment Zone as a State Significant Site, under State Environmental Planning Policy (Major Projects) 2005.

Figure 29 Planned Employment Lands for Central Coast



Source: NSW Department of Planning (2009)

7. Employment Lands Demand

In order to assess the future employment land needs of Gosford LGA an analysis of the likely future demand for employment land is important to establish whether a shortage is likely and over what time frame.

7.1 Historical Take Ups

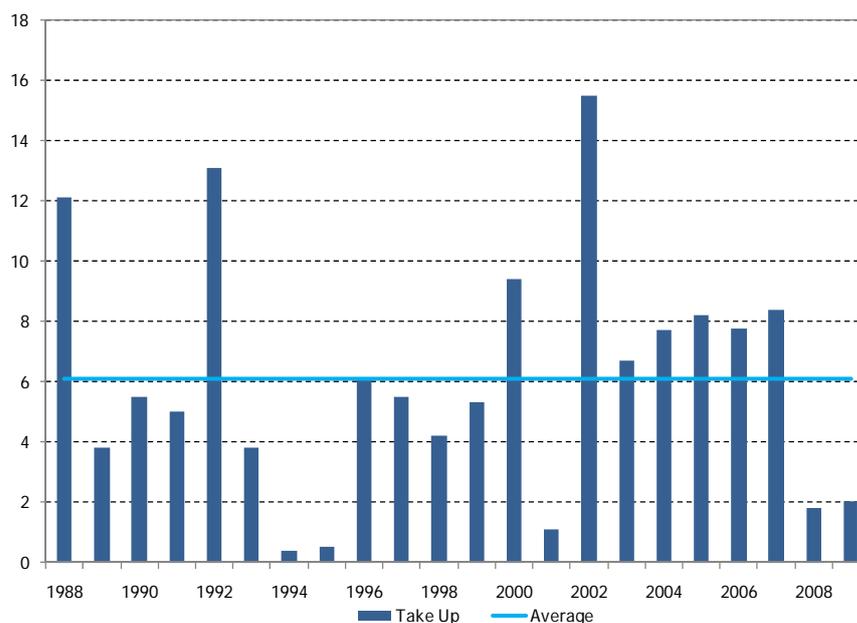
Past rates of demand for employment land can be an indicator of future demand. A database of development approvals for employment land in the Gosford LGA provides information on take up rates in the past.

Over the last 20 years, take up rates within the Somersby Industrial Park have averaged 6.1 hectares per year. As shown in Figure 30 land take up in Somersby spiked in 2002 with a total of 15.5 ha. This was mostly due to a large approval for 'Borg' industrial for a 10 ha site within the Somersby Industrial Park.

Between 2003 and 2007, take up rates were above the historical average before declining in 2008 and 2009. This decline can likely be explained by the impact of the global economic slowdown on business confidence and investment.

It is also worth noting that current take up rates within the Somersby Industrial Park have been impacted by the difference in expectations between land holders and buyers. Anecdotal evidence through consultation indicates that land holders are asking land prices above what buyers and businesses are willing to pay. Land holders seem content to wait until the market improves before selling to businesses and facilitating investment. For the Gosford LGA the historical take up rates averaged 8.2 ha per annum.

Figure 30 Somersby Industrial Park, Site Area Take Up (ha), 1988-2009

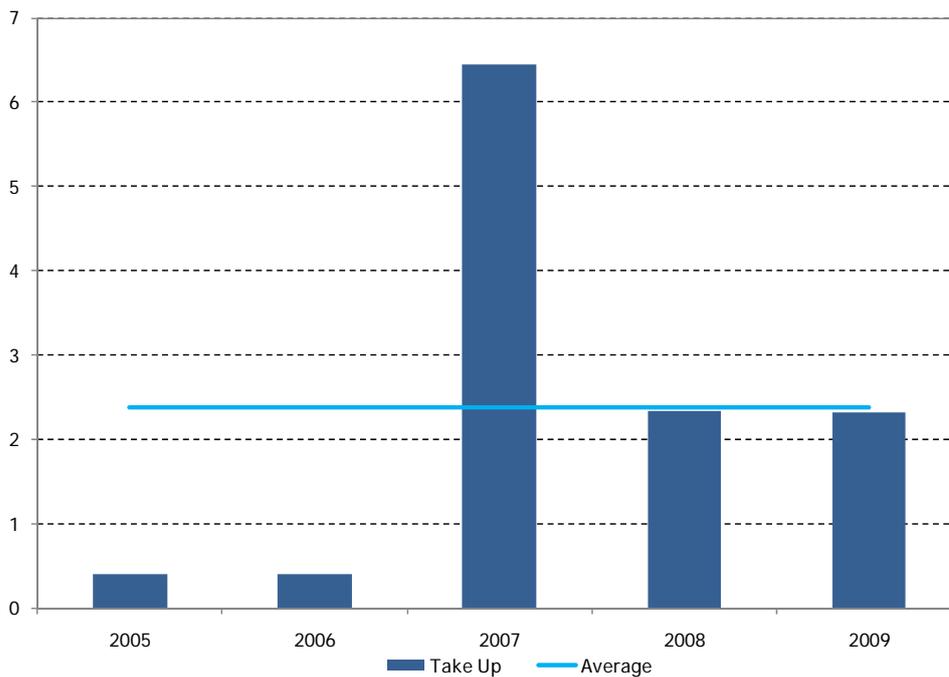


Source: Gosford City Council (2009)

Take up rates in employment precincts outside Somersby have fluctuated in recent years from 0.4 ha in 2005 to 6.5 ha in 2007 with an average of 2.4 ha per year over the last five years (Figure 31). The economy reached its peak in 2007 on the back of the mining boom and strong business confidence which may explain the high take up rate in 2007. This may also be due to a large development approval in Lisarow.

The global economic slowdown may also explain the declining take up rates in 2008 and 2009.

Figure 31 Industrial Area Take Up (ha), 2005-2009 (areas other than Somersby)



Note: Other than Somersby Industrial Estate
Source: Gosford City Council (2009)

7.2 Projected Employment Land Demand

In basic terms, industry is generated by servicing the demands created by providing goods and services to the local population, value adding to locally generated products and value adding to products generated elsewhere in other regions.

Important demand drivers for employment land in the Gosford LGA include:

- ▶ **Economic growth:** The demand for goods and services stimulates investment in productive capacity, which in turn results in increasing demand for land to locate production facilities and accommodate employees. An increase in overall economic growth in the Gosford LGA, including growth within the industrial sectors, will increase the demand for additional employment lands as well as augmenting the potential for intensification or redevelopment of existing employment lands to accommodate higher value add industries;
- ▶ **Labour productivity:** There is a positive relationship between labour productivity and the demand for employment land. Labour productivity in Gosford could be enhanced through the introduction of industries utilising new technologies, thus allowing for up skilling or skill transference opportunities for the local workforce, or through the provision of greater professional development opportunities via increasing the range of skills training offered by local knowledge infrastructure;



- Levels of employment:** As economic prosperity rises so too does employment. Assuming labour productivity remains strong, the level of production increases accordingly. Therefore, by predicting employment levels it is possible to estimate the demand for employment land. The projected employment targets within the Gosford LGA are put forth in section 5.3.4;
- Demographic trends:** Shifts in the demographic profiles of a region have impacts on its future economic growth prospects. Two of the issues pertaining to Gosford’s demographic profile are its ageing population and difficulties with the retention of its youth. Both of these issues can affect the future composition and skill set of the region’s workforce and accordingly could impact on the future demand for employment lands;
- Changes in industry structure:** Certain industries tend to locate within industrial estates and have different value adding outcomes. The significance of these industries to a region will in part determine the demand for employment land. As discussed in section 5.8 several industries within the Gosford LGA have been identified as having capacity for future growth, thus potentially changing the existing industrial structure within the region; and
- Urban encroachment:** As discussed in section 5.7, sustained population growth within the Sydney metropolitan area has resulted in urban expansion, encroachment on employment land and limited potential for future industrial expansion within many parts of the metropolitan area. This has also resulted in industrial businesses considering new locations on the outskirts of the metropolitan areas, such as the Central Coast, where there is available and affordable employment lands which are well serviced by transport infrastructure.

Each of these factors is considered in the following employment land projections.

7.2.1 Population Projections

As part of this investigation population projections have been prepared for Gosford between 2006 to 2036 at five year intervals based on the *Central Coast Regional Strategy* and the NSW Department of Planning’s SLA projections. It is projected that the Central Coast regional population will increase to approximately 405,000 in 2031 as outlined in the *Central Coast Regional Strategy*. The Gosford LGA’s population is projected to increase by 36,777 to almost 200,000 in 2036.

Table 18 Adjusted Population Projections

	2006	2011	2016	2021	2026	2031	2036	Total	Ave Per Year
Gosford	162,100	169,795	175,388	180,580	185,982	191,577	198,877	36,777	1,226
Wyong	142,700	155,045	169,492	184,340	198,978	213,423	231,523	88,823	2,961
Central Coast	304,800	324,840	344,880	364,920	384,960	405,000	430,400	125,600	4,187

Source: DoP (2008a), DoP (2008b)

7.2.2 Employment Projections

This investigation has accepted the minimum employment target of 45,000 additional jobs in the Central Coast region by 2031 as outlined in the *Central Coast Regional Strategy* and *Central*

Coast Regional Economic Development and Employment Strategy. This includes a minimum target of 3,000 additional jobs to be created in employment lands. In order to achieve these targets, Gosford will have to increase its containment rate by reducing the outflow of residents who work in Sydney and neighbouring areas. This will be crucial as an ageing population in the region is also likely to see the workforce participation rate decline further over time.

This report has taken the target of 3,000 additional jobs for employment lands in Gosford by 2031, as outlined in the *Central Coast Regional Strategy* and expanded through to 2036 in a low and high scenario:

- ▶ Low: An additional 3,115 minimum jobs to be created in employment lands in the Gosford LGA by 2036. This is based on a target of 3,000 additional for employment lands in Gosford by 2031, as outlined in the *Central Coast Regional Strategy*, and projected population growth of 3.8% between 2031 and 2036 in Gosford.
- ▶ High: An additional 3,600 jobs minimum to be created in employment lands in the Gosford LGA by 2036 as extrapolated from the CCRS. This is based on a target of 3,000 additional for employment lands in Gosford by 2031, as outlined in the *Central Coast Regional Strategy*. This equates to 120 jobs per year which corresponds to 3,600 jobs over the 30 years between 2006 and 2036.

7.3 Methodologies

The methodology has utilised two approaches to assess employment land requirements (demand). The approaches differ in the type of demand/requirements they assess and both have merit in informing planning for the future of employment lands.

7.3.1 Workforce Approach

The workforce methodology approach looks to project employment land requirements to meet the job targets for Gosford. Based on the data from the ABS Census in 2006, it is estimated that there were 8,340 people employed in the LGA in the employment lands sector.

Table 19 Employment in Gosford Employment Lands Sector, 2006

Industrial Sector	Employment	% of Total
Heavy Industry	1,239	14.9%
Modern General Industry	3,564	42.7%
Transport, Warehousing & Storage	1,361	16.3%
Supporting Industry	2,176	26.1%
Total	8,340	100.0%

Source: ABS (2007)

It has been assumed that the 3,115-3,600 additional jobs in employment lands in Gosford will be staged uniformly between 2006 to 2036, equating to approximately 104-120 jobs per year. These jobs have been broken down by sector based on the employment composition in 2006.

Table 20 Projected Employment in Gosford Employment Lands Sector (jobs)

Industrial Sector	2006	2011	2016	2021	2026	2031	2036	Change
Low Scenario								
Heavy Industry	1,239	1,316	1,393	1,470	1,547	1,625	1,702	463
Modern General Industry	3,564	3,786	4,008	4,229	4,451	4,673	4,895	1,331
Transport, Warehousing & Storage	1,361	1,446	1,530	1,615	1,700	1,784	1,869	508
Supporting Industry	2,176	2,312	2,447	2,582	2,718	2,853	2,989	813
Total	8,340	8,860	9,378	9,896	10,416	10,935	11,455	3,115
High Scenario								
Heavy Industry	1,239	1,328	1,417	1,506	1,595	1,685	1,774	535
Modern General Industry	3,564	3,820	4,077	4,333	4,589	4,846	5,102	1,538
Transport, Warehousing & Storage	1,361	1,459	1,557	1,655	1,753	1,851	1,948	587
Supporting Industry	2,176	2,333	2,489	2,646	2,802	2,959	3,116	940
Total	8,340	8,940	9,540	10,140	10,740	11,340	11,940	3,600

Source: ABS (2007), AECgroup (2010)

Employment density benchmarks have been used to estimate the required amount of employment land to meet the employment targets. Each of the categories of employment land accommodates different levels of employment due to the differences in land use requirements. AECgroup has adopted the following benchmarks:

- ▶ Heavy General Industry employs 18 employees/ha
- ▶ Modern General Industry employs 30 employees/ha
- ▶ Transport, Warehousing & Storage employs 20 employees/ha
- ▶ Supporting land uses employ 25 employees/ha

Forward planning exercises for employment land must also consider the accommodation of services (such as roads and utilities), open space and buffers. Benchmarks indicate requirements for services and buffers of approximately 20% of the total industrial area. This open space represents an indicative allowance for buffering. Buffers will be determined as part of the detailed investigations necessary to support a rezoning.

Based on the assumptions above, there is projected demand for between 588.4 ha -613.3 ha of employment land in the Gosford LGA in 2036, equating to an additional minimum 160 ha – 185 ha of employment lands in Gosford between 2006 and 2036 (see Table 21). The comparison of required land demand and existing supply is undertaken in the following gap analysis.

Given the planning period is from **2010 to 2036** this will equate to an additional **138.6 ha – 160.3 ha** minimum of employment lands. Note that in this case the high end of the range has been adopted.

Table 21 Required Industrial Land

Industrial Sector	2006	2011	2016	2021	2026	2031	2036	Change 2006 - 2036	Change 2010 - 2036
Low Scenario									
Heavy Industry	68.8	73.1	77.4	81.7	86.0	90.3	94.5	25.7	22.3
Modern General Industry	118.8	126.2	133.6	141.0	148.4	155.8	163.2	44.4	38.5
Transport, Warehousing & Storage	68.1	72.3	76.5	80.8	85.0	89.2	93.5	25.4	22.0
Supporting Industry	87.0	92.5	97.9	103.3	108.7	114.1	119.6	32.5	28.2
Infrastructure and Buffers	85.7	91.0	96.3	101.7	107.0	112.3	117.7	32.0	27.8
Total	428.4	455.1	481.7	508.4	535.1	561.7	588.4	160.0	138.6
High Scenario									
Heavy Industry	68.8	73.8	78.7	83.7	88.6	93.6	98.5	29.7	25.7
Modern General Industry	118.8	127.3	135.9	144.4	153.0	161.5	170.1	51.3	44.5
Transport, Warehousing & Storage	68.1	72.9	77.8	82.7	87.6	92.5	97.4	29.4	25.5
Supporting Industry	87.0	93.3	99.6	105.8	112.1	118.4	124.6	37.6	32.6
Infrastructure and Buffers	85.7	91.8	98.0	104.2	110.3	116.5	122.7	37.0	32.1
Total	428.4	459.2	490.0	520.9	551.7	582.5	613.3	184.9	160.3

Note: Columns may not add to total due to rounding.
Source: AECgroup (2010)

The above workforce approach demand analysis breaks employment land demand into four main categories based on land use. Gaps in the supply of employment lands for each category for between 2010 and 2036 include:

- ▶ Heavy Industry: The employment target approach projects a requirement for an additional 22.3 ha – 25.7 ha minimum of employment lands for the heavy industry sector.
- ▶ Modern General Industry: The employment target approach projects a requirement for an additional 38.5 ha – 44.5 ha minimum of employment lands for the modern general industry sector.
- ▶ Transport, Warehousing & Storage: The employment target approach projects a requirement for an additional 22 ha – 25.5 ha minimum of employment lands for the transport, warehousing and storage sector.
- ▶ Supporting Industry: The employment target approach projects a requirement for an

additional 28.2 ha – 32.6 ha minimum of employment lands for the supporting industry sector. This sector is currently recording a shortfall especially in the urban areas with the sector requiring good access to workers.

The amount of future employment land required is based on benchmarks of employment (jobs/ha) and historical land take-up averages. Should the intensity of employment (jobs/ha) be below the assumed benchmarks or land take-up rates be above expectations, the required employment land supply would be higher than projected.

7.3.2 Land Take Up Approach

The land take up approach looks to project the demand for industrial land from industrial businesses. It differs from the workforce approach in that it looks to project business demand while the workforce approach looks to project land requirements to achieve job targets.

The methodology is based on the historical take up of employment land in Gosford LGA which averaged 8.2 ha per annum. While take up was significantly lower in 2008 and 2009, this can be explained by the affect of the global economic slowdown on business investment and it is deemed likely that investment will pick up in the future in line with historical trends.

Assuming that future take up rates in the Gosford LGA are in line with historical averages, there would be demand for an additional **213.2 ha** minimum of employment land between 2010 and 2036.

8. Land Suitability and Selection Criteria

8.1 Selection Criteria for Potential Employment Lands

Planning for industrial land supply requires a balanced, holistic and strategic view of a range of issues, including:

- ▶ the amount and location of existing zoned land;
- ▶ the current position of the industrial market (such as capacity pressures, suitability of existing sites and remaining development potential in existing areas);
- ▶ the most appropriate amount of land to supply to the market at any one time relative to projected demand;
- ▶ the different locational needs of and markets served by various industry types;
- ▶ the most appropriate spatial framework and distribution of land to ensure market strength and competitive position;
- ▶ the impacts of new land releases on existing zoning and previous investment decisions
- ▶ the intent of the landowner; and
- ▶ the ability to supply services and infrastructure to proposed new release areas.

The supply of land needs to distinguish between general services based land needs and strategic export needs.

- ▶ Local service based industry needs to be accessible to the population centres and supplier markets in the local area. Often these businesses require street front exposure to passing trade and may retail goods and services from a shopfront or warehouse. The provision of land in local areas should be in accordance with demand and appropriate supply for growth so as to not jeopardise the role of other industrial precincts.
- ▶ Strategic export sectors, on the other hand, have different location needs, often requiring direct access to their primary products, larger land areas for larger operations, and access to major transport infrastructure for access to markets outside the region. In many cases they do not rely on direct exposure to a local market since this is not a core market for their business. The location of new export land in the LGA will need to ensure that while remaining reasonably proximate to the local labour force, the areas take advantage of major transport infrastructure or large tracts of flat land capable of accommodating a wide range of larger businesses.

8.1.1 Site Selection Criteria

There are many factors to consider when identifying and assessing potential sites for new industrial land development.

State Government Departments have in place planning policy to guide the selection of new urban land. The Department of Planning needs to be satisfied that new industrial land is located in appropriate areas and are consistent with the CCRS.

Table 22 Industrial Land Supply – Site Selection Criteria

Guiding Principle	Criteria	Site Analysis
1. Economic	<ul style="list-style-type: none"> Healthy economic activity 	<ul style="list-style-type: none"> Land affordability Profile of the site Ability to attract tenants Flexibility of site to accommodate tenants Data technology capabilities Ability to create an industry cluster Development feasibility
	<ul style="list-style-type: none"> Regional positioning 	<ul style="list-style-type: none"> Capacity to service intra regional growth and development Regional competitiveness (capacity to service competitive advantage)
	<ul style="list-style-type: none"> Efficient and effective transport access 	<ul style="list-style-type: none"> Access and profile to highway / major roads network Access for consumers, workers and service vehicles (energy efficiency) Access to export markets from airport and rail Proximity to existing industrial areas Access to tradewaste sites and transfer stations Traffic implications and constraints Access for B Double vehicles Access costs to connect with the arterial network
	<ul style="list-style-type: none"> Cost-effective infrastructure and land use 	<ul style="list-style-type: none"> Existing investment in services and infrastructure Upfront investment required in infrastructure and impact on viability Impact on existing land uses and other industrial areas
	<ul style="list-style-type: none"> Employment impacts 	<ul style="list-style-type: none"> Direct and indirect employment generation Proximity to labour force and vehicle kilometres (journey to work)
2. Governance	<ul style="list-style-type: none"> Accountability and compliance 	<ul style="list-style-type: none"> Existing zoning and suitability of proposed land use Planning direction of and support from Council and Dept. Planning Potential for future expansion
	<ul style="list-style-type: none"> Landowner views 	<ul style="list-style-type: none"> Willingness of owners to develop as industrial Attitudes of and impacts on adjoining land holders
	<ul style="list-style-type: none"> Community acceptance 	<ul style="list-style-type: none"> Acceptable levels of impact on community amenity Acceptable visual impacts and appropriate buffers

Guiding Principle	Criteria	Site Analysis
3. Human Habitat	<ul style="list-style-type: none"> Quality built environment and places 	<ul style="list-style-type: none"> Proximity of residential areas and potential encroachment Proximity of areas of high environmental value Convenience of workplace trips Suitable size for intended role (i.e. export scale vs local) Elevation of land and fill requirements
	<ul style="list-style-type: none"> Infrastructure services 	Proximity to and availability of essential services: <ul style="list-style-type: none"> Water Sewer Electricity Broadband/technology
4. Ecology	<ul style="list-style-type: none"> Healthy waterways 	<ul style="list-style-type: none"> Flood levels Catchment management Waste water treatment
	<ul style="list-style-type: none"> Geotechnical 	<ul style="list-style-type: none"> Contamination issues Geotechnical issues Soils testing Vegetation
	<ul style="list-style-type: none"> Biodiversity 	<ul style="list-style-type: none"> Flora and fauna/wildlife corridors/threatened species Other vegetation/conservation issues

Source: AEC, 2007

8.2 Land Suitability

The Gosford LGA is subject to a number of environmental constraints which affect the ability of land to be used for employment purposes. The type of constraints and how they affect the Gosford LGA is discussed in Appendix B.

Using this information on constraints and opportunities a land suitability analysis was undertaken for Gosford LGA. The methodology used in this investigation aims to identify and evaluate a range of constraints, which will impact upon the ability of Gosford to accommodate further employment lands development.

The identification of a sound methodology will also enable the community and landowners to better understand the process of planning, site selection and development. Ultimately, the application of a sound methodology will help the development industry to develop appropriate sites within Gosford that best serve the needs of the local and regional community and economy.

PART D

STRATEGY AND IMPLEMENTATION



9. The Strategy for Employment Lands

9.1 Planning Principles

It is important in guiding the identification of future employment lands development in Gosford over the short, medium and long term that a set of principles be adopted that acknowledge Gosford's potential competitive strengths. The principles are as follows (not in order of importance):

1. Preference is given to development resulting in **urban growth and consolidation** on land that adjoins other land which is already being used for employment lands purposes and is the most economic to service.
2. The Gosford economy is fundamentally **linked** to the economy of Sydney, Wyong and Newcastle and this employment investigation needs to reflect this.
3. Gosford Council needs an **adequate supply** of ready to build on employment lands to facilitate short-term, medium-term and long-term economic growth.
4. Employment land needs to be available in a **range of locations** in order to create choice in the market.
5. High quality and **environmentally responsible development** of employment lands is supported by Gosford Council, as are the benefits associated with such developments.
6. Protect general industrial employment clusters from **encroachment of incompatible land uses** to minimise any adverse effect of industry on land uses in other zones.
7. Ensure that subdivision is controlled to make certain land is **not fragmented** into parcels unsuitable for identified long term employment use. This is important so as to avoid fragmented ownership and increases in land value to the extent that it becomes economically unviable to consolidate in the future.
8. Make **provision for local service industries** and employment areas in suitable locations relevant to existing and future population areas.
9. Not include for development land which has high **conservation value** or which has heritage or cultural significance.
10. Promote development at a rate and in locations that can be provided with **infrastructure services** without placing undue burden upon existing community resources.
11. Recognise that industrial land is a **limited resource**.

9.2 Future Need and Existing Supply

The employment lands investigation is to ensure that, there will be an ongoing supply of industrial zoned land to cater for forecast demand for the next 26 years.

As shown in 6.1.8 there is currently 128.08 ha supply of land zoned for employment lands and yet to be developed. Section 7.3 demonstrates the anticipated demand is expected to be between 138.6 ha to 213.2 ha (low scenario workforce method and land take up rate scenario) between 2010 and 2036. Therefore there is need to identify between **10.5 ha to 85.12 ha** of additional employment lands in Gosford to meet demand, subject to appropriate investigations. A conservative approach would be to take the higher figure of **85.12 ha** of employment lands. This equates to about **3.27 ha per year on average** (over the 26 year period).

The higher figure is more appropriate in this situation because the economic impacts of a shortage of employment lands are far greater than those caused by a minor over supply of employment lands.

It is crucial that there is a robust and dynamic strategic planning framework that will ensure that adequate forward planning is undertaken to meet this forecast demand. The ongoing economic growth and sustainability Gosford LGA should be a key priority in any future planning.

9.3 Analysis of Existing Planning Precincts - Accommodating Future Employment Lands

The most logical place to expand employment lands is into areas of land immediately adjacent to existing planning precincts (planning precincts are described in section 6.1). It is these sites where the employment land supply in the short to medium term is most likely to be sourced.

Each planning precinct is discussed below in terms of:

1. Land suitability and area constraints;
2. Future employment lands opportunities; and
3. Strategic planning discussion and actions for the precinct.

9.4 Precinct 1 Somersby

Land Suitability Analysis

The Somersby Industrial Park is subject to a number of environmental constraints, which affect the ability of land to be zoned as an extension the existing employment lands (The methodology is described in Appendix B). Using this information on constraints and opportunities, a land suitability analysis was undertaken for the Somersby Precinct. The methodology used in this investigation aims to identify and evaluate a range of constraints, which will impact upon the ability of the area to accommodate further industrial development. The identification of a sound methodology will also enable the community and landowners to better understand the process of planning, site selection and development.

This investigation identified a number of environmental constraints and opportunities applicable to land in Somersby resulting in a constraints map (Figure 36 in Appendix D). The map identifies areas that are relatively unconstrained and potentially suitable for development. This map does not represent a detailed assessment of all economic and social constraints. It does, however, provide a reasonable representation of constraints and provides a sound basis for identifying potential growth areas for development subject to appropriate investigations. The main constraints within Somersby include the 1 in 100 year flood, vegetation management, archaeological items and slope.

The constraints analysis for the Mt Penang Site was based on DCP 144 Mount Penang. This includes specific areas for vegetation and riparian management and heritage conservation. Figure 33 demonstrates the areas within the site which have been previously identified as having ecological value including bushlands and the Piles Creek Tributary and new lakes and ponds as well as permanent gardens.

Certain items are listed as heritage items under the IDO 122 and Draft Gosford LEP 2009 which includes the buildings and gardens are of historical or cultural significance. The site is listed as a place of State Significance, on the NSW Heritage Register.

Therefore for the purposes of this analysis the vegetation, as shown on Figure 33 and the heritage items, as shown on Figure 34 will be ranked 5. Other uses which will be considered as a hard constraint are the Juvenile Justice Centre, sports grounds and High Security Area.

From the constraints maps there are a number of areas that, subject to further investigation may be suitable for rezoning to accommodate future employment lands growth, these are discussed in further detail below.

Future Employment Lands Opportunities

The lands adjoining Somersby Industrial Park represents the major opportunity for the expansion of employment lands in the Gosford LGA. It has a good location adjacent to transport infrastructure with land available for expansion to the south east. Based on potential demand for employment lands over the next 26 years, there will likely be a need for a progressive expansion of the precinct over time to ensure adequate supply.

As previously identified, transport, warehousing and logistics represents a key industry growth opportunity for Gosford. Despite the region currently recording a relatively low level of employment, the industry is recording strong growth nationally and Gosford boasts a strategic location between Sydney and Newcastle. Direct access to major infrastructure is critical to the attraction of these businesses and Somersby represents the best location within the Gosford LGA due its proximity to the F3 and existing access roads to the Somersby Industrial Park. Potential opportunities for Somersby include distribution centres for large retailers, road freight companies, warehouses, logistics operations and high tech industries.

Using the land suitability analysis in this report and the scoping studies, site analysis and strategic work undertaken previously by Gosford Council there are a number of areas that, subject to further investigation may be suitable for rezoning to accommodate future employment growth. These are discussed in the context of the key planning principles below.

Proposed Future Employment Lands - Mount Penang Parklands (Area 1)

Parts of the Mount Penang Parklands have potential for future utilisation as employment lands of either a commercial or industrial character. The Parklands lie across the Pacific Highway from the Somersby Industrial Park and are accessible from Kangoo Road. Improved access to the western aspect of the Parklands, particularly for B-Doubles, from the F3 and Central Coast Highways would greatly enhance the suitability of the site for future employment uses. Optimal utilisation of the land would be for industries seeking good amenity and transport access and could include an industrial park style development suitable for combined manufacturing/ warehousing/ office operations.

Taking into account ecological and heritage values described above a site 16.6 ha in size is shown in Figure 44. This site is flat and is situated at the entrance to the Somersby Industrial Park, the Coast Highway and the F3 Freeway which will be an important asset to the site. The proximity to the highway and visual exposure make this site ideally suited to Business Park type of development. This area is set back enough from the heritage items so as not to have any impact.

DCP 144 designated this area for 2 to 3 storey buildings with a total floor area of around 120,000 sq metres. The objective of the DCP was to also provide a high quality technology park set within a park land environment.

This area is relatively free from physical constraints, however, much of its development will depend on the demand to develop the site for a business park when compared to other areas such as Wyong or Baulkham Hills where public transport options are available to the site. It is noted that the Parklands site is now listed as a potential state significant site. This may have the effect of fast-tracking its development for employment generating land uses.

Given the recent development of the high school and the above recommendations for future employment generating lands in Mount Penang Parklands, it is therefore important the existing DCP is revised. The DCP needs to consider existing constraints to the land and recommend site specific controls for the design and development of employment lands.

Proposed Future Employment Lands - Acacia Road / Debenham Road (Area 2)

Area 2 is located immediately opposite the Juvenile Justice centre, and adjacent to existing 4(a1) Industrial zoned area under the LEP22 (refer to Figure 45). This area provides a logical

extension to the existing industrial development and has excellent proximity to services and access off the Central Coast Highway and the F3 Freeway.

This area is proposed to be zoned RU1 Primary Production under the *draft Gosford LEP 2009*. Due to its previous and current uses this area contains very little vegetation. The existing uses on the site include rural dwellings, primary production and a quarry, which has been identified as coming towards the end of its operation. The site is relatively free of constraints with only a small steep slope on the quarry site however, this is likely to be re-contoured once the quarry has ceased its operations.

Area 2 is a natural progression from the industrial uses to the west and Acacia Road and Debenham Road provide a physical boundary and easy access for further industrial development. This total size of this site is 23.6 ha. Concentrating additional opportunities in this location will have benefits in terms of synergies between businesses

Proposed Future Employment Lands – West Somersby (Area 3)

Area 3 is located to the west of Myoora and Somersby Falls Road on the western edge of the existing Somersby Industrial Park (refer to Figure 46). This area provides a logical extension to the existing industrial development and has excellent proximity to services.

This area is proposed to be zoned RU1 Primary Production under the draft Gosford LEP 2009. It is bounded to the west by land zoned E2 Environmental Conservation which is approximately 150 to 200 wide. Beyond this is the Brisbane Waters National Park. Bounding the area to the south Council land and to the north is rural land and a heritage site.

The site is relatively free of constraints with only a small ridge on the north western edge of the site. A buffer area from the National Park and Environmental Conservation area will need to be considered as part of its redevelopment. The total size of these areas is 45.9 ha

Proposed Future Employment Lands - Isolated Lots in Somersby (Area 4)

During the rezoning of the Somersby Industrial Park several isolated lots were not included in the overall rezoning. These sites are proposed to be zoned to RU1 Primary Production in the *draft Gosford LEP 2009*. These sites are surrounded by industrial land uses and zoned industrial land. Therefore for the purposes of consistency it is recommended to rezone these areas to IN1 General Industrial in the draft Gosford LEP. These lots include the following (refer to Figure 46):

- ▶ Lot 1 DP 331514 – 180 Wisemans Ferry Road Somersby
- ▶ Lot 31 DP 811669 – 244 Debenham Road Somersby
- ▶ Lot 91 DP 546768 – 156 Somersby Falls , Somersby

The total size of these areas is 3.15 ha.

Area for Investigation 1- Old Sydney Town

Somersby has traditionally been a key tourist precinct for the Central Coast. Old Sydney Town, a historical theme park, was located in the precinct though is now closed to the public. The Australian Reptile Park and Wildlife Sanctuary is also located in Somersby and is a popular tourist destination. The sites are located next to each other and are adjacent to the Somersby

Industrial Park on the western border. Parts of the Old Sydney Town site could represent an opportunity for future development as employment lands due to its limited constraints.

Since the closing of Old Sydney Town in 2003, the site has not been utilised for any consistent economic use. In the short term and given the availability of other better positional lands, it is important for Gosford to protect the potential for tourism uses to be re-established within this site. It is for this reason that the Old Sydney Town site has not been considered as a potential employment lands site in the short to medium term.

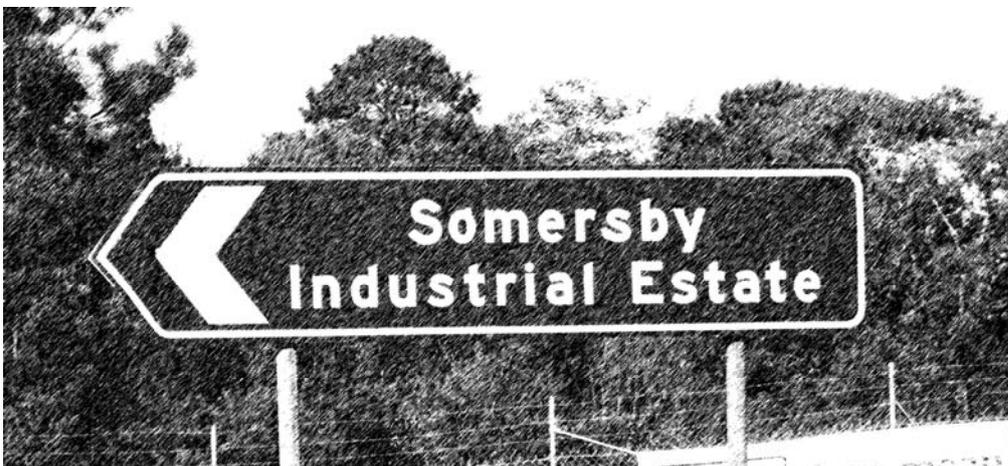
However, Gosford's key tourism assets include its beaches and coastal villages which represent a better focus for tourism development. Over the longer term as other employment lands areas are developed the loss of this tourism land could be out weighed by the economic benefits of employment land, contributing to the region's economic growth and development. The future of this site should be revisited when this Employment Lands Investigation is next reviewed.

The Australian Reptile Park is a successful tourist attraction in its own right but the potential to create a 'tourism cluster' in Somersby may be limited by the market and other economic factors. Any expansion of the Somersby Industrial Park to the west would have to consider the Australian Reptile Park and ensure that there are suitable buffers to ensure that the amenity of the park is not adversely affected.

Strategic Planning Discussion and Actions for the Precinct

As previously discussed, the expectations of land owners and buyers are not currently aligning with land holders asking values above what businesses are willing to pay. Development within the Somersby Industrial Park will be market driven and will require the realigning of land value expectations to facilitate sales and development activity.

In order to promote employment uses within Somersby the proposed employment land areas identified above will need to be investigated further for potential rezoning to IN1 General Industrial. It is recommended that this precinct be preserved to accommodate both light and general industrial uses given it is a significant sized industrial precinct with reasonable access, flat topography and no defined land use conflicts. In addition the Mt Penang Area (1) should be encouraged as a short term opportunity for a business park.



9.5 Precinct 2 West Gosford

Land suitability and area constraints

Figure 37 is the constraints map for the West Gosford Precinct. The map identifies areas that are constrained and unsuitable for development. The existing employment lands zoned areas are fairly unconstrained.

However, the western side of the precinct slopes significantly towards the escarpment to the west. There are several lots on the western side of this precinct which are vacant (on Stockyard Road and Tathra Road). These sites are constrained by steep slopes and dense vegetation.

Bounding the employment lands to the west and north are further steep slopes and further dense vegetation.

In addition due to the proximity of Narara Creek parts of this precinct are affected by sea level rise as well as the 1 in 100 year flood level. In addition some lots adjacent to Narara Creek have been identified as having a risk of acid sulfate soils. The natural boundaries to the east and west provide a constraint to any extension to employment land development in these areas.

Future employment lands opportunities

The West Gosford precinct represents one of the major employment precincts in the Gosford LGA with vacant land for development. As identified previously this area currently has 16.8 ha of zoned vacant land. As stated above it appears some of this land contains dense vegetation and is on steep slopes. However, until further flora and fauna studies are completed this land will be considered as having potential for employment lands development in accordance with its existing zoning.

Extensions to the West Gosford Precinct to the west, north and east are limited due to the natural boundaries of the escarpment and therefore steep lands and Narara Creek to the east as well as dense vegetation.

Bounding the precinct to the south is the Central Coast Highway which provides another physical edge to further industrial development. In addition to the highway to the south is several lots which are currently zoned for commercial use and proposed to be zoned B5 Business Development under *the draft Gosford LEP 2009*. Given these lots proximity to the Central Coast Highway and therefore visual exposure to customers and its current use for large floor plate retailing this site would be better suited to bulky goods retailing under the B5 Business Development under the *draft Gosford LEP 2009*.

Strategic Planning Discussion and Actions for the Precinct

The West Gosford precinct represents one of the major employment precincts in the Gosford LGA with zoned vacant land for development. While there is competing demand within the precinct from commercial uses, it is recommended that the precinct be consolidated as an employment lands precinct through an industrial zoning. It is strategically important due to its proximity to the Gosford City Centre and Council should look to maintain the industrial nature of the precinct and not support further encroachment by non-employment uses if possible. This is

discussed in further detail below in Section 9.14. For this reason this report supports the proposed rezoning of this precinct to IN1 General Industrial under the *draft Gosford LEP 2009*.

Gosford has a limited supply of zoned employment lands which is a further reason to ensure that the existing supply is preserved for employment use. In particular, the retention of rare large lots of industrially zoned land is considered highly important. Bulky goods retailing within the precinct should be prohibited.

Within this precinct there is still a large amount of zoned vacant land available (16.8 ha). This provides the opportunity to develop a large area for industrial use in close proximity to Gosford City Centre, the Central Coast Highway and the Freeway as well as in proximity to residential population. The precinct needs to concentrate on the intensification of the employment lands within its current boundaries in order to add value to existing underutilised employment lands. For a further discussion on intensification of employment lands refer to section 9.18.

Based on the above discussion there are no additional rezoning opportunities within the West Gosford Precinct, however, maximisation of development potential within the existing zoned area is supported.

West Gosford - competing demand within the precinct from commercial uses



9.6 Precinct 3 Gosford (North)

Land suitability and area constraints

Figure 38 is the constraints map for the North Gosford Precinct. The map identifies areas that are constrained and unsuitable for development. The employment lands zoned areas are fairly unconstrained. Only a small area which is affected by ecological constraints and it is proposed to be zoned RE1 under the *draft Gosford LEP 2009*.

The remainder of the precinct is fairly flat and cleared of any vegetation. However, the majority of the employment lands on the western side of the railway are affected by high occurrence of Acid Sulfate Soils, 1 in 100 yr flood constraints and sea level rise. This is even more prominent the closer the site is to Narara Creek.

Future employment lands opportunities

The employment lands to the west of the railway track are bounded by Narara Creek to the west and north, the railway track to the east and south by the showground. Therefore extensions of employment lands immediately adjacent to this area are limited by physical and natural constraints. Within this area there is currently several sites vacant totalling 0.4 ha. However, these sites are highly constrained e.g. flood prone and unlikely to be developed over the life of this investigation and are therefore discounted from the analysis.

This investigation however, supports the rezoning of a site to the south currently used for aquaculture to IN1 General Industrial under the *draft Gosford LEP 2009*. This will make available a large, well located site for industrial development.

The employment lands to the west of the railway track are bounded to the west by Narara Creek and the railway track to the east and south by residential development. Expanding employment lands into this area is not supported until the existing 2.6 ha which is currently zoned for employment lands is developed.

Strategic Planning Discussion and Actions for the Precinct

Gosford (North) precinct is at near full capacity with building density within the precinct relatively high. There is limited opportunity for building coverage to increase in the precinct.

The precinct has been infiltrated with a large number of other users (this is discussed in further detail in Section 9.14). Industrial zoned land in this area is limited due to flood constraints and the adjacent showground and Council should not support further encroachment by non-employment lands uses. Employment intensity within the precinct will have to be primarily driven by technological and space utilisation improvements.

9.7 Precinct 4 Lisarow

Land suitability and area constraints

The Lisarow precinct is relatively free of constraints as it has previously been heavily developed (see Figure 39). The areas are fairly flat with only with bushfire prone land - buffer area affecting the precinct. There are however, small areas of dense vegetation bounding Pacific Highway North. Some lots to the north are significantly affected by steep slopes however; some of these are large enough to accommodate development in the flat areas of the site.

Future employment lands opportunities

There is one lot vacant within the Lisarow employment land precinct to attract new business. This site is heavily vegetated and is slightly sloping. However, its retention in a zone to allow employment generation is supported given its location, existing zoning and design opportunities that can overcome physical constraints.

There is also anecdotal evidence that some businesses in the precinct have been impacted heavily by the global economic downturn and may close. Although this is normally a negative it may also create opportunities for new business investment. This includes the closure of Albany International's paper products operations which have created a 7.7 ha site with substantial buildings.

There is the potential to create a business park type industrial development on the Albany site to diversify the supply of employment lands in the Gosford LGA and ensure competitiveness. This site has high exposure from a major arterial road and is in close proximity to the railway and other public transport.

As previously identified, food processing and beverages represent an industry growth opportunity for the Gosford LGA. There are several large food processing companies currently located in Lisarow and this could represent another opportunity for further intensification within other sites in this precinct. Given Chickadee and Sara Lee are currently located here this could provide food related type of industrial cluster.

This area is bounded to the north, south, east and west by residential development and a small area to the north which is proposed to be rezoned to E3 Environmental Management. To the north of the precinct the land is undulating with steep ridges. Employment lands generally need fairly flat area due to the large floor plates often required, and the physical constraints generally would preclude conversion to allow employment generating land uses. Land prices are already quite high which also limits the opportunity for expansion of this precinct.

Strategic Planning Discussion and Actions for the Precinct

There appears to be no opportunity for expansion of the precinct though there does appear to be opportunities for intensification and maximisation of development potential. This could include sub-dividing some lots to create multiple smaller lots. The building coverage within the precinct is also relatively lower than other precincts in the Gosford LGA creating opportunities

for businesses to expand operations onsite in the future (this is discussed in further detail below in Section 9.14).

9.8 Precinct 5 Wyoming

Land suitability and area constraints

Figure 40 is the constraints map for the Wyoming Precinct. The map identifies areas that are constrained and unsuitable for development. The existing employment lands zones are fairly unconstrained.

This precinct is divided into a north and south precinct.

- ▶ North: Brooks Ave dissects the precinct. The precinct is a mixed use precinct with 24 lots totalling 8.4 ha zoned industrial under Gosford Planning Scheme Ordinance. The site is bounded to the north and east by the Pacific Highway and to the west by the railway line. To the south the site is bounded by E2 Environmental Conservation under the *draft Gosford LEP 2009*. Beyond the railway line is Narara Creek. This site is also constrained by the 1 in 100 year flooding as well as a low occurrence of acid sulfate soils. Given the surrounding environment this precinct does not have any areas for expansion.
- ▶ South: Glennie Street/Cary Street: Comprising 62 lots with a mix of manufacturing, wholesale and showrooms with a range of other service operations. Located in the suburb of Wyoming. This precinct is located on the eastern side of the Pacific Highway, this area is located behind some commercial zoned uses (between the railway and the Pacific Highway) which includes a car dealership. The remainder of the precinct contains fibro / weatherboard single dwellings that are approaching the end of their expected life span. The sites containing residential dwellings are between 600 m² to 1000 m² in size.

Future employment lands opportunities

The southern area (Glennie Street/Cary Street) of this precinct on the eastern side of the highway, contains lots with older housing stock that is considered as having development potential due to its age and location. The total amount of land that has development potential is 2.6 ha.

Within the northern area (Brooks Ave) of the precinct, there are currently no vacant lots within the Wyoming precinct. This precinct is surrounded on all sides by environmental or physical constraints therefore giving no areas for expansion.

Strategic Planning Discussion and Actions for the Precinct

As explained above the southern area of this precinct (Glennie Street/Cary Street) has potential for future development of employment lands (2.6 ha). This land is currently zoned for industrial purposes and therefore amalgamation of the lots should be encouraged due to the availability of land with good access to the arterial road network and the amount of land available. Due to the fragmented nature of the lots this site is seen as a long term prospect until land prices rise high enough for capital gains to outweigh other factors.

For the northern area, there are no vacant lots and no areas available for expansion. There are no future employment land use opportunities within this precinct. The majority of the land uses

facing the Pacific Highway comprise of car showrooms or storage facilities. Within the precinct the land uses are varied with entertainment uses, gyms and wholesalers. This precinct has been infiltrated with a large number of what are considered non industrial type of uses such as sport and recreational operations. The predation of non industrial use is discussed further in Section 9.15.

For the reasons discussed in this section the IN1 zone proposed in *draft Gosford LEP 2009* is supported.

9.9 Precinct 6 Erina

Land suitability and area constraints

Figure 41 is the constraints map for the Erina Precinct. The map identifies areas that are constrained and unsuitable for development. The employment lands zoned areas are fairly unconstrained. However, this site is located adjacent to Erina Creek and therefore heavily affected by the 1 in 100 year flood constraints and sea level rise as well as a risk of disturbed terrain for acid sulfate soils. A positive measure for employment lands redevelopment is the precinct is flat and contains no vegetation.

Future employment lands opportunities

The Erina precinct is at full capacity with demand likely to increase in the future given its proximity to Erina Fair and the Central Coast Highway.

Bounding the precinct to west and south is Erina Creek and to the east is the commercial zoned area which faces the Central Coast Highway. This commercial area currently has a substantial amount of retail services and serves as a secondary node of retail activity to Erina Fair. It is therefore unsuitable to be rezoned for industrial activities. This existing commercial area is proposed to be rezoned B5 Business Development under the *draft Gosford LEP 2009*, which permits bulky good retailing.

Bounding the precinct to the north is a residential area with fibro/ weather board single dwellings as well as some public recreation uses. Within this area there has been some leakage into the adjoining single dwellings with several dwelling utilising the dwellings for home occupations including surveyors, drafting, electrical engineers etc. Given the demand for service industry in this area there is potential to expand the precinct to the north through investigating the potential of rezoning residential land to industrial.

The proposed area (area 5) as shown in Figure 48 would form a progression from the industrial uses to the south across Barralong Road. The Central Coast Highway and Winani Road/ Narrawa Road provide a physical boundary to the potential industrial expansion area and easy access for further industrial development. Dissecting the lots to the west of Lingi Street is a row of vegetation which contains Swamp Mahogany which is a Koala food tree. Therefore prior to any development on these sites flora and fauna investigations need to be undertaken. Flooding should also be considered. On the east block to the east of Lingi Street some lots are adjacent to the creek and therefore riparian corridors. The proximity this creek will need to be considered in the redevelopment of this area. The land to the east slopes considerable towards the Central

Coast Highway. Concentrating additional opportunities in this location will have benefits in terms of synergies between businesses. The total size of this site is 5.4 ha.

Area 5 does not have a relatively high residential amenity given the age and quality of the dwellings, its history of flood affection and location on a busy road. It is noted however, that a constraint to development is the fragmented pattern of land ownership and the small size of allotments that may limit the type of industrial uses that could occur in this area. Given these constraints, it would be expected that the area would be attractive for small scale service type activities, rather than any major industrial development. Based on the current layout, there is potential for adverse traffic impacts with a multiple number of driveways accessing Barralong Road that contains a high amount of through traffic. These issues would need to be addressed should a rezoning be contemplated.

It is also noted that there is a small area of industrially zoned land at the intersection of Avoca Drive and Central Coast Highway. This area contains a service station and building supplies outlet, with a small strip of residential allotments located between the side of the buildings supplies outlet and Avoca Drive. Further expansion of the industrial zone into residential lots fronting onto Avoca Drive would not be supported given their location on an arterial road.

Strategic Planning Discussion and Actions for the Precinct

The precinct is characterised by a mixture of land uses ranging from service businesses, bulky goods and retail services to small scale light industrial operations. The role of Erina since the opening of Erina Fair is primary been a focal point for retailing and commercial activity. In order to protect this area from any further non traditional industrial development this precinct is to be zoned IN 1 General Industrial Development under the *draft Gosford LEP 2009* (refer to Section 9.14 for more details).

Building density on the existing industrially zoned land is relatively high indicating there is limited opportunity for building coverage to increase. Employment intensity within the precinct will have to be primarily driven by technological and space utilisation improvements.

In order to promote employment within the Erina precinct investigations could be initiated into the possible rezoning of land on the northern side of Barralong Road, west of the Lingi Street.

9.10 Precinct 7 Woy Woy

Land suitability and area constraints

Figure 42 is the constraints map for the Woy Woy Precinct. The map identifies areas that are constrained and unsuitable for development. As described in Section 6.1.7 , industrial land in Woy Woy is contained in four precincts including: Rawson Road and Ocean Beach Road, Woy Woy; Alma Avenue, Woy Woy Memorial Drive, Blackwall; and Nagari Road, Woy Woy (old abattoir site).

Nagari Road, Woy Woy (old abattoir site) is constrained as it is affected by high risk acid sulfate soils, sea level rise, steep slopes and bush fire prone land. To the north and east of the site is regionally significant land and EEC's. The site is bounded to the north by National Parks and will also be affected by potential buffers to this area. To the south east of this site is a small lot

which currently contains a substation and is also affected by the same constraints. This site is also surrounded by recreation and environmentally sensitive areas.

The other two areas in Rawson Road/ Ocean Beach Road and Alma Avenue, Woy Woy comprises primarily automotive repair operations, warehousing etc and are relatively unconstrained. These areas are surrounded by low density residential uses.

Memorial Drive, Blackwall contains primarily light industrial and service land uses and is surrounded by public recreation uses. This area is constrained by land slip and steep slopes to the east.

Future employment lands opportunities

The three precincts including Rawson Road and Ocean Beach Road, Woy Woy; Alma Avenue, Woy Woy and Memorial Drive, Blackwall do not have any spare capacity. These areas are older buildings with small lots which service the local residents. These areas are generally bounded by arterial roads and therefore industrial uses should continue within these boundaries and not expand to the surrounding residential neighbourhoods. Redevelopment of sites could occur, which should be for industrial uses rather than other uses which are permitted in the zone but do not generate employment.

The Nagari Road, Woy Woy (old abattoir site) site is itself constrained and is surrounded by National Park and therefore can not be expanded.

Strategic Planning Discussion and Actions for the Precinct

As there are no vacant lots and no areas available for expansion there are no future employment land use opportunities within this precinct.

The majority of the land uses are the traditional industrial uses such as automotive repairs. This area may have the opportunity to support other types of uses given its close proximity to residential development and major roads. This is discussed further in Section 9.15. For the reasons discussed in this section it is recommended to retain and reinforce the industrial zoning along Rawson Road and Ocean Beach Road, Woy Woy; Alma Avenue, Woy Woy and Memorial Drive, Blackwall and Nagari Road, Woy Woy (IN1 Industrial Zone under the *draft Gosford LEP 2009*).

The Nagari Road, Woy Woy (old abattoir site) site is constrained due to steep slopes etc and therefore any future use would need to consider these constraints. It is therefore unlikely that this site will be developed to the more traditional industrial uses which need large floor plates easy access etc.

9.11 Precinct 8 Kincumber

Land suitability and area constraints

Figure 43 is the constraints map for the Kincumber Precinct. The map identifies areas that are constrained and unsuitable for development. The employment lands zoned areas are fairly constrained as it is affected by high risk and disturbed terrain acid sulfate soils, sea level rise, 1 in 100 yr flood and bush fire prone land.

Future employment lands opportunities

Bounding the precinct to the north, west and south is public recreation land, to the east and south is Empire Bay Road and a small area to the west is environmental protection. Beyond this road to the east are low density residential and a sewage treatment plant. Given the surrounding environment this precinct does not have any areas for expansion.

Strategic Planning Discussion and Actions for the Precinct

The Kincumber precinct is at full capacity with demand likely to increase in the future to service the local catchment. Building density within the precinct is relatively high indicating there is limited opportunity for building coverage to increase. Employment intensity within the precinct will have to be primarily driven by technological and space utilisation improvements.

The precinct has been infiltrated with a large number of other users such as church, child care centre and a retail development containing a small supermarket, takeaway food etc. However, some more traditional uses exist such as a concrete batching plant (x3), bus depot, car repair stations etc.

This highlights the loss of land for employment generation, where industrial uses become replaced with non industrial uses that seek to locate on industrial land due to relatively cheaper land and on going costs. This can lead to a diminishing supply of land for local industrial needs, and a marginalisation of industrial activities.

In this and other small 'service – oriented' industrial areas, a policy of consolidation, retention and reinforcement of industrial uses should be supported to ensure these lands are not compromised by non – industrial uses. Cumulatively, these uses can have a significant sterilizing affect on the overall contribution of industrially zoned land to economic growth as well as a lack of industrial land to service local community needs.

9.12 Summary of Potential Employment Areas in Gosford LGA

There is a requirement for additional employment land in the Gosford LGA to meet employment land demand targets over the next 26 years. There is also a need to reinforce, consolidate and retain existing industrial areas so they can reach their full development potential as employment generating lands.

Using the land suitability analysis in this report and the scoping studies, site analysis and strategic work undertaken previously by Gosford Council as well as the *Central Coast Regional Strategy* (DoP, 2008) there are a number of areas that, subject to further investigation may be suitable for rezoning to accommodate future employment growth. These areas are summarised below in Table 23.

Table 23 Potential Employment Lands Areas in the Gosford LGA

Location - Suburb	Area	Gross Potential Employment Lands Area (ha)	Comment
Precinct 1-Somersby	Mount Penang Parklands (Area 1)	16.6	The Mount Penang Parklands lie across the Pacific Highway from the Somersby Industrial Park and are accessible from Kangoo Road. The site area takes into account ecological and heritage values within Mount Penang. This site is flat and is situated at the entrance to the Somersby Industrial Park which will be an important asset. This area is relatively free from physical constraints, however, its development will depend on the demand to develop the site for a business park when compared to other area such as Wyong or Baulkham Hills where public transport options are more readily available.
Precinct 1-Somersby	Acacia Road / Debenham Road (Area 2)	23.6	Area 2 is located immediately opposite the Juvenile Justice centre, and adjacent to proposed IN1 Industrial zoned area under the Gosford LEP. This area provides a logical extension to the existing industrial development and has excellent proximity to services and access off Central Coast Highway and the F3 Freeway. This area is proposed to be zoned RU1 Primary Production. Due to its previous and current uses this area contains very little vegetation. The existing uses on the site include rural dwellings, primary production and a quarry, which has been identified as coming towards the end of its operation. The site is relatively free of constraints with only a small steep slope on the quarry site however, this is likely to be levelled once the quarry has ceased its operations.
Precinct 1-Somersby	West Somersby (Area 3)	45.9	Area 3 is located to the west of Myoora and Somersby Falls Road on the western edge of the existing Somersby Industrial Park (refer to Figure 46). This area provides a logical extension to the existing industrial development and has excellent proximity to services. This area is proposed to be zoned RU1 Primary Production under the draft Gosford LEP 2009. It is bounded to the west by land zoned E2 Environmental Conservation which is approximately 150 to 200 wide. Beyond this is the Brisbane Waters National Park. Bounding the area to the south is Council land and to the north is rural land and a heritage site. The site is relatively free of constraints with only a small ridge on the north western edge of the site. A buffer area from the National Park and Environmental Conservation area will need to be considered as part of its redevelopment

Location - Suburb	Area	Gross Potential Employment Lands Area (ha)	Comment
Precinct 1 - Somersby	Isolated Lots in Somersby (Area 4)	3.15	<p>During the rezoning of the Somersby Industrial Park several isolated lots were excluded. These sites are proposed to be zoned to RU1 Primary Production in the <i>draft Gosford LEP 2009</i>. These lots include the following:</p> <ul style="list-style-type: none"> ▶ Lot 1 DP 331514 – 180 Wisemans Ferry Road Somersby ▶ Lot 31 DP 811669 – 244 Debenham Road Somersby ▶ Lot 91 DP 546768 – 156 Somersby Falls , Somersby.
Precinct 6 - Erina	North of Barralong Road (Area 5)	5.4	<p>Located to the north of the existing employment lands area this area currently has some home businesses operating within it. This area is a potential expansion from the industrial uses to the south and the Central Coast Highway provide a physical boundary. Dissecting the lots to the west of Lingi Road is a row of vegetation which contains Swamp Mahogany which is a Koala food tree. On the east block to the east of Lingi Street some lots are adjacent to the creek and therefore riparian corridors. Therefore future rezoning should be subject to resolution of flooding, flora/fauna, riparian corridors and consideration of constraints in relation to fragmentation and traffic.</p>
Total		94.65	

9.13 Drivers of Change

Future changes to the character of Gosford have the potential to have an impact on the dynamics of the employment lands market. Proposed infrastructure projects such as the upgrading of the intersection of the Central Coast Highway with Brisbane Water Drive and Manns Road in West Gosford and the Narara to Lisarow upgrade will have an impact on traffic flows. Improved traffic flows at West Gosford will likely drive demand for employment land at the West Gosford precinct which is also likely to make the precinct more attractive to non-employment land uses which require exposure to passing traffic. Council should be aware of this and look to maintain the industrial nature of the precinct by not supporting further encroachment.

The successful completion of the Gosford Challenge and redevelopment of the waterfront will improve Gosford as a place to live, work, study and play. This will likely drive investment in the local area including the nearby employment precincts at North Gosford and Wyoming. These precincts are at close to full capacity (comprising largely older developments) though

improvements to the surrounding area may flow through to redevelopment of sites to a higher quality. This will depend on market forces and whether redevelopment is financially attractive to land owners and tenants. Council could look to promote higher amenity and sustainable development in these precincts through development controls so future development reflects the changing character of the area.

9.14 Bulky Goods

Over the last decade there has been an encroachment of bulky goods operations into employment lands such as West Gosford. Some major businesses have located in the precinct (through existing zoning provisions as building supplies outlets) and have created a large number of jobs for the region. This has resulted in the precinct becoming more commercial in nature and integrating with the Gosford City Centre as an ancillary retail/bulky goods centre. While this has resulted in strong employment growth, industrially zoned lands are a finite resource in the Gosford LGA and critical to growing the local economy and broadening the economic base to promote local employment.

The *draft Gosford LEP 2009* defines bulky goods as:

“bulky goods premises means a building or place used primarily for the sale by retail, wholesale or auction of (or for the hire or display of) bulky goods, being goods that are of such size or weight as to require:

(a) a large area for handling, display or storage, or

(b) direct vehicular access to the site of the building or place by members of the public or the purpose of loading or unloading such goods into or from their vehicles after purchase or hire, but does not include a building or place used for the sale of foodstuffs or clothing unless their sale is ancillary to the sale or hire or display of bulky goods.”

The West Gosford employment lands precinct has undergone a transition over the last decade with several bulky goods type activities being established. It is noted in the existing 4(a) zone that hardware and building supplies are permissible. This enabled the development of Bunnings at Stockyard Place. On land opposite Stockyard Place, a bulky goods outlet was permitted by way of an enabling clause. Given the location of this land, in relatively close proximity to business zoned land on the Central Coast Highway, there is now speculation that the intervening land could be appropriate for further bulky goods type development or other business type development. It is noted that there is already zoned land at West Gosford which is vacant that could accommodate this form of development.

Bulky goods development should be confined to business zoned lands which help ensure centre vitality, viability and sustainability of existing centres, and not allow the encroachment of more business oriented land uses into industrially zoned land.

Bulky goods clusters should only be allowed on land zoned B5 Business Development under the *draft Gosford LEP 2009*. The boundaries of these clusters should be restricted so as not to encroach into the light or general industrial areas. Expansion of bulky goods retailing should only be permitted within these designated areas.

9.15 Non Industrial Uses

Many areas within Gosford have also been experiencing the predation of traditional industrial land within industrial zones for non industry uses such as churches, gyms, childcare centres, funeral homes, brothels and entertainment areas. These uses are attracted to industrially zoned land due to the relatively cheaper development costs. They have significant potential to erode the availability of industrial land and marginalising industrial development.

Protecting major employment areas such as Somersby, West Gosford, North Gosford and Lisarow from such uses will ensure that traditional industrial uses will be protected and encouraged. Industrial zoned lands are a finite resource in the Gosford LGA and critical to growing the local economy and fostering local employment and ensuring land is available for industrial use to serve the community. It is for this reason that uses in the IN1 General Industrial Zone should be reviewed to ensure that non industrial land uses are complementary to employment generating land uses. Inappropriate uses that may encourage more commercialisation of industrial areas should be excluded whilst ensuring there is sufficient land to accommodate service industries e.g. trade, car repairs etc. This review should also consider the objectives for the zone to strengthen its use for industrial purposes and encourage the containment of industrial areas and maximisation of development potential. This review should consider the role of other zones and alternative locations for these uses if removed from industrial zoned land. Some non industrial that may not be appropriate include:

- ▶ Funeral homes or Funeral chapel
- ▶ Place of public worship
- ▶ Place of public entertainment
- ▶ Child care centres.
- ▶ Entertainment facility
- ▶ Recreation facility (indoor, major or outdoor)
- ▶ Function centre and
- ▶ Vehicle showrooms, sales and hire.

These uses may be more suitable in the B5 Business Development under the *draft Gosford LEP 2009*. Areas within Gosford zoned B5 Business Development are generally along main roads and close public transport options which may be more suitable for the above uses.

9.16 Protecting the Employment Land Base

Given the limited amount of industrial land available for development and redevelopment in Gosford, conversion to non-employment generating activities should be discouraged, despite the intensifying market pressure. The market pressure arises from the fact that developer capital returns are greater for residential or commercial development than industrial development and therefore more appealing.

The risk of continuing to lose employment lands in favour of residential and/or business development is that Gosford's population to jobs ratio will grow worse, not better, over time. The result will be a less complete community, with more Gosford residents having to commute to Sydney to work, creating greater traffic congestion and the environmental, social and economic

consequences associated with it. As the population ages the economic base narrows until it is predominantly a service and retail economy.

Gosford is not alone in facing this challenge. Many other Councils, both in the Central Coast, Sydney and further afield, are facing the same pressure for conversion of industrial land to other uses that directly produce few, if any, jobs or long-term economic benefits.

The housing and business use versus industry issue is less clear in cases where the future of industry is uncertain, such as a number of Sydney Metropolitan Councils that have witnessed an exodus of manufacturing jobs and an influx of new residents seeking housing. But, that is not the case in Gosford, where there is every reason to expect that Gosford's industrial land base can make an increasing contribution over time to local employment and prosperity if it is protected and appropriate planning controls in place.

9.17 Business Parks

Business Parks is a reference to large areas being utilized by light industry, offices and commercial uses. Corporate offices make up the largest proportion of business use with large companies zoning to cater for businesses wishing to co-locate office and industrial functions. The business uses typically require larger floor plate configurations and areas of high amenity and access to, or location within, specialised centres.

Business parks are representing a key growth area in relation to employment lands. The potential for businesses to consolidate office operations from commercial centres to the same site as the back office, manufacturing, warehouse and distribution activities is proving an attractive option for a lot of companies.

Demand for business parks is a trend that has generally been experienced throughout Australia and not just focused in Australia's capital cities. Businesses throughout the country are looking for opportunities to consolidate operations in out-of-centre business parks in higher amenity locations. Demand for the Gateway Estate in the Mount Kuring-Gai Industrial Area (located approximately 30 minutes south of Gosford) has been reasonably strong, indicating demand from business parks on the fringe of Sydney.

The CCRS recognised that the 'development of business parks provide good building design and layout and an emphasis on light industrial and value-adding industries and integration of industrial, warehousing and office activities. Significant opportunities also exist to expand technology-based jobs in the Region'. An action within the CCRS was to establish a framework for the establishment of business parks. This may include:

- ▶ prohibition of office-only activities in out-of-centre locations
- ▶ set a maximum percentage of office floor space within an out-of-centre commercial complex where this office floor space is integrated with activities such as manufacturing and distribution
- ▶ ensure that business parks are strategically located near a major transport corridor.

The Metropolitan Strategy also commented that new guidelines will need to be developed by the Department of Planning for the location or establishment of business parks. This could also apply to Gosford. The Strategy states that business parks should:

- ▶ Support existing centres;
- ▶ Have high quality design outcomes;
- ▶ Reduce environmental impacts;
- ▶ Make better use of existing and proposed public transport infrastructure to reduce car dependence; and
- ▶ Build on existing concentrations and clusters of knowledge based activity such as universities or hospitals.

Given the primary objective of the Gosford Challenge to focus the development of future commercial office provision in the Gosford CBD, thus contributing to its revitalisation, provision of an out-of-centre business park of a commercial office character would not be consistent with the objectives of either Council or the Department of Planning. Accordingly, any future business parks to be established within the Gosford LGA should be of a mostly industrial nature. It is noted that this would need to be considered in terms of permissibility of use within existing and proposed zones

The Tuggerah Business Park located in the Wyong Shire has more of a commercial focus towards the establishment of corporate regional headquarters rather than industrial components such as manufacturing, warehousing and distribution. The development of a business park in the Gosford LGA would provide for the diversification of employment lands and provide suitable land for a growing sector. Its location, however, would be subject to other considerations, such as zoning, potential to affect Gosford CBD, affect on industrially zoned land etc.

Gosford City Council is currently undergoing a process of planning for the revitalisation and development of the Gosford City Centre and promoting some office style development that could compromise the success of this process should be resisted.

The precincts where business parks are proposed include the following:

- ▶ Somersby/Mount Penang: This precinct is not located as close to the Gosford City Centre and could represent a complementary precinct. Some commercial businesses have already located in Mount Penang indicating that the location is not a major impediment and the good amenity of the area is attractive to office workers. The good access to road infrastructure will also represent a key competitive advantage in relation to the warehousing and distribution side of operations.
- ▶ Lisarow: At 7.7 hectares, the site which until recently housed the Albany International operations ('Lisarow Site') would be of a suitable size to allow for the development of a relatively substantial business park. The Lisarow Site could accommodate a business park of a general industrial nature and could attract businesses seeking to integrate their administration, manufacturing and distribution capabilities within one central location. The Lisarow Site could potentially accommodate several businesses seeking large footprints for their operations.

Of the opportunities for business parks discussed above, the redevelopment of the Lisarow Site to house a business park would be the most preferable given its accessibility in regard to the Pacific Highway, the train station, residential communities and the workforce.

Other areas which are also close to the business centre such as West Gosford (considered a village in the centres hierarchy) do not have vacant land which is considered suitable for business park use. The areas vacant in west Gosford are not visually prominent from the main roads and would generally suit more light industrial uses rather than business parks. It is considered these areas would displace employment use.

The following are key requirements for business parks that Council should consider:

- ▶ Require new business parks to be in locations that will support the existing network of commercial centres and can be accessed;
- ▶ Business parks should only permit businesses that require large floor plates; (more than 1000m²) are linked with research and technology or require storage/warehousing component. Those businesses that are purely office related i.e. accountants, solicitors, etc, should not be permitted within business parks but encouraged in commercial/retail centres to help support their viability.
- ▶ Future business parks must demonstrate a contribution to subregional economic and job growth and provide for recreational, cultural and/or learning facilities.
- ▶ Business parks should be in locations that do not undermine the Gosford CBD.
- ▶ Business parks need to be master planned to ensure all constraints and opportunities on the site have been considered.
- ▶ A maximum office space component of 60% should be required for each development/business and development standards should be set for FSRs and car parking provisions. The maximum office space is recommended in order to protect the CBD. An objective of this investigation is not to undermine the potential redevelopment in the CBD.

Case Studies for Office Space to Non Office Space in Business Parks

Homebush, Sydney, incorporates virtually 100% office space with supporting retail facilities. Norwest in Sydney's Baulkham Hills incorporates a mix of tenants ranging from 20% to 100% office space. These requirements are recognised by the recent Sydney Metro Strategy that found that technological developments and process and system improvements were leading to "reduction in shop floor workers and more office based employees". It also noted that "many industrial activities have higher office components with more white collar workers" resulting in more jobs in employment lands.

In Melbourne, the Axxes, Corporate Park incorporated a range of 100% office tenants over a 6 month period to move from a 40%/60% office/industrial mix to a 50%/50% mix. Com.Park at Mulgrave in Melbourne has an 80%/20% office/industrial mix including some office/warehouse units with a 50%/50% mix. The success of this park encouraged the developer to purchase a second site for another Com.Park in Melbourne (*URBIS, September 2007*)

The important conclusion to draw from this is that future employment land development in Somersby and Lisarow needs to provide for a flexible mix of land uses and proportions of floor space in order to meet the various needs and requirements of employment land users. If this is not provided these users will go elsewhere and in the case of major regional organisations this may mean bypassing Gosford altogether (*URBIS, September 2007*)

Table 24 Trends in Business Park Developments in Brisbane

Tenant	Suburb (Brisbane)	Leased Area (sqm)	Office Component
Visy	Hemmant	8,500	3%
Kone Elevators	Bowen Hills	1,172	60%
Cesco Ltd	Hemmant	2,035	20%
Australian Freight Services	Hemmant	3,800	20%
Australian Maritime Services	Teneriffe	2,450	60%
Strammit Industries	Crestmead	19,118	6%
Berri	Lytton	14,215	10%
Nick Scali Furniture	MacGregor	4,970	65%
Tyco Australia	Cannon Hill	5,571	54%
Mountain Designs	Hendra	3,300	33%
Hart Sport	Aspley	2,600	20%

Source: Northeast Business Park - Business Park Assessment (URBIS, September 2007)

It is recommended that consideration be given to zoning any business parks to B7 Business Park to maintain consistency with the Standard Template Instrument. Future business park proposals will be subject to detailed consideration through the planning proposal process. The objectives of the zone are to

- ▶ *To provide a range of office and light industrial uses.*
- ▶ *To encourage employment opportunities.*
- ▶ *To enable other land uses that provide facilities or services to meet the day to day needs of workers in the area.*

Inclusion in the zone will identify a suite of uses that are compatible for the precinct and do not compromise the CBD. Business parks need to be significantly distinguished from the *B5 Business Development zone*. The land uses and objective for the *B5 Business Development zone* are primarily for bulky goods as described in Section 9.13.

9.18 Intensification of Employment Land

Several employment land precincts in the Gosford LGA such as Gosford (North), Kincumber, Lisarow, Wyoming and Erina have limited available land with limited expansion potential. Intensification of employment lands represents an opportunity to foster job growth in these precincts. This involves increasing the number of employees per hectare of land.

It is not always possible for government to directly control how land is used, though it may be achievable through a combination of policy and regulations to influence the intensity of industrial land use and therefore reduce the need to find additional green field sites.

Intensification often occurs when a business' activity grows while remaining on the same site. Many firms are motivated to remain at their current site as long as possible due to issues such as:

- ▶ Availability of additional space on site;
- ▶ Significant relocation costs and establishing at a new location;
- ▶ Proximity to current suppliers and customers and risk of disrupting existing relationships through unfamiliar location; and
- ▶ Proximity to employees and unwillingness to risk staff turnover.

Intensification usually involves increasing the site coverage, rather than increasing the number of employees per unit of built floor area. Intensification will therefore be strongest on sites that currently have relatively large land areas for the size of the buildings on site. Opportunities include:

- ▶ Investigating the planning opportunities in relation to setbacks to allow businesses to build larger buildings on lots. This will allow for the larger site coverage ratios which would in turn result in higher employment intensity.
- ▶ Attracting more technological advanced industries to Gosford will create more value add to the economy as well as resulting in more efficient or intensive use of existing employment land and buildings. This could be encouraged through a well designed Business Park such as the Norwest Business Park in Baulkham Hills.

9.19 Large-Scale Industry

Part B (Situational Analysis) of this investigation demonstrates there is a significant demand for large-scaled industry within Gosford LGA. The criteria for large-scaled industry includes medium to large sites which are between 5 to 50 ha, flat land, the provision of suitable utilities and reasonably priced resources and energy, close proximity to railway or road and competitively priced land. Some industry can lead to impacts on the surrounding area such as fumes, noise and waste due to their operational requirements. For this reason large sites will need to incorporate buffer land to help deal with these negative externalities. Land at Acacia Road and Debanham Road (area 2) and West Somersby (Area 3) would be suited to this type of activity.

10. Employment Lands Release Program

10.1 Balancing Supply and Demand for Industrial Land

This section determines whether there is an adequate supply of industrial land to meet expected demand over the next 26 years.

As previously outlined in 6.1.8 , Gosford has approximately 128.08 ha supply of land zoned for employment lands and yet to be developed. The majority of vacant land yet to be developed (and not ecological or cultural significant) is located in Somersby Precinct (100.98 ha).

On the demand side, this investigation has shown that there are several views as to what might be required between now and 2036. Section 7.3 demonstrates the anticipated demand is expected to be between 138.6 ha to 213.2 ha (low scenario workforce method and land take up rate scenario) between 2010 and 2036.

There should be a goal of maintaining a “rolling supply” of land to ensure that there is no restriction on supply, adequate competition between sites and a variety of locations to choose from. It is also noted that larger releases may be required in 5 to 10 years when it is predicted that the existing employment land opportunities may be depleted. Once the existing zoned supply is discounted there is a need to identify between **10.5 ha to 85.12 ha** of additional employment lands in Gosford to meet demand. A conservative approach would be to take the higher figure of **85.12 ha** of employment lands. This equates to about **3.27 ha per year on average** (26 year period).

The Gosford LGA has a finite amount of land available for urban development due to its topographical constraints, waterways and levels of infrastructure, and this supply is nearing exhaustion. The LGA is generally no longer an area suitable for ‘green fields’ urban development, and as such there needs to be maximisation of land uses within existing zoned areas. There will be competing demands for residential, employment generating land uses (both business and industrial) and other activities. It is also noted that high environmental and scenic values also pose a significant constraints to further urban development.

The goal of maintaining an adequate supply of industrial land needs to be balanced with natural constraints of the LGA and demands for other land uses, however, Council is committed to undertaking strategic investigations to ensure land use evolution and maximisation of existing potential within existing zoned areas occurs.

10.2 The Industrial Land Release Program

The purpose of the industrial land release program is to guide the location of future employment lands over the life of the investigation. It includes a time frame of short (0-10 years), medium (10-20 years) and long term (20 years plus) to give an idea when this land should be considered for rezoning. These time frames refer to the period in which rezoning should commence if the land is to supply lots to the market at a future date (GHD, 2007).

It is assumed that land takes up to six years to reach the market from commencement of the rezoning process.

Table 30 outlines each of the potential employment land areas and provides an indication of when the rezoning process will need to be considered if these areas are to supply employment land to the market at the appropriate time.

Table 25 Gosford Employment Land Release Program

Potential Employment Locality	Precinct	Gross Area (ha)	Net Area (ha)	Approximate Years supply (@ 3.27 ha per yr Shire wide demand)	Timing for commencement of rezoning	Comment
Precinct 1-Somersby	Mount Penang Parklands (Area 1)	16.6	13.28	4.1	Short/ Medium Term	Assumes 80% of land will yield lots.
Precinct 1-Somersby	Acacia Road / Debenham Road (Area 2)	23.6	18.88	5.8	Medium Term	Assumes 80% of land will yield lots.
Precinct 1-Somersby	West Somersby (Area 3)	45.9	36.72	11.2	Medium / Long term	Assumes 80% of land will yield lots.
Precinct 1-Somersby	Isolated Lots in Somersby (Area 4)	3.15	2.52	0.8	Short Term	Assumes 80% of land will yield lots.
Precinct 6 - Erina	North of Barralong Road (Area 5)	5.4	4.32	1.3	Short Term	Assumes 80% of land will yield lots
		94.65	75.72	23.2		

Note: all potential areas will need to be the subject of detailed strategic investigations to determine the suitability of industrial development.

Collectively this land release program identifies 75.72 ha (net) or approximately

- ▶ 6.8 ha or 2.1 years supply of land for the Short Term,
- ▶ 13.3 ha or 4.1 years supply of land for the Short /Medium Term,
- ▶ 18.9 ha or 5.8 years supply for the Medium Term , and
- ▶ 36.72 ha or 11.2 years supply for the medium /long term.

If all land was developed at the assumed yields this equates to approximately 23.2 years supply of employment land that could be added to the existing land bank of zoned land. The distribution of land areas across the time frames reflects the current situation that there are significant areas of land in Gosford that are already zoned for employment purposes. This area does fall short of the life of this investigation by 2.8 years. However, given there is 128.08 ha supply of land zoned for employment purposes that is yet to be developed it is unlikely this will cause an undersupply.

Within section 7.3.1 workforce methodology approach projects employment land requirements to meet the job targets for Gosford. The workforce approach demand analysis breaks employment land demand into four main categories based on land use. The approach identified gaps for each category including heavy Industry (22.3 ha – 25.7 ha), modern general industry (38.5 ha – 44.5 ha), transport, warehousing & storage (22 ha – 25.5 ha) and supporting Industry (28.2ha – 32.6 ha).

In areas such as Mt Penang and Lisarow where business parks are encouraged on these sites, three of the four land use categories may be developed. Therefore it is difficult to compare the identified gap areas with the proposed areas to be development within the employment lands. However, as shown in Table 26 this investigation is able to determine if these industries will be supported within these areas.

This table demonstrates that all the land use categories are supported to some extent. Heavy industry which needs large buffer areas as the surrounding area can be impacted by fumes, noise and waste due to their operational requirements, can only be supported on two sites. However, these are large areas (one site being over 45 ha) and the workforce approach only identified the need for a maximum of over 25 ha for heavy industry.

Table 26 Likely Supporting Industries by Location

	Heavy Industry	Modern General Industry	Transport, Warehousing & Storage	Supporting Industry
Release Areas				
Mount Penang Parklands (Area 1)	No	Yes	Yes	Yes
Somersby - Acacia Road / Debenham Road (Area 2)	Yes	Yes	Yes	Yes
Western Somersby (Area 3)	Yes	Yes	Yes	Yes
Somersby Isolated Lots in Somersby (Area 4)	No	Yes	Yes	Yes
Erina North of Barralong Road (Area 5)	No	Yes	No	Yes
Existing Zoned Areas (Discounted Developable Land only)				
Somersby	No	Yes	Yes	Yes
West Gosford	No	Yes	No	Yes
Gosford (north)	No	Yes	No	Yes
Lisarow	No	Yes	Yes	Yes

Note: Yes – more likely to be suitable on this site

No – less likely to be suitable on this site.

The above definitions are not aligned with the standard template and references should be made to appropriate land use tables in relevant planning instruments in relation to permissibility of uses.



Ideally this investigation should be reviewed every five to seven years to check whether areas were developed as expected and to assess any changes in demand or services and infrastructure. If needed, areas can be brought forward if development exceeds expectation or other areas are withheld from supply. If development falls short of expectation then areas can be deferred to a later time frame.

This investigation includes areas that have been identified in the land suitability analysis as having ecological and physical characteristics that may make them suitable for employment land development. Areas in proximity to existing industrial zones were given preference over isolated lands. The investigation also considers the need to provide land in a range of locations in Gosford LGA.

11. Implementation and Review

11.1 Implementation

Areas that are already zoned for industrial development will continue to supply land to the market over the life of this investigation. The intention of this investigation is to identify area of suitable investigation to replenish these stocks of zoned land to ensure a continuous and long term supply. It is not appropriate that all areas identified in this investigation proceed to rezoning at the same time and Council does not have the resources to do this. Only those areas within the identified time frame will be considered by Council for investigation.

Each potential employment land release area (or group of areas) will require an amendment to the relevant planning controls, development control plan provisions, a Section 94 contributions plan and/or a planning agreement with Council. Servicing issues also need to be considered and addressed.

It should be noted that no consultation with landowners who may have lands suitable for rezoning has occurred as part of this investigation. Any future investigations would be subject to consultation with owners.

11.2 Summary of Actions

To ensure planning policies facilitate, protect and support employment lands development the following actions need to be considered.

Recommendations	Actions	Timing
Forecast and Monitor		
Develop and maintain a program to forecast and monitor the demand and supply of employment lands	Review the industrial land investigation every five years.	Ongoing
Land Supply and Delivery		
Maintain a 25-year land bank to ensure a regular employment lands supply.	Develop an industrial land release program for the supply and release of industrial land which includes the following : <ul style="list-style-type: none"> ▶ Commence the rezoning process for North of Barralong Road, Erina (Area 5) and Isolated Lots in Somersby (Area 4) so this area is market ready within the next 5 years. ▶ Commence detailed site investigation of Mount Penang Parklands (Area 1). Assess the viability of this site in satisfying the employment land requirements for Gosford over the short to medium term especially in terms of the provision of a Business Park. 	By 2015 (short) By 2020 (short/ medium)

Recommendations	Actions	Timing
	<ul style="list-style-type: none"> ▶ Commence detailed site investigation of Acacia Road / Debenham Road (Area 2). Assess the viability of this site in satisfying the employment land requirements for Gosford over the medium term. ▶ Commence detailed site investigation of West Somersby (Area 3). Assess the viability of this site in satisfying the employment land requirements for Gosford over the medium/ long term. 	<p>By 2020 (medium)</p> <p>By 2030 (medium/ long term)</p>
Accommodating Future Employment Lands		
Business Parks	<ul style="list-style-type: none"> ▶ Review opportunities for business parks in suitable locations such as Mount Panang and Lisarow. ▶ It is recommended that proposed business parks are rezoned to Zone B7 Business Park under the draft Gosford LEP 2009 ▶ A maximum office space component of 60% should be required for each development/business and development standards should be set for FSRs and car parking provisions ▶ Business parks should be in locations that do not undermine the Gosford CBD. 	Ongoing
Large-Scale Industry	<ul style="list-style-type: none"> ▶ Consider land at Acacia Road and Debenham Road (Area 2) and West Somersby (Area 3) for large scale industry. This sites will need to incorporate buffer land to help deal with these negative externalities of large scale industries 	Ongoing
Planning for Consolidation and Containment of Existing Employment lands		
Ensure that employment lands precincts are preserved.	<ul style="list-style-type: none"> ▶ Encourage the consolidation of existing industrial sites through redevelopment of brown field and infill of under-utilised sites. 	Ongoing
	<ul style="list-style-type: none"> ▶ Undertake a review of permissible uses in the proposed IN1 zone to ensure uses do not sterilize land for employment generation. ▶ Do not permit bulky goods retailing in the IN1 – General Industrial. 	Ongoing
	<ul style="list-style-type: none"> ▶ The Nagari Road, Woy Woy (old abattoir site) site is constrained due to steep slopes etc and therefore any future use would need to consider these constraints. It is 	On going



Recommendations	Actions	Timing
	therefore unlikely that this site will be developed to the more traditional industrial uses which need large floor plates easy access etc.	
	<ul style="list-style-type: none"> ▶ Within the Wyoming Precinct eastern side of the highway, contains lots with older housing stock that is considered as having development potential due to its age and location. Amalgamation of the lots should be encouraged for industrial uses because of the availability of land with good access to the arterial road network and the amount of land available. 	On going

11.3 Which Zone is most appropriate?

The range and nature of businesses that operate in employment lands, and the way the composition of activities is likely to change in the future, is complex. However from a planning perspective the decisions to be made about the future zoning of land are relatively simple.

The structure of zones in the standard template basically revolves around the separation of land uses. As far as relevant to this investigation the key land use groups involved are limited to industrial and other uses such as places of public worship (as discussed in section 9.15) . Different zones allow these uses in different combinations.

The key decisions to be made in considering the appropriate planning framework of existing industrial areas are:

- ▶ Major employment areas, often export related and not located within local residential neighbourhoods.
- ▶ More localised employment areas that cater for local community services.

11.4 Development Standards

Gosford's DCP 113 – Industrial Development, D6.42 Somersby Industrial Estate - Landscape Guidelines and the draft DCP 2009 currently provides the management of industrial development. The majority of the controls within these DCP's are considered adequate. However, the following is suggested to incorporate into development controls for employment land uses.

11.4.1 Intensification of Development

Council could consider reducing setbacks for areas such as West Gosford , Gosford (North), Wyoming, Woy Woy and Kincumber , where not located on major roads. As stated in Section 9.18 an intensification of standards may result in redevelopment of these areas which in turn is an opportunity to foster job growth in these precincts.

11.4.2 Landscape and Visual Impact Management

The application of the following principles will ensure that visual aesthetic values are protected in the development of employment lands within Gosford:

- ▶ Within Somersby locate the largest and tallest structures in the western areas low lying areas so they are less visually intrusive as viewed from the west.
- ▶ Continue to implement programmes to manage conservation values within Somersby
- ▶ Provide adequate setbacks on individual lots to enable retention of remnant vegetation and screen planting to public/private interface
- ▶ Develop design guidelines for signs, planting, fencing, and hard landscape elements that will be visible from public roads.
- ▶ Develop a lighting management plan that will control light emission levels from individual sites so that the cumulative effect of night time lighting is within acceptable limits.

11.4.3 Indicative Lot Sizes

Section 6.2.1 examines the current distribution of industrial land by lot size. The various industrial estates in the region record different distributions of lot sizes and to some extent that determines the type of uses that predominate in each area. Lisarow and Somersby record the largest lot sizes with an average lot size of 18,480 sqm and 14,472 sqm respectively.

Industrial estates including Gosford (north), Wyoming, Woy Woy and Erina are characterised by smaller lots with each having 50% or greater under 2,000 sqm. West Gosford and Kincumber are both made up primarily of mid range lot sizes.

The larger lots within Somersby generally coincide with larger manufacturing uses and should be reserved for major industries. Related downstream processing or specialist industries may be suited to medium to smaller sized lots. There is potential to amalgamate several lots if there is a need for larger sites. In considering the appropriate lots size for area Council will need to have regard to the following factors:

- ▶ the subdivision, where it involves the creation of a significant number of lots, should provide for variety in lot size;
- ▶ the size of lots should provide sufficient space to accommodate the industrial operations and buildings envisaged, make allowance for possible future expansion, and allow the site to function properly and efficiently in terms of development requirements These requirements may relate to such factors as safe ingress and egress, vehicular movement within the curtilage of the site, parking, deliveries, storage and bin areas, boundary setback requirements and landscaped areas; and
- ▶ the overall pattern of lot sizes in the locality and the type of industrial activity characteristic of the locality in which the subdivision is located.

11.5 Environmentally Sustainable Development

Sustainability is an integral part of Gosford City Council's activities, including all levels of planning. Gosford City Council needs to remain current with planning and development trends

as they evolve based on marketplace demands. Employment lands buildings are significant users of energy, for a number of reasons:

- ▶ often there are high levels of electronic equipment (photocopiers, computers etc) which have a constant power drain (i.e. not turned off at the wall);
- ▶ operating practices and work safety standards set requirements for lighting levels, air quality and temperature;
- ▶ patterns of office lighting and flexible working hours mean that lights and air conditioning may operate for significant amounts of time each day, even when the building is sparsely occupied;
- ▶ building design is often unresponsive to climatic conditions;
- ▶ power costs are often recovered from tenants leases, buffering the landlord from the financial impacts of building design on energy usage; and
- ▶ shopping trends are towards the creation of enclosed, air-conditioned environments.

By effectively accommodating and managing employment related land use demand in the future, the Gosford can best achieve its economic and sustainability objectives and become a regional leader.

This section provides an outline of the potential green and eco-friendly aspects of industrial development trends in which Gosford City Council could consider for future development. It is recommended that the Gosford enact green strategies across all employment land zones. This approach would be in line with Gosford's environmentally sustainable initiatives.

12. Conclusion

The findings of this employment lands investigation demonstrate employment growth pressures will continue to increase throughout Gosford. At the local level, a number of economic drivers have been identified which will generate market demand for employment lands development. The focus of this investigation is therefore on creating and encouraging the appropriate strategic investigations into identified areas to ensure an adequate supply of employment generating (industrial) land uses. Important conclusions include:

- ▶ The employment lands are concentrated within the eastern portion of Gosford LGA at Lisarow, North Gosford and Wyoming, Erina, Somersby, West Gosford and Mount Penang, with smaller areas at Woy Woy and Kincumber. This pattern is one that can be built on over the next 26 years with a number of areas having the potential for expansion into green field or brown field sites.
- ▶ This employment lands investigation (if implemented) will ensure that there will be an ongoing supply of industrial zoned land to cater for forecast demand for the next 26 years. There is currently 128 ha supply of land zoned for employment purposes that is yet to be developed. The anticipated demand is expected to be up to 213 ha (land take up rate scenario) over the next 26 years. Therefore there is need to identify up to 85 ha of additional employment lands in Gosford to meet demand.
- ▶ There are many factors to consider when identifying and assessing potential sites for new industrial land development. Gosford is subject to a number of environmental constraints which affect the ability of land to be used for employment purposes. Using the land suitability analysis in this report and the scoping studies, site analysis and strategic work undertaken previously by Gosford Council as well as the *Central Coast Regional Strategy* (DoP, 2008) there are a number of areas, subject to further investigation, which may be suitable for rezoning to accommodate future employment growth. They cover a total area of 76 ha. These areas and the recommendations that relate to them are summarised in Section 11.2
- ▶ Some employment lands precincts have undergone a significant transition over the last decade with bulky goods and commercial businesses encroaching into traditional industrial areas. This has changed the character from a predominantly industrial area with more distinct commercial nature. This has resulted in the loss of employment lands at the expense of commercial uses. Bulky goods retailing should be prohibited within industrial areas. This report supports the draft Gosford LEP 2009 prohibiting bulky goods retailing in the IN1 General Industrial Zone.
- ▶ There needs to be a clear framework and direction for businesses park type developments and a zoning framework identifying appropriate zones, permissible land uses etc to accommodate this activity.
- ▶ Industrial zoned lands are a finite resource in the Gosford LGA. Wise use of existing zoned areas as well as the potential areas identified in this investigation is important and critical to growing the local economy.

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Appendix A

Relevant Planning and Economic Documentation

Relevant Statutory Documents

Environmental Planning and Assessment Act 1979

The EP&A Act sets the legal basis for planning controls in NSW. This strategy is not intended to be a statutory instrument prepared under the EP&A Act, but it will be used by Council to prepare statutory plans at a later date.

State Environmental Planning Policies

A number of SEPPs that may be applicable to the Gosford Shire Employment Lands Investigation are as follows:

SEPP 14 Coastal Wetlands

The aim of SEPP 14 is to ensure coastal wetlands are preserved and protected for environmental and economic reasons. This SEPP requires consent and the concurrence of Planning NSW for clearing, draining, filling of, or constructing a levee within, the identified wetlands. Wetland areas are not considered available for future development.

SEPP 22 Shops and Commercial Premises

SEPP 22 provides controls to permit changes of use. For example, from one type of shop to another type of shop. This change of use is still considered to be permissible if the proposed use is prohibited under an environmental planning instrument. Although this can occur, it is still necessary to obtain development consent should the consent authority be satisfied that the change of use will not have an unacceptable adverse impact.

SEPP 26 Littoral Rainforests

SEPP 26 aims to provide a mechanism for the assessment of development proposals that are likely to damage or destroy littoral rainforest areas. The policy applies to certain mapped areas and includes a 100 metre buffer zone surrounding such areas. The policy requires that consent must be granted prior to the carrying out of any development within these areas. The likely effects of the proposal must be considered in an environmental impact statement. Littoral rainforest areas are not considered available for future development.

SEPP 44 Koala Habitat Protection

SEPP 44 encourages the conservation and management of natural vegetation areas that provide habitat for koalas to ensure permanent free-living populations will be maintained over their present range. The policy applies to 107 local government areas including Gosford. Local councils cannot approve development in an area affected by the policy without an investigation of core koala habitat. The policy provides the statewide approach needed to enable appropriate development to continue, while ensuring there is ongoing protection of koalas and their habitat. Typically, koala habitat is not considered available for future development.

SEPP 55 Remediation of Land

SEPP 55 provides a statewide planning approach to the remediation of contaminated land. This policy aims to promote the remediation of contaminated land for the purpose of reducing the risk of harm to

human health or any other aspect of the environment. Contaminated land is constrained for certain types of development.

SEPP 71 Coastal Protection

This policy came into effect on 1 November 2002. It seeks to ensure that development in the NSW Coastal Zone is appropriate and suitably located, to ensure that there is a consistent and strategic approach to coastal planning and management and to ensure that there is a clear development assessment framework for the coastal zone.

This SEPP requires a greater level of scrutiny of any development proposals considered to have an adverse impact on the coastal areas of the NSW (as per Schedule 2 of the SEPP) and originally required the adoption of a Master Plan by the Minister for Infrastructure and Planning for all major subdivisions (generally 25 or more residential lots or 5 or more rural-residential lots). These Master Plans were subsequently required to be prepared as Development Control Plans.

SEPP Major Development

This SEPP defines certain developments that are major development under Part 3A of the Environmental Planning and Assessment Act 1979 and determined by Joint Regional Planning Panels (JRPP). One of the aims of this SEPP is to identify development to which the development assessment and approval process under Part 3A of the Act applies.

Development that is described in Schedules 1, 2 and 3 of the SEPP (in the opinion of the Minister) are deemed to be Part 3A projects.

SEPP (Infrastructure) 2007

This Policy repealed a broad range of SEPP's that previously applied to the Gosford including SEPP 8 – Surplus Public Land, SEPP 9 – Group Homes, SEPP 11 – Traffic Generating Development, SEPP 16 – Tertiary Institutions, SEPP 48 – Major Putrescible Landfill Sites, and SEPP (ARTC Rail Infrastructure) 2004.

The aim of this Policy is to facilitate the effective delivery of infrastructure across the State by:

1. improving regulatory certainty and efficiency through a consistent planning regime for infrastructure and the provision of services, and
2. providing greater flexibility in the location of infrastructure and service facilities, and
3. allowing for the efficient development, redevelopment or disposal of surplus government owned land, and
4. identifying the environmental assessment category into which different types of infrastructure and services development fall (including identifying certain development of minimal environmental impact as exempt development), and
5. identifying matters to be considered in the assessment of development adjacent to particular types of infrastructure development, and
6. providing for consultation with relevant public authorities about certain development during the assessment process or prior to development commencing.

This Policy provides planning controls for a wide range of infrastructure and land uses that are now not required to be addressed in LEPs.

SEPP (Repeal of REP Provisions) 2009

As of 1 July 2009, regional environmental plans will no longer be part of the hierarchy of environmental planning instruments in NSW. All existing REP's including the, REP No. 8 - Central Coast Plateau Areas, REP No. 9- Extractive Industry (No. 2) and REP No. 20 - Hawkesbury–Nepean River are now deemed State environmental planning policies (SEPPs). The Sydney Regional Environmental Plan No 6— Gosford Coastal Areas has been repealed by the SEPP. The remaining REP's affecting the Gosford LGA contain the following objectives.

- ▶ REP No. 9- Extractive Industry (No. 2): Identifies regionally significant extractive resources within the Sydney Region to facilitate their utilisation. The plan ensures extraction is carried out in an environmentally acceptable manner and prohibits extraction from certain environmentally sensitive areas. It ensures that decisions on future urban expansion take into account the ability to realise the full potential of important deposits.
- ▶ REP No. 20 - Hawkesbury–Nepean River : Integrates planning with catchment management to protect the river system. The impact of future land use is to be considered in a regional context. The plan covers water quality and quantity, environmentally sensitive areas, riverine scenic quality, agriculture, and urban and rural residential development. It controls development that has the potential to impact on the river environment. The plan applies to all parts of the catchment in the Sydney Region (15 local government areas), except for land covered by Sydney REP No. 11 - Penrith Lakes Scheme. The REP is supported by an Action Plan, which includes actions necessary to improve existing conditions.
- ▶ REP No. 8 - Central Coast Plateau Areas : Protects prime agricultural land of State and regional significance as well as regionally significant mining and extractive resources.

Local Environmental Plans

Gosford Planning Scheme Ordinance 2008

The Gosford City Council's major local planning instrument is the Gosford Planning Scheme Ordinance (PSO) 2008, which is a Council wide LEP, excluding the land applicable to the Gosford City Centre Local Environmental Plan 2007.

The Gosford City Council PSO 2008 currently zones a range of areas for various urban land uses. It provides the main statutory basis for future development and is the statutory instrument that has been used to implement Council policy. Its relevance to this project is that it sets the basis for the existing stock of zoned and developed or undeveloped land that this investigation needs to consider in assessing the long term requirements for urban land in Gosford City.

Employment lands activities are focussed on land zoned

- ▶ 4(a) Industrial (General)
- ▶ 4(b) Industrial (Light) ,
- ▶ 4(c) Industrial (extractive) and
- ▶ 4(d) Industrial (offensive or hazardous)

Gosford Local Environmental Plan No 22

Local Environmental Plan No. 22 (1981) provides the local planning framework for development in the Somersby Industrial Park area. It provides for employment generating development under the 4(a1)

Industrial Zone. Column 2 of the table in Part 2 cl. 8 of the LEP No 22 outlines the permissible development within this zone subject to Council consent. Development standards are also included in the LEP for development on land within 4(a1) *Industrial Zone* and are displayed in Table 27.

Table 27 Gosford Local Environmental Plan No 22 Development Standards

Item	Standard Required
Lot Size	<ul style="list-style-type: none"> ▶ 2ha for an allotment fronting Wisemans Ferry Road (width of at least 70m). ▶ 4000 square metres for any other allotment (width of at least 36m). ▶ Lots which are subject to clause 3 of the LEP are required to have a minimum width of 24m.
Setbacks	<ul style="list-style-type: none"> ▶ Minimum of 20m from Wisemans Ferry Road. ▶ Minimum of 10m from any other road frontage. ▶ Side and rear setbacks are set to a minimum of 5m.
Density	<ul style="list-style-type: none"> ▶ Site coverage is not to exceed 75%.

Draft Gosford Local Environmental Plan

The New South Wales Government has recently introduced a range of reforms to the Environmental Planning and Assessment Act 1979; one of which requires each local government area within NSW to prepare a new comprehensive Local Environmental Plan in accordance with the Standard Instrument for Local Environmental Plans that took effect on 31 March 2006.

Gosford City Council has completed the draft LEP 2009 and this plan finished exhibition on 5 May 2010. At the time of writing this report, Gosford City Council was reviewing submissions.

There are 34 standard zones to which Councils can add permissible uses and objectives in response to local needs. The following zones relate to this investigation as per Council's Draft LEP 2009. The Gosford LEP 2010 has not proposed any areas to be zoned for IN2 Light Industrial or IN3 Heavy Industrial.

However, until a new LEP is gazetted, the existing zonings under the Gosford Planning Scheme Ordinance 2008 will continue to apply to employment lands prior to gazettal.

Table 28 Draft Gosford Local Environmental Plan – relevant zones

Zone	Description and location
Business Zones	
B1 Neighbourhood Centre	The zone is generally intended to cover small neighbourhood centres that include small scale convenience retail premises, business premises or community uses that serve the needs of the surrounding area.
B2 Local Centre	This zone is generally intended for centres that provide a wide range of uses including retail, employment, entertainment and community uses.
B3 Commercial Core	The B3 – Commercial Core zone is designed to encourage employment in specific centres. This zone is generally intended for



	major centres that provide a wide range of uses including retail, employment, entertainment and community uses.
B4 Mixed Use	Similar to the Local Centre zone, this zone will provide for a range of retail, employment, residential, entertainment and community functions where the main centre includes a broader mix of services and functions than the local centre.
B7 Business Park	This zone is generally intended for land that primarily accommodates office and light industrial uses, including high technology industries as well as bulky goods and wholesale suppliers. The zone also permits a range of facilities and services to support the day-to-day needs of workers, such as childcare centres and neighbourhood shops.
Industrial zones	
IN1 General Industrial	<p>This zone replaces the General Industrial and Industrial zones. It covers a wide range of industrial uses. This zone prohibits bulky goods and retail premises.</p> <ul style="list-style-type: none"> Within Gosford this zone is located in West Gosford, Somersby and Lisarow and smaller industrial areas at Erina, North Gosford, Kincumber, Wyoming and on the Woy Woy Peninsula. This zone replaced the 4(a) Industrial, 4(b) Light Industrial under the Gosford Planning Scheme Ordinance (PSO) 2008 and land zoned as part of the Somersby Industrial Park.
IN4 Working Waterfront	<p>This zone is for waterfront industrial and maritime activities with direct water front access. Its objectives ensure that development does not have an adverse impact on the environmental and visual qualities of the foreshore.</p> <ul style="list-style-type: none"> This zone applies to a small area on the waterfront at Mooney Mooney currently being used for activities associated with oyster farming. It is currently unzoned.

Development Control Plans

Development Control Plans (DCPs) are created by Council under the provisions of the EP&A Act. They deal in more detail with selected areas of Gosford or with selected issues that apply across the entire LGA. Relevant provisions from existing DCP's are being incorporated into Council Consolidated DCP as required under the NSW planning reforms. The four DCP's that take a strategic approach and are relevant to this investigation are as follows:

DCP 113 – Industrial Development

This plan summarises Council's policies for the management of industrial development with the exception of land contained within the Somersby Industrial Park identified under LEP No. 22. The purpose of this plan is to provide appropriate and relevant standards, guidelines and requirements for the development of industry in the City of Gosford so as to achieve well planned and orderly development.

The DCP encourages industrial development that is designed in context with the site and surrounding development in terms of setbacks, bulk, height, streetscape presentation and car parking.

D6.42 Somersby Industrial Estate - Landscape Guidelines

The objective of this Policy is to provide urban design and landscape guidelines for the development of Somersby Industrial Park in recognition of the sensitive environmental nature of the area and the visual

prominence of the estate. The Policy refers to Somersby Industrial Estate - Landscape Guidelines for its guiding principles.

DCP 137 LOT 3 DP 712505 Ghilkes Road Somersby Tourist Accommodation and Conference Training Facilities

Located on the western boundary of the Somersby Industrial Park this DCP was specially developed to provide more detailed guidelines for the development of the land for tourist accommodation and conference/training facilities. The DCP is affected by the provisions of Interim Development Order No 122 as amended by Local Environmental Plan No 389. The LEP is in the form of a sunset clause that shall lapse if the use is not commenced within three years from the date of gazettal of the amending LEP, or such later date as the Minister may, before the expiration of that period, notify by order published in the Gazette.

The purpose of the DCP was to manage the impact of future development on the amenity of the locality and to limit the scale of development so as to not prejudice the use of other lands for agriculture. This includes (but not limited to) the following provisions:

- ▶ The total number of tourist units on the land is to be limited to thirty (30);
- ▶ Permanent occupancy of the tourist units is prohibited;
- ▶ Strata titling of the tourist units is prohibited, together with the further subdivision of the land;
- ▶ All new buildings are to be setback a minimum of 30 metres from adjoining roads
- ▶ Buildings are to be restricted to a maximum height of two storeys.

DCP 138 Lot 26 DP 3944 Manns Road, West Gosford - Bulky Goods Salesroom/Showroom

Local Environmental Plan No. 387 has rezoned Lot 26 DP 3944 Manns Road, West Gosford to enable the development of the site for bulky goods salesroom and showroom. The purpose of this plan is to provide more detailed guidelines associated with the development of the land for a bulky goods salesroom/showroom.

DCP 144 Mount Penang Festival Development Site

This DCP applies to the Mount Penang Site which is situated adjacent to the F3 on the Pacific Highway exit ramp, adjacent to Somersby Industrial Precinct. Mount Penang has been continuously used for a Juvenile Justice Centre since 1912 and has cultural and social heritage values as well as rare and endangered flora and fauna.

The DCP was developed to guide the orderly development of the site. The objective of DCP 144 is to accommodate a mix of uses that generate employment opportunities for the region and broaden its economic base and encourage development that respects the heritage significance of the site.

A master plan for the site must be completed prior to any development proposal. The DCP also provides a concept plan for the site including a festival Precinct, sports precinct, a mixed use precinct, permanent gardens and bushland.

The concept plan identified an area for potential industrial and commercial uses on the western side of the site (Kangoo Precinct). The remainder of the site has either indigenous or non indigenous heritage values or vegetation management constraints. This precinct is described as gently sloping with open grassland and pockets of dense bushland. This area is remote from the heritage precincts.

Draft Development Control Plan 2009

Council has also prepared a draft Development Control Plan (DDCP) 2009 to provide further guidelines for development. The DDCP 2009 consolidates all the existing DCPs. The relevant sections to this investigation include the following.

- ▶ Part 2: Chapter 2.1 - Character – Somersby:

Desired Character

'This area will remain a master-planned estate for medium- and higher-impact employment activities, where development conserves the scenic value of surrounding bushland backdrops, protects Aboriginal cultural values, maintains the amenity of nearby residential properties, and achieves high standards of streetscape quality. Future development will conform to detailed planning controls that have been prepared and adopted for this area.'

- ▶ Part 2: Chapter 2.1 - Character - West Gosford

Desired Character

"This should remain a mixed-use centre that provides predominantly retail and business services to the surrounding district, but might also incorporate some accommodation, where the civic quality of prominent backdrops to Gosford City's major arterial thoroughfares are enhanced by "greening" of the road frontages, standards of commercial presentation are co-ordinated, and high levels of pedestrian activity are displayed.

Promote high levels of visible retail-type activities facing the main roads and outdoor carparks....."

- ▶ Part 2: Chapter 2.1 - Character – Erina

Erina 10: Employment Centre Desired Character

'This area should remain a mixed-use cluster of medium- and higher-impact employment activities, where new developments maintain the scenic quality of surrounding bushland backdrops that can be seen from major roads and residential areas, where the amenity of nearby residential properties is protected and local streetscape quality is enhanced....."

- ▶ Part 2: Chapter 2.1 Character Kincumber

Kincumber 8: Employment Centre Desired Character

"This area should remain a mixed-use cluster of medium- and higher-impact employment activities, where new developments maintain the scenic quality of surrounding bushland backdrops that can be seen from major roads and residential areas, where the amenity of nearby residential properties is protected and local streetscape quality is enhanced....."

- ▶ Part 2: Chapter 2.1 - Character – Lisarow

Lisarow 10: Employment Centre: Desired Character

"These areas should continue to accommodate a mix of industrial, commercial and distribution services, maximising local employment opportunities while maintaining the environmental quality of naturally-vegetated backdrops that are visible from major roads and residential areas, as well as enhancing the streetscape quality of road frontages and preserving existing levels of amenity that are enjoyed by surrounding residential properties."

- ▶ Part 3: Specific Controls for Development Type Chapter 3.10 - Industrial Development

Part 3 consolidates DCP 113 – Industrial Development into the main document. The objectives of this Part include encourage good design solutions for industrial development; to ensure that new industrial development represents a high level of urban design with recognition of the form and character of the existing man-made and natural context; to ensure the efficient use of urban land by maximising development potential of new and existing land and infrastructure.

117 Directions

Under the EP&A Act, the Minister for Planning also has the ability to direct Council to comply with certain directions when preparing draft LEPs. A revised set of 117 directions was issued on July 2009, these directions have been considered for the purpose of this Strategy. The following directions which are relevant to this investigation are discussed below.

Table 29 117 Directions

Direction	Description and Relevance
1. Employment and Resources	
Direction 1.1 Business and Industrial Zones	<p>The objectives of this direction are to:</p> <ul style="list-style-type: none"> a) encourage employment growth in suitable locations, b) protect employment land in business and industrial zones, and c) support the viability of identified strategic centres. <p>This direction applies when a council prepares a draft LEP that affects land within an existing or proposed business or industrial zone (including the alteration of any existing building or industrial zone boundary).</p>
3. Housing, Infrastructure and Urban Development	
3.4 Integrating Land Use and Transport	<p>The objective of this direction is to ensure that urban structures, building forms, land use locations, development designs, subdivision and street layouts achieve the following planning objectives:</p> <ul style="list-style-type: none"> a) improving access to housing, jobs and services by walking, cycling and public transport, and b) increasing the choice of available transport and reducing dependence on cars, and c) reducing travel demand including the number of trips generated by development and the distances travelled, especially by car, and d) supporting the efficient and viable operation of public transport services, and e) providing for the efficient movement of freight. <p>This direction applies when council prepares a draft LEP that creates, alters or removes a zone or a provision relating to urban land, including land zoned for residential, business, industrial, village or tourist purposes.</p>

Direction	Description and Relevance
4. Hazard and Risk	
Direction 4.3 Flood Prone Land	<p>The objectives of this direction are:</p> <ul style="list-style-type: none"> a) to ensure that development of flood prone land is consistent with the NSW Government's Flood Prone Land Policy and the principles of the Floodplain Development Manual 2005, and b) to ensure that the provisions of an LEP on flood prone land is commensurate with flood hazard and includes consideration of the potential flood impacts both on and off the subject land. <p>This direction applies when a council prepares a draft LEP that creates, removes or alters a zone or a provision that affects flood prone land.</p>
Direction 4.4 Planning for Bushfire Protection	<p>The objectives of this direction are:</p> <ul style="list-style-type: none"> a) to protect life, property and the environment from bushfire hazards, by discouraging the establishment of incompatible land uses in bushfire prone areas, and b) to encourage sound management of bushfire prone areas. <p>This direction applies when a council prepares a draft LEP that affects, or is in proximity to land mapped as bushfire prone land.</p>
5 Regional Planning	
Direction 5.1 Implementation of Regional Strategies	<p>The objective of this direction is to give legal effect to the vision, land use strategy, policies, outcomes and actions contained in regional strategies.</p>

Relevant Strategic Documents

State Plan – NSW Government

The NSW State Plan sets out a range of key initiatives for Government Action. The State Plan focuses on five areas of activity of the NSW government. Of relevance to this Strategy, is Chapter 2 of the State Plan, Growing Prosperity in NSW'. In this, the NSW Government affirms that NSW is open for business and outlines the following priorities for achieving this:

- ▶ maintaining and investing in infrastructure to support the growing economy
- ▶ cutting red tape
- ▶ increasing participation in education and training
- ▶ maintaining the State's AAA rating

The State Plan also proposes increasing business investment in rural and regional NSW as a high priority. The Plan clearly highlights that investing in regional and rural areas to foster economic development is a key priority for the NSW Government. This will potentially impact on demand for industrial land within many regions and rural areas throughout NSW.

City of Cities A Plan for Sydney's Future Metro Plan – NSW Government, 2005

The City of Cities Plan is a broad framework to facilitate and manage growth and development in Metropolitan Sydney over the next 25 years. The Plan has five aims which seek to achieve a more sustainable Sydney. The plan is based on a growth scenario of 1.1 million people between 2004 and 2031, from a current population of 4.2 million to 5.3 million by 2031. To cater for this growth, the Plan requires 640,000 new homes; 500,000 more jobs are being planned for over the next 25 to 30 years; 7,500 hectares of extra industrial land if current trends continue; 6.8 million square metres of additional commercial floor space; and 3.7 million square metres of additional retail space. To implement the Cities Strategies the Metropolitan Sydney is arranged into ten subregions

Central Coast Regional Strategy 2006-31 - Department of Planning

The Central Coast Regional Strategy (CCRS) is the key strategic planning document for the NSW Central Coast. It applies to the local government areas of Gosford and Wyong. The Strategy aims to ensure that adequate land is available and appropriately located to accommodate the projected housing and employment needs for the Region's population over the next 25 years.

The CCRS also defines potential areas for growth within each LGA. The Department has released these as the 'Growth Areas Map' for the region. The Growth Areas Maps indicate the land which is proposed as employment lands, which refers to land identified to provide the necessary projected industrial land.

Gosford has been named as a Regional City and will provide a high level of services and employment to support the surrounding catchments. Erina and Woy Woy have been identified as Towns within the Region. They will provide services just to the local area, while villages such as Lisarow will provide services only to their local communities.

The Strategy identifies the capacity of an additional 45,000 jobs in the Central Coast Region with a target of 18,000 jobs in the Gosford LGA by 2031. Within the Gosford sub-region, jobs provided by designated employment lands are to reach 3000 by 2031. The Strategy identifies 640 hectares of industrial land to be retained to meet this target. Methods suggested in the Strategy to protect and enhance the supply of employment lands are:

- ▶ Establish an Employment Lands Development Program to maintain the balance between demand and supply of employment land.
- ▶ Release more Greenfield land to overcome a shortage of supply.
- ▶ Develop new policy initiatives to encourage the regeneration of 'brownfield' sites to support new investment and employment opportunities.
- ▶ Employ more efficient processes for zoning and developing employment lands.
- ▶ Improve coordination between State departments and agencies, councils and industry to improve economic development opportunities associated with employment lands policy.

The Central Coast Regional Strategy also includes a list of sustainable criteria. This criteria is a clear, transparent list of matters that any new proposal will be assessed against in order to be considered for urban development.

Central Coast Regional Economic Development and Employment Strategy 2009 (REDES) Department of Planning

The REDES was developed to provide a long-term strategy for the sustainable economic development and jobs growth for the NSW Central Coast region. The strategy recognises that predicted population growth in the area requires the generation of more than 45,000 new jobs in the region over the next 20 years. Strategies adopted by the REDES to increase employment opportunities within the region include:

- ▶ Attracting new businesses and supporting existing businesses.
- ▶ Improving the training and skills development opportunities.
- ▶ Increasing research, knowledge and innovation.
- ▶ Ensuring appropriate planning processes and land supplies.
- ▶ Planning for regional economic centres.
- ▶ Providing new infrastructure.
- ▶ Marketing the region as an attractive business location.

The strategies of REDES have been developed as part of the overarching Central Coast Regional Strategy released in 2008.

The REDES provides employment targets which suggest that 60% of these jobs will be in the Wyong LGA and 40% in Gosford LGA. The Strategy states that a target of 3000 employment needs to be reached for employment lands in Gosford LGA for 2031. Further Actions identified for employment lands in the REDES include:

- ▶ Stage 1 Employment Lands Audit
 - Undertake a comprehensive employment land audit to identify potential supply and site requirements for larger businesses.
 - Establish processes for the land supply information to be kept up to date. This study would involve the Department of Planning and the two Councils, with industry participation.
- ▶ Stage 2 Strategic Framework
 - Develop a strategic framework for the delivery of employment lands on the Central Coast.

Somersby Plan of Management, 2005

Gosford City Council and the NSW Premier's Department commissioned Conner Wagner to prepare a Plan of Management for Somersby Industrial Park. Items of Ingenious and ecological significance have been identified in the areas which have caused a level of uncertainty in the Park given the type of development that is permissible.

The POM proposes management zones with detailed management controls in each zone. The principles applied to the management zones include:

- ▶ Where wildlife corridors exist, management zones have been placed on boundaries to minimise the affect on development potential.
- ▶ Where lots are developed and a corridor can not be achieved no management zone is achieved
- ▶ Where existing crown roads can serve as a corridor or habitat area, these are proposed for closure, to minimise impact on private property.

- ▶ Where there are minor watercourses that are narrow, the management zones have been developed in line with the significance of the water course.

Somersby Flora and Fauna Study

The Somersby Flora and Fauna Study was developed a background report for the Somersby Plan of Management. This report describes the flora and fauna characteristics of the subject site and to identify significant species, populations and ecological communities, and their habitats that occur on the subject site. The report also is intended to define and identify areas of Core Habitat of threatened species.

The study found that Somersby contains vegetation and fauna species that are threatened and afforded the protection of NSW and Commonwealth legislation. Further, the Somersby vegetation communities provide habitat that remains of significance to threatened fauna species. While there are cleared areas, or areas with heavily modified vegetation, areas remain that have conservation value where development has the potential to significantly impact on threatened flora/fauna.

NSW Coastal Policy 2007 – Department of Planning

The NSW Coastal Policy (1997) is the State Government's policy for the co-ordinated planning and management of the NSW Coastline. The policy represents an attempt to better co-ordinate the management of the coast by identifying in a single document the various management policies, programs, and standards as they apply to a defined coastal zone (GHD 2008).

This Policy applies to the coastal zone along NSW including coastal estuaries, lakes, lagoons, islands and rivers, therefore a proportion of the Gosford LGA is covered. In relation to urban land release, this policy applies to all new developments and publicly owned lands within urban areas covered by the coastal zone.

Draft Gosford Centres Strategy - Gosford City Council

The draft Gosford Centres Strategy aims to identify the needs of residents within the Gosford LGA and provide a City Centres strategy which effectively services those needs both economically and environmentally. The draft Strategy encourages infill residential and commercial development within city centres with nearby employment precincts servicing these centres.

A key aspect of the draft Strategy is for Council to avoid predation of land uses that undermine the overall land use zoning hierarchy. Short-term gains from 'higher order' development is discouraged as it will result in reducing the supply of land for required land uses. Identified employment lands should be avoided by development which may restrict the capacity for future employment-generating 'lower order' industrial development.

The strategy recognises the importance of concentrating growth and activities in centres. The strategy identifies employment lands as a centre typology and lists the following guiding principles that relate to employment lands:

- ▶ Where feasible, existing zoned employment land should be utilised before new employment lands are developed. However the land must be suitably located for proposed employment activity.
- ▶ The rezoning of employment lands to residential and other non-employment uses should not be supported unless supported by an employment lands strategy.
- ▶ Opportunities for the expansion of existing nodes for employment purposes where they are approaching full development should be investigated.

- ▶ Employment lands should have suitable buffers to residential areas.

In consideration of these guidelines, a *Central Coast Employment Lands Strategy* was undertaken by Parsons Brinckerhoff in 2004. The study identified Somersby Industrial Park, the Gosford Industrial area at West Gosford and Lisarow Industrial Area as employment lands within an employment precinct. The strategy recommends concentration and containment of industrial activities within these areas to maximise landuse, as there will be future opportunities to redevelop much of West Gosford into 'higher order' industrial and service oriented uses.

Draft Gosford Land Use Strategy 2031 – Gosford City Council

The *Draft Gosford Landuse Strategy 2031* aims to provide a framework for Council to effectively allocate landuses with consideration of the requirements of regional and state priorities and legislation, the community's Gosford Vision 2025 for the city; and the influence of current trends and drivers existing within the city.

Employment targets within the Gosford LGA are 18,000 new jobs by 2031 with 3,000 of those to be in employment lands.

The most significant economic weakness identified by the strategy is the inability to sustain a young working population within the Gosford LGA. The strategy identifies that the supply of employment lands is essential for economic development and the redevelopment of centres in other Council LGA's has seen an increase in young workers.

The strategy highlights the need for an industrial lands strategy that identifies future additional lands for industrial development with an emphasis on proximity to major transport nodes. Council's industrial lands strategy is to focus new development within the Somersby, West Gosford, Lisarow and North Gosford industrial areas.

Draft Economic Development Program 2008 – Gosford City Council

The Gosford Draft Economic Development Program was created to facilitate the implementation of a successful economic development framework integrated into the citywide Gosford LEP. The program identifies two key facts about the Central Coast economy which need to be addressed; it has volatile levels of unemployment and a very large number of people commute outside the region to work.

There is estimated to be about 62,000 jobs in Gosford LGA with almost one third of those jobs in and around the Gosford City Centre. The vast bulk of jobs are and will continue to be produced on employment lands, in centres and on business zoned lands.

The Program identifies Somersby Industrial Park and West Gosford industrial area as providing the most potential for major expansion. The total available vacant and unconstrained industrial land at the end of 2007 was 92.5 hectares at Somersby and 29.8 hectares at West Gosford This release of useable land is estimated to provide for an increase of at least 3000 extra jobs which will assist Gosford in reaching its target of 3,000 new jobs on industrial land over the next 25 years

The Program estimates that under the *Draft Gosford LEP 2009*, there is capacity for over 53,000 new jobs. Population growth over the next 25 years will see the creation of about 6,350 jobs in Gosford City. To reduce the amount of people commuting to Sydney for work an estimated 15,900 jobs will need to be created.

Expansion of Somersby Industrial Park is seen as essential in increasing Industrial employment within the Gosford LGA. If Somersby is overlooked, it will reach full capacity in no more than 10 years (GCC, 2008).

Gosford Strategic Studies Report, 2006 - SGS

SGS Economics and Planning prepared the Gosford Strategic Studies Final Report (November 2006) to inform and guide key areas of the *Gosford LEP 2010*. This Report provided detailed analysis in relation to population profiles, projections and targets, state of the economy and future economic outlook and infrastructure.

In terms of employment and the economy the report stated the following:

- ▶ A comparatively high proportion of Gosford residents work in Sydney;
- ▶ Gosford LGA does not show a major strength in one industry;
- ▶ Gosford ageing population is likely to be an influence on the size of its future labour pool.
- ▶ Increasing the self containment rate could provide more local employment opportunities for Gosford Residents.
- ▶ SGS's base case projected jobs in Gosford to grow by 7,870 between 2006 and 2031.
- ▶ An appropriate supply of employment lands within a regional context (industrial, commercial and agriculture) is important for the future economic development and employment in Gosford.
- ▶ Develop local employment opportunities to increase employment self containment through the encouragement of business investment, support of home business, making Gosford an attractive place for young people
- ▶ Strengthen Gosford identity within the region, proving a clear hierarchy of centres within the LGA and improving economic and transport connections to Wyong and Newcastle as well as Sydney.

Central Coast Employment Lands Study, 2004 - Parsons Brinckerhoff

The Central Coast Employment Lands Study (CCELS) was undertaken by Parsons Brinckerhoff in 2004 and funded by the then Department of Infrastructure Planning and Natural Resources, in partnership with Premiers Department, Department of State and Regional Development, the regional Councils and Business Central Coast.

This study was commissioned to provide a strategic regional context for landuse decision making in relation to employment lands and provide the foundations upon which an employment and settlement strategy could be built. Guiding strategic principles for the Study were:

- ▶ Consolidation and managed expansion of appropriate regional employment nodes; or
- ▶ Managed expansion of carefully selected and appropriate new areas for future employment land provision; or
- ▶ A combination of the two principles.

This study identifies Somersby Industrial Park, the Gosford Industrial area at West Gosford and Lisarow Industrial Area as employment lands within an employment precinct. Major new releases for employment lands are within Wyong Shire, within the Wyong Employment zone and Bushells Ridge.

Employment lands would not have a role in providing increased residential density within existing urban areas. The Study itself acknowledges the need to have sufficient buffers between types of employment lands and residential living areas.

This Study was prepared for DOP to inform the draft CCRS and is not department or governmental policy.

A Focus on Business - CARE 2008

'A Focus on Business' was prepared by the Centre for Agricultural and Regional Economic in 2008 for the Central Coast of NSW Area Consultative Committee Inc and the NSW Department of Premier and Cabinet. The report is a strategic planning document designed to establish policies for the future direction of business development within the Central Coast region. It contains recommendations for future actions, short and long term.

The strategy identifies the requirement for business operations within the Central Coast to diversify to reduce local residents commuting elsewhere for work. Industries within the Central Coast that require a high knowledge and technology content operate at a low level and will be a constraint on future development within the region.

The document identifies the following issues that a development strategy can be built around:

Maintain existing strengths including:

- ▶ The retailing structure
- ▶ The Central Coast as a visitor destination
- ▶ The food manufacturing capacity (and the agriculture that supports it)
- ▶ Filling gaps and taking opportunities including:
- ▶ The need to expand most areas of business services
- ▶ The potential to nurture small specialised manufacturing industries based on high knowledge and technology inputs
- ▶ The weak level of activity in various research and technology support activities

Building the entrepreneurial capacity of local businesses, including:

- ▶ A set of business development programs focused on particular groups of (mainly small) businesses with the objective of achieving high growth and building capacity.
- ▶ As a co-product of the above, to build effective business networks that provides the capacity to maintain business momentum and adaption.
- ▶ For larger firms access government programs that build capacity.
- ▶ Develop processes to fill gaps in the economic structure and reduce commuting from the region of high level skills.
- ▶ Begin the development of a program that builds an entrepreneurial culture in the region.
- ▶ Restructure the industry attraction strategy around a whole-of-industry approach that takes into account value chains and gaps in the economic structure.

- ▶ From a business perspective, transport and communication capacity is critical if businesses are to extend their reach beyond the Central Coast. This priority needs to be a front-of-mind issue for those agencies involved in planning infrastructure development.
- ▶ Develop a program with the schools in the region to inform students about the local economy and the opportunities that it presents for their future careers, including entrepreneurial opportunities.
- ▶ Investigate the setting up of a foundation focussed on supporting worthy initiatives for business development. Contributions may be sought from businesses that receive support in their development or relocation with the possibility of some government matching contributions.

Peninsula Urban Directions Strategy – Gosford City Council

An integrated landuse planning strategy was completed for Gosford City Council in 2005. Its objective was to highlight the scope for population growth and areas suited to accommodate growth within the surrounding suburbs of the Woy Woy Peninsula.

Currently around 50 per cent of the Peninsula's working age population is employed in Gosford or Wyong. The strategy recognises that the lack of urban lands and business zones within the area limits opportunities to expand local employment. Existing light industrial areas in the Peninsula are important for local economic prosperity and current levels of business activity and employment should be maintained. The strategy highlights that industrial activity should aim to accommodate a variety of low-cost operators that generate relatively benign environmental impacts, offer cost-effective services and are located to reduce travel demands on local residents.

The Gosford Challenge - Master Plan for the Renewal of the Gosford City Centre, 2009 – Gosford City Council (Draft)

The Gosford Challenge - Gosford City Centre Master Plan (Draft) was completed and released in late 2009. Its purpose is to provide a framework for future development within Gosford City Centre to ensure the successful revitalisation of the city.

The generation of jobs is vital for the sustainable growth of Gosford City. The master plan identifies the importance of accommodating new enterprises, more specifically, providing office space, educational facilities, hotels, retail and retail services. The Masterplan highlights the need for the Public Sector to concentrate on developing the public realm to encourage the development of private catalyst projects. Leverage of land is suggested to promote private funding which will assist in the investment and development of public infrastructure and in turn encourage investment and development by local landowners, government and developers.

Gosford Vision 2025 A Strategic Direction for the Future, Gosford City Council, 2004

Vision 2025 was a community driven process that identified key strategic directions for the future for Council to align all its plans, operations and activities to guide future development and operations to achieve the community's vision. It is to help Council and the community decide what future paths to take to create a city within which residents want to live. The key strategies from the vision that align with a vibrant network of communities and settlements based on centres, within a high quality environmental setting, are outlined below:

- ▶ Creating economic opportunity and employment
- ▶ New business - promote the formation of new businesses

- ▶ Environmentally sustainable industry - promote environmental sustainable industry and innovative technology in the local economy
- ▶ Centre of Excellence - develop and promote Gosford as a centre of excellence
- ▶ Urban growth - manage urban growth and transport system through community, stakeholder, and government collaboration
- ▶ Urban design - promote development around compact urban areas to reduce urban sprawl to retain bushland and rural landscapes, whilst maintaining Gosford's diverse character
- ▶ Character - protect Gosford's character through integrated planning with the environment, quality design and sound development
- ▶ Revitalise CBD - expand and promote a vibrant revitalised Gosford CBD
- ▶ Maximisation of development potential within and around centres, provided it is supported by sound urban design principles and having regard to infrastructure and environmental constraints, shall help achieve the development of sustainable communities as envisaged under Vision 2025.

Quality of Life Strategy 2007 -2010, Gosford City Council

The Quality of Life Strategy is an update of the Community Plan 2001. It brings together issues that affect people's well being. The purpose of the Quality of Life Strategy is to provide an overview of community issues, how Council is responding, and to outline the opportunities for other groups to get involved. The key areas covered in the document includes: Being Part of Our Community; A Balanced Life; Community Spaces and Places; Community Safety; Home and Travel; and Community and Council.

Mt Penang – Festival Development Corporation

The Festival Development Corporation (FDC) was established in 1998 by the NSW Government as a statutory government authority under the Growth Centres (Development Corporations) Act 1974. The key role of the FDC is to ensure the successful implementation of a master plan which has been created for 152 hectares of government owned land at Mt Penang Parklands (MPP), near Gosford (FDC, 2009). The master plan includes the following:

- ▶ An Event Park with associated bus and coach parking.
- ▶ A sports park for cricket and other sporting codes.
- ▶ Community uses and other environmentally sustainable infrastructure services.
- ▶ Mt Penang Gardens, featuring cascading water gardens and twelve (12) unique garden rooms.
- ▶ A light industrial and commercial business park, together with tourism and retail premises.

Successful implementation of the master plan will ensure ecologically sustainable development within MPP complements existing heritage character, increases quality of life for people living nearby and creates long term economic benefits for the region and the State.

Festival Development Corporation Mt Penang Strategic Plan

To assist in the successful implementation of the MPP master plan the FDC produced a strategic plan in January 2010 for the redevelopment of MPP. The strategic plan was created after recent revision of development within MPP revealed that the site had not yet achieved its core value of financial viability. Financial projections showed that the FDC will be self-sustaining until December 2013, after which time will begin to accumulate deficit each month.

The strategic plan aims to achieve financial viability within the next 5-10 years by initiating a master plan review process, producing a five (5) year financial cash flow forecast and creating an investment strategy. To assist in achieving this, a list of priorities for the Corporation has been identified, including:

To achieve a new master plan agreed with stakeholders.

- ▶ To generate institutional and developer interest in the site.
- ▶ To grow the tenancy portfolio on the site, whilst providing security for existing tenants, in respect to maintaining property standards, future development strategies, green space and rental return balance.
- ▶ To maintain public access and community infrastructure at an affordable level.
- ▶ To conserve and maintain the heritage assets on the site whilst ensuring their economic return.
- ▶ To look for partnership opportunities which will minimise costs, and/or maximise revenue.

The strategy concludes by recommending that in order for the FDC, Government and Central Coast residents to get the best possible outcome, the current DCP, LEP and master plan applicable to the MPP site need to be reworked to facilitate development that is more responsive to local needs and topographies.



Appendix B

Constraints Analysis

Introduction

This report provides a methodology for the assessment of environmental constraints within Gosford City Council. The methodology aims to identify and evaluate a range of constraints, which will impact upon the ability of the LGA to accommodate further employment lands. This process is called a land suitability analysis.

The identification of a sound methodology will also enable the community and landowners to better understand the process of planning, site selection and development. Ultimately, the application of a sound methodology will help the development industry to invest in and develop appropriate sites within Gosford City that best serve the needs of the local and regional community and economy.

Methodology

The methodology for determining appropriate land use focuses on those features of the LGA's landscape that pose limitations to development. These areas may be divided into the categories of economic, social and environmental limitations.

These constraints will strongly influence the preparation of a 'land constraints map'. Natural features primarily define the environmental limitations. The land constraints map is a composite map containing a number of overlays. These overlays include but are not limited to maps of environmental protection areas, bushfire hazard area, flood prone land, steep land and the location of prime agricultural land. The integration of the overlays enables the user to recognise areas of varying suitability for different land uses.

Environmental Limitations

The land suitability approach used in this study identifies and ranks key environmental factors that are important for development.

Some constraints create prohibitions to development e.g. high hazard floodway. Other constraints identify less desirable areas that generate the need for mitigation measures e.g. bushfire hazards. A suitability analysis eliminates lands where development is prohibited or has constraints limiting the type or density of development based on agreed criteria.

Economic and Social Limitations

Economic and social limitations don't always lend themselves to being mapped in the same way as natural features. However, once Council has determined areas of low environmental limitations at a broad scale, this information can subsequently be used by investors to target areas for further investigation as part of their risk assessment and decision making process.

Employment lands have a range of economic and social requirements which include the location of the site, its size, price, commercial attractiveness, accessibility and the availability of infrastructure and services.

In assessing further economic and social factors, a number of elements must be considered to determine whether sustainable development can be achieved. These economic and social elements are based on industry standards relating to the final land use and are shown in the land suitability analysis framework below.

Land Suitability Analysis Framework

STEP 1



STEP 2

BROADSCALE LAND SUITABILITY ANALYSIS

Env Protection Zoned Land (E2) and National Parks (Zone E1) Public Recreation (RE1), State Forest Zones (RU3)

Acid Sulfate Soils:
High Probability
Low Probability

Heritage

Vegetation Management:

Zone E3 Environmental Management

Wetlands (SEPP 14)

EEC's and Regionally Significant Vegetation

Bushfire:

Vegetation 1
Vegetation 2
Buffer

Minor Waterways plus 50 m buffer

Land Slip:

Category 1 Low Hazard Area
Category 2 Medium Hazard Area
Category 3 High Hazard Area
Category 4 Immediate High Hazard Area.

Topography:

Less than 10 degrees slopes
10.1 - 15 degree slopes
15.1 - 18 degree slopes
Greater than 18 degree slopes

Land Susceptible to Sea Level Rise

Flood Liable Land (1:100 year probability event)

Extractive Industries a buffer

Contaminated Lands

Infrastructure:

Rail and Road
Sewerage Treatment Plan with 400 m buffer
Waste Facilities with 300 m buffer

DETAILED SITE SUITABILITY ASSESSMENT FOR INDUSTRIAL DEVELOPMENT

Commercial Attractiveness

Land affordability;
Potential building construction costs;
Profile of the site;
Potential rents and yields;
Development yield/ and values/ financing;
Flexibility if the site.

Industrial Development Only

Ability to attract tenants;
Data technology capabilities;
Ability to create industry cluster.

Physical suitability

Suitable size for intended role (i.e. large scale vs local);
Elevation of land and fill requirements;
Previous uses, contamination/rehabilitation opportunities.

Accessibility

Access and profile to highway/ major road network;
Traffic implications and constraints;
Industrial Development Only
Access for consumers, workers and service vehicles;
Access to export markets from airport and rail;
Proximity to existing industrial areas;
Access to trade waste sites, transfer stations;
Proximity to labour force and vehicle kilometres.

Social Factors

Archaeological sites
Attitude of owners and tenure;
Acceptable levels of impact on community amenity;
Acceptable visual impacts;
Industrial Development Only
Appropriate employment opportunities;
Convenience of workplace trips;
Availability of public transport;
Noise buffers;
Appropriate buffers.

Infrastructure Services

Access to required infrastructure and utilities
Access to technology / broadband Internet

Assessment

In determining land suitable for employment development purposes a ranking system has been formulated and applied to the various constraints that apply to the Gosford City Council.

The following assessment of environmental constraints determines the supply of land (beyond that already zoned). Some of the constraints below create prohibitions against future development. Other constraints merely require further investigation or mitigation measures that may influence the location, type and density of development.

In determining land suitable for employment development purposes a ranking system has been formulated and applied to the various constraints that apply to Gosford City Council. This identifies which constraints are limiting and highlights the constraints that can be overcome through mitigation measures and management. The ranking for each constraint can then be mapped for each land unit in the Gosford City Council.

The environmental constraints ranking system includes the following:

Rank	Constraints Feasibility
1.	<i>Most suitable for development (relatively unconstrained).</i>
2.	<i>Suitable for development with some controls.</i>
3.	<i>Marginally suitable for development – may require further investigation and / or specific engineering solution or exclusion of certain areas.</i>
4.	<i>Selective development only – subject to further assessment, limited and appropriately designed development may be possible.</i>
5.	<i>Not suitable for development.</i>

Multi-Criteria Analysis

Multi-Criteria Analysis requires consideration of the relative importance of each criterion compared to other criteria. A paired comparison method was selected for weighting of criteria. This approach required each criterion to be compared to each of the other criteria to determine which of the two (paired) criteria is considered more important, and by how much. By considering the number of times any particular criteria is rated as more important than any other, and the levels of importance, the criteria can then be ranked as a set in terms of importance. For this project, only environmental criteria were compared to each other. Weightings were normalised so that they are between 1 and 100 for each criteria.

GIS Analysis

Once evaluation criteria and weightings were undertaken, a GIS modelling and analysis technique was used to overlay geographic data for each of the evaluation criteria.

The steps involved in the GIS analysis to identify areas that are overall more or less suitable for the urban or employment lands development are described below:

- ▶ Datasets were sourced from Gosford City Council and were imported into an ESRI geodatabase;
- ▶ The data applied for each evaluation criterion were compiled and analysed according to the performance ratings on a series of grids across the study area. In general, the grids were in the order

of 5 m x 5 m cells, however in some cases the grid size was varied to ensure the data will be properly represented;

- ▶ The weightings were applied to each criterion and the overall score for each evaluation criterion in each grid calculated. The GIS model then compiled scores across all the evaluation criteria for each grid and identified areas that are more or less suitable for urban or employment lands development. The weighted overlays were added together and multiplied by a specified weighting. As a result, an overall sensitivity map was produced. The lower the score, the more attractive the site for development;
- ▶ The Multi-Criteria Analysis was performed using ESRI's ArcGis Version 9.1.

Limitations

While the Multi-Criteria Analysis technique is a powerful tool for screening broad study areas, it must be noted that there are a number of limitations including:

- ▶ Inability to represent all of the critical aspects that determine suitability for development in a geographic format;
- ▶ Accuracy and currency of some data;
- ▶ Absence of data for some locations (eg Koala Habitat or Threatened Species data not available);
- ▶ Coarseness of some of the assumptions that may be made in determining performance ratings and weightings for evaluation criteria; and
- ▶ Coarseness of some of the 'rounding off' of areas that are identified by the modelling process as having some suitability for development

Assessment of Environmental Constraints

The following assessment of environmental constraints determines the supply of land. Some of the constraints below create prohibitions against future development. Other constraints merely require further investigation or mitigation matters that may influence the location, type and density of development.

A summary of the ranking and assessment can be found in Table 30.

Public Recreation (Zone RE1), State Forest Zones (zone RU3) and National Parks and Nature Reserves (Zone E1)

National Parks and Nature Reserves (Zone E1) Public Recreation (Zone RE1)*, State Forest Zones (Zone RU3) areas are not available for development regardless physical characteristics and a ranking of 5 will be used for the purposes of this study.

** Note that there may be areas zoned RE1 that Council considers surplus to its recreational needs. If such areas exist they will not automatically be ranked 5.*

Acid Sulfate Soils

Acid Sulfate Soils (ASS) generally occur in low lying areas below 5m AHD. The term ASS refers to soils that are producing acid (actual acid sulfate soils) and those that could become acid producing (potential acid sulfate soils).

Potential acid sulfate soils are naturally occurring soils containing iron sulfides (pyrite). They become actual acid sulfate soils when the pyrite is exposed to air, often because of human activity. Once oxidised the addition of water results in the production of sulfuric acid.

In July, 2000, The National Working Party on ASS released the *National Strategy for the Management of Coastal Acid Sulfate Soils*. The Strategy provides a framework for governments, industry and the community to manage development on these soils. It seeks an integrated approach to management and provides general background about the impacts of acid drainage.

Acid Sulfate soil areas in Gosford have been divided into 3 primary map classes which indicate the risk of encountering problems with it and the depth in the soil profile at which it is likely to occur. The classes include high probability of occurrence of acid sulfate soils, low probability of occurrence of acid sulfate soils and disturbed soils. The mapping has been designed to provide information on acid sulfate soil distribution and indicate land uses, which are likely to create an environmental risk by disturbing acid sulfate soils.

Given the adverse impacts of exposed acid sulfate soils and the need for appropriate management within any development, areas of high probability (in accordance with the acid sulfate soils mapping) have a ranking of 3, while areas within ASS low probability will have a ranking of 2.

Heritage

In 1977, the NSW Heritage Act legislated that councils must identify, protect and manage heritage through local planning regulations. The two levels of statutory listing are:

- ▶ the State Heritage Register
- ▶ the heritage schedule in Gosford City Council's draft Local Environmental Plan 2009

Under Clause 5.10 of the *draft Gosford LEP 2009* the objectives of Heritage Conservation are

- ▶ *to conserve the environmental heritage of Gosford City Local Government Area, and*
- ▶ *to conserve the heritage significance of heritage items and heritage conservation areas including associated fabric, settings and views, and*
- ▶ *to conserve archaeological sites, and*
- ▶ *to conserve places of Aboriginal heritage significance.*

The majority of Gosford's heritage items and heritage conservation areas were identified in two major heritage studies carried out in 1998 and 2001. These are items of significant value and therefore will be ranked 5

Environmental Conservation Zoned Land (Zone E2) and Zone E3 Environmental Management

Under the *draft Gosford LEP 2009* the objectives of the E2 Environmental Conservation Zone are to:

- ▶ *To protect, manage and restore areas of high ecological, scientific, cultural or aesthetic values.*
- ▶ *To prevent development that could destroy, damage or otherwise have an adverse effect on those values.*
- ▶ *To promote ecologically, socially and economically sustainable development and the need for and value of biodiversity in the local government area.*

- ▶ *To ensure development is compatible with the desired future character of the areas covered by this zone.*
- ▶ *Limit development in areas subject to steep slopes and flooding.*

This zone permits with consent bed and breakfast accommodation, dwelling houses and recreation areas. Even though employment generating development is prohibited this zone, it is not considered a hard constraint as further flora and fauna studies will be needed. Accordingly, any land zoned for the E2 Environmental Conservation Zone under the *draft Gosford LEP 2009* will be ranked 4.

Under the *draft Gosford LEP 2009* the objectives of the E3 Environmental Management Zone are to:

- ▶ *To protect, manage and restore areas with special ecological, scientific, cultural or aesthetic values.*
- ▶ *To provide for a limited range of development that does not have an adverse effect on those values.*
- ▶ *To promote ecologically, socially and economically sustainable development and the need for and value of biodiversity in the local government area.*
- ▶ *To ensure development is compatible with the desired future character of the areas covered by this zone.*
- ▶ *To highlight the importance of this zone in providing an environmental buffer to areas of high ecological, scientific, cultural or aesthetic value.*

Even though this zone permits development such as dwellings and neighbourhood shops with consent, employment generating development is prohibited. It is assumed that the level of environmental constraints on such land would be prohibitive to it being intensively developed for employment purposes. Accordingly, any land zoned for the E3 Environmental Management under the *draft Gosford City LEP 2009* will be ranked 4.

Wetlands

Wetlands are a key component of the water cycle, playing critical roles in maintaining the general health of rivers, estuaries and coastal waters. They assist in mitigating the effect of floods through water storage and retention, absorb pollutants and improve downstream water quality and provide habitats for animals and plants include a number of species that are threatened or endangered.

State Environmental Planning Policy (SEPP) 14 –Coastal Wetlands identifies areas where the habitat values, ecological and hydrological process of wetlands need to be conserved and managed from the impact of development. Therefore, any SEPP 14 wetlands will be ranked 5.

Koala Habitat

SEPP 44 encourages the conservation and management of natural vegetation areas that provide habitat for koalas to ensure permanent free-living populations will be maintained over their present range. The policy applies to 107 local government areas including Gosford City Council. Local councils cannot approve development in an area affected by the policy without an investigation of core koala habitat. The policy provides the statewide approach needed to enable appropriate development to continue, while ensuring there is ongoing protection of koalas and their habitat. Typically, koala habitat is not considered available for future development.

All of Gosford LGA has been mapped as Koala Habitat under SEPP 44.

There has been no Koala Plan of Management undertaken for the LGA and therefore specific areas which may contain Koala food trees are not known. It is therefore not possible to allocate a ranking to this constraint.

Regionally Significant Vegetation and EECs

Gosford City Council LGA contains important habitat for a diverse array of native fauna and flora. Certain areas have high conservation value and contain a number of endangered ecological communities and regionally significant vegetation communities. The location of flood prone lands, the retention of vegetation corridors and their associated buffers establish the basis for a network of habitat links and/or corridors within the area.

The *Threatened Species Conservation Act 1995* and *Environment Protection and Biodiversity Conservation Act 1999* aim to protect threatened species and significant flora and fauna corridors. It is therefore necessary to incorporate appropriate constraints for vegetation management. It is also a requirement of the Central Coast Regional Strategy (2006) that significant vegetation be protected. It is therefore necessary to incorporate appropriate constraints for vegetation management in any land suitability analysis.

Ecological communities can be listed as Endangered Ecological Communities under the *Threatened Species Conservation Act, 1995*. EEC's are areas of predicted high conservation value for forest fauna, and include many large areas of vegetated lands and important vegetation remnants. Gosford City Council has also mapped key habitats which consist mainly of vegetation types of high regional status.

However, this mapping is not site specific information and may contain inaccuracies and therefore both EEC's and regionally significant vegetation will be ranked 4.

Bushfire Hazard

The *Rural Fires Act 1997* requires the identification of bushfire-prone land areas based on bushfire hazard mapping and the provision of Asset Protection Zones (APZ's) (NSW Rural Fire Service 2006).

Bushfire hazard can be a major development constraint given the likelihood for extreme fire events periodically. The slope of the land, aspect and the vegetation types present, determines the level of bushfire hazard.

Gosford City Council categorises bushfire prone land into Vegetation Category 1 and Vegetation Category 2. Vegetation Category 1 bushfire prone land is that land within (or within 100 m) of a high bushfire hazard area. Vegetation Category 2 bushfire prone land is that land within (or within 30 m) of a medium bushfire hazard area.

Opportunities exist to manage the interface between new development and surrounding vegetation, including perimeter roads, fuel reduction and building design. More detailed site based assessment of bushfire hazard needs to be undertaken in conjunction with future development to ensure that development is located and designed having regard to the degree of bushfire hazard.

Where adequate fire protection measures cannot be established, development should be prohibited. However, as mitigation is often an option, then the constraint should not be regarded as absolute. For this reason Vegetation Category 1 (including a 100m buffer) will be ranked as 3 and Vegetation Category 2 (including a 30m buffer) will be ranked as 2.

Minor Waterways plus 50 m buffer

The sustainability and maintenance of minor waterways (rivers, creeks and drainage lines) within the Gosford City is paramount in ensuring the ongoing environmental functioning of the estuary and in protecting water quality. Riparian controls are needed to provide channel stability to creeks, drainage lines and waterways essential in maintaining the basic health of the catchment.

Riparian habitat in Gosford City is important to the maintenance of 'fish' (including aquatic invertebrate) populations and communities and has the highest priority for being conserved and protected from potential adverse impacts associated with development

As no detailed riparian study has been completed it has been assumed minor waterways with a 50 metre buffer are features which are associated with unique geological and biological systems and are recognised as priority items for conservation. Therefore minor waterways and a 50 metre buffer will be ranked as 5.

Landslip

Slope and cliff instability hazards refer to the possible structural incompetence of these features and associated potential problems with the foundations of buildings, seawalls and other coastal works. Gosford City Council DCP 163 *Geotechnical Requirements For Development Applications* includes management strategies and requirements for areas identified with land slip.

The DCP divides land within the LGA into 4 geotechnical classes. Each category is based on slope, bedrock type and soil type. Category 1 Low Hazard Area are areas not susceptible to significant landslip hazard; instability not expected unless major site changes occur. As development practices are usually sufficient for safe development in these areas, Category 1 will be ranked as 2.

Category 2 Medium Hazard Area is land areas of potential landslip hazard and possible soil creep or a moderately steep soil covered slope. Instability may occur during and after extreme climatic conditions. As restrictions on nature and extent of development (especially earthworks) may be required, Category 2 will be ranked 3.

Category 3 High Hazard Area is land areas susceptible to soil creep, landslip and rockfalls due to steep slope profiles in stratified formations and proximity of land to cliff areas and alluvial deposits. The risk associated with development in these areas are often higher than normal and therefore will be ranked 4.

Category 4 Immediate High Hazard Area is land areas where there is evidence of active or past landslips, or areas where quarries, excavations/filling/ erosion have created potentially unstable slopes during climate extremes, or areas of coastal and bluff instability, or rock face failures. More than one type of hazard is also usually present. Even though this category is generally unsuitable for development engineering solutions maybe possible for many areas and will therefore be ranked 4.

Topography

Protected lands are listed under the *Native Vegetation Conservation Act 1997* and represent land that generally has a slope greater than 18 degrees from the horizontal; and land situated in, or within 20 metres of the bed or bank of any specified river or lake or land that is in the opinion of the Minister, environmentally sensitive or effected or liable to be effected by soil erosion. Therefore, slopes greater than 18 degrees will be ranked 5.

Slope is a significant factor influencing soil erosion, drainage and bushfire hazard. Slopes greater than 15 degrees are likely to have geological constraints and are susceptible to mass movement and high to

very high erosion hazard. In addition, slopes greater than 15 degrees can cause installation and management problems for sewerage and water systems. Particularly within employment lands steeper slopes also make truck manoeuvres difficult. Therefore, lands with a slope of 15 to 18 degrees have a low probability of being suitable for further development and will be ranked 4.

Slope between 10 degrees and 15 degrees present a high bush fire danger for dwellings, footings require a great deal of cut and fill, access is difficult and they present a greater erosion hazard. In areas with these grades development is more difficult. However, with specific engineering solutions development is possible.

Within the industrial precincts these slope constraints can be overcome by careful design, earthworks, and by adoption of site management techniques that ensure land surface stability. If there is a shortage of developable industrial land and a reasonable level of demand, costs incurred are unlikely to preclude development. Therefore slopes between 10 and 15 degrees will be ranked 2.

Relatively flat grades (less than 10 degrees) significantly reduce costs associated with the installation of infrastructure to service proposed development. Therefore due to the cost efficiency of lesser grades for industrial and commercial development a ranking of 1 will be used for slopes less than 10 degrees (PEC, 1978).

Land Susceptible to Sea Level Rise

There is now broad scientific consensus that climate change is occurring and that early impacts of this change are observable (Newton, 2007). Climate change refers to a directional change in climate, beyond natural bounds of variability that is attributed to human activity and alters the composition of the atmosphere. The likely changes most relevant to this study are sea level rise and increased storm activity with resultant higher risk of inundation, flooding and shoreline erosion (Newton, 2007).

The *NSW Sea Level Rise Policy* (DECCW, Oct 2009) states that national projections for sea level rise along the NSW coast are for 40 cm by 2050 and 90 cm by 2100.

In December 2009 Gosford City Council resolved to adopt a Sea Level Rise (SLR) Planning Level of 0.9m by the year 2100. The adopted sea level rise figure is consistent with the NSW State Government SLR Policy Statement and allows Council, to move forward and undertake detailed studies and plans that will assist in establishing future planning and development decisions to address the changing conditions. The primary purpose of the benchmarks is to provide guidance supporting consistent considerations of sea level rise impacts, within applicable decision-making frameworks. However, the long time frames involved make it important not to sterilize land from otherwise productive use in the interim. It is not a hard constraint in the short term, but it is in the long term. Therefore land affected by a 90 cm sea level rise should be ranked 2.

Flood Liable Land

Flood liable land presents a constraint to development as it has implications with regard to the provision and cost implications applying to hydraulic infrastructure, roads and services installed within floodplains. In high hazard situations it presents a threat to life and property. Filling of flood areas (not high hazard) is possible in some situations but needs careful assessment to avoid causing problems elsewhere.

The flood constraint is based on the indicative 1 in 100 year flood level. Flood hazard primarily is a function of depth of flood water and the velocity at which the water moves. At flood water depths in excess of 2 metres, (even at low velocities) there can be damage to light framed buildings from water

pressure, flotation and debris impact. Motor vehicle instability by buoyancy will also occur at such depths. At velocities in excess of 2 metres the stability of foundations and poles can be affected by scour. Also, grass and earth surfaces scour, become rough and unstable (DIPNR , 2005).

Flooding is a major constraint for urban land in proximity to the Brisbane Waters Estuary. Gosford City Council *DCP 115 Building in Flood Liable Areas* identifies flood liable land as being inundated by a 1% AEP flood event. A Flood Planning Level (FPL) of 2.45m AHD presently applies for the entire Brisbane Water Estuary - to set minimum floor levels for residential development. This is based on an observed flood level of 1.95m at Gosford in the May 1974 ocean storm surge event, plus a 0.5m freeboard.

These identified areas within Gosford City are not designated watercourses and therefore it may be possible to be replaced by an engineering solution.

In the absence of being able to distinguish between high and low hazard flood ways and until further detailed are undertaken to determine the extent of this constraint and therefore it will be ranked 2.

Extractive Industries

Gosford City has several extractive industry sites. However, the majority of these resources are soon to be exhausted and in some cases the quarry work will end within the 20 year planning horizon. Once the quarry has exhausted the resources the site has the potential for urban development. For this reason extractive industries will be ranked 2

Contaminated Lands

Portions of the Gosford City have been identified as potentially contaminated land due to the former use or current uses of the land for example workshop, service station, land filling, lead paint removal, termite treatment.

The *Environmental Planning and Assessment Act 1993 (EP&A Act)* and *State Environmental Protection Policy 55 (SEPP 55)* require Gosford City Council to consider the suitability of land for a proposed development. The risk to health and the environment from contamination must be included in a preliminary assessment, which includes a preliminary site inspection of the contaminated lands. SEPP 55 requires that Council be satisfied that a site is suitable for its proposed use or can and will be made suitable. A site can be made suitable through measures such as site remediation.

Therefore, for these reasons any lands affected contamination will be ranked 2.

Infrastructure

Rail and Roads

Critical economic infrastructure that will support future employment growth includes: road and rail. These areas are to be considered a hard constraint which create prohibitions to development and are to be ranked 5.

Sewage Treatment Plant with 400 m buffer and Waste Facilities with 300 m buffer

There are currently one sewage treatment plant (STP) in Gosford City which is located at Kincumber . The STP's provides sewerage to the Gosford City communities. *Gosford City Council Policy S2.01 Sewage treatment works - Buffer zones* recommends a 400 buffer around STP's from urban development. Affected areas will be ranked 5.

Gosford City Council has a Waste Management Facility at Kincumber and Woy Woy. DPI (2007) recommends a 300 buffer around Waste Management Facilities from urban development. Affected areas will be ranked 5.

Table 30 Land Suitability Analysis: Environmental Constraints

Constraint Criteria	Ranking
National Parks (E1), Public Recreation (RE1), State Forest Zones (RU3)	5
<i>Acid Sulfate Soils:</i>	
High Probability	3
Low Probability	2
Heritage	5
Env Protection Zoned Land (E2)	4
Zone E3 Environmental Management	4
EEC's and Regionally Significant Vegetation	4
Wetlands (SEPP 14)	5
<i>Bushfire:</i>	
Vegetation 1	3
Vegetation 2	2
Buffer	1
Minor Waterways plus 50 m buffer	5
<i>Land Slip:</i>	
Category 1 Low Hazard Area	2
Category 2 Medium Hazard Area	3
Category 3 High Hazard Area	4
Category 4 Immediate High Hazard Area.	4
<i>Topography:</i>	
Less than 10 degrees slopes	1
10.1 - 15 degree slopes	2
15.1 – 18 degree slopes	4
Greater than 18 degree slopes	5
Land Susceptible to Sea Level Rise	2
Flood Liable Land (1:100 year probability event)	2



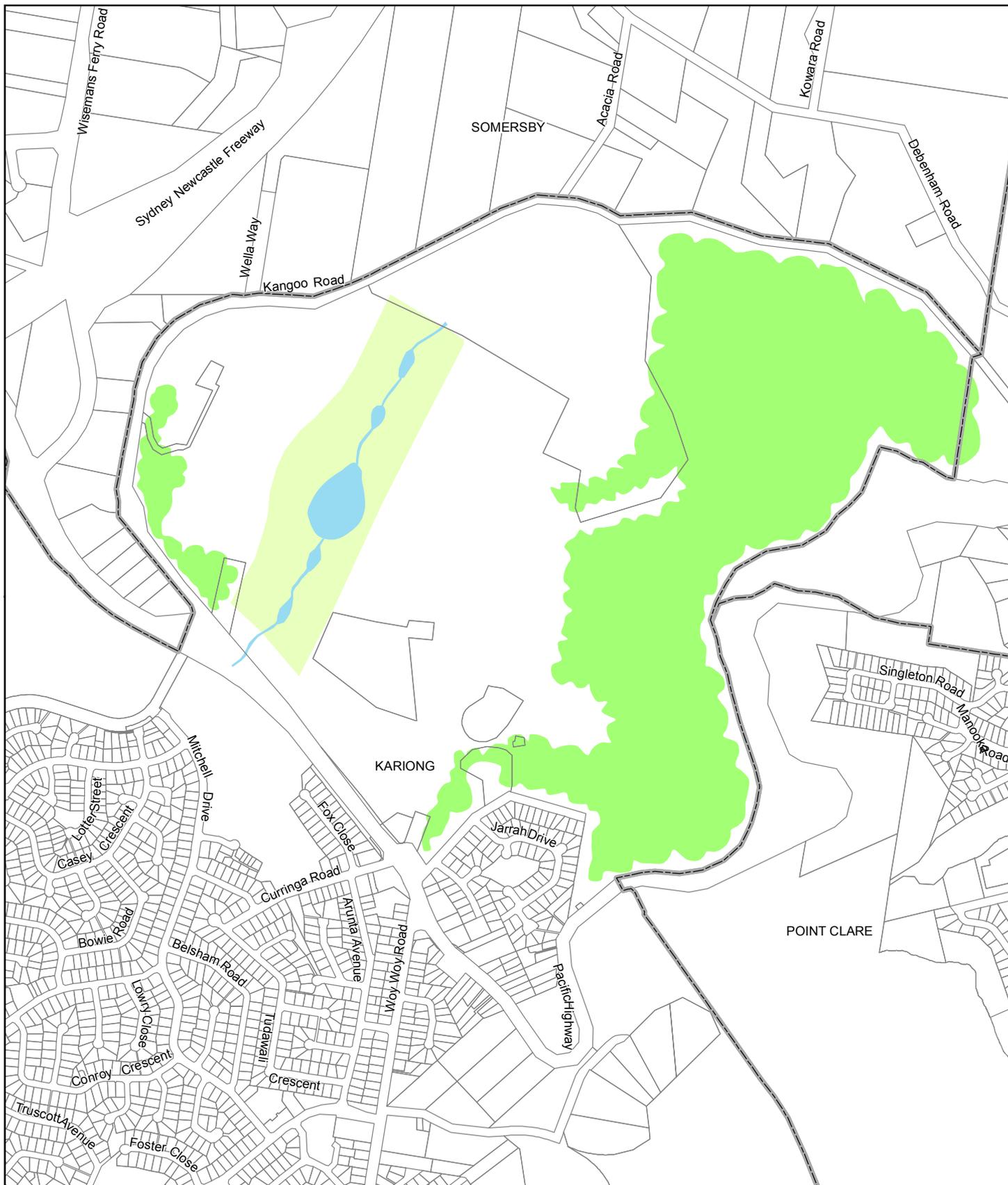
Constraint Criteria	Ranking
Extractive Industries	2
Contaminated Lands	2
<i>Infrastructure:</i>	
Rail and Road	5
Sewerage Treatment Plan with 400 m buffer	5
Waste Facilities with 300 m buffer	5

The above rankings have been used to compile a constraints map for the Gosford City Employment Lands Investigation.



Appendix C

Mt Penang Constraints



LEGEND

- | | | | |
|---|-------------------|---|--|
|  | Cadastral |  | Bushland Trees to be Protected |
|  | Permanent Gardens |  | Pines Creek Tributary, New Lakes & Ponds |

1:12,000 (at A4)

0 50 100 200 300 400

Metres

Map Projection: Transverse Mercator
Horizontal Datum: Geocentric Datum of Australia (GDA)
Grid: Map Grid of Australia 1994, Zone 56



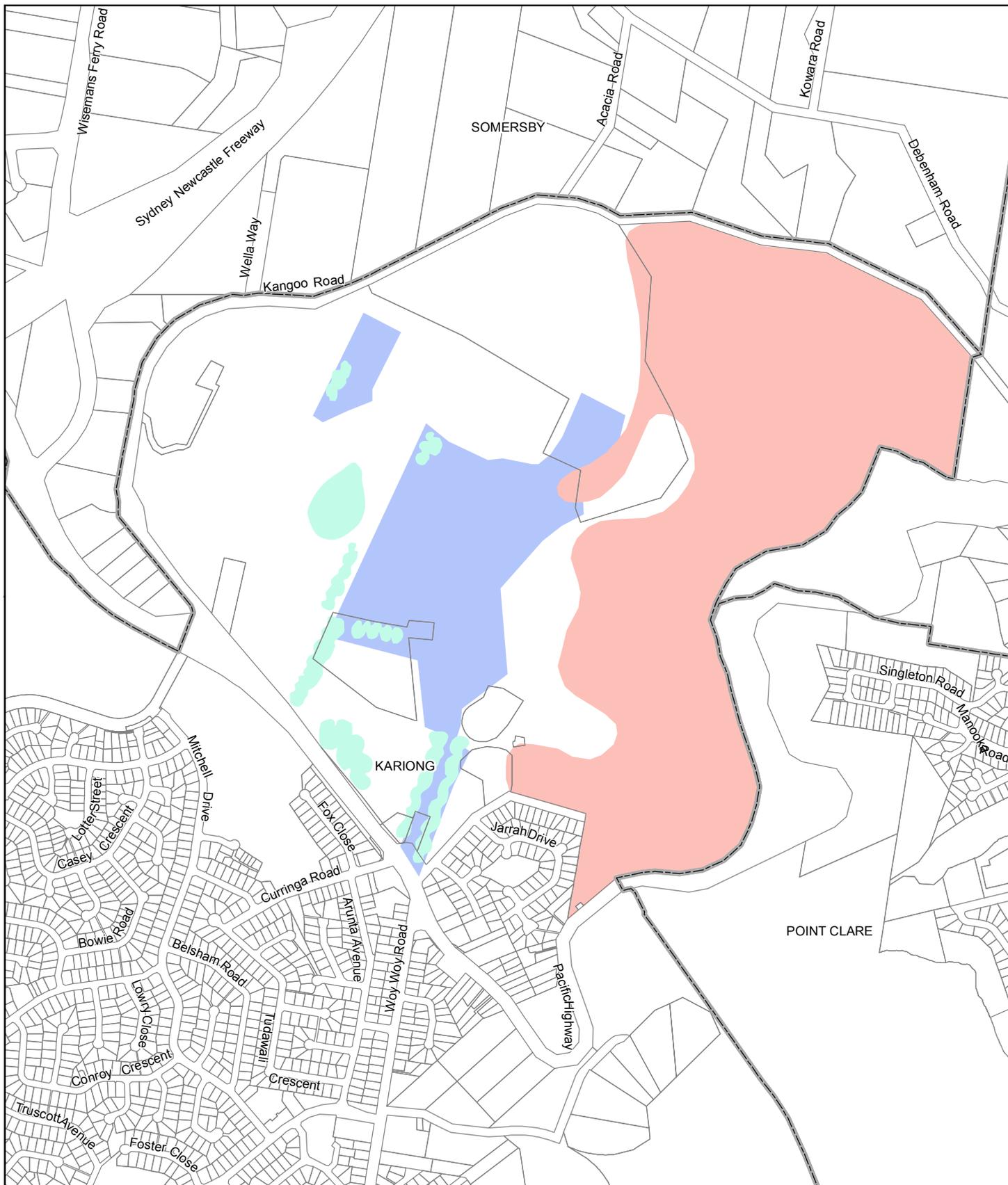
Gosford City Council
Employment Lands Investigation

**Mount Penang
Vegetation Management**

Job Number	22-15081
Revision	A
Date	14 JUL 2010

Figure 33

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LEGEND

- | | | | |
|--|--------------------|--|--|
| | Cadastral | | Heritage Precincts
Aboriginal Archaeology |
| | Historic Precincts | | Landscape Elements |

1:12,000 (at A4)

0 50 100 200 300 400

Metres

Map Projection: Transverse Mercator
Horizontal Datum: Geocentric Datum of Australia (GDA)
Grid: Map Grid of Australia 1994, Zone 56



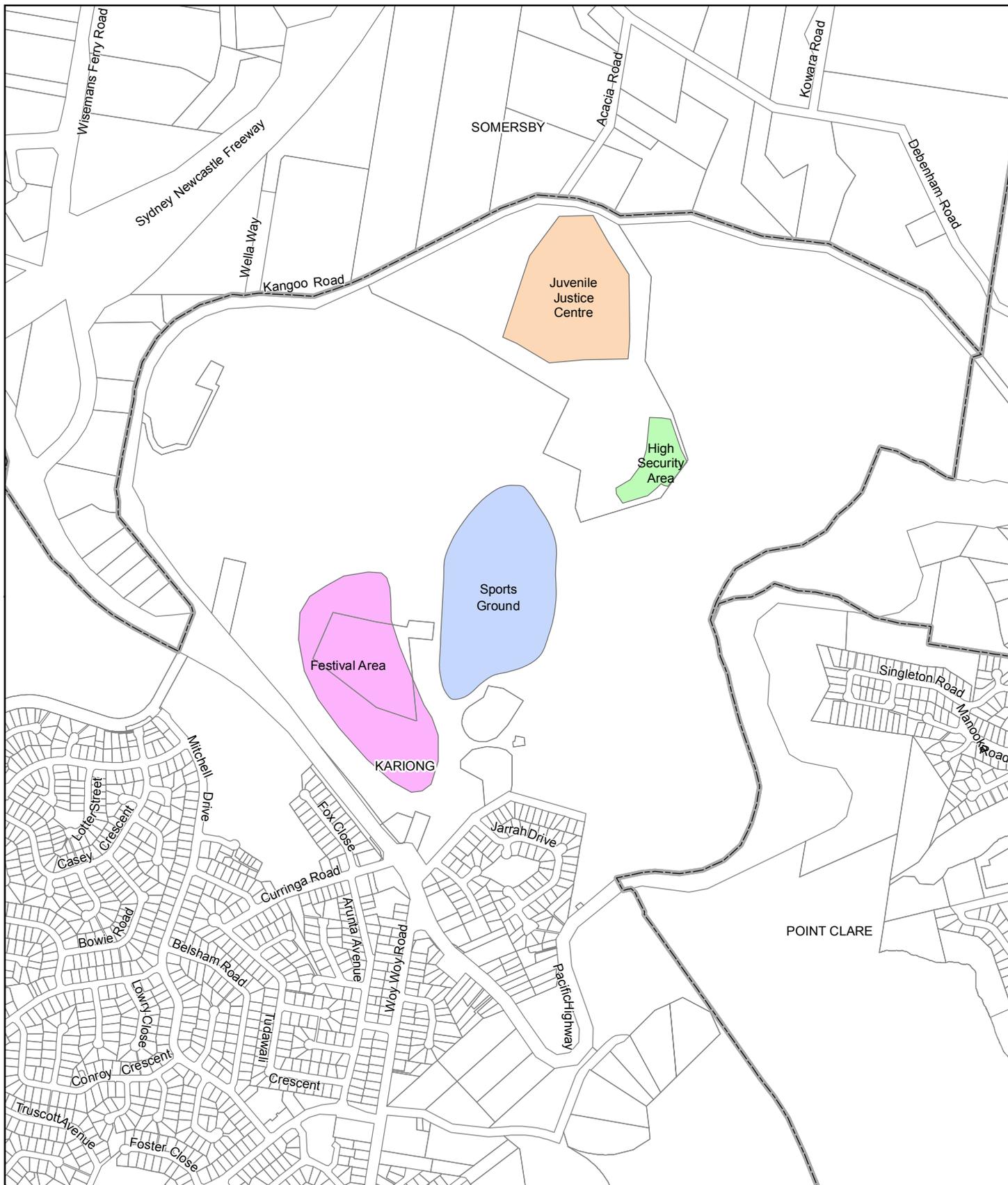
Gosford City Council
Employment Lands Investigation

Job Number | 22-15081
Revision | A
Date | 14 JUL 2010

**Mount Penang
Heritage Precincts**

Figure 34

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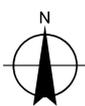
- Cadastre
- Juvenile Justice Centre
- Festival Area
- Sports Ground
- High Security Area

1:12,000 (at A4)

0 50 100 200 300 400

Metres

Map Projection: Transverse Mercator
Horizontal Datum: Geocentric Datum of Australia (GDA)
Grid: Map Grid of Australia 1994, Zone 56



Gosford City Council
Employment Lands Investigation

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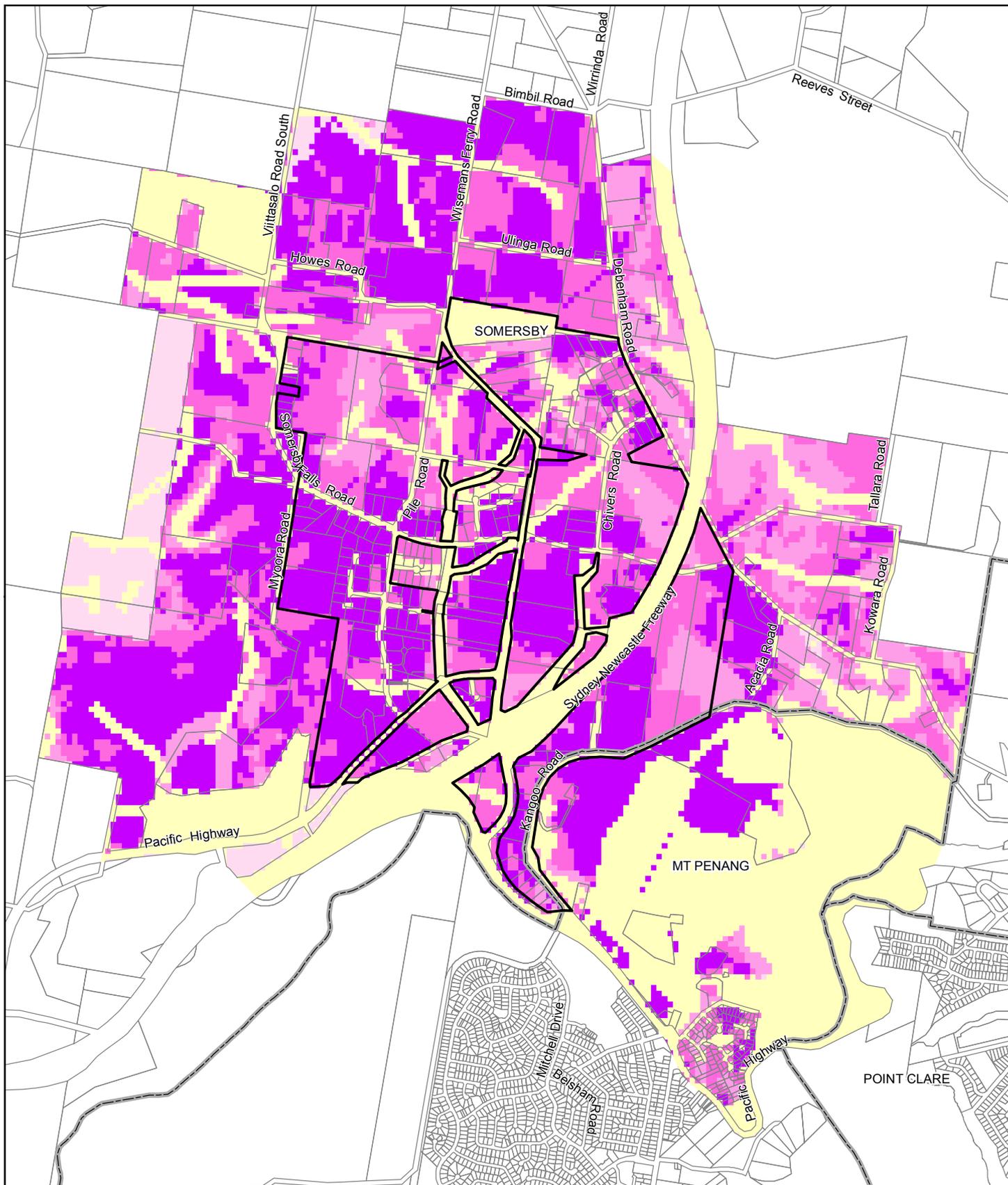
**Mount Penang
Other Uses**

Figure 35



Appendix D

Constraints Mapping



LEGEND

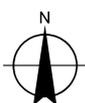
- | | | | | | |
|--|-----------------------|--|----------------|--|-------------------|
| | Cadastral | | no Constraint | | Medium Constraint |
| | Industrial Zoned Land | | Low Constraint | | High Constraint |
| | | | No Go Area | | |

1:24,000 (at A4)

0 100 200 400 600 800

Metres

Map Projection: Transverse Mercator
Horizontal Datum: Geocentric Datum of Australia (GDA)
Grid: Map Grid of Australia 1994, Zone 56

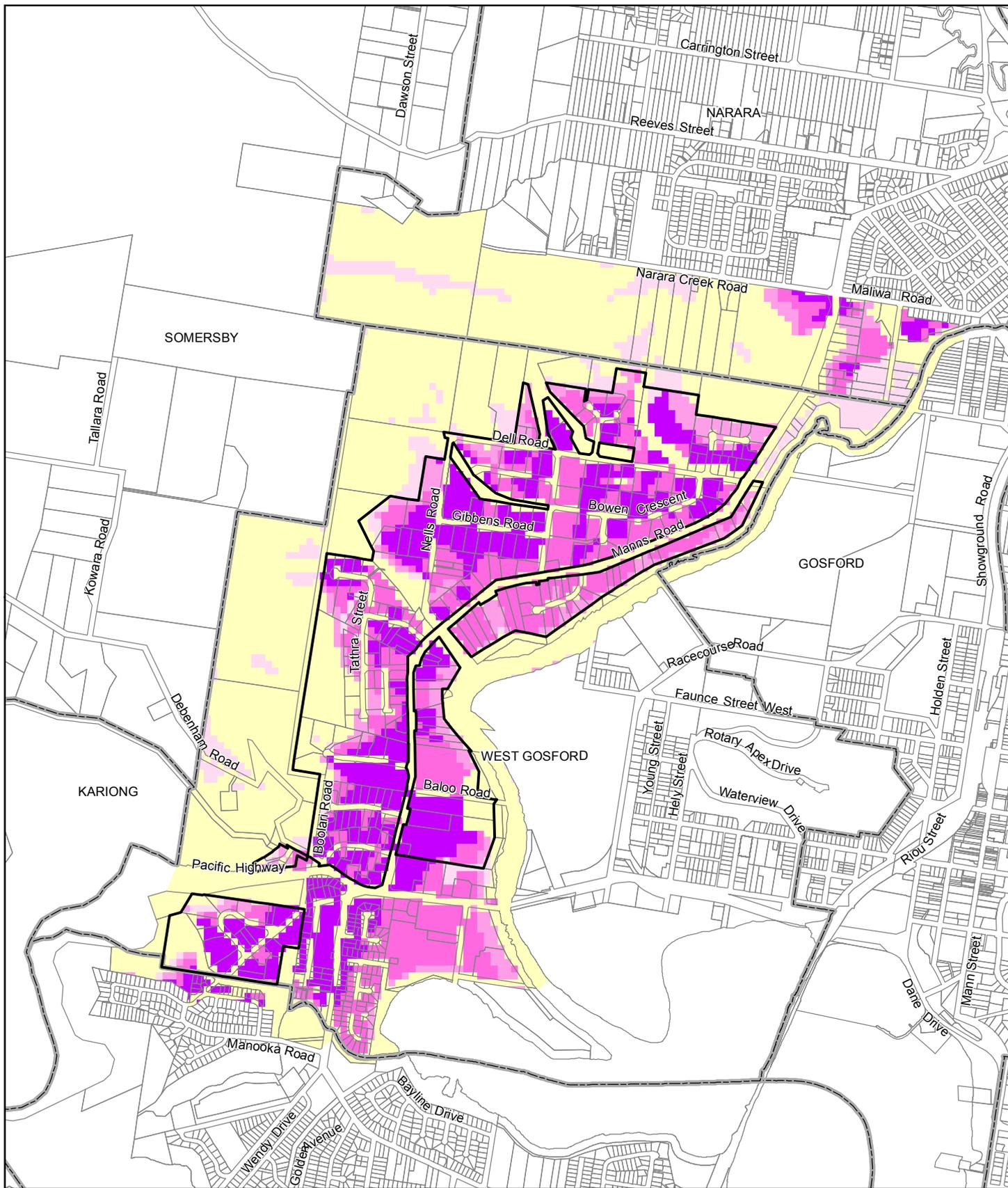


Gosford City Council
Gosford Employment Lands Strategy

Job Number 22-15081
Revision A
Date 15 JUL 2010

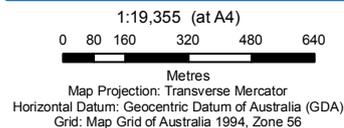
**Somersby Precinct
Constraints Map**

Figure 36



LEGEND

- | | | | | | |
|--|-----------------------|--|----------------|--|-------------------|
| | Cadastral | | no Constraint | | Medium Constraint |
| | Industrial Zoned Land | | Low Constraint | | High Constraint |
| | | | No Go Area | | |

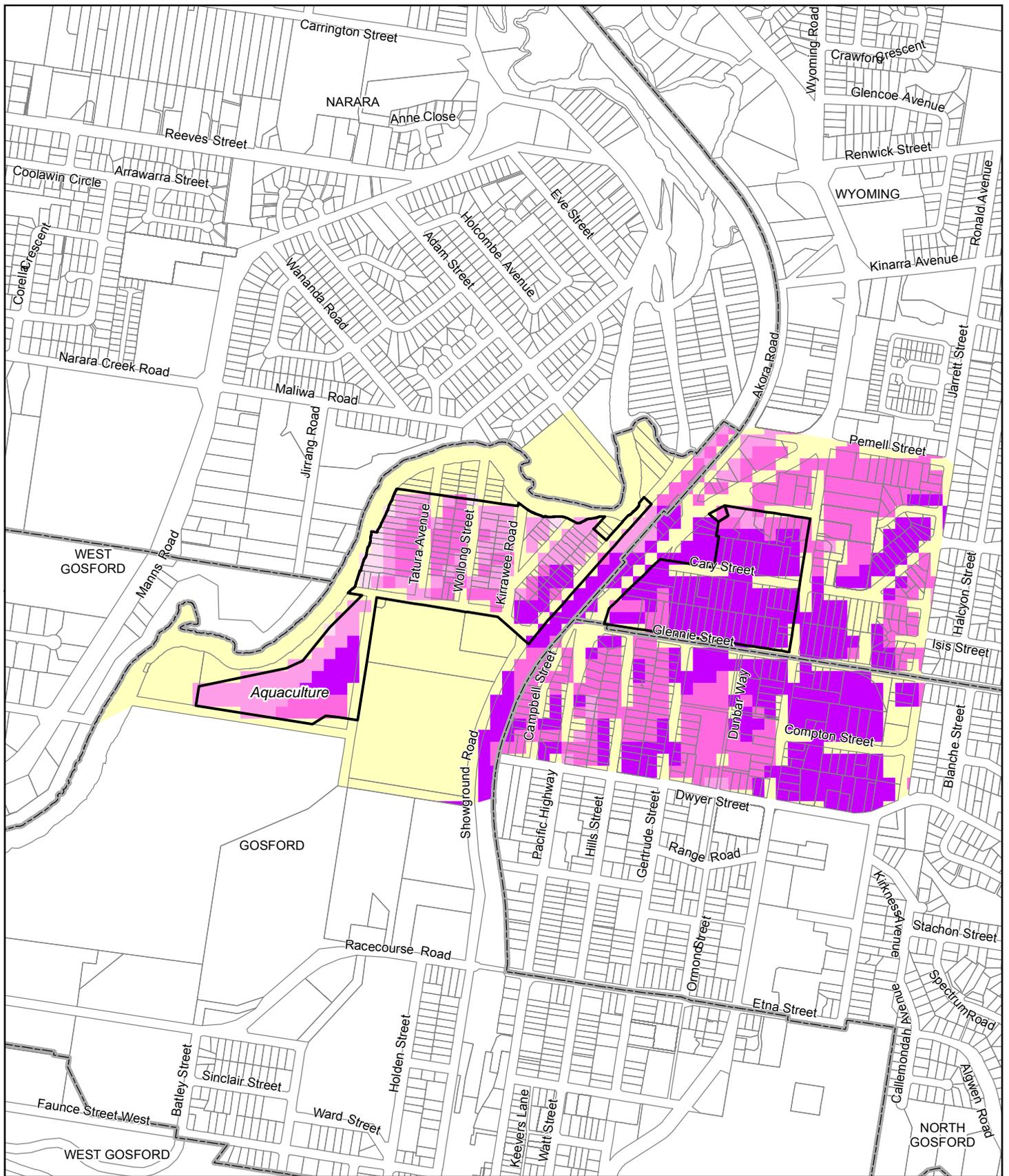


Gosford City Council
Employment Lands Investigation

Job Number | 22-15081
Revision | A
Date | 14 JUL 2010

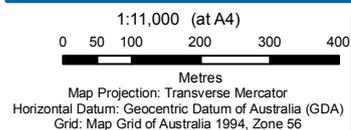
**West Gosford Precinct
Constraints Map**

Figure 37



LEGEND

- | | | | | | |
|--|-----------------------|--|----------------|--|-------------------|
| | Cadastral | | no Constraint | | Medium Constraint |
| | Industrial Zoned Land | | Low Constraint | | High Constraint |
| | | | No Go Area | | |

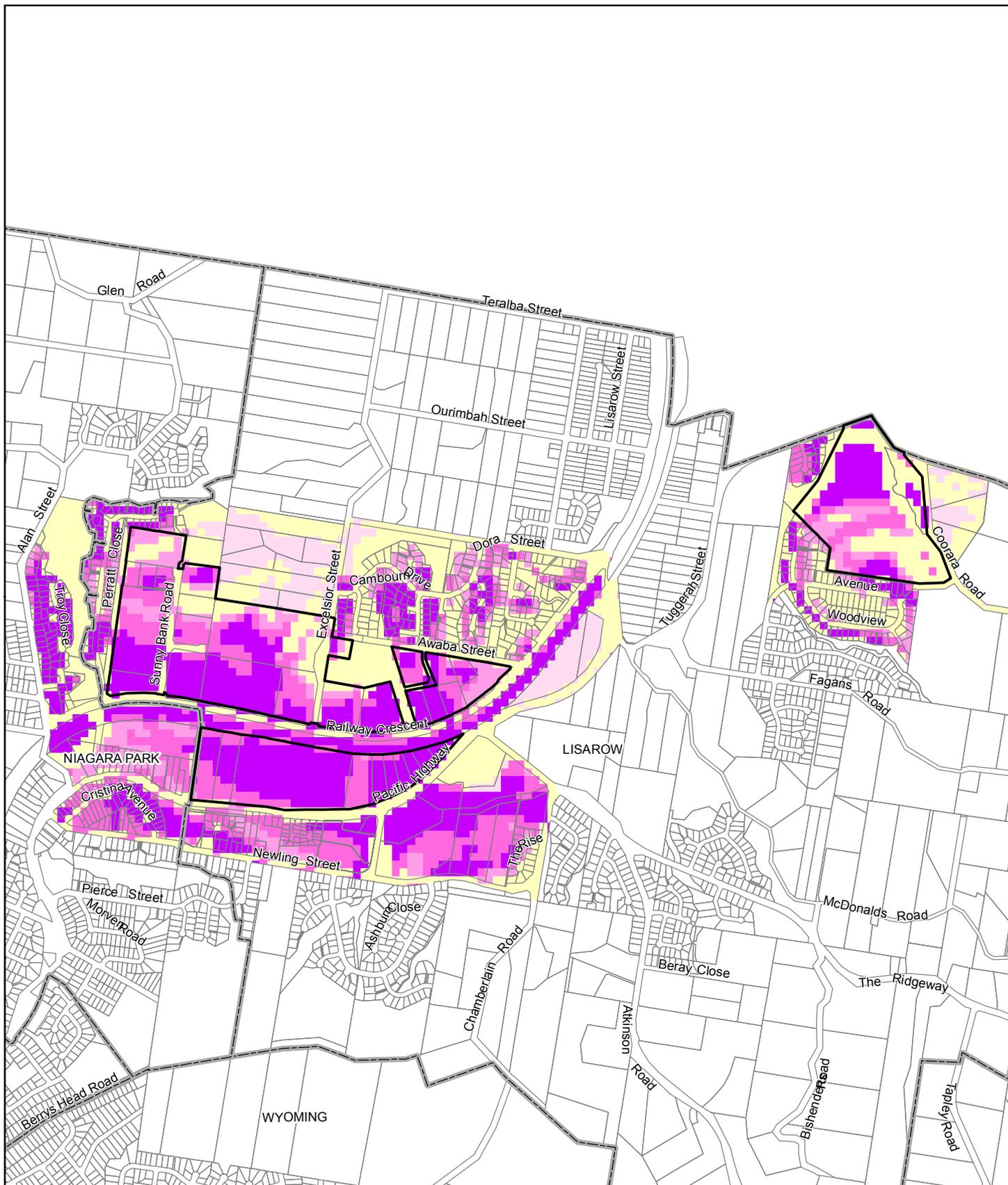


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Gosford Employment Lands Strategy

Job Number 22-15081
Revision A
Date 15 JUL 2010

**North Gosford Precinct
Constraints Map**

Figure 38



LEGEND

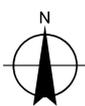
- | | | |
|-----------------------|----------------|-------------------|
| Cadastre | no Constraint | Medium Constraint |
| Industrial Zoned Land | Low Constraint | No Go Area |
| | | High Constraint |

1:17,000 (at A4)

0 70 140 280 420 560

Metres

Map Projection: Transverse Mercator
Horizontal Datum: Geocentric Datum of Australia (GDA)
Grid: Map Grid of Australia 1994, Zone 56



Gosford City Council
Employment Lands Investigation

Job Number 22-15081
Revision A
Date 14 JUL 2010

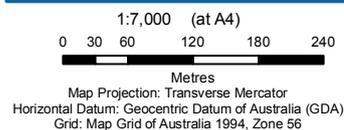
**Lisarow / Niagara Park Precinct
Constraints Map**

Figure 39



LEGEND

- | | | |
|-----------------------|----------------|-------------------|
| Cadastrate | no Constraint | Medium Constraint |
| Industrial Zoned Land | Low Constraint | High Constraint |
| | | No Go Area |

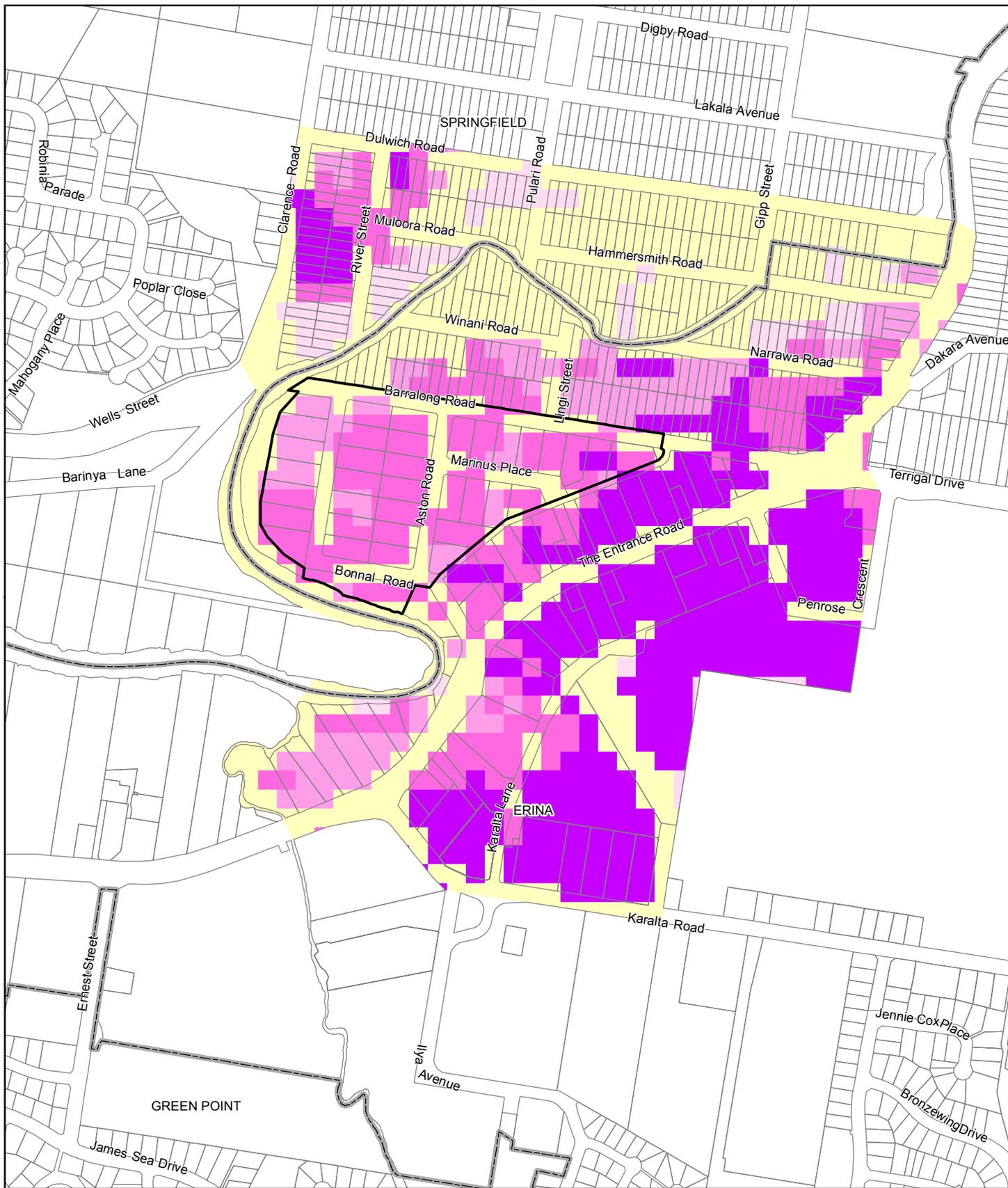


Gosford City Council
Employment Lands Investigation

Job Number 22-15081
Revision A
Date 14 JUL 2010

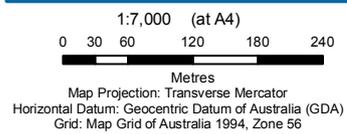
**Wyoming Precinct
Constraints Map**

Figure 40



LEGEND

- | | | |
|-----------------------|----------------|-------------------|
| Cadastre | no Constraint | Medium Constraint |
| Industrial Zoned Land | Low Constraint | High Constraint |
| | | No Go Area |



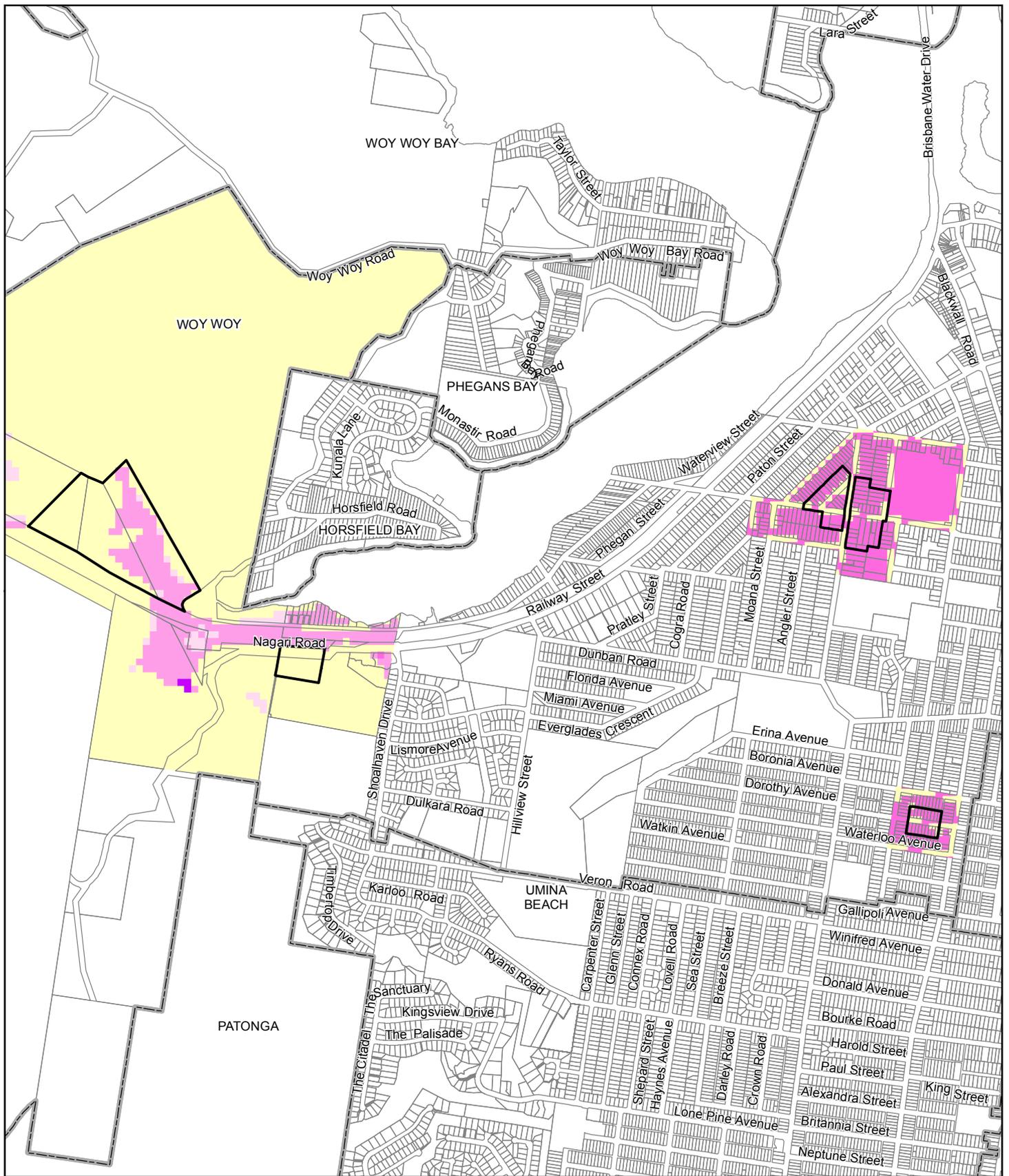
Gosford City Council
Employment Lands Investigation

**Erina Precinct
Constraints Map**

Job Number | 22-15081
Revision | A
Date | 14 JUL 2010

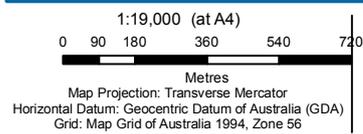
Figure 41

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LEGEND

- | | | |
|-----------------------|----------------|-------------------|
| Cadastre | no Constraint | Medium Constraint |
| Industrial Zoned Land | Low Constraint | High Constraint |
| | | No Go Area |

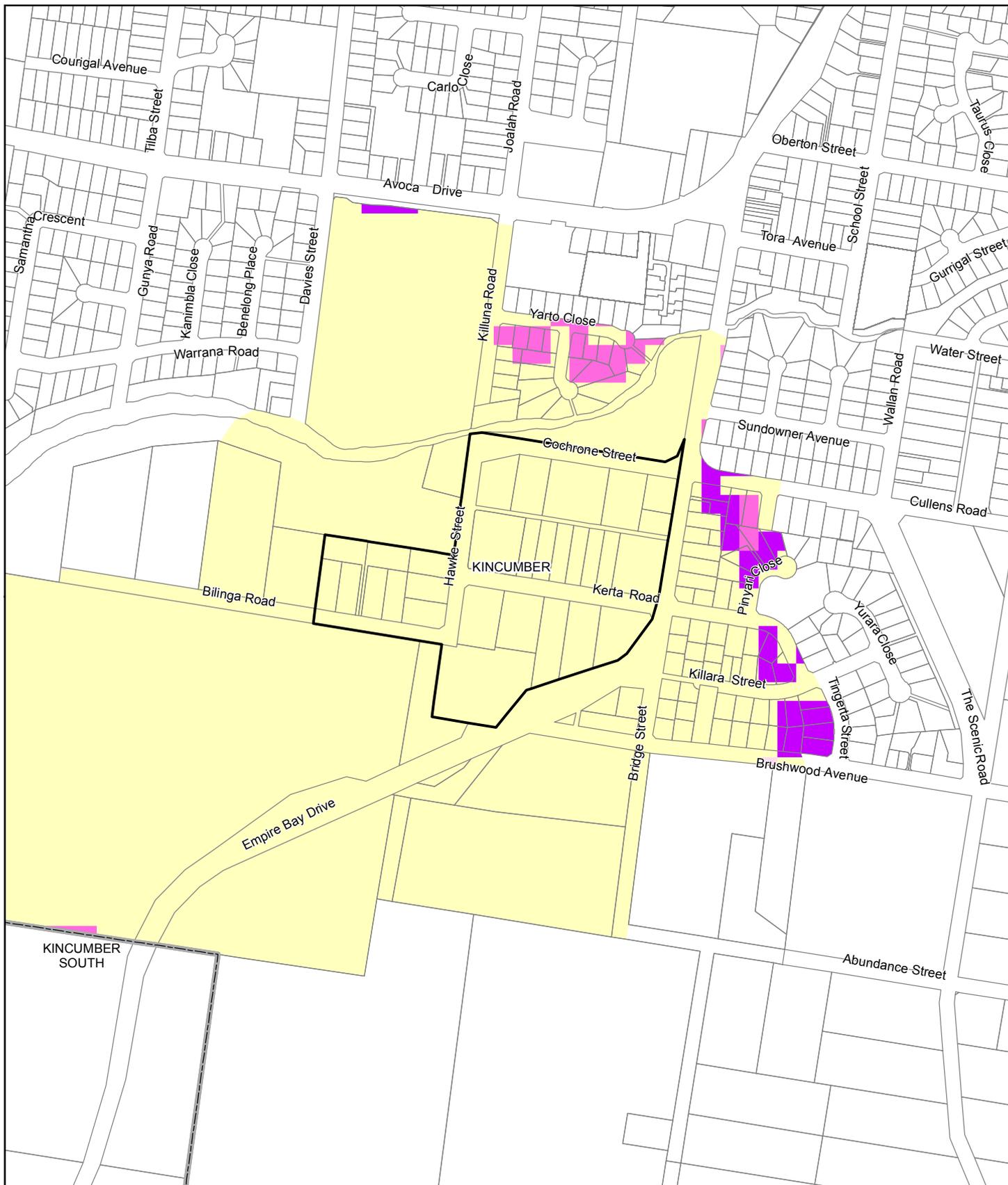


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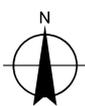
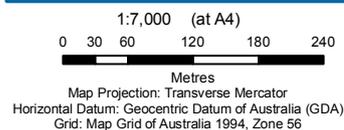
**Woy Woy Precinct
Constraints Map**

Figure 42



LEGEND

- | | | |
|-----------------------|----------------|-------------------|
| Cadastre | no Constraint | Medium Constraint |
| Industrial Zoned Land | Low Constraint | High Constraint |
| | | No Go Area |



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Employment Lands Investigation

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**Kinumber Precinct
Constraints Map**

Figure 43

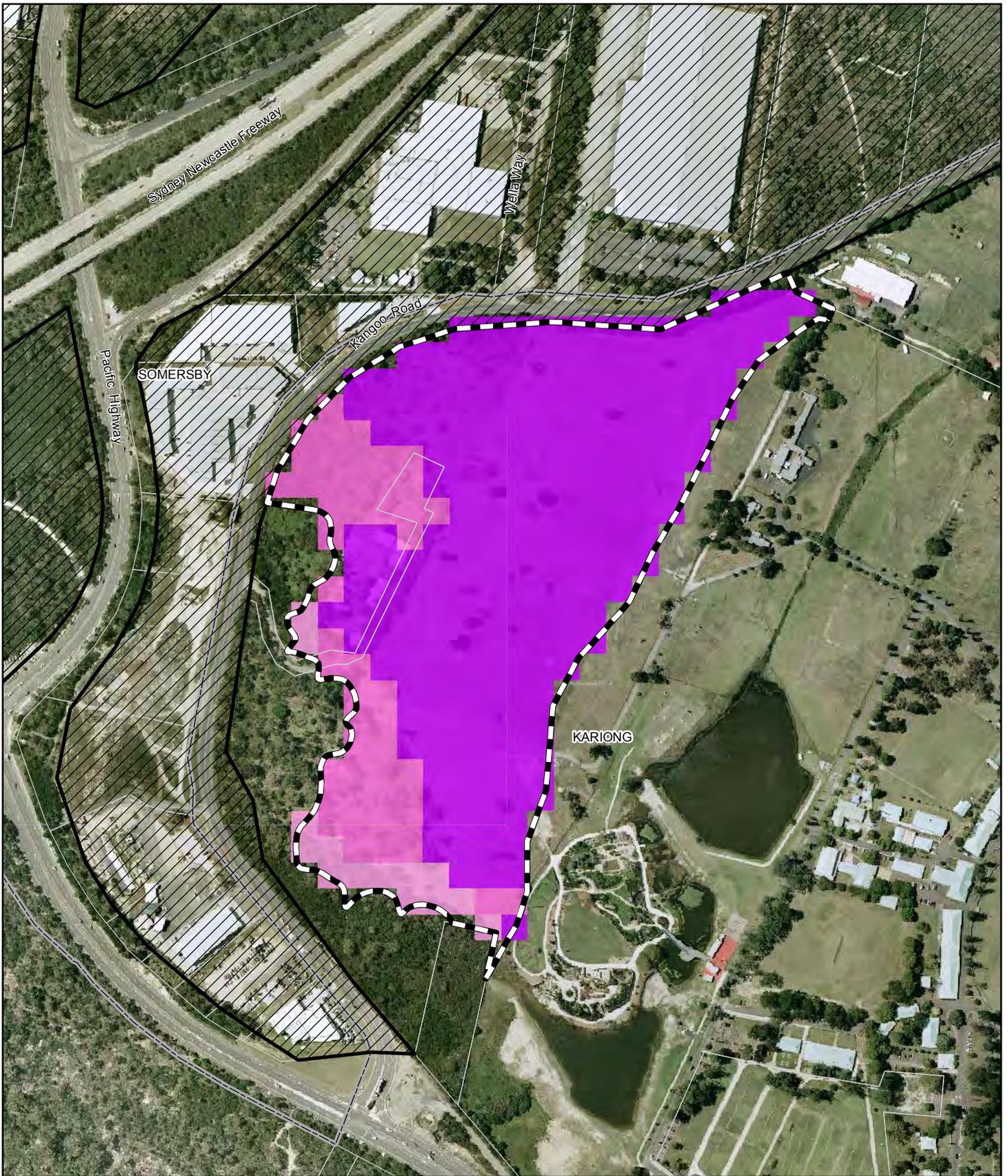
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Appendix E

Potential Employment Lands Areas



LEGEND

- | | | | |
|------------|-----------------------|----------------|-------------------|
| Cadastrate | Industrial Zoned Land | no Constraint | Medium Constraint |
| | | Low Constraint | High Constraint |
| | | | No Go Area |

1:5,000 (at A4)

0 20 40 80 120 160

Metres

Map Projection: Transverse Mercator
Horizontal Datum: Geocentric Datum of Australia (GDA)
Grid: Map Grid of Australia 1994, Zone 56



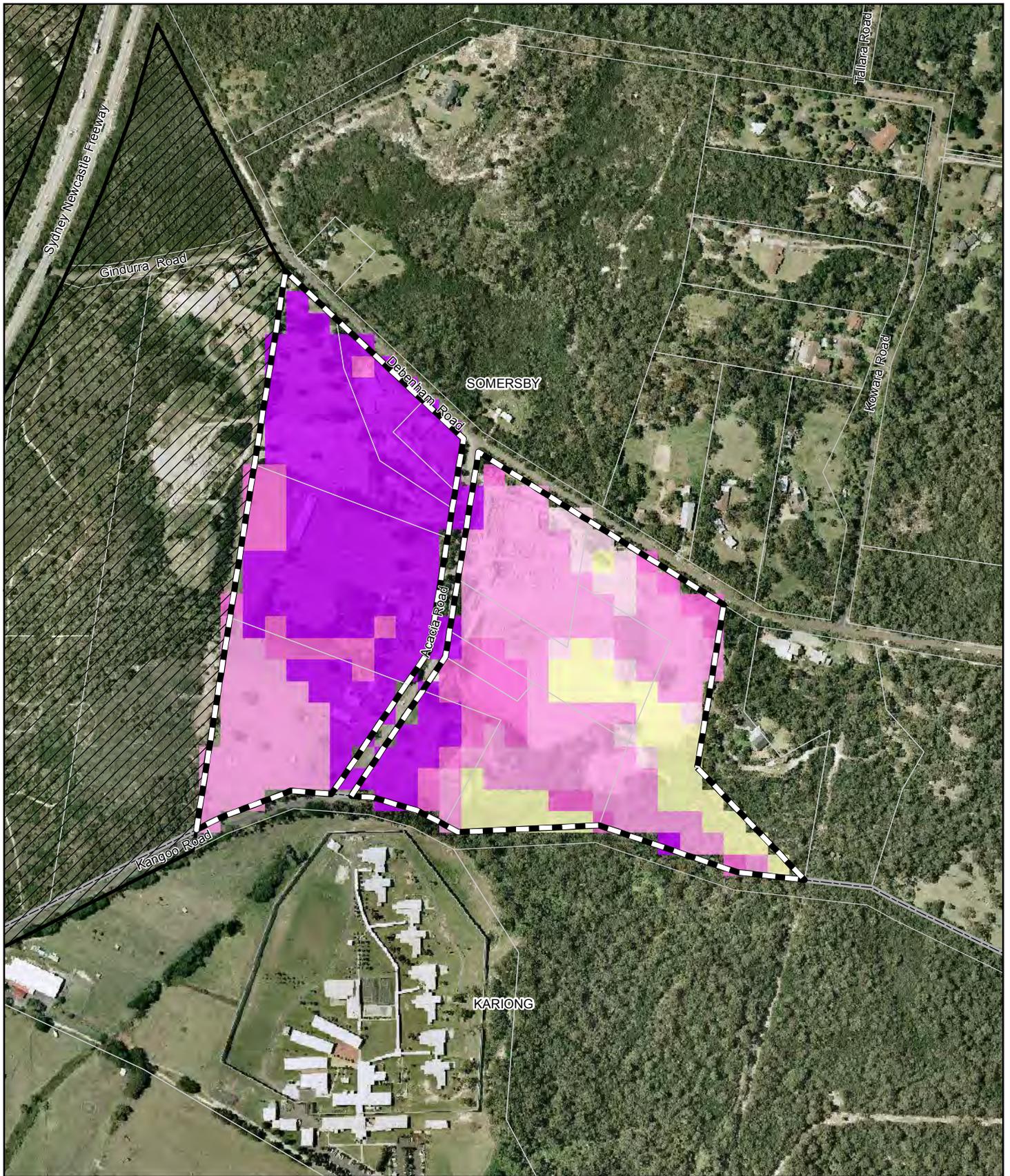
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Employment Lands Investigation

Proposed Future Employment Lands 1
Mount Penang Parklands

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Date 22 SEP 2010

Figure 44

J:\22\15081\GIS\GIS SEE J Drive\Maps\Deliverables\Lands Strategy Report\2215081_013_FIG45-49_FutureEmployment_Mapbook_20100922_A.mxd
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LEGEND

- | | | | |
|----------|-----------------------|----------------|-------------------|
| Cadastre | Industrial Zoned Land | no Constraint | Medium Constraint |
| | | Low Constraint | High Constraint |
| | | No Go Area | |

1:6,000 (at A4)

0 25 50 100 150 200

Metres

Map Projection: Transverse Mercator
Horizontal Datum: Geocentric Datum of Australia (GDA)
Grid: Map Grid of Australia 1994, Zone 56

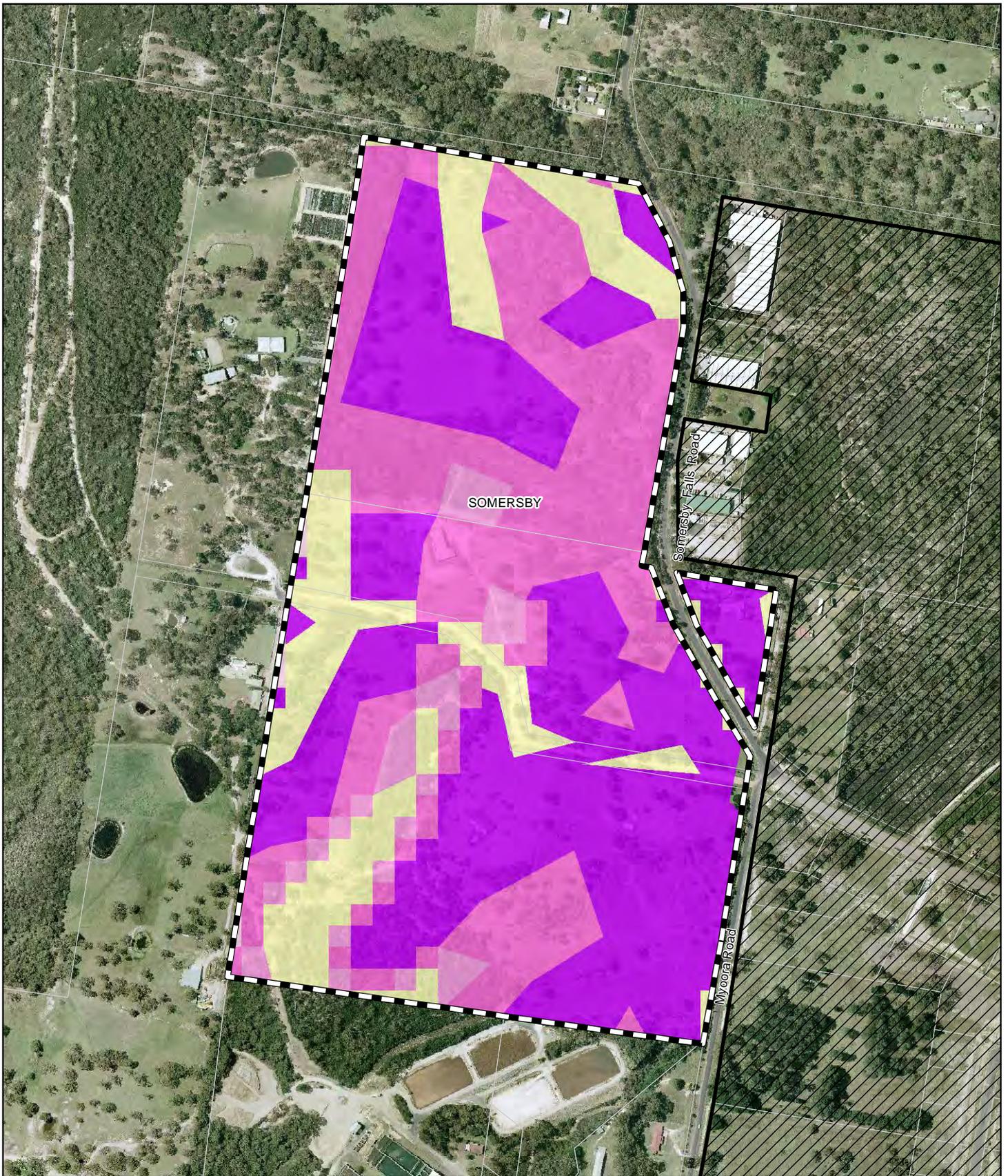


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Proposed Future Employment Lands 2
Acacia Road / Debenham Road **Figure 45**

J:\22\15081\GIS\GIS SEE J Drive\Maps\Deliverables\Lands Strategy Report\2215081_013_FIG45-49_FutureEmployment_Mapbook_20100922_A.mxd
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LEGEND

- | | | | | | |
|---------------------------------|-----------------------|---------------------|----------------|-----------------|------------|
| Cadastre | Industrial Zoned Land | no Constraint | Low Constraint | High Constraint | No Go Area |
| Proposed Future Employment Land | Medium Constraint | Weighted Constraint | | | |

1:6,000 (at A4)

0 15 30 60 90 120

Metres

Map Projection: Transverse Mercator
Horizontal Datum: Geocentric Datum of Australia (GDA)
Grid: Map Grid of Australia 1994, Zone 56



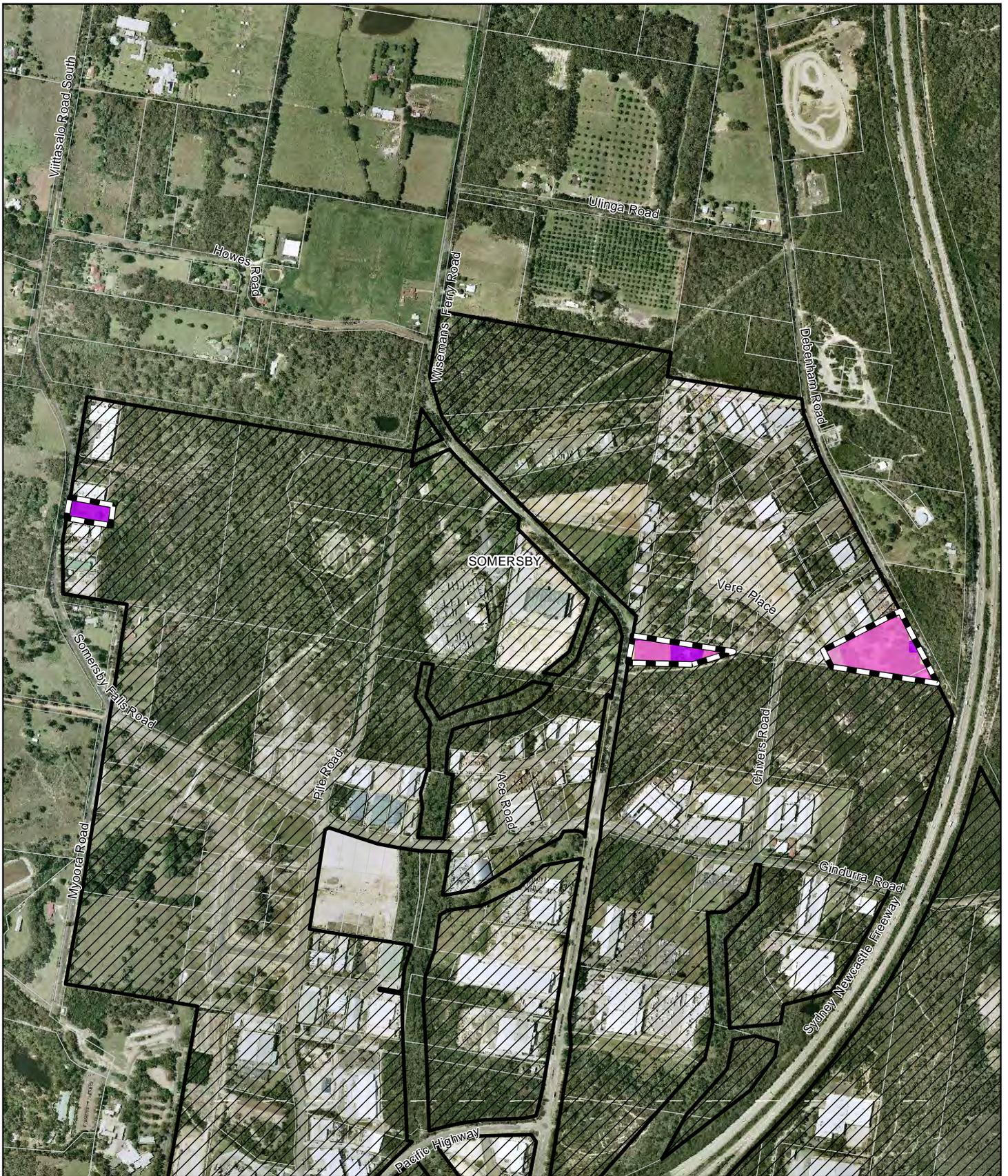
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Date 22 SEP 2010

**Proposed Future Employment Lands 3
West Somersby**

Figure 46

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LEGEND

- | | | | |
|---|---|--|---|
|  Cadastre |  Industrial Zoned Land |  no Constraint |  Medium Constraint |
| | |  Low Constraint |  High Constraint |
| | | |  No Go Area |

1:11,000 (at A4)
 0 25 50 100 150 200
 Metres

Map Projection: Transverse Mercator
 Horizontal Datum: Geocentric Datum of Australia (GDA)
 Grid: Map Grid of Australia 1994, Zone 56



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**Proposed Future Employment Lands 4
 Isolated Lots in Somersby**

Figure 47

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LEGEND

-  Cadastre
-  Industrial Zoned Land
-  no Constraint
-  Low Constraint
-  Medium Constraint
-  High Constraint
-  No Go Area

1:4,000 (at A4)

0 10 20 40 60 80

Metres

Map Projection: Transverse Mercator
Horizontal Datum: Geocentric Datum of Australia (GDA)
Grid: Map Grid of Australia 1994, Zone 56



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Proposed Future Employment Lands 5
Erina Extension

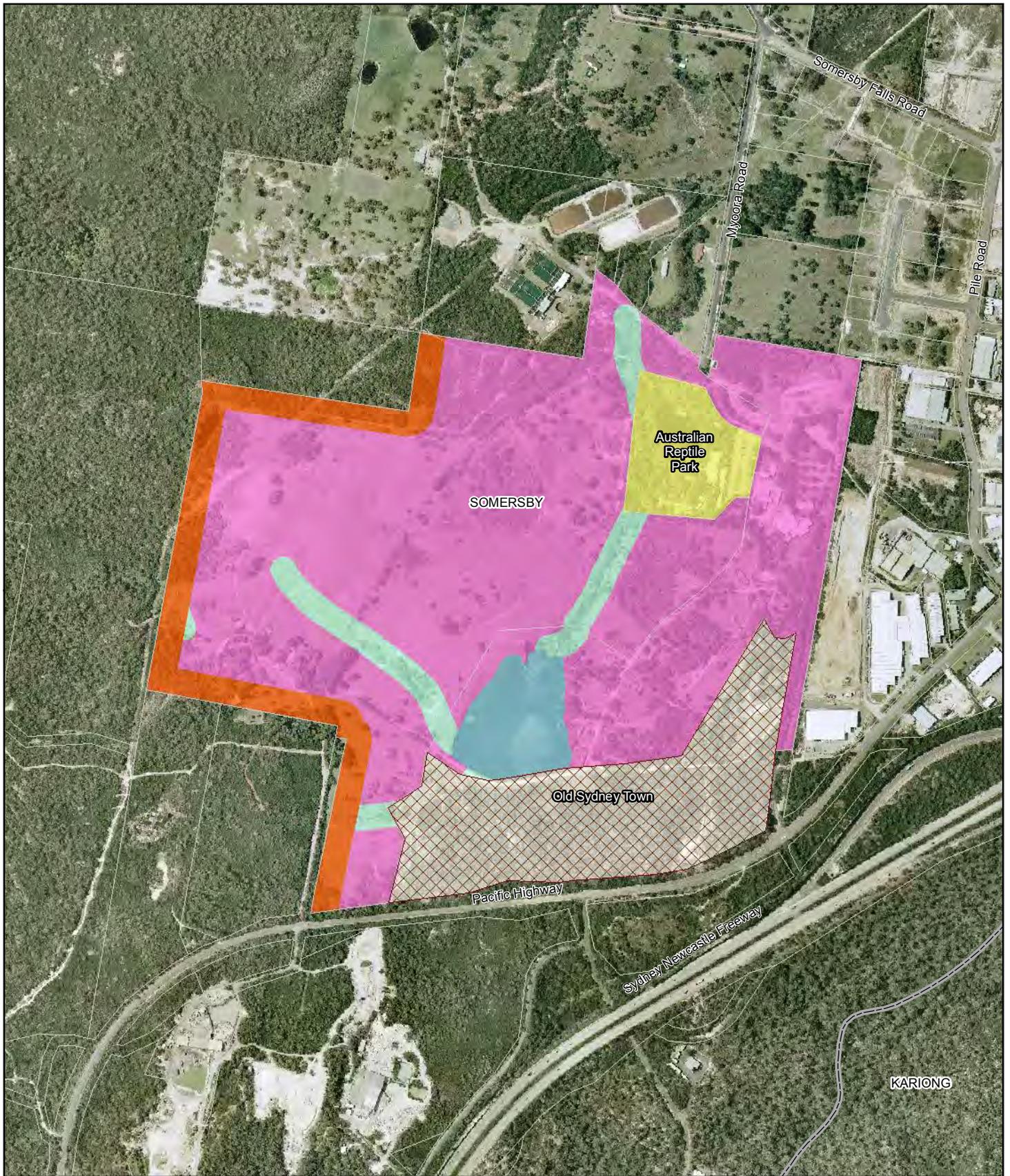
Figure 48

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Appendix F

Future Investigation Areas



LEGEND

- Cadastre
- Investigation Area
- Creek
- Australian Reptile Park
- 50m Bushfire Protection
- Lake
- Heritage Site

1:10,000 (at A4)

0 45 90 180 270 360

Metres

Map Projection: Transverse Mercator
 Horizontal Datum: Geocentric Datum of Australia (GDA)
 Grid: Map Grid of Australia 1994, Zone 56



Gosford City Council
 Employment Lands Investigation
 Area for Investigation
 Old Sydney Town

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Figure 49



GHD

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