

Botany south Industry Study

Final Report

City of Botany Bay Council

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Abbreviations

BEC	Business Enterprise Centre
CBD	Central Business District
LEP	Local Environmental Plan
LGA	Local Government Area
RTA	Roads & Traffic Authority
SD	Statistical Division
SLA	Statistical Local Area
Sqm	Square metres

EXECUTIVE SUMMARY

The City of Botany Bay Council is undertaking a project to assess the potential for renewal of the Botany south area in Botany Bay LGA. Objectives of the **Botany south project** are to revitalise the mixed residential and industrial area by improving amenity in an area where residential and industrial activity can co-exist while ensuring the economic viability of the area. The objectives of this Botany south industry study as addressed in this report are to:

- understand the nature of the businesses in Botany south;
- determine the viability of the industrial and employment activity in the Botany south area;
- to determine if this area should continue to be zoned industrial; and
- to provide guidance with regard to the future of this industrial activity and land.

Description of the Area

The study area is less than one kilometre east of Sydney Airport, less than two kilometres north of Port Botany as the crow flies and close to Sydney CBD, with easy access to the Eastern Distributor. The area has traditionally been and remains an area where people lived and worked close to home. There is a fringe of residential land around the industrial area and some residences among the industrial uses. Different street plantings and setbacks provide a distinction in character between the residential and industrial areas.

The Pemberton-Wilson Precinct comprising the eastern part of the study area has been proposed to be a residential zone along the western side of Wilson Street with 2 and 3 storey residential, with the eastern side of Pemberton Street proposes as mixed employment and residential uses.

Industrial Land Supply

Most properties are less than 2500m² with a significant proportion below 1000m². The most common lot size within the area is between 250 and 500m². Lot sizes are smaller to the west of Sir Joseph Banks Street and larger to the east of this street.

Common uses include motor vehicle retailing and service, manufacturing and transport and storage, including a high proportion of unusual 'niche' manufacturers. The relatively few transport and storage firms occupy most of the largest sites, generally in the Pemberton-Wilson Precinct.

The key differentiating features characterising the Botany south industrial area are:

- Excellent road access to the CBD but also to the south west;
- Smaller freehold sites favoured by many smaller manufacturers;
- Higher than usual level of local trading; and
- High level of business spirit.

Constraining factors include:

- Not zoned for purely industrial/manufacturing and zoning ambiguity.
- Residential encroachment on industrial land leading to complaints from residents and constraints on operating times.

- Poor building quality with low clearance levels.
- Limited off-street parking.
- Limited public transport.
- No room for expansion.

Competing industrial land areas include other areas in west and north Botany, Banksmeadow/Botany Bay, Mascot, Alexandria/Rosebery, Marrickville and outer industrial areas. Each has its own strength and weaknesses and are not direct substitutes for Botany south.

There is a diminishing supply of industrial land in Sydney in the middle and inner ring of the metropolitan region resulting from growing population with rezoning of many industrial areas for residential development or 'mixed-use'.

Demand for Industrial Land

There are higher proportions of people employed in textile, clothing, footwear and leather manufacturing and food, beverage and tobacco manufacturing in the study area than in Botany Bay SLA. The area provides a base for these relatively 'niche' operations, which are now comparatively few in inner suburban areas.

Although the wider South Sydney/Botany sub-region had its manufacturing workforce almost halved between 1981 and 2001 it maintained nearly the same share of Sydney's total employment in manufacturing, even as total Sydney population and employment grew dramatically over the period. While factors have promoted a change of land use in inner suburbs, the significance of the remaining manufacturing activity should not be underestimated. While nationally employment in manufacturing has fallen, nationally output has increased. There are fewer people working in larger factories with only limited reductions in land use.

Nearly 15% of people who work in the Botany travel zone also live in the Botany Bay SLA, relatively high proportion compared to other parts of Sydney. Together the adjacent SLAs plus Botany Bay account for 41% of workers in the travel zone and 34% in the Botany Bay SLA. The other major source of workers is from the south and west, particularly Rockdale, Sutherland Shires West and East and Kogarah.

Issues and Analysis

Movements in employment and land use distribution - In spite of the pressures on inner industrial land, development of new lands in the south and west and strong growth in other sectors in the South Sydney Botany Bay areas, the study area retains a substantial industrial role within metropolitan Sydney. Industry is drawn to remain in the South Sydney Botany Bay corridor with exceptional access via the eastern distributor to the City and M5 to the south and west and the still largely intact extensive industrial areas. A substantial proportion of workers are still living relatively locally, to a greater extent for the study area than for most other parts of Sydney or for the SLA as a whole. This has acted to retain a more representative social mix, arguably benefiting the area.

Strategic land value - The port and airport are catered for in relatively large areas of land adjacent to the respective facilities. Both are planning expansion. However, the study area is not

currently being used as a strategic site for either of these facilities and to do so would be undesirable due to heavy traffic generation. However, retaining the Botany south industrial area with its smaller parcels, reduces pressure for subdivision and fragmentation of large parcels in the more strategic areas. The area's many small freehold sites can be specifically configured to suit the niche manufacturing operations hosted there.

Local service requirements - About 15% of the land area is required to meet local service needs. In principle this could be met by land along Botany Road although currently these businesses are scattered through the study area.

Major truck routes and movements - There is some interest in Botany south in diverting truck traffic from Botany Road. However traffic movement on Botany Road will remain very high even if the proposals are put in place, with an unusually large percentage of that traffic being heavy trucks. Over half of the frontage on Botany Road between the highway and Foreshore Road intersection is industrial or commercial in nature. Much of the remainder is residential, whose amenity is substantially affected by the heavy traffic. The industrial and commercial use of Botany Road frontage provides a buffer from the road to dwellings located on the streets behind.

Impact of development controls - The *Development Control Plan No 33 – Industrial Development (Version 5)* include specified setbacks, landscaping to screen industrial buildings and the requirement for loading and parking to be at the rear of premises which work well for larger sites. However, when applied to smaller sites they have a disproportionately large impact on the amount of usable space, reducing useable space to less than 50% for lots under 1000m² and to less than 25% for lots under 500 m². Some requirements such as turning vehicles on site simply cannot be met for smaller sites. By inhibiting reinvestment and new development, in the short to medium term these controls result in a declining standard of presentation.

Industry residential conflicts – Mixed industrial residential areas do not work. Restrictions on operating hours and truck movements reduce industry viability. With increasing mechanisation and capital intensity of manufacturing, it is more important to be able to operate double or even triple shifts and up to seven days a week. Some businesses have significant seasonal peaks requiring long operating hours for shorter periods during the year. An industrial area catering to manufacturing, warehousing and transport needs to permit this operating flexibility.

Potential for residential use - There have been proposals to rezone the fringe as a way of overcoming existing conflicts. This does not address the underlying problem, but moves it in the short term. Further, it reduces the confidence of business in the area, which is essential if it is to undertake the investments required to maintain the standard of the area and address the causes of conflicts in the long term.

The Pemberton-Wilson Street Precinct Rezoning has been proposed and in progress for over a decade. Some existing landowners have positioned their holdings to take advantage of the expected rezoning. The industrial land parcel sizes and uses displaced are mostly comparable in character to parcel sizes and uses available in nearby industrial estates – ie are more easily replaced if lost – than for other parts of the study area.

The Pemberton-Wilson Street Precinct proposes a buffer zone along Pemberton Street, to assist the co-existence of industry and residential uses along this edge. Thus the rezoning of the Pemberton-Wilson Street Precinct should not undermine the viability of the remaining industrial area and may even contribute to its long-term viability. Further residential conversion would be problematic.

Industry Viability on the Site

The biggest threats to viability of industrial use of the study area are increasing commuter time and distance for the workforce; high land costs and strong competition from competing higher value uses; increasing fragmentation of land and difficulty in expanding in existing locations; conflicts with adjacent residential areas, with operating restrictions imposed; and congestion in local streets. However, this site is less affected by these factors than many other inner city sites, and they remain manageable to a greater extent than in some other locations.

The other threat is the impact of the DCP on reinvestment in the area. An alternative approach is required in the study area, which sustains the objectives of the DCP, but in a way that is responsive to the lot sizes and layout of the area.

It is the view of the consultants that the industry based in the study area has a significant contribution to Botany Bay and the wider Sydney Metropolitan area that is worth sustaining given the area's attributes.

Proposed Approach and Recommendations

Residential/Industrial transition

There should be a clear definition between the residential and industrial zones.

- Acknowledge the **threshold** between the residential and industrial areas on the ground plane in the public domain with a change in materials where this threshold occurs.
- Increase **public domain planting** in the industrial area to improve the visual quality of the area and counter the inability to accommodate large areas of landscaping in the private domain.
- Use the contrast in **treatment of front setbacks** to accentuate the transition between residential and industrial areas. Hardstand areas required for truck movements in the front of industrial zoned buildings limit the area available for landscaping. Residential areas have consistent vegetated front setbacks in contrast to varied setbacks in the industrial area.

A "buffer zone" should be created within the transition area between industrial and residential development zones.

- Amend the current LEP to provide specific controls for the buffer zone within Botany south.
- Amend DCP 33 as it applies to Botany south to encourage appropriate landscape treatment within allotment boundaries.
- Incorporate public domain proposals within ongoing capital works budgets for progressive implementation.

Pedestrian Access

Pedestrian access through the industrial area should be encouraged in streets with low-level truck movements and high levels of pedestrian amenity.

- Implement the Botany south Transport Study and Action Plan.
- Incorporate public domain proposals within ongoing capital works budgets for progressive implementation.

Site Use and Access

Revise existing development controls to address issues of truck access and allow small to medium sized lots to be upgraded and redeveloped without the need for amalgamation.

Site Configuration

- Narrow frontage sites may locate driveway and loading areas along one boundary, provided the boundary does not adjoin a residential use.
- Front setbacks should be considered a “merits” issue consistent with the needs of access and parking, appropriate landscape and presentation to the street. Buildings are not required to set back a minimum of 9 metres from the front boundary.
- On small frontage sites, buildings may align to the side boundary in all locations except where a residential zone adjoins. In cases where an existing industrial building is built to the boundary and predates the current occupancy of the adjoining residential zone, this exception may be relaxed.

Parking and Access

- Parking and vehicle manoeuvring areas may be located within the front setback area, provided minimum landscape requirements are met (see “Landscape”, below).
- A proportion of the on-site parking requirement may be accommodated on the adjacent street, or preferably, if the required parking quota cannot be reached on-site, a financial contribution to a car parking plan should be provided. This requires the preparation of a Section 94 car-parking plan.
- An area for delivery vehicle access/manoeuvring may be provided within the frontage area in order to allow such vehicles to enter and leave in a forward direction.
- Access driveways should be paired, with adjacent properties locating driveways side by side

Landscape

- If buildings are set back from a side boundary, appropriate landscaping is to be provided.
- A landscape zone is to be provided adjacent to the front property boundary of no less than 1.5 metres. This zone should accommodate shade trees for adjacent parking, interspersed with screen planting/hedging of 1.2 metres in height.
- Landscape planting (public and private domain) should be focused on the larger areas created between sites by the collocation of driveways.

Transition Zones

Amend the LEP by inserting a special clause within the appropriate Industrial Zone stating:

“Consent will not be granted to proposed development within the Botany south Transition Area unless the proposed development achieves the following: *(insert appropriate performance standards relating to vehicle and operating noise, operating hours, height/overlooking neighbours)*”

DCP Controls

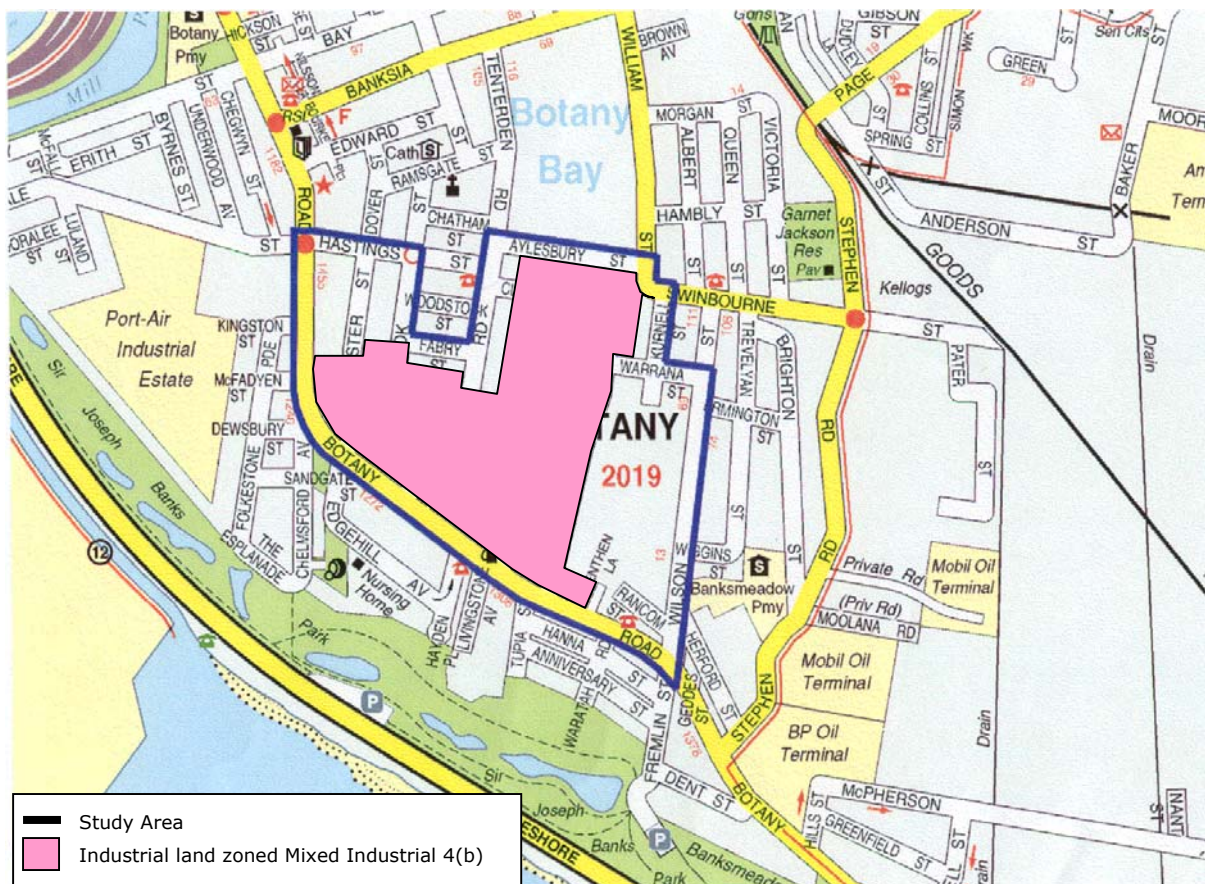
- Amend DCP 33 to incorporate site utilisation, access and landscaping recommendations described above within a specific Botany south section.

1 INTRODUCTION

1.1 Introduction to the Study

The City of Botany Bay Council is undertaking a project to assess the potential for renewal of the Botany south area in Botany Bay LGA. The purpose of the Botany south project is to enhance the attractiveness, liveability and overall amenity of the Botany south area to ensure that it is a well-served and suitable area for both residents and businesses. The area covered by the project is shown in Figure 1.

Figure 1. Botany south Project Area



Objectives of the Botany south project are to revitalise the mixed residential and industrial area by improving amenity in an area where residential and industrial activity can co-exist while ensuring the economic viability of the area. The project seeks to consult the local community as well as building partnerships between local community, state government agencies, local community groups and property developers.

This study of Botany south industry is part of the Botany south project addressing the same area, but also specifically focusing on the industrial land zoned mixed industrial 4(b) and referred to as the 'Botany (Central) Industrial Precinct'. This area is shown in Figure 1. The objectives of this industry study as addressed in this report are to:

- understand the nature of the businesses in Botany south;
- determine the viability of the industrial and employment activity in the Botany south area;
- to determine if this area should continue to be zoned industrial; and
- to provide guidance with regard to the future of this industrial activity and land.

This report provides guidance to the council on the strategic direction for these employment lands including future planning and development, implementation approaches and urban design considerations specific to the Botany south area.

1.2 Methodology

This study focuses on the current situation and future potential for industry revitalisation in Botany south. The steps undertaken in the current study include:

- Relevant materials were collected and a background analysis of the situation in the study area was compiled.
- A detailed survey of the land uses within the area was conducted.
- A quantitative and qualitative analysis of demand-side data and an analysis of trends in land use and employment change was developed using analysis from the SGS input-output model.
- A detailed survey of business operators and key stakeholders was used to identify issues and options.
- A situation analysis was prepared and recommendations proposed to improve the area.

1.3 Report Structure

The report begins by describing the study area, zoning and urban characteristics in Section 2.

Section 3 assesses industrial land supply in the context of Botany south and competing industrial land areas.

Section 4 considers the demand for different types of industrial land and user requirements and puts Botany south in the context of South Sydney and the Sydney metropolitan area.

Section 5 presents an analysis of the preceding sections leading to the proposed approach in Section 6. Section 7 provides a summary and conclusions.

2 Study Area Description and Context

The Botany south study area is north of Botany Road between Wilson Street, Aylesbury Street, Fabry Street and Hastings Street. The Botany south mixed industrial area is a mixture of free standing small lots with a range of manufacturing, wholesaling and warehousing type industrial uses, combined with one storey residential houses.

The area has traditionally been and remains a mixed industrial and residential area where people lived and worked close to home. The study area is less than one kilometre east of Sydney Airport and less than two kilometres north of Port Botany as the crow flies. The area is also very close to Sydney CBD, with easy access off the Eastern Distributor.

Figure 2. Location of Botany south Study Area



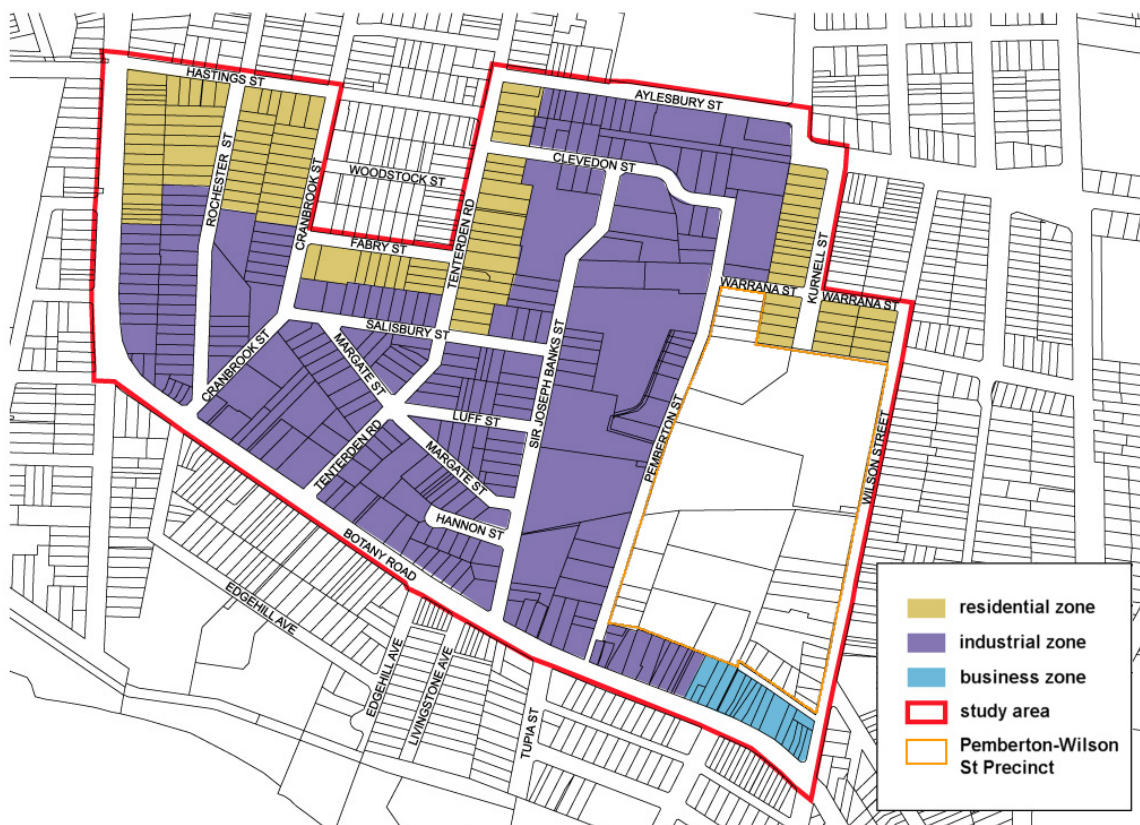
2.1 Zoning

The Botany South Area is zoned predominantly for industrial purposes with residentially zoned properties found principally on its periphery. Within the study area are four planning zones:

- A residential fringe bordering the north of the study area;
- An area of land zoned Mixed Industrial in the centre and south west portion of the study area;
- An area, the Pemberton-Wilson Street precinct, proposed for rezoning to the east of the study area; and
- A small pocket of business in the far southeast corner.

The zone boundaries are also shown in Figure 3.

Figure 3. Study Area Current Zoning



2.1.1 Residential Zone

The Residential Zone within the study area is part of the wider residential zone to the north. It includes residences on streets shared with industrial use or backing onto such uses around the northeast and northwest perimeters of the study area.

Many of the houses in the area are well maintained, with owners undertaking renovations, maintaining small gardens in the front yard and the houses are generally of neat appearance. Only 9 of the 41 residences have off street parking and while the remainder have access to unrestricted street parking there can be competition for available car spaces during the day.

Building types in this area tend to be mostly single storey dwellings or three storey walk-up apartments (located along Rochester Street). Front setbacks are generally consistent at about 5-6 metres and tend to be vegetated. Street planting in the residential areas is consistent with small trees lining most streets. Concrete footpaths and grassed verges on both sides of the street in the residential area provide for pedestrians.

Although the residential area shares common through streets with the industrial zone, the impact of the connection is reduced by a number of factors:

- There is a slight bend in some of the streets at or near the transition from residential to industrial use;
- Many of the streets are relatively narrow and treed, reducing the appearance of industrial activity as seen from the residential end;
- Signs are posted restricting heavy vehicles from the residential portion of the streets;
- There is a low ridge separating residential from industrial use to the east of Tenterden Road.

Most of the access for traffic to the industrial zone is from Botany Road avoiding the residential zone. However, traffic to industrial sites on Aylesbury and Wilson Streets necessarily pass through or past residential areas.

The extent of the industrial use had been much wider, with a large former industrial site on Williams Street north of Aylesbury Street now developed as residential. This has left a small island of industrial uses on Banksia Street.

2.1.2 Mixed Industrial B Zone

The boundaries of the Mixed Industrial B zone are defined in the City of Botany Bay, Development Control Plan No. 33 – Industrial Development Version 5 (February 2003) as the Botany (Central) Industrial Precinct. The area is zoned Mixed Industrial 4(b) under the provisions of the Botany Local Environmental Plan 1995.

However, there is an Interim Development Order No. 19 – Botany on the land bound by Wilson St, part of Warrana St, Pemberton St and Rancom St, known as the Pemberton-Wilson Street Precinct. This is treated as a separate zone below.

Building types in the industrial area range from smaller unmodulated boxes of brick and corrugated sheeting to very large buildings designed for manufacturing. Many buildings address the street with only a blank wall and large roller door. Newer buildings relate better to the street with offices

overlooking the public domain. Some of the largest lots have vast areas of unbuilt area, currently used for purposes such as container storage.

The larger landholdings tend to have more areas of landscaping in their private domain while the smaller lots generally use the front setback for the manoeuvring of vehicles and parking.

There are some very large trees lining the streets in the industrial area. In many cases the trees are significantly larger than the buildings (which tend to be no higher than the equivalent of 3 residential storeys). Generally these large trees are located in the public domain.

Front setbacks vary in this area – some streets have consistent setbacks while others vary from a metre to over 15 metres in the same block. Where street planting is dense, this pattern is harder to read as the trees define the street edge rather than the buildings.

The large amount of heavy vehicles using these roads has a significant impact on many of the streets in the industrial area.

The floor space ratio allowable in Mixed Industrial 4(b) and Mixed Industrial – Restricted 4 (b1) is 1:1. The definition of the Mixed Industrial 4(b) zoning in the Botany Local Environmental Plan 1995 is as follows:

1. Objective of the zone

The primary objective is to improve the environmental amenity of the locality by encouraging the upgrading and redevelopment of properties for light industrial, retail and commercial uses which would not detract from the amenity of the area by reason of the size or type of activity proposed.

The secondary objectives are:-

- (a) to ensure that any development which occurs is commensurate with the capacity of the road network in the vicinity;*
- (b) to ensure that development by the nature of its operations does not detrimentally affect the environment or the amenity of adjoining or adjacent residential premises; and*
- (c) to encourage energy efficiency and energy conservation in all forms of development permissible within the zone.*

2. Development which may be carried out without development consent:

Exempt Development.

**3. Development which may be carried out with development consent
Development for the purpose of:**

Automotive uses; car repair stations; child care centres; clubs; commercial premises; community facilities; convenience shops or facilities; high technology industries; hotels; identified land uses; light goods dispatch; light industries; recreation facilities; refreshment

rooms; service stations; subdivision; taverns; tradespersons' supply and service stores; utility installations; vehicle rental centres; and warehouse or distribution centre.

4. Development which is prohibited:

Any development other than development included in item 2 or 3.

Council objectives for the Botany (Central) Industrial Precinct are as follows:

- O1 To ensure that development complies with the intent of the Botany south objectives and outcomes.*
- O2 To improve the design standard of developments within the Precinct.*
- O3 To ensure that any development respects and responds to the heritage items within the Precinct and surrounds.*
- O4 To reduce the land use conflicts between industrial and residential uses.*
- O5 To ensure that development supports the efficient operation of businesses in the Precinct.*
- O6 To improve the function of existing uses within the Precinct.*
- O7 To ensure that best management practises are adopted to minimise odour from industrial operation within the Precinct.*

2.1.3 Pemberton-Wilson Street Precinct

The Pemberton-Wilson Street Precinct is the area generally bound by Wilson Street, Rancom Street, Pemberton Street and Warrana Street in Botany south. Council originally resolved to rezone the precinct to Residential 2(b) in November 1992. A draft LEP was prepared, and in response to submissions opposing rezoning as residential, resolved to stop the rezoning change at that time.

In 1996, Council requested that a revised draft LEP be prepared based on staff proposals to rezone the area to 2(c) Enterprise Zone. This would *"allow the long term creation of a residential area but would contain certain constraints on both residential and non-residential development to ensure that compatibility applies."* The draft LEP No. 3 was revised after advice, and eventually publicly exhibited in October/November 1998 with zoning designated as 2(e) Enterprise Zone. Four submissions were received opposing the rezoning, substantially raising issues of conflict between residential and past and current industrial uses.

The LEP was not finalised at that time, in part because recommendations from an earlier study, "Risk Assessment Study for the Botany/Randwick Industrial Complex and Port Botany" prepared by the Department of Environmental Planning in 1985 had recommended, inter alia, "no intensification of new residential development be allowed within the 'hazard line'". The majority of the subject area for LEP No. 3 was within that area.

After further discussions and advice, the Executive Director, Sustainable Development wrote on 20 September 1999 that: *"there are no off-site industrial risk constraints to development for the purposes of medium density residential uses at land bound by Pemberton, Wilson, Warrana and*

Rancom Streets.” Subsequently the Council recommended reactivating the process to rezone the precinct. At the same time Council approved preparation of a planning study by LFA Architects resourced by a major landholder in the precinct.

In 2001 Council entered into a partnership with the Department under the Urban Improvement Program (UIP) to revitalise the area known as Botany south. The Pemberton Wilson Street Precinct was considered a key catalyst for revitalisation of this area. A review of Draft LEP No. 3 and preparation of a DCP were early tasks in the UIP.

PlanningNSW emphasised the need for employment generating activities on the site. They supported either a mixed use zone or a number of separate zones, but not commercial development as this is better suited to sites closer to public transport.

Consultation with residents and landowners showed support for change in the area and physical improvements, and the need for a development framework for future planning. Issues raised included concerns about the buffer and interface between residential and industrial uses, avoiding excessive bulk, particularly adjacent to residential areas and avoiding shifting existing conflicts by moving the boundary. While differing views were put forward about the extent of employment land required, there was agreement that it should be consolidated rather than scattered in the precinct.

A range of views were put on changed street layouts, access and traffic management. Specific concerns were to ensure adequacy of parking arrangements and avoiding street changes that may increase traffic. A need for more public open space was flagged if residential growth was to occur.

In February 2003 Council resolved:

1. *That the contents of the report dated 10 Feb 2003 by the Manager, City Planning be noted.*
2. *Pursuant to Section 54(1) of the Environmental Planning and Assessment Act 1979 to prepare a local environmental plan to rezone the area bounded by Pemberton Street, Warrana and Wilson Streets, Botany to a part 2(b) Residential; part 3(a) Business general and part 4(b1) Mixed Industrial – Restricted be prepared;*
3. *planningNSW be advised that the rezoning of the land proposed in point 2 of the recommendation be implemented through an amendment to draft Botany Local Environmental Plan 1995 (Amendment No. 3);*
4. *The amendment to draft Botany Local Environmental Plan 1995 (Amendment No. 3) be exhibited in accordance with the provisions of the Environmental Planning and Assessment Act and its Regulation;*
5. *A development Control Plan for the Pemberton-Wilson Street Precinct be prepared; and*
6. *The Manager of City Planning be authorised to exhibit draft Development Control Plan No. 31 for Pemberton-Wilson Street Precinct in accordance with the Environmental Planning and Assessment Act 1979 and its Regulation.*

In response to two submissions received, in July 2003 Council recommended minor changes be made to the draft LEP and DCP before they are placed on exhibition.

A draft Botany LEP 1995 – Amendment No.3 is still being considered for the Pemberton-Wilson Street Precinct. It proposes a new zoning known as Zone No. 4(b1) – Mixed Industrial – Restricted

35 m wide along Pemberton Street. The remaining area is to be zoned Residential 2(b). It includes additional new streets and extensions to existing streets, and two public open spaces.

The Pemberton-Wilson Street Precinct is proposed to be a residential zone along the western side of Wilson Street with 2 and 3 storey residential, then directly along the eastern side of Pemberton Street Council proposes there will be mixed employment uses and residential. The objective is to also enhance the Banksmeadow Shopping area as a local centre. The indicative planning framework is illustrated in Figure 4.¹

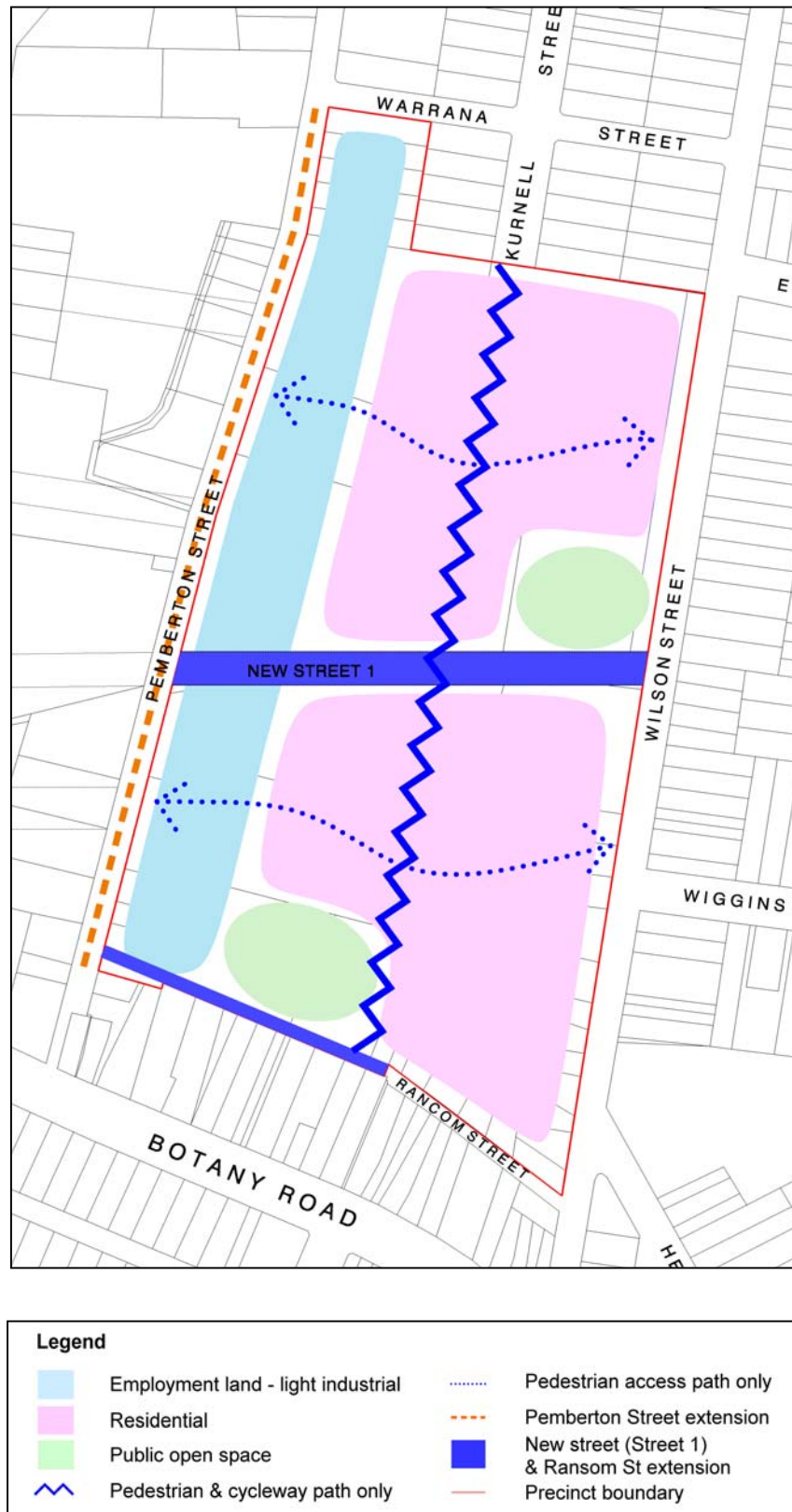
Further discussion on the planning for this Precinct can be found in Section 5.7.

2.1.4 Business Zone

A small strip of shops along Botany Rd from the corner of Wilson Street is zoned Business General. The area is known as the Banksmeadows Shopping area. It serves local residents and people working in the industrial area with cafes and a mix of retail and local services.

The small strip of attached shops are generally built to the footpath edge with awnings extending beyond to provide shelter. The buildings are generally two storeys with retail at ground level and residential or other commercial uses above. The paved footpaths are not wide enough to incorporate trees or planted beds, therefore the footpaths are not utilised by the adjacent shops. This could also be due to the large number of heavy vehicles that travel along Botany Road.

¹ City of Botany Bay Draft Botany Local Environment Plan 1995 – Amendment No 3 – Pemberton – Wilson Street Precinct. City of Botany Bay Draft Development Control Plan No 31 for Pemberton – Wilson Street Precinct.

Figure 4. Draft Indicative Precinct Planning Framework

Source: City of Botany Bay

2.2 Urban Character

2.2.1 Existing Vegetation

There appears to be a relatively clear distinction between the industrial zoned area and residential areas located to the north. Residential areas are characterised by formal street tree planting, while the industrial area is much less formal and more scattered. The industrial area does however maintain a “green” streetscape quality, though this is contributed to significantly by landscape provided within the frontage areas of individual properties. The distribution of existing vegetation is shown in Figure 5.

Figure 5. Existing Vegetation



Formal street tree planting is present within residential areas (right), while street trees are less formal and more scarce within the industrial area (left)

Figure 6. Existing Vegetation: Industrial and Residential Areas



2.2.2 Setbacks

Significant setbacks are present within both the industrial and residential areas of Botany south (Figure 7). There is however a clear distinction between areas in that residential properties possesses large front gardens, while in industrial areas this frontage space is utilised as hardstand - generally as a result of the constraints imposed by site size and lot frontage.

Figure 8. Overview of Characteristics of Streets in Study Area

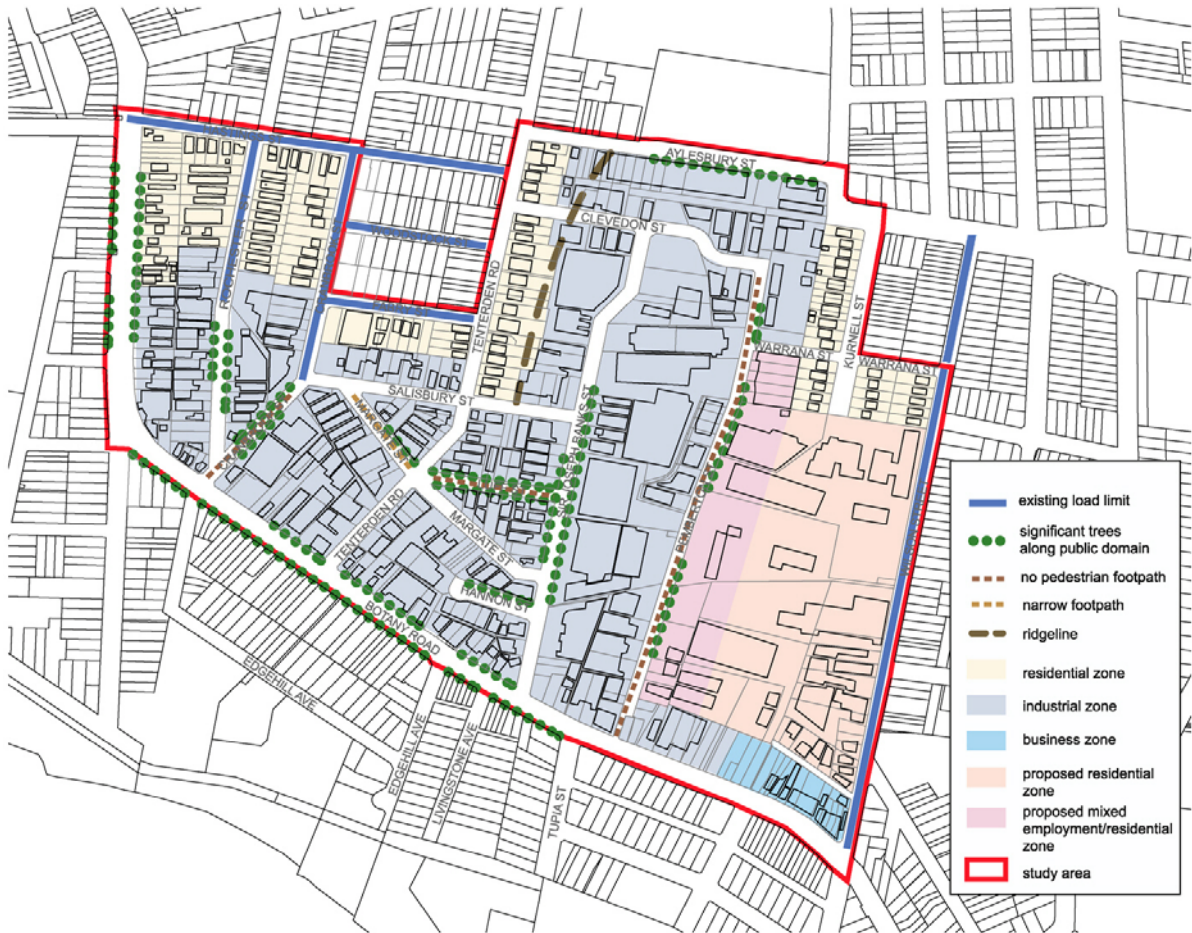


Figure 9. Summary of Street Character

Street Name	Footpaths	Curbs	Parking	Street Width	Traffic	Noise	Smell
Aylesbury St	Concrete, both sides of street	Grass curb, many trees	No restrictions, but limited availability due to many trucks	3 lanes, wide street for small trucks	Limited	Quiet	Normal
Botany Road	Concrete, both sides of street	Grass curbs, limited trees	No restrictions, but limited availability	4 lanes	Busy	Loud traffic noise	Normal
Clevedon St	Concrete, both sides of street	Grass curb, many trees	No restrictions, some available	2 lanes, sufficient for cars	Medium	Generally quiet	Normal
Cranbrook St	Concrete, both sides of street	Grass curb, many trees	No restrictions, some available	2 lanes, wide street for small trucks	Medium	Generally quiet	Normal
Hannon St	Concrete, both sides of street	Grass curb, many trees	No restrictions, but limited availability	2 lanes, wide street for small trucks	Medium	Generally quiet	Normal
Luff St	None	Overgrown and buildings close to street	No restrictions, many available	2 lanes, sufficient for cars	Limited	Generally quiet	Normal
Margate St	Concrete, both sides of street	Grass curb, many trees	No restrictions, but limited availability	2 lanes, sufficient for cars	Limited	Welding	Welded metal
Pemberton St	Concrete, only near Botany Road on one side	Grass curb, many trees	No restrictions, but limited availability	2 lanes, wide street for small trucks	Busy, many trucks	Machinery noise	Paint and glue smells
Rancom St	Narrow concrete, one side	Grass curb, few trees	No restrictions, none available	2 lanes, narrow, sufficient for cars	Limited	Generally quiet	Normal
Rochester St	Concrete, both sides of street	Grass curb, many trees	No restrictions, some available	2 lanes, sufficient for cars	Limited	Generally quiet	Normal
Salisbury St	Concrete, both sides of street	Grass curb, many smaller trees	No restrictions, some available	2 lanes, wide street for small trucks	Medium	Generally quiet	Glue smell
Sir Joseph Banks St	Concrete, both sides of street	Grass curb, many trees	No restrictions, none available near Botany Road due to trucks	2 lanes, wide street for small trucks	Medium	Trucks	Normal
Wilson St	Concrete, both sides of street	Grass curb, many trees	No restrictions, many available	4 lanes, wide street for trucks	Medium	Quiet	Normal

Source SGS research

3 Supply Analysis

This section provides an analysis of the land in the industrial zone in the study area, including the area proposed for rezoning. It excludes the roughly 20% of the study area which is residential in both zoning and use.

3.1 Profile of Industrial Land in the Study Area

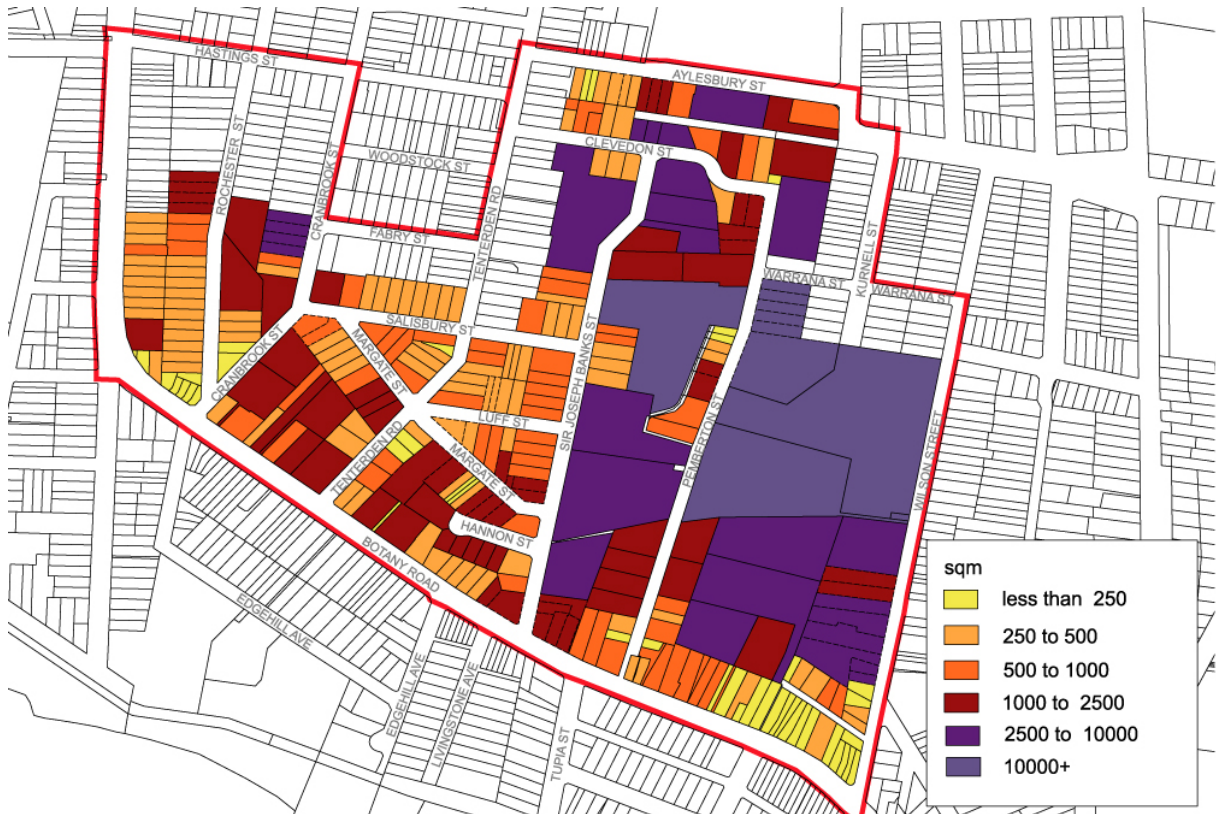
The industrial area has two distinct zones with a total of approximately 2.7 km² in private land holdings in 270 parcels. Figure 10 summarises the mix of lot sizes in the study area and Figure 11 shows the distribution across the study area.

Figure 10. Lot Size Profile

Lot size	Number		Area	
	No.	%	m ²	%
less than 250	33	12.2	6718	2.5
250 to 500	109	40.4	44966	16.4
500 to 1000	79	29.3	54291	19.8
1000 to 2500	38	14.1	55934	20.4
2500 to 10000	8	3.0	35702	13.0
10000+	3	1.1	76008	27.8
Total	270	100.0	273618	100.0

Over half of all lots are less than 500 m² but they account for only about 20% of the land area. In contrast, the 20% of lots larger than 1000 m² account for over 60% of the land area. On average lot sizes are small to the west of Sir Joseph Banks Street and larger to the east of this street. Figure 11 illustrates this distribution.

From this table, it is clear that the majority of properties are less than 2500m², and a significant proportion of these below 1000m². The most common lot size within the area is between 250 and 500m². This creates particular issues with respect to development, access and operation, which are distinct from the perceived nature of industrial development in Botany. In this respect, DCP 33 is directed at large sites and encourages amalgamations in order to achieve suitable amenity and operation.

Figure 11. Property Boundaries and Distribution of Lot Sizes

3.2 Land Use

SGS conducted a detailed investigation of the land uses in the Botany south study area. This involved mapping out the businesses and residences in the area by combining an extensive site survey, Council information and data from Australia on Disc supplied by the Australian Yellow Pages. The full details of this research are contained in Appendix B.

3.2.1 Residential Uses

There are 41 residences included in the industrial zone. They are clustered on:

- Botany Road;
- The south side of Aylesbury Street near Tenterden Road
- Salisbury Street, mostly near Tenterden Road
- Tenterden Road, near Salisbury Street
- Wilson Street (at the southern end near Botany Road)

Residences within the industrial zone are mostly clustered on the periphery rather than being mixed within the industrial area. Only a handful could be regarded as 'embedded' within industrial activity as such. Due to the conflicts between residential and industrial activities, this pattern has

implications for the operation of industrial premises. Ninety percent of residences are on lots smaller than 500 m². Residences account for about 28% of lots under 500 m².

Figure 12 shows the relationship of major land uses within the study area, highlighting the distribution of residences and major classes of industrial and other uses.

Figure 12. Distribution of Uses



3.2.2 Uses of Occupied Industrial Land

The most common land uses in Botany south is motor vehicle retailing and services, with 17% of businesses in the area being **motor vehicle retailing and service** businesses occupying 10% of the land used for occupied industrial uses. There are 34 automotive panel beaters and vehicle service centres, ranging from truck servicing to luxury European car servicing. Ten of the motor vehicle retailing and service centres are along Botany Road, with the rest being distributed within the Botany south industrial area.

Discussions with property agents revealed that many of these automotive panel beaters and service centres have been living and working in the area for 20-30 years. There is speculation that as operators of these auto-related businesses retire in the coming years they will not be replaced by like activities.

The next largest category by number of businesses in the Botany south industrial area are the various types of '**other manufacturing**', with 27 different firms in the area constituting 14% of the proportion of businesses and 9% of the land. These other users are made up of a variety of manufacturers, with some pockets of niche market production such as scaffolding, wrought iron products, and a range of engineering manufacturing firms.

Machinery and equipment manufacturers and **metal product manufacturers** are also prominent in Botany south, with 21 businesses (11% of businesses and 6% of land) and 16 businesses (8% of businesses and 4% of land) respectively.

Historically the area has been a **textile and leather manufacturing** zone. There are still 16 textile, clothing, footwear and leather manufacturing sites in Botany south representing 8% of businesses and 24% of the occupied land use. Standard Knitting Mills has five sites and there are 11 other companies of this nature.

Standard Knitting Mills/Universal Dyers is a dominant user of land, with a land area totalling 50,742 m² on five sites in the study area. Standard Knitting Mills and the associated companies are long established. They sourced their labour from the sub-region, which was a working class area. The Standard Knitting Mills properties are in need of renewal with older buildings being of poor appearance with limited or no parking at all sites except 40 Sir Joseph Banks Street.

The largest user of land in the Botany south industrial area is **transport and storage**. The 13 businesses in this sector represent 7% of businesses and occupy 41,046 m² or 25% of the land. Price & Speed occupy most of this (36,074 m²) handling shipment containers. It is expected that Price & Speed will relocate within the next 18 months. The land they occupy will be rezoned to mixed industrial/restricted on the Pemberton Street side and residential on the Wilson Street side. Container storage and handling is considered an inappropriate use of land in this mixed residential/industrial area as it adds to truck traffic on streets that do not have sufficient parking or space for large trucks.

Other land users in the area cover a diverse range of sectors, with a stone mason, diamond tool manufacturer and supplier, fork lift supply and services, chemical supplier, art and framing specialists, boat making and repairs, furniture manufacturing, food production, City of Botany Bay Council Depot, three commercial laundry services and a film production company. There is also a car museum being established in the study area, which has recently relocated from Ultimo.

There is a range of companies in the area that appear to service the local residential community. Of a total of 197 companies (a few of which have multiple sites) there are roughly 29% of businesses with a local orientation. This translates to around 35,361 sqm, or around 13% of the 28 hectares in title in the area. These include furniture, electrical, plumbing, construction, household goods such as carpets and the 34 car smash repairs and mechanics (including one petrol station).

3.2.3 Vacancies

Vacancies are also high in the Botany south industrial area. There are 26 vacant premises in Botany south, making up 10% of the total number of premises but 3% of the land area. Vacancy rates slightly higher (12%) in properties with lot sizes from 250 to 1,000 m². One large site of 4,772 m² is unoccupied.

Discussions with property agents indicated that leasing can be difficult. Reasons suggested included the restrictions imposed by the existing zoning, limits on truck movements and access, as well as the mixed residential zoning. The market for property sales is healthier, in a low interest rate environment, which tends to encourage some speculative investment in property.

3.2.4 Land Use by Lot Size

Smaller lots are occupied by a wide range of uses but automotive related, construction related, metal manufacturing and specialty manufacturing account for over half of the non-residential uses of lots under 500 m².

Lots between 500 m² and 2500 m² are most widely distributed across the study area. Again automotive related, construction related, metal manufacturing and specialty manufacturing are significant but not as dominant as on smaller lots. Other significant uses are: food manufacturing, textile clothing and footwear, glass and ceramics and industrial machinery.

Larger lots (over 2500 m²) are used by the large textile manufacturer and associated use and transport and storage. The latter in particular are heavy generators of traffic. Generally the larger lots are associated with wider streets and better access. Many of the large lots in this area have both front and rear access, providing opportunities for drive through circulation although this pattern of use is not widely evident. These streets were also locations where odours were noted.

A more detailed breakdown of land use by lot size is shown in Figures 13 and 14.

Figure 13. Count of Business Type by Lot Size

	Lot Size (m ²)						Total
	< 250	250 - 500	500 - 1000	1000 - 2500	2500 - 10000	10000+	
Sector	No.						
Food beverage and tobacco manuf		3	2	4			9
Textile clothing footwear and leather manuf	1	6	3	2	3	1	16
Wood and paper product manuf			3	1			4
Printing, publishing and recorded media	1	3	4				8
Petroleum, coal, chemical manuf			1	2			3
Non-metalic mineral manuf			4	2			6
Metal product manuf	4	5	4	3			16
Machinery and equip manuf	4	7	6	4			21
Other manuf	2	10	11	5			28
Construction and related	1	10	3	1			15
Wholesaling		4	3	1			8
Retailing		7	1	1			9
Motor veh retailing and services	5	14	10	5			34
Transport and storage		3	4	1	3	2	13
Business services	1	2		1			4
Other services		2	2	1	1		6
Total	19	76	61	34	7	3	200

Figure 14. Land Use by Lot Size

	Lot Size (m ²)						Total
	< 250	250 - 500	500 - 1000	1000 - 2500	2500 - 10000	10000+	
Sector	No.						
Food beverage and tobacco manuf		1,224	1,461	5,528			8,214
Textile clothing footwear and leather manuf	235	2,606	2,062	2,358	19,851	30,671	57,783
Wood and paper product manuf			2,022	1,389			3,412
Printing, publishing and recorded media	240	1,078	2,936				4,253
Petroleum, coal, chemical manuf			754	2,283			3,037
Non-metalic mineral manuf			2,740	2,700			5,439
Metal product manuf	818	2,030	2,713	4,448			10,010
Machinery and equip manuf	812	3,013	3,889	5,774			13,489
Other manuf	405	4,286	7,521	8,542			20,755
Construction and related	165	4,195	1,903	1,225			7,488
Wholesaling		1,750	2,175	1,430			5,354
Retailing		3,304	837	1,187			5,329
Motor veh retailing and services	1,086	5,752	7,310	8,615			22,763
Transport and storage		1,086	2,619	2,305	6,678	45,338	58,026
Business services	230	590		2,060			2,880
Other services		916	1,624	1,260	4,401		8,200
Total	3,991	31,832	42,566	51,105	30,930	76,008	236,433

3.3 Attributes and Perception of the Study Area

The following observations are based on the consultant's observations and responses to surveys of businesses, real estate agents and other stakeholders as summarised in Appendix B Company Survey Analysis and Appendix C Property Agents Survey.

Botany south is an attractive location as it is close to Sydney Port, with access via the Eastern Distributor to the CBD and north and M5 to south and west suburban areas and country NSW.

It has good amenity for staff with shopping centres close by. The area is often seen to be desirable because of its proximity to staff and managers who live in the eastern suburbs. It is also readily accessible from the south and south west via the Princes Highway and M5. It is not on a commuter rail service but Botany Road has a bus route.

The importance of connections to wider Sydney from the study area are confirmed from the business survey question about the location of suppliers and customers. Figure 15 shows the average proportions of business that companies in Botany south estimated they were doing within four geographical ranges. This demonstrates that the bulk of business for companies in Botany south is coming from the greater Sydney metropolitan area, similarly the majority of their suppliers are also from the greater Sydney metropolitan area.

Figure 15. Catchments for Botany south Businesses

	Suppliers	Customers
Location	%	%
Botany south	15	22
Sydney Metropolitan	60	62
Rest of Australia	15	15
Overseas	9	0
Total	100	100

Source: SGS Botany south Company Survey

Many respondents commented that they primarily deal with customers or suppliers in the eastern suburbs/south Sydney area, with some being highly dependent on the Port or other local businesses for customers or supplies. A very small amount of product from Botany south is being exported overseas (0.3%) and a modest amount of business is staying within the confines of Botany south (15% suppliers and 22% customers). However, this is a relatively high level of local trading compared to most industrial areas in Sydney.

Location was the most highly rated attribute of the area in response to the business survey along with suitability of the buildings. In the case of location, it is access to arterial roads, proximity to customers, owner and staff rather than proximity to the port or airport that was rated highly. In the case of the buildings, this was often the result of modifications to suit their particular needs.

The business spirit of the area was rated nearly as high as these more operational issues as a significant attribute. This is also a relatively uncommon feature for industrial estates. Ease of access by trucks and local services were given moderately good ratings.

Lower ratings were given for parking, appearance and the planning controls. While these were given low ratings, they were also the items that were ranked the lowest in importance. Planning controls did receive a somewhat higher ranking for importance than appearance or on-street parking for trucks.

3.3.1 Industrial Site Values and Tenure in Botany south

According to real estate agents, price is a common 'pull' factor apparently businesses to the Botany south area. However this was not reflected in business owner/manager survey responses. As the area is more run down with poorer amenity, narrower streets and less parking than other industrial areas it does tend to be cheaper. Real estate agents suggested that it can be a last resort for businesses that cannot afford the alternatives nor find a site in a different area due to limited supply.

Prices for industrial sites have increased rapidly over the last 2-3 years. However, the cost of leasing had remained steady, due to the low interest rate climate, in which people prefer to buy rather than lease. The survey of businesses confirmed that over half owned their property. Many occupants prefer the independence of the free-standing buildings and the absence of strata title. This small separate lot format is not a common pattern in most industrial areas.

A key issue for industrial land users in Sydney is the scarcity of available industrial sites and property agents have found buyers to be decreasingly price sensitive in general. Owner-occupiers in some cases see holding land as an investment in its own right, with expectations of continued capital appreciation. In some cases this is reinforced by expectations of re-zoning or change to higher value use.

The purchase and lease rates in Botany south are summarised in Figures 16 and 17.

Figure 16. Purchase Prices in Botany south Study Area

Type of Building	Price Range
Modern building with good amenity	Approx \$2,000 per m ²
Freestanding building 10-20 years old	\$1,300 to \$1,600 per m ² depending on size and quality
Vacant site or site with building ready to bulldoze	\$700 to \$800 per m ²

Source: Real Estate agents survey

Figure 17. Lease Prices in Botany south Study Area

Size of Building	Price Range
<100 m ²	Approx \$80 per m ²
100 to 300 m ²	\$100 to \$130 per m ²

Source: Real Estate agents survey

Comparative prices in nearby industrial areas are higher, for example in Alexandria run down older sites sell for \$1,800 per m², while most sites in Alexandria will sell for a minimum of \$2,000 per m² regardless of the size of the site with the average closer to \$2,700 per m². Banksmeadow has little for sale and properties tend to lease for around \$120 per m² for their very large sites. Matraville sites sell for \$1,200 to \$1,600 per m², but this area is set to increase in price. Until recently there was little interest in it, as it was not as well known as other areas to the south of Sydney. Newer industrial sites in Randwick, where older factories have been bulldozed and new buildings erected are now selling for around \$2,500 per m².

3.3.2 Summary of Key Features

The key differentiating features characterising the Botany south industrial area are:

- Excellent road access;
- Smaller freehold sites;
- Higher than usual level of local trading; and
- High level of business spirit.

3.3.3 Factors Constraining Industrial Sites in Botany south

A range of factors were identified by agents and business owners as constraining development in industrial sites in Botany south:

- Not zoned for purely industrial/manufacturing use with boundaries between industrial and residential properties.
- Zoning transparency and predictability with claims that some potential buyers/lessors being advised by Council not to bother applying for Development Application as zoning will change in future.
- Operation times allowable, Botany south restricts industrial operation times and truck movements to between 7-8 am and 6 pm.
- Residential encroachment on industrial land means increased complaints from residents about truck movements and manufacturing noises.
- Poor building quality with low clearance levels.
- Limited off-street parking.
- Truck access; almost all industrial land uses require truck access and often at night as well as during the day, therefore an area should not be zoned for industrial manufacturing use unless there is good truck access.
- Land contamination deters potential tenants or buyers who are aware that this can be a problem in the area. The community has shown that they are willing to take action on this issue, with flyers being posted in shop windows to organise a meeting about the quality of bore water in the area.
- Limited public transport.
- No room for expansion.

3.4 Supply of Industrial Land in Inner Sydney

In the context of Inner Sydney, Botany south is a fairly small parcel of industrial land in an arc of industrial land to the south of central Sydney. A very high number of business respondents stated that if they had to leave Botany south they would stay in Botany or the surrounding suburbs, such as Alexandria, Matraville and Mascot. The reasons listed included access to arterial roads, the metropolitan area and eastern suburbs, access to the rail and port, proximity to customers and affordability.

Alternatives to the Botany area for the remaining respondents were larger plots of land with easier DA approvals in the western suburbs, or the Kogarah area for cheaper prices.

The industry developed on what was at the time the southern fringe of Sydney in close proximity to the port at Botany Bay and later the airport. The distribution of industrial land in South Sydney is shown in Figure 18.

Figure 18. Industrial Areas in South Sydney



Other industrial areas each have their own character and industry mix. Some are relatively direct competitors with Botany south whereas others have quite different strengths and character. The main areas are profiled briefly below.

3.4.1 Other Areas in West and North Botany

There are two other industrial areas just to the north and west of Botany south. To the north, there is industrial development on Lord and Daphne Streets.

The Lakes Business Park and adjacent areas on Lord Street are zoned Mixed Industrial B, the same as the study area. However, this area hosts offices and warehouses of a substantially different character than those in Botany south. Many are relatively new and major corporations have located offices there with water views, and proximity to Southern Cross Drive and the airport. It is essentially isolated along Lord Street, buffered to the north by a waterway and expressway, to the east by a park and to the west by Botany Road. It backs on to the industrial land of Daphne Street, some of which recently has converted to residential use.

The area along Daphne Street is zoned Residential B. However it is more similar in character to some of that in the study area. This area has had recent residential development and industrial land use is becoming increasingly fragmented.

To the west of Botany Road, there is an area of industrial land on Hale and Bay Streets and adjacent side streets of a comparable overall area to the study area. It is zoned general industrial. There is a high concentration of transport and related businesses, creating high levels of heavy truck movements onto Botany Road. This estate does not have direct access to the Foreshore Road, although a large part of the movements would be to or from Botany Bay or the airport.

There is also a mix of other uses not dissimilar to that found in the study area. The overall mix of lot sizes is also roughly similar, although a large part of the land is in the more structured Port/Air Industrial Estate.

To the south and west the industrial area is adjacent to a park and then Foreshore Road and the airport. To the north the area is flanked by a waterway and highway and to the north east by Botany Road. The southern portion of the eastern flank backs onto some residential areas.

3.4.2 Banksmeadow/Botany Bay

This is the largest, relatively contiguous area of industrial land remaining in the south Sydney area. It includes parts of Banksmeadow, Matraville, Randwick and Port Botany. The area is served by Foreshore Road, Wentworth Avenue/Buneroong Road and a number of smaller feeder routes as well as a freight rail line. Much of the area is naturally buffered by water frontage, major road routes and in some parts topography. It has relatively less threat of encroachment than many inner industrial areas.

Given its proximity to the port of Botany Bay, it has a very strong focus on the port and freight movements with a high proportion of transport and storage activity. It also includes some very large industrial areas from current and former major industries (food processing, pharmaceuticals, chemicals, refineries). Some of these larger industries have relocated leaving opportunities for expansion by freight and warehousing firms. While many parcels are very large there are also small parcels and industrial development with many small leasehold sites. As with any older industrial area, some fragmentation of holdings has occurred.

3.4.3 Mascot

The Mascot industrial area borders the northern perimeter of Sydney airport extending to Tempe in the west. It is well served by Airport Drive and connections to the M5 and via a number of routes to the city, as well as by rail to parts of the area. It is buffered by major routes (O'Riordan Street, Princes Highway) and the airport and continues into the adjacent industrial areas to the north. There are some edges addressing residential areas to the southwest.

The area has a substantial focus on the airport support services and airfreight. It includes a mix of lot sizes, and has retained a number of very large sites as well as a wide variety of smaller sites and industrial parks with small leasehold opportunities. Some of the land is designated specifically for airport related use.

Most industrial land users in Botany south are not dependent on the airport or the port so this is not a strongly direct competitor. While they can be importing or exporting materials their business is not dependent on being in close proximity to the airport. The major airport users now have the land they require and there are presently vacancies around the airport as some other import/export related manufacturers have moved away to be nearer their employees.

3.4.4 Alexandria/Rosebery

This area continues north from Mascot and is the closest large industrial area to central Sydney. The area is only slightly smaller than the Banksmeadow/Botany Bay industrial area. It incorporates some quite large sites, but not quite as many large sites as Banksmeadow/Botany Bay.

The area is very well positioned to serve the needs of central Sydney and all eastern suburbs. It is also well positioned with respect to the airport, Botany Bay and via the M5 to the southwestern suburbs. There are some bottlenecks to the western parts of the city.

The area has been subject to pressures from rising land prices and encroachment by other uses. There have been increasing amounts of office, bulky goods/retail and even residential development in the area. The construction of the Green Square commuter railway station and other recent developments have further added to land price pressures, particularly in the northern end of the area.

3.4.5 Marrickville

Marrickville extends to the west of the Alexandria industrial area. It is only slightly further from the CBD but not as well connected by road. It is well served by rail.

This area has been less subject to the pressures of encroachment by residential, office and other higher value uses to date and prices have remained well below those of Alexandria.

3.5 Supply of Industrial Land in the Greater Metropolitan Region

New industrial land development has been extensive in the south and west of greater Sydney spurred on in part by the development of new highways serving these areas. Demand for this land has been stimulated by rising prices for inner industrial land and the conversion of substantial industrial land in the Homebush area to other uses. Erosion of industrial land in other areas has also occurred.

While there has been loss of industrial land in inner areas, the new releases have resulted in a net overall gain for greater Sydney.

In many cases movements to the outer suburbs are stimulated by expansion of existing industries and the inability to find large sites for expansion at competitive prices. In others, conflicts and constraints arising from adjacent incompatible uses make remaining in existing inner areas less attractive.

There has been widespread discussion regarding the apparent diminishing supply of industrial land in Sydney – particularly in the middle and inner ring of the metropolitan region (within 25km of the CBD). Shrinking supply has resulted from growing population pressures in these areas, which has driven the rezoning of many industrial areas for residential development or the introduction of 'mixed-use' zoning, which allows residential development. Accordingly, these areas have experienced sharp increases in value – particularly in South Sydney and Inner Sydney suburbs, which has forced industry to consider locations further away from Sydney CBD.

Figure 19 shows some sample industrial land sale and rent prices for Sydney. It highlights how land values in inner suburban locations (e.g. South Sydney, Artarmon/Lane Cove) are increasing and are higher than other suburban alternatives.

Figure 19. Sample Industrial Land Sale and Rent Values in Sydney

	South Sydney	Artamon/ Lane Cove	Central West	Hunting- wood	Wetherill Park	South West
Site value	$\$/m^2$					
2001-2002	550	550	300	250	200	120
2002-2003	625	700	325	250	310	135
5yr forecast p.a (%)	5	7.9	5.4	5.1	5.4	9.1
Prime rent						
2001-2002	127	160	115	105	90	80
2002-2003	130	170	125	110	90	85
5yr forecast p.a (%)	3.4	4	4.8	3.7	4.1	5.6

Source: LandMark White 2003

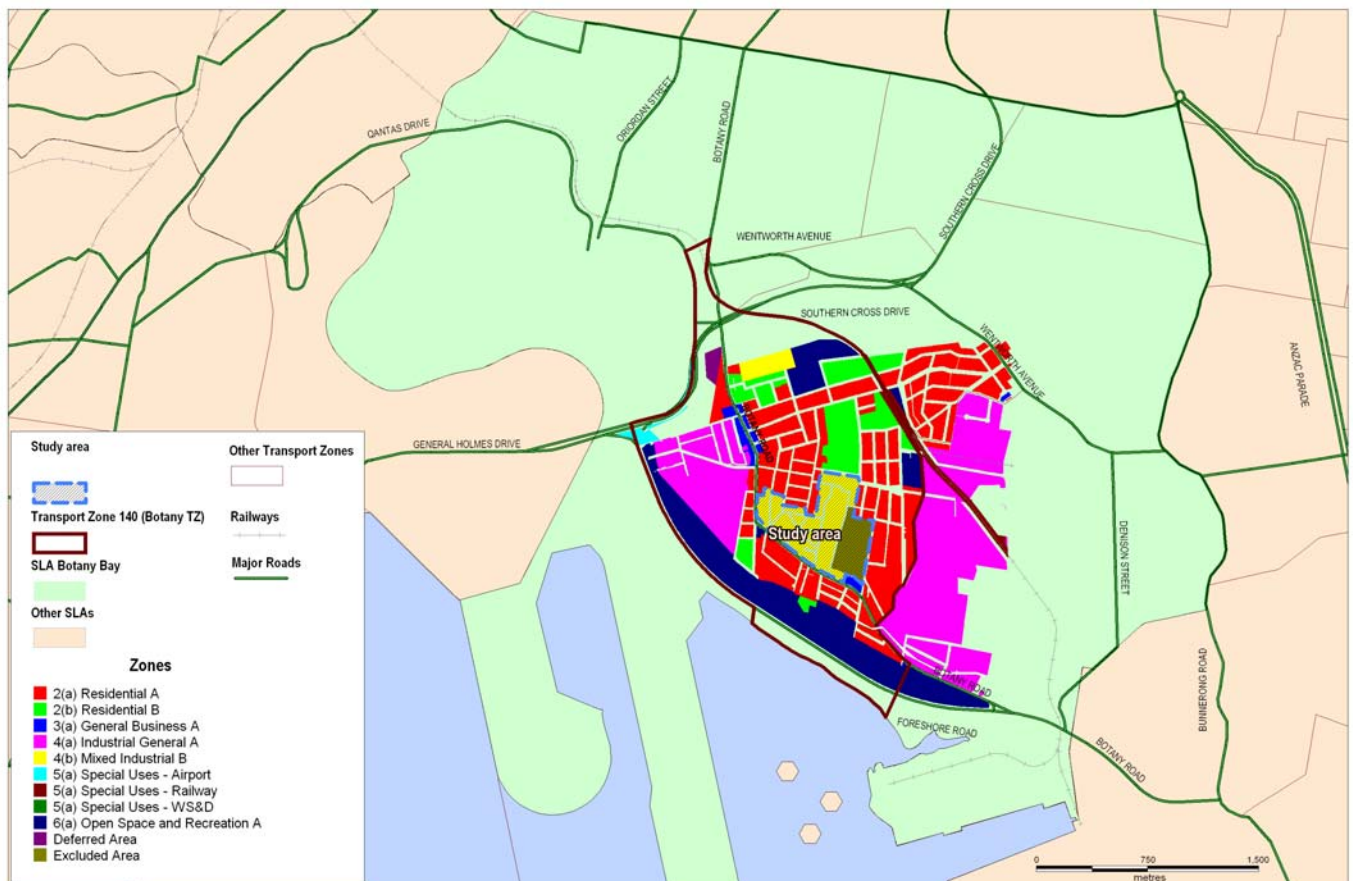
4 Demand Analysis

4.1 Employment by Industry in Botany Bay

Statistics on employment and employment trends have been analysed at the level of the travel zone, Statistical local area (SLA) which corresponds to the Local Government Area (LGA) boundary and for the wider Botany Bay/South Sydney and Metropolitan Sydney areas.

The Botany south study area falls within the Botany travel zone 140, and that travel zone falls within the Botany Bay Statistical Local Area (SLA). Figure 20 shows where the travel zone lies in comparison to the Botany Bay SLA/LGA.

Figure 20. Study Area in Travel Zone and SLA



Figures 21 and 22 show the employment by major industry sector in the travel zone compared to the SLA as a whole.

Figure 21. Employment by Industry, Botany Bay, SLA and Travel Zone, 2001

Industry Sector	SLA		Travel Zone	
	No.	%	No.	%
Agriculture, Forestry and Fishing	52	0.1	6	0.1
Mining	3	0.0	3	0.1
Manufacturing	6887	16.1	1673	30.7
Electricity, Gas and Water Supply	120	0.3	13	0.2
Construction	1151	2.7	407	7.5
Wholesale Trade	2569	6.0	847	15.5
Retail Trade	3675	8.6	407	7.5
Accommodation, Cafes and Restaurants	2278	5.3	86	1.6
Transport and Storage	18654	43.7	787	14.5
Communication Services	941	2.2	111	2.0
Finance and Insurance	442	1.0	25	0.5
Property and Business Services	2924	6.8	582	10.7
Government Administration and Defence	865	2.0	64	1.2
Education	399	0.9	82	1.5
Health and Community Services	565	1.3	166	3.1
Cultural and Recreational Services	266	0.6	31	0.6
Personal and Other Services	538	1.3	110	2.0
Not Stated	176	0.4	18	0.3
Non-Classifiable Economic Units	145	0.3	29	0.5
Total	42650	100.0	5447	100.0

Source: Transport Data Centre, Journey to Work 2001

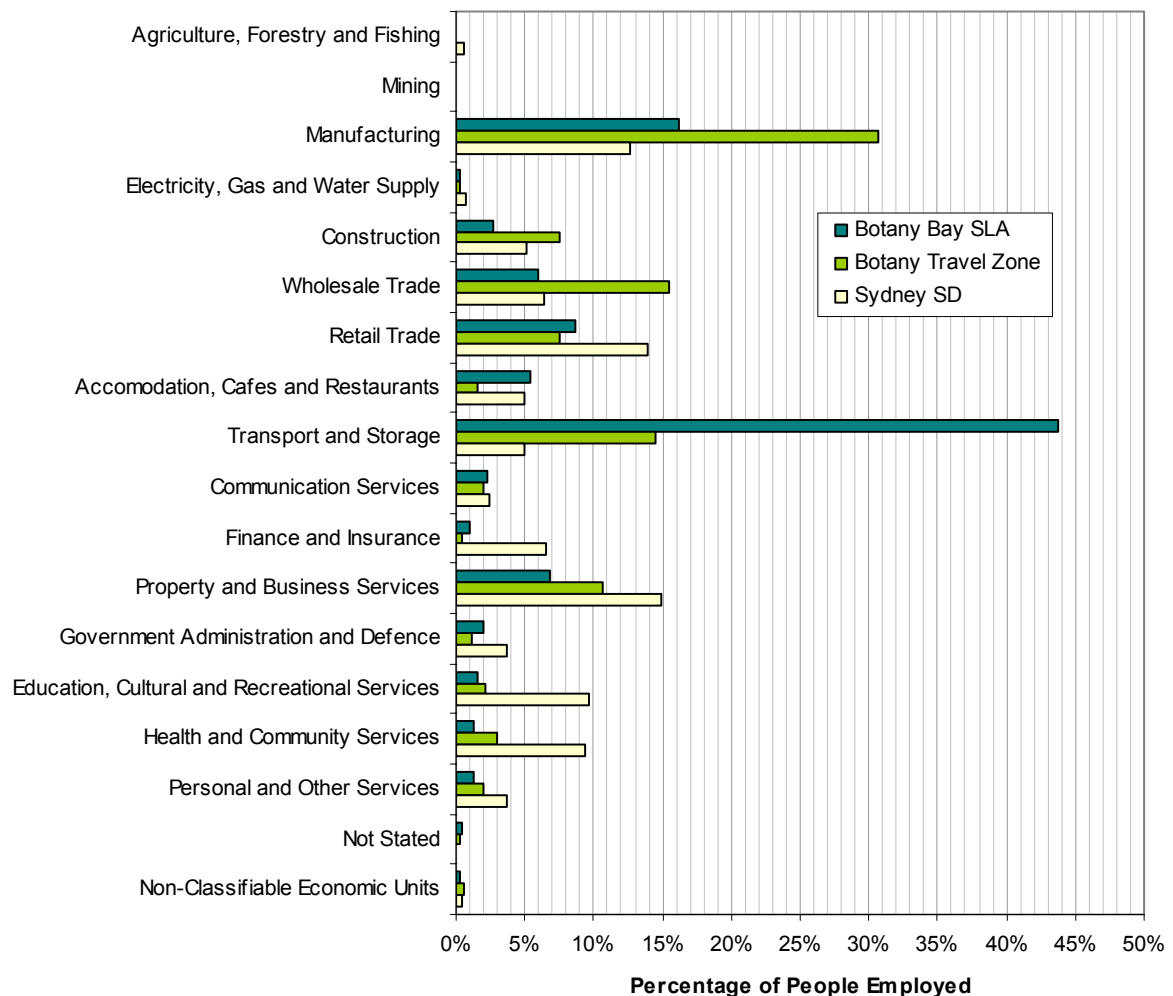
The SLA is employment 'rich' with almost 43,000 jobs (in 2001), compared to the resident population of roughly 36,000. This is not surprising given the substantial areas of industrial land in the SLA. Within the SLA, the Botany travel zone hosts 12.7% (5,447) of the jobs at an average density of 190 per ha. Approximately one third of these are employed in the study area.

The airport and port fundamentally influence the profile of industry with almost half (43.5%) of the jobs in the SLA in the transport and storage sector. Transport and storage is also an important employment sector in the travel zone at 14.5%, although most of these jobs are in the west side of Botany Road, outside the study area.

Within the travel zone, manufacturing is the dominant employer, with over 30% of jobs within this industry category. Almost a quarter of the SLAs manufacturing jobs are in the Botany travel zone.

The wholesale trade is also a key sector in the travel zone (15.5%), although again most jobs in this sector and in the zone are outside the study area. Construction (7.5%) and property and business services (10.7%) are also key employment sectors in the travel zone (relative to the SLA). Other significant employment sectors serving the local residential community in the study area include retail (7.5%, principally along Botany Road) and personal and other services (2.0%).

Figure 22. Employment by Industry, Botany Bay SLA, Travel Zone, Sydney SD 2001



Source: ABS Census Journey to Work data, 2001

The figure shows how employment in both the SLA and travel zone is strongly skewed compared to employment in Sydney as a whole, in the ways described above. In particular, both the SLA and the travel zone show relatively less population driven employment (retail trade, accommodation, cafes, restaurants, plus education, health and personal services). This is clearly a reflection of the high proportion of industrial land and relatively modest population of the LGA.

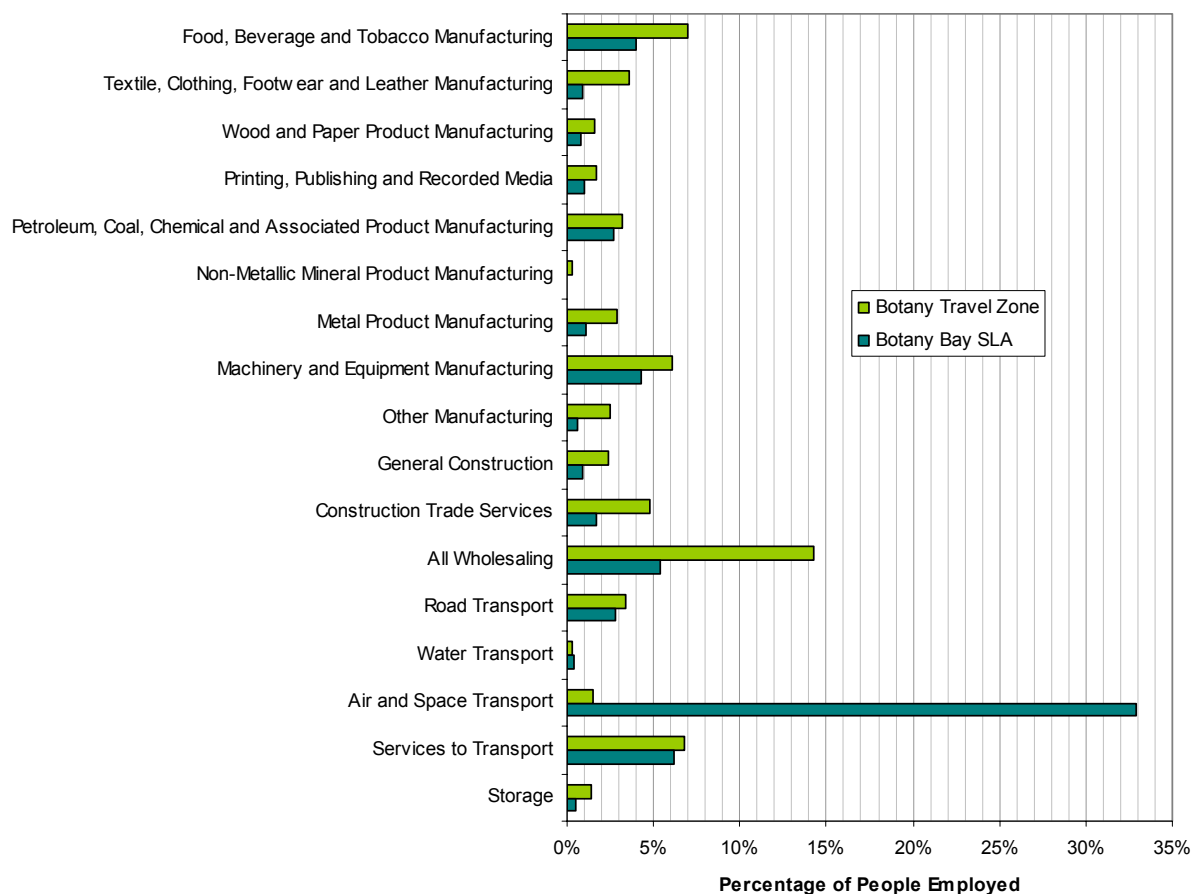
Figure 23 looks at transport, wholesaling, storage and manufacturing industries in more detail, as these are the main industry groups in the study area. This chart compares the proportion of total employment in different sectors in the SLA with the travel zone.

The travel zone has relatively few people employed in the 'air and space' transport sector compared to the SLA as a whole. On this indicator the study area (and Botany travel zone) is not a strategic area for companies working at Sydney Airport, nor in Airport related activities. Factors would include the fact that this travel zone is further from the airport than other parts of Botany

Bay SLA, it has narrower roads which can be very congested and the range, quality and size of sites in Botany travel zone are not appropriate to airport related activity.

There is a reasonable share of employment in the travel zone in services to transport, indicating that it is linked to the predominant sector in the SLA. However, apart from Pemberton-Wilson Street Precinct activities of Price and Speed, most activities in this sector in the zone are outside the study area. There are an isolated number of activities in the study area, which are related to port or airport activity but may not be categorised as such.

Figure 23. Employment in Botany Bay SLA and Botany Travel Zone by Industry, 2001



Source Transport Data Centre, Journey to Work 2001

Wholesale employment is well represented in the travel zone. The area is comparatively inexpensive to lease or buy and with the close proximity to the city and the eastern suburbs, is considered a good location for wholesale traders. It should be noted that although the proportion of people employed in wholesale trade is high at 14% for Botany travel zone, wholesaling has a smaller presence in the Botany south study area with only nine wholesaling companies there. More wholesaling activity is located in the Lord Street area.

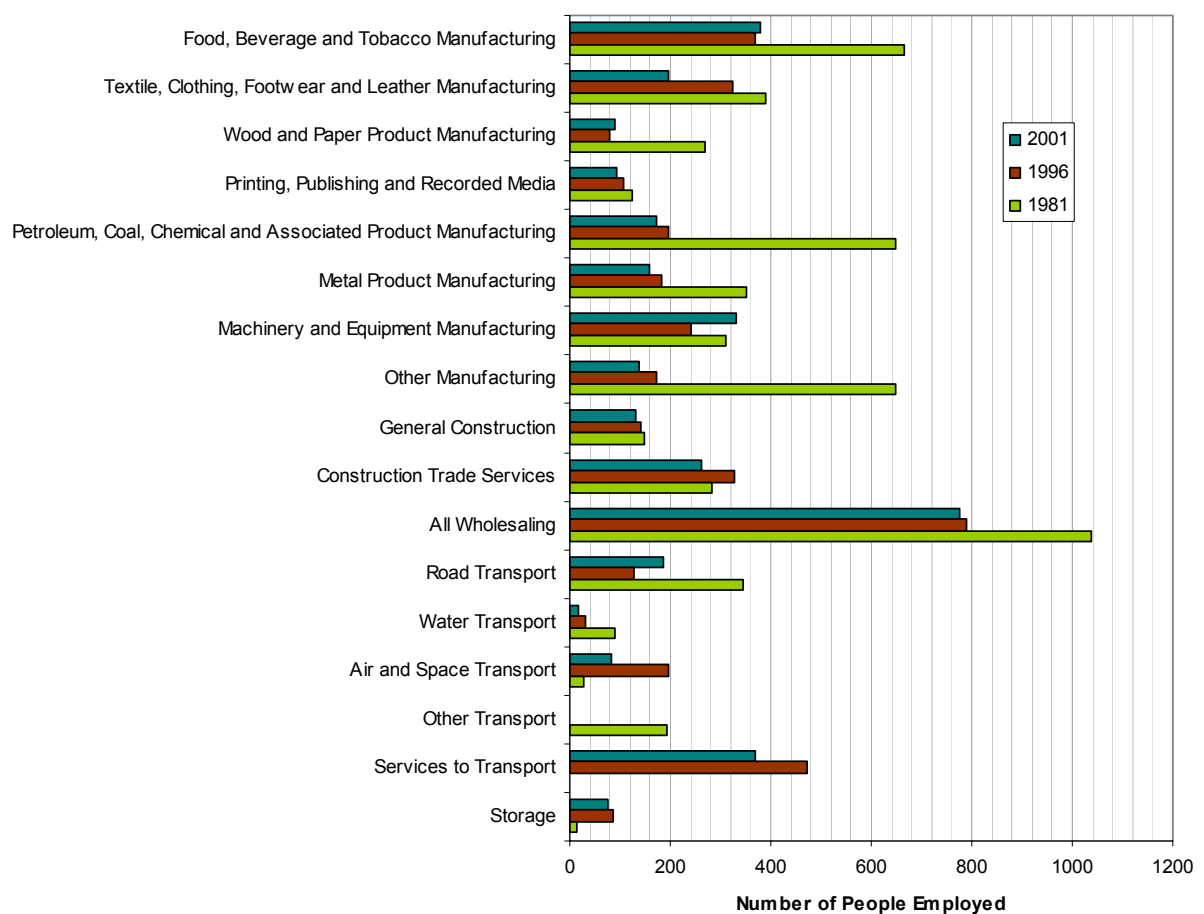
The Botany south study area is predominantly a manufacturing area and this shows through in the data with all types of manufacturing having a higher proportion of people employed in them in Botany travel zone compared to Botany Bay SLA. In particular there are higher proportions of people employed in textile, clothing, footwear and leather manufacturing and food, beverage and tobacco manufacturing in Botany travel zone than Botany Bay SLA.

Many of these companies are found in the Botany south study area with 16 textile, clothing, footwear and leather manufacturing firms and nine food, beverage and tobacco manufacturing firms in the study area. It is evident that the area provides a base for these relatively 'niche' operations, which are now comparatively few in inner suburban areas.

4.1.1 Trends in the Distribution of Manufacturing Activity

Botany south and surrounding areas have been a thriving hub of manufacturing, wholesale and transport activity, with close proximity to the city, Sydney airport and Sydney port, as well as the concentration of tradespeople and production/transport workers in the area. However, employment in these activities has changed dramatically over the 20 year period from 1981 to 2001 Figure 24.

Figure 24. Employment in key industry sectors, Botany Travel Zone



Source: Transport Data Centre, Journey To Work 1981, 1996 and 2001

All but one of the manufacturing sectors in the figure shows a decline in employment in the travel zone. Declines are also evident in wholesaling and road transport².

The factors behind these changes extend well beyond the study area and even Botany Bay. Sydney has undergone a number of major changes affecting Botany and other inner industrial areas including:

- the gentrification of inner city suburbs, for example the significant change to the Woolloomooloo docks, and other suburbs such as Surry Hills, Strawberry Hills, and changes underway in parts of Redfern and Alexandria;
- new waves of immigrants, who have become the new generation of production and transport workers, tend to be located in middle and outer suburban areas;
- the mechanisation of production in some manufacturing sectors, resulting in fewer workers being required to produce the same amount of goods; and
- a general trend to shift manufacturing out of Australia where the cost of labour is comparatively higher than many other Asia-Pacific countries, which now claim a competitive advantage in mass production manufacturing.³

Figure 25 shows how the share of employment in different industry sectors in the South Sydney/Botany sub-region changed from 1981 to 1996 to 2001.

Total employment in the South Sydney/Botany sub-region increased 48% from 90,218 to 133,374 jobs between 1981 and 2001. The combined South Sydney and Botany Bay SLAs saw a 39% decline in employment in manufacturing from 32,073 people to 19,678 people, driven by the factors described above, in particular the shifting of manufacturing out of inner Sydney and in some cases, overseas. In contrast, transport and storage in the combined South Sydney, Botany Bay area rose 25% over the 20-year period from 18,979 to 23,802 employees.

Most of the employment growth over this period was in property and business services and population oriented sectors (retail trade, accommodation, cafes and restaurants, education, health and personal services). Property and business services became a major employer, rising from 2,558 employees to over 16,513 employees, placing it as the third highest employing industry in 1996 and 2001. The majority of this activity can be ascribed to changes in the South Sydney SLA as Botany Bay SLA only employed 2,924 people in property and business services in 2001, of which 582 were in the Botany travel zone.

Other changes include:

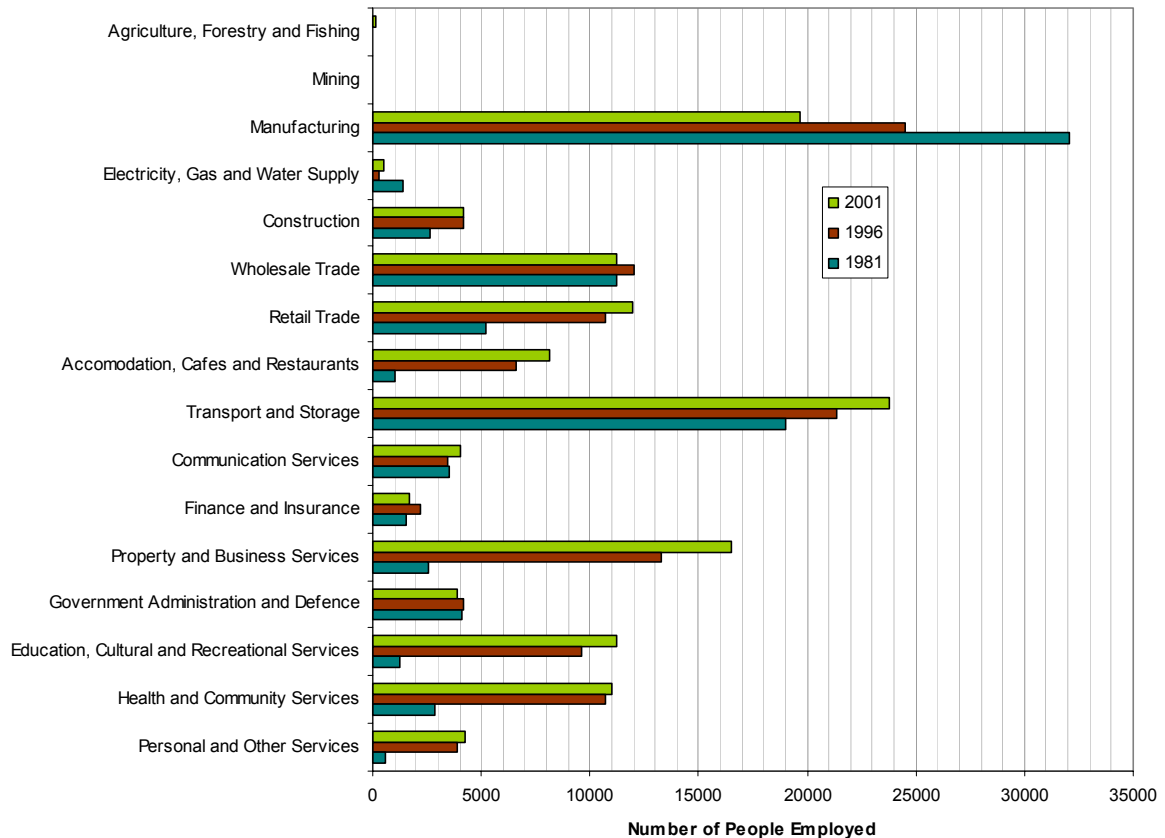
- Accommodation, cafes and restaurants (1,022 in 1981 to 8,118 in 2001)
- Retail trade (5,243 in 1981 to 11,986 in 2001)
- Education, cultural and recreational services (1,234 in 1981 to 11,210 in 2001)
- Health and community services (2,843 in 1981 to 10,992 in 2001)
- Personal and other services (568 in 1981 to 4,232 in 2001)

² Some caution needs to be applied as there was a reclassification of some industry sectors between 1981 and 1996.

³ <http://www.apmforum.com/emerald/manufacturing-management.htm>

The majority of this activity has occurred in South Sydney, with Botany Bay consolidating its position as the key area for transport and storage.

Figure 25. Employment Trends by Industry for Combined Botany Bay and South Sydney SLAs 1981 to 2001



Source: Transport Data Centre, Journey To Work 1981, 1996 and 2001

The reduction in manufacturing employment and increase in transport and storage can be put in context by looking at the relative role of inner areas in the greater Sydney activity as shown in Figure 26. This shows that economic base of the area has expanded, with significant activity in a wider range of sectors than in 1981. Overall, there are few sectors in which the share of Sydney employment has declined since 1981.

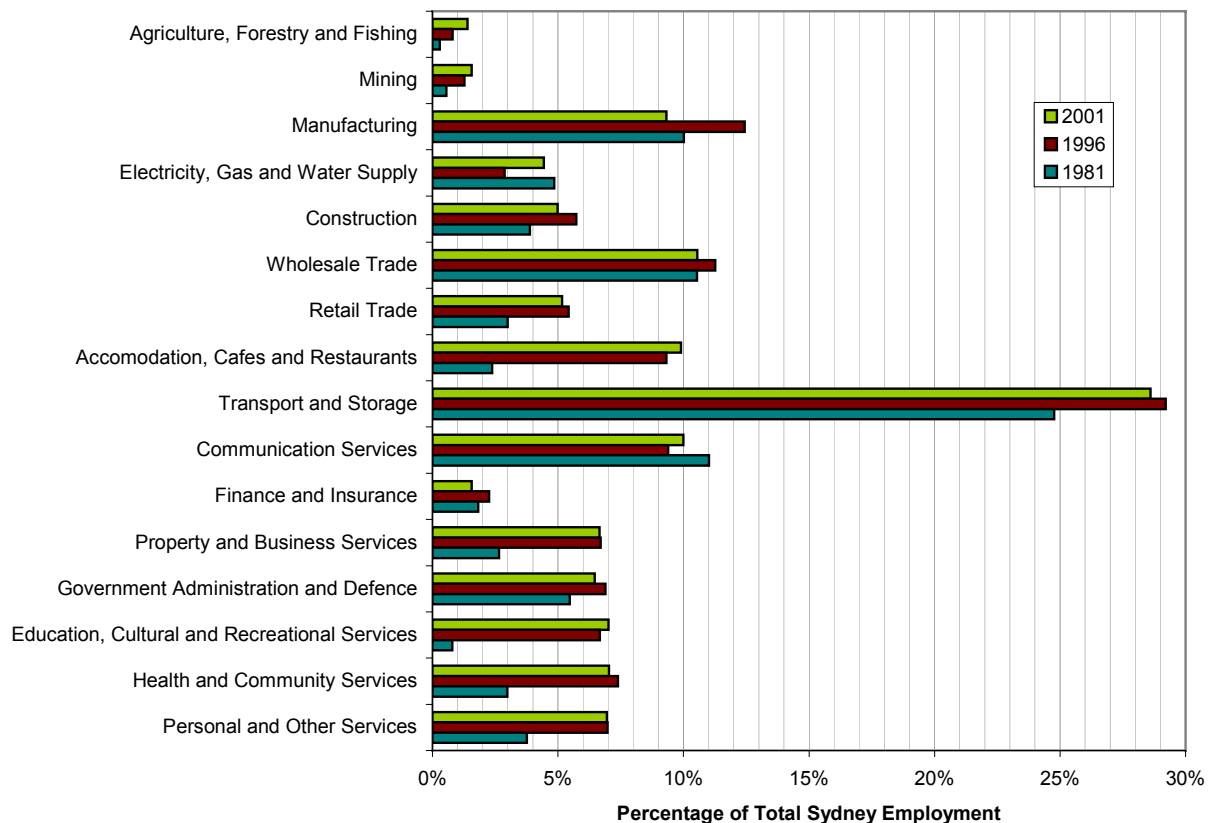
South Sydney and Botany Bay SLAs housed a huge 28.61% of all transport and storage in Sydney SD in 2001, increasing from 24.76% in 1981. These SLAs have also both consistently played a key role in the wholesale trade, communications and manufacturing, with about a 10% share of Sydney SD employment in South Sydney or Botany Bay SLAs over the period.

While the number of jobs in manufacturing declined substantially in the sub-region in the 20-year period, the proportion of people employed in manufacturing in South Sydney/ Botany Bay as a proportion of Sydney SD has remained relatively constant. In 1981 the percentage of Sydney's

jobs in manufacturing in South Sydney/Botany Bay was 10.0%. This rose to 12.4% in 1996 and dropped to 9.3% in 2001.

As noted earlier, the growth has been in population related sectors, sectors in which previously this area was well under-represented but now provides a diverse range of economic activity for the area.

Figure 26. Trend in Employment by Industry for Combined South Sydney and Botany Bay SLA s compared to Sydney SD 1981 to 2001



Source: Transport Data Centre, Journey to Work 1981 to 2001

Although the wider South Sydney/Botany sub-region had its manufacturing workforce almost halved between 1981 and 2001 it maintained nearly the same share of Sydney's total employment in manufacturing, even as total Sydney population and employment grew dramatically over the period. Thus while factors have promoted a change of land use in inner suburbs, the significance of the remaining manufacturing activity should not be underestimated.

Trends in manufacturing employment do not equate to comparable reductions in land use. While nationally employment in manufacturing has fallen, nationally output has increased. There are fewer people working in what are sometimes larger factories.

A key counter trends in the sub-region is the consolidation and strengthening of the transport and storage sector. The role of the airport and port have further consolidated this activity in the area.

4.2 Source of Workers

Figure 27 shows the SLA of origin for workers in both the Botany Bay SLA and the travel zone for the week before the 2001 census for people who travelled to work in these areas.

The more localised the catchment the greater its integration in and importance to the local community as a place for employment. A more diverse labour market base would be evidence of a more strategic business orientation, where more specialised labour is required, drawn from a wider catchment, and involved in inter-regional sales. The data reveals a mixed story in this regard.

The table shows that 14.8% of people who work in Botany travel zone also live in the Botany Bay SLA (with some in the Botany travel zone). This is higher than the share of workers in the Botany SLA as a whole who live in the SLA (9.21%) and relatively high compared to other parts of Sydney.

Apart from this difference, the broad pattern of source of workers is similar for both the SLA and the travel zone. The second highest proportion of people (13.2%) working in Botany travel zone and highest for the SLA (11.1%) travel from Randwick, the neighbouring SLA to the east of Botany Bay SLA. The other adjacent SLAs contribute a much smaller proportion of workers. Together the adjacent SLAs plus Botany Bay account for 41% of workers in the travel zone and 34% in the Botany Bay SLA.

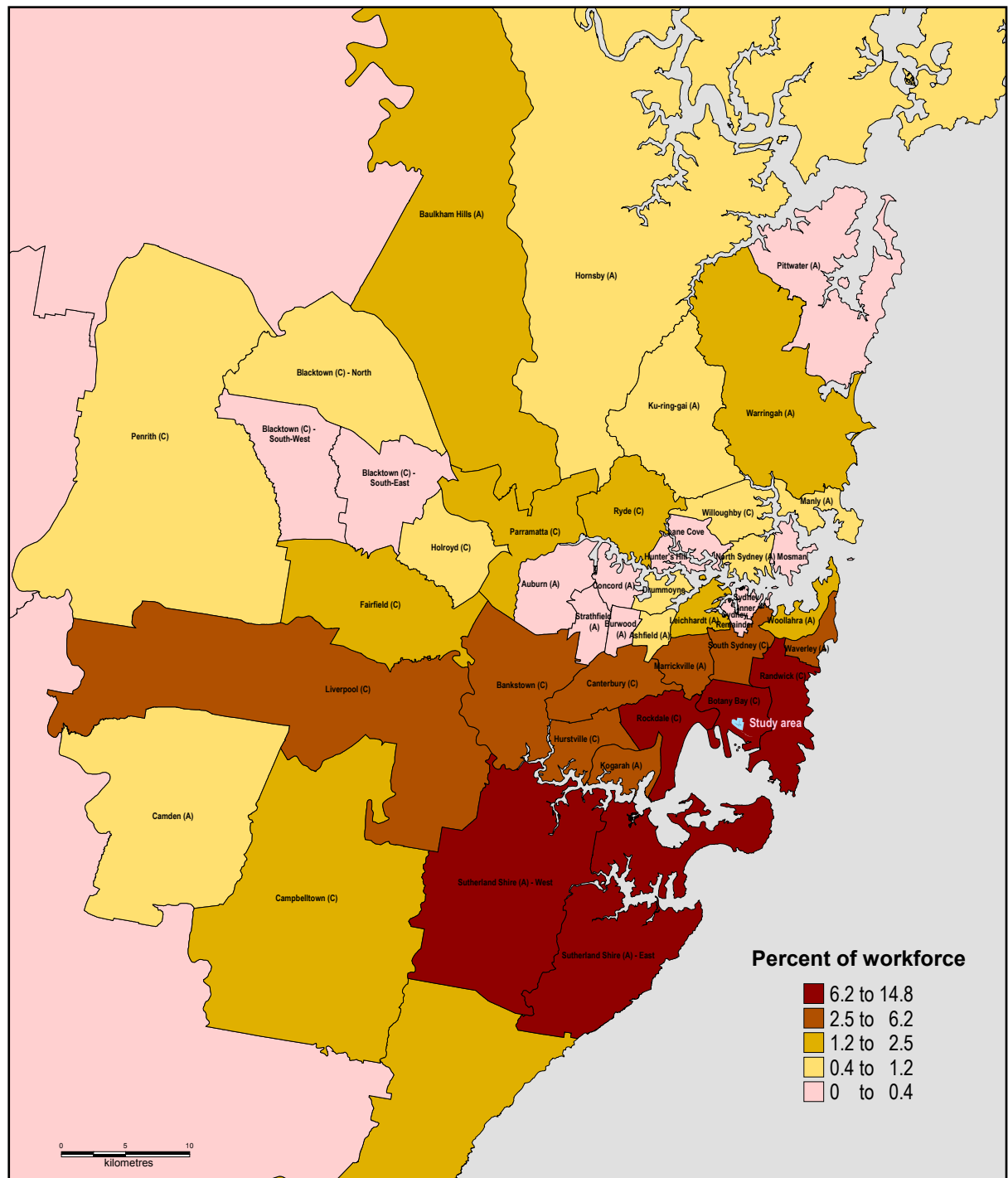
The other major source of workers is from the south and west, particularly Rockdale, Sutherland Shires West and East and Kogarah. The remainder of the people working in Botany Bay are coming from a wider area, including Canterbury, Bankstown, Hurstville and other areas with a strong bias toward the west and south. Figure 28 shows the distribution of worker origins in map form.

A close home to work relationship has the effect of minimising 'vehicle kilometres travelled' (vkt), which is a desirable aspiration, reducing congestion, vehicle emissions and overall travel costs. The local level relationship between home and work in Botany south has probably fallen as the available blue collar resident labour force has diminished with the gentrification of nearby residential areas and as improved transport to the south and west has made the area accessible to workers from lower cost areas. It is still notably stronger for the travel zone compared to the LGA as a whole.

Figure 27. Origin SLA for Botany Bay SLA and Botany Travel Zone Workers

Source SLA	SLA		Travel Zone	
	No.	%	No.	%
Botany Bay	3927	9.2	828	14.8
Randwick	4728	11.1	740	13.2
Other	4747	11.1	411	7.4
Rockdale	3408	8.0	406	7.3
Sutherland Shire West	3072	7.2	363	6.5
Sutherland Shire East	3185	7.5	349	6.2
Canterbury	1760	4.1	225	4.0
Kogarah	1283	3.0	184	3.3
South Sydney	1358	3.2	165	3.0
Waverley	831	2.0	155	2.8
Bankstown	1426	3.3	151	2.7
Hurstville	1444	3.4	148	2.7
Marrickville	1136	2.7	143	2.6
Liverpool	1123	2.6	138	2.5
Campbelltown	791	1.9	104	1.9
Warringah	625	1.5	89	1.6
Baulkham Hills	525	1.2	85	1.5
Woollahra	529	1.2	84	1.5
Fairfield	536	1.3	76	1.4
Leichhardt	616	1.4	76	1.4
Wollongong	779	1.9	77	1.4
Parramatta	520	1.2	72	1.3
Ryde	455	1.1	65	1.2
Hornsby	458	1.1	48	0.9
North Sydney	410	1.0	47	0.8
Penrith	313	0.7	47	0.8
Willoughby	328	0.8	43	0.8
Ashfield	357	0.8	41	0.7
Drummoyne	298	0.7	39	0.7
Ku-ring-gai	429	1.0	38	0.7
Blacktown North	220	0.5	33	0.6
Camden	262	0.6	32	0.6
Holroyd	280	0.7	35	0.6
Manly	230	0.5	32	0.6
Gosford	252	0.6	23	0.4
Total	42641	100.0	5592	100.0

Source Transport Data Centre, Journey to Work 2001

Figure 28. Source of Workers in Travel Zone, 2001

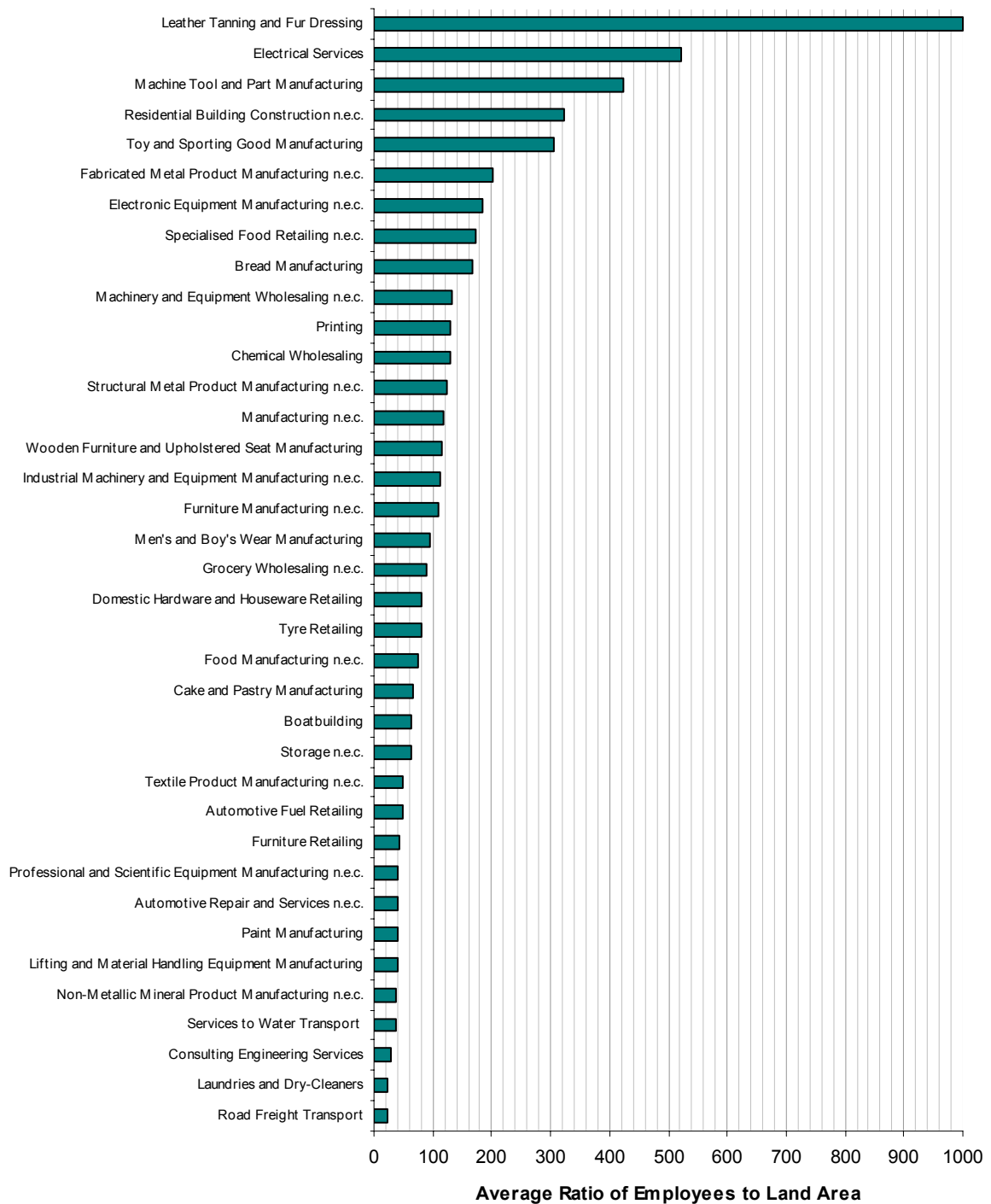
4.3 Botany south Comparison of Land Area to Employment

As noted in the discussion above, the employment intensity of manufacturing has been declining. The employment intensity per unit of land varies substantially by sector.

The average ratio of employees to land area for the 68 companies surveyed was 62 employees per ha. These are based on small samples for each industry category, but give an indication of the types of industry that are likely to be contributing smaller amounts of car congestion and car parking demand. Figure 29 shows that the non-manufacturing sectors had the lowest ratio of employment to land area: road transport industry, followed by laundries and dry-cleaners and consulting engineering services.

The most intensive employment to land uses in the area are manufacturing sectors: leather tanning and fur dressing industries, electrical services and machine tool and part manufacturing.

Industries with higher employment intensities require more car parking and contribute more car traffic to the area. These movements tend to be concentrated at times of shift changes – typically peak periods. On the other hand, transport and storage businesses tend to generate many more truck movements, which may occur throughout the day (and night, where permitted).

Figure 29. Ratio of Employees to Land Area by Industry

Source: SGS Botany Bay South Company Survey

4.4 Flow on Employment Effects of Jobs in Botany Travel Zone

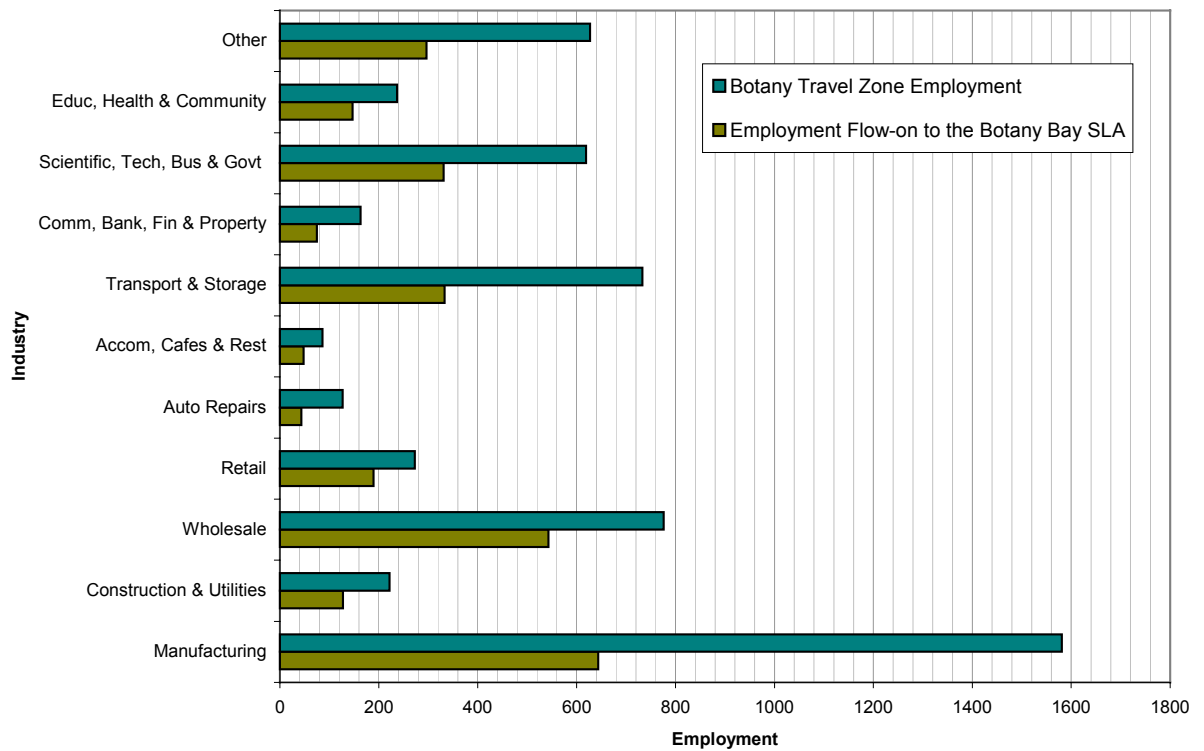
An input-output model was developed by SGS to explore the effect that businesses in Botany Travel Zone had on turnover and employment in the whole of Botany Bay SLA. The model uses SGS derived output and employment multipliers to estimate how much employment is 'created' in the Botany Bay SLA as a result of the existing business activity in Botany travel zone. That is, employment that derives from purchasing goods and services locally based on average behaviour in industry sectors about such supplier-buyer linkages. This can be used in turn to understand the effects if, for example, some of the industry relocates as a result of loss of employment land in the area.

Some caution needs to be taken in applying this methodology at this scale. Large integrated urban areas such as central Sydney often defy 'average' behaviour as choices about supply of goods and services may be strongly influenced by local factors over small distances. Nonetheless the approach can offer some insights.

The results of the input output model are summarised in Figure 30. Manufacturing is the dominant employer in this area, yet it has the least flow-on into the surrounding economy of Botany Bay SLA. The model estimates that the 1,581 jobs in manufacturing within Botany travel zone result in 644 jobs in Botany Bay SLA. This shows the diffuse sourcing of inputs in this sector.

Sectors with a higher integration in the local economy are wholesale and retail, but these are hardly represented in the study area.

The transport and storage sector in Botany travel zone also employs a high number of people, yet has a relatively small flow-on into Botany Bay SLA. There are 733 people employed in transport and storage in Botany travel zone, which has a flow-on into Botany Bay SLA of 333 jobs.

Figure 30. Summary of Input-Output Table by Industry Group

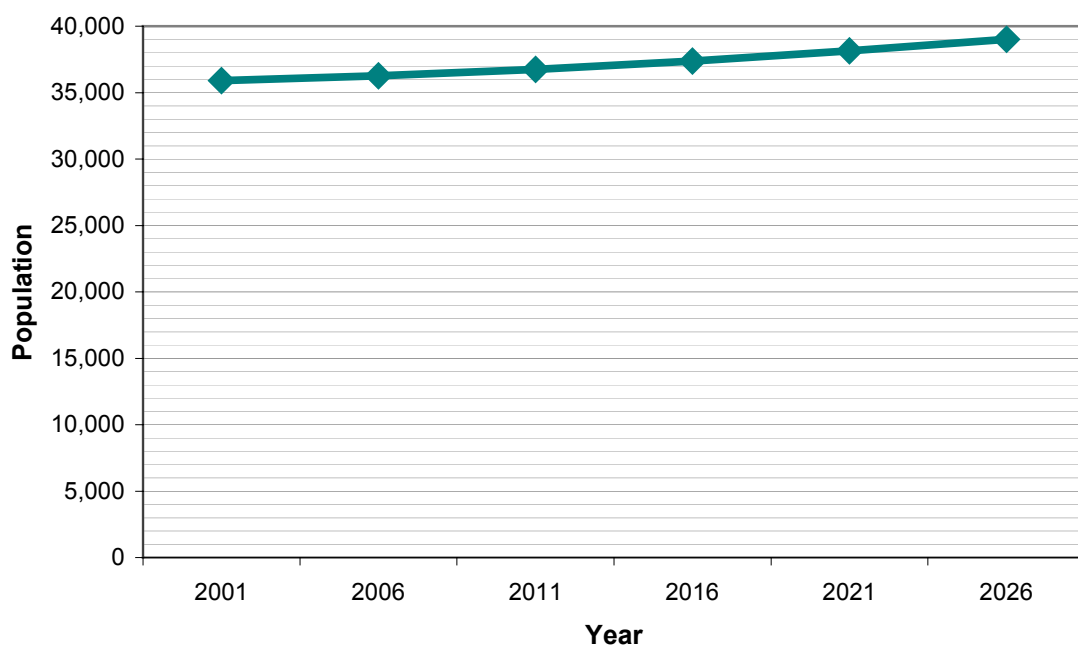
Source: SGS Research and Transport Data Centre, Journey to Work 2001

4.5 Demand for Population Related Service Industry

As noted in section 4.1 above, the proportion of employment in population driven sectors has been much lower than for Sydney as a whole but grew strongly from 1981 to 2001. It is worth assessing the future demand for increased population driven employment in the event that other sectors relocate out of the SLA. It also provides insight into the need for population driven portions of the industrial activity in the study area (auto service industries, residential construction, etc.)

Figure 31 shows the projected population growth for the SLA.

Figure 31. Population Growth, Botany Bay



Population growth rates in Botany Bay SLA are expected to be relatively moderate, ranging from 1-2% each five-year period. This indicates that while there will be a need for the retention of service oriented businesses in the area, such as smash repairs, furniture stores, plumbers, electricians etc. there is not expected to be significant additional demand for these services in the next two decades. This is assuming that existing patterns of growth in the area are persistent over this period and there are no major impacts on residential growth such as significantly higher density housing or removal of housing for say, port expansion.

5 Issues and Analysis

This section draws out a number of themes impacting on the assessment of the future of the Botany south industrial land from the previous sections. These are used as a framework for undertaking the assessment of viability and the future use of the area. The analysis starts from wider considerations and moves down to focus on local issues.

5.1 Movements in employment and land use distribution

The demand analysis in Section 4 described shifts in employment between the inner South Sydney/Botany Bay area and the Sydney Metropolitan area. In spite of the pressures on inner industrial land, development of new lands in the south and west and strong growth in other sectors in the South Sydney Botany Bay areas, the area retains a substantial industrial role within metropolitan Sydney.

It shows the extent to which industry is drawn to remain in the South Sydney Botany Bay corridor with exceptional access via the eastern distributor to the City and M5 to the south and west and the still largely intact extensive industrial areas.

The shift that is occurring is driven by both push and pull factors.

Pull factors include:

- A westward movement of much of the industrial production workforce. This makes locating in outer areas less problematic than it may have been in times past;
- New highway infrastructure allows good access to the state and into the city centre;
- Land costs are much lower;
- New, large scale industrial estates have fewer conflicts with residential areas; and
- Modern infrastructure, road widths and services.

Push factors, often the flip side of the pull factors, include:

- Increasing commuter time and distance for the workforce;
- High land costs in inner areas and strong competition from competing higher value uses;
- Increasing fragmentation of land and difficulty in expanding in existing locations;
- Conflicts with adjacent land uses, particularly residential areas, leading to restrictions on operating hours or vehicle movements;
- Congestion and poor access in local streets.

Inner areas are particularly prone to displacement by competing uses where these are permitted. Typically office and residential uses are capable of more intensive land use than single storey industrial operations. A premium is also payable for being close to the city centre, a premium with higher value for offices and residences than for most types of industry. These suggest that over time, there will be a movement out of inner areas to peripheral areas influenced by market forces.

However, there are also a wide variety of restraining factors:

- Owners and managers select business locations and have a bias to areas near where they live. They are more highly concentrated in the east and north of Sydney and may resist relocation to the south and west.
- Established operations often have a substantial investment in existing customised buildings with fixed and not easily moved production equipment.
- The existing workforce may still be significantly drawn from the local area and relocation may result in the loss of key staff.
- Some operations with a high concentration of customers in central areas are prepared to pay the location premium as a savings in travel time to customers and as an aid in providing competitive levels of service delivery.
- Simple inertia will extend the time any transition takes even where a move is warranted.

Studies to better define the movement of employment lands are in progress but definitive results are not yet available.

One concern about the loss of employment land in central areas has been that local residents will have to travel out of the area to work. While inevitably this will be true for some, as a general rule:

- There is a significant surplus of employment in inner areas compared to population and it is growing over time. Botany Bay SLA is employment 'rich' with almost 43,000 jobs (in 2001), which compares to the resident population of roughly 36,000 and a resident workforce of about half that. Employment growth has occurred most strongly in commercial and population driven sectors rather than those that occupy industrial land.
- The pattern of commuter movement is strongly from suburban areas to the core for central Sydney as a whole and as shown in Figure 28. This suggests that the relocation of some employment to outer areas could contribute to travel reduction. However, the pattern of movement is likely to be much more dispersed and may increase the dependence on individual car travel and be harder to serve with public transport with little net environmental or cost improvement.

The preceding analysis confirmed this pattern for the Botany travel zone (Figure 28) but with a substantial proportion of workers still living relatively locally. The pattern of the past has been of industrial workers living and working locally in the Botany Bay and Randwick areas. This still remains so to a greater extent for the study area than for most other parts of Sydney or for the SLA as a whole. This has acted to retain a more representative social mix, arguably benefiting the area.

However, both the profile of employment and the profile of residents is changing. In the future, more workers in other, non-industrial sectors may be working and living locally.

5.2 Strategic land value

Port and Airport

Within this large pattern of movement of industrial land to outer areas, there are strategic sites that have additional specific value that need to be recognised and protected. Examples include land servicing the port and airport. Both of these uses are catered for in relatively large areas of land adjacent to the respective facilities.

The airport has a well-established base at Mascot, with potential to extend north into industrial land as required. There is land designated for specifically airport related uses. At times it is difficult to attract tenants to available sites that have the required airport links.

Port Botany has an extensive hinterland in Banksmeadow. Some of this has formerly been used for large industries with no direct link to the port operations. As some of these plants have relocated, this has made room for more transport and storage related activities as shown by the growth in employment in these sectors in the SLA.

Both the airport and port are planning expansion. The draft airport Masterplan proposes more extensive use of land within the airport for a range of uses including retail and commercial as well as airport related industrial use. Space remains available for the foreseeable future in both Mascot for the airport and Banksmeadow for the port.

The study site land use survey and business survey served to underline the fact that the study area is not currently being used as a strategic site for either of these facilities to a significant extent. Most of the port or airport related activity that does occur in the Botany travel zone is found in the Hale Street site or the Lord Street/Lakes Business Park area.

Much port and airport related is traffic intensive and would be undesirable to encourage in this location. Service type operations that did not involve movement of goods are likely to locate closer to the port or airport. In any event, more attractive locations are available for these uses.

There is another benefit in retaining industry in the study area. Most of the industry in Botany south is on relatively small parcels of freehold land. The parcels adjacent to the airport and port are generally much larger. Larger parcels are relatively harder to obtain when required. By hosting these smaller uses in Botany south, it reduces pressure for subdivision and fragmentation of large parcels in the more strategic areas.

Road Links

Comments from the business survey and the real estate interviews underlined the importance of the proximity of the motorway to the site. In this respect it is similar to a number of sites along the M5 and other major routes, except that it is one of the sites with a balance of access to the city centre and outer suburbs. It is at the easier end of the commute for incoming workers and the lower end of inner suburban property values.

Site Character and Characteristics

There is a more subtle type of strategic importance arising from the character of the business community and the support that they provide to each other. The degree of supplier buyer linkages within Botany south is high compared to most industrial estates, and there was a very strong ranking for the business spirit of the area. When this is combined with the relatively unusual mix of 'niche' manufacturing, it suggests that the businesses in the study area derive some benefits from being located together in the area.

Another feature of the area is that it has a large collection of freehold individual small to medium sized sites. This has allowed occupiers to modify the premises to their operational requirements without constraints by landlords (only by the zoning requirements which may at times also be constraining). It also provides security of tenure and certainty of future occupancy costs. While these features can be obtained elsewhere, there are few locations where there is as large a concentration to the extent of forming a 'community' of such businesses.

5.3 Local Service Requirements

The industry survey showed just less than one quarter of sales from survey respondents as being in Botany. There are clearly a number of local service providers in the study area industrial zone.

Local service industry needs a home in any community. While there is no shortage of options in the area, few of the other locations offer the ease of access, freehold sites of a suitable size, visibility and low cost of Botany south. In some cases other locations would be available but at a higher cost than current premises.

In total about 15% of the land area is required to meet local service needs. In principle this could be met by land along Botany Road although currently these businesses are scattered through the study area.

5.4 Major Truck Routes and Movements

Botany Road carries an unusually large volume of heavy truck traffic even for a major arterial road. Although Foreshore Road provides major through link between the eastern collector and the port, substantial numbers of trucks use Botany Road either as an alternative to this or to access sites between the port and highway interchange.

There is a requirement for the road network to allow trucks going to and from the port to move 24 hours per day in order to maximise efficiency, particularly as the port continues to expand.

There are a substantial number of freight operations in the Hale Street industrial precinct that receive or despatch deliveries to the port or airport. At present the only access is from Botany Road. This generates movements in both directions along the length of Botany Road but with movement restricted to 5½ or 6 days per week.

There is some interest from the stakeholders, property agents, residents and shop owners in the Botany south area in diverting truck traffic from Botany Road in Botany south altogether. An option to extend Hale Road to Foreshore Road has been suggested (as per the Botany Bay City Council Development Control Plan No. 33 – Industrial Development) and it will be particularly beneficial to the trucks travelling to the industrial park on Hale Road. An extension of Hale Road could also potentially reduce truck traffic along Botany Road, but there are a number of issues associated with this proposal:

- RTA suggests that it is unrealistic to expect that Botany Road in the Botany south area could ever be free of truck traffic and become a quiet, community oriented area for residential housing.
- RTA research on truck traffic around Sydney has shown that although traffic can be diverted from the local roads near the source of the truck traffic (such as the port), 30-40% of that traffic is travelling to a local destination (such as Discovery Cove Park or Botany south industrial area) so a proportion of trucks will remain.
- Although roads can be improved to link Foreshore Road to Botany Road to the north of Botany south, the port and airport will also expand and it is realistic to operate on the premise that the number of trucks travelling along Botany Road will continue to increase.
- RTA has put up signs to discourage truck drivers from using Botany Road where they can use Foreshore Road, but as Botany Road is a State owned road they cannot restrict any form of traffic along this road.
- There are plans to install another pedestrian crossing and traffic light along the south end of Botany Road in the near future, which will make the road safer for entering traffic and pedestrians and will slow truck and other traffic travelling along it.
- Botany LGA has the most traffic of any LGA in Sydney, measured as the number of car trips in or through the LGA per day. Botany LGA had under 36,000 residents in the 2001 census and takes 190,000 trips per day. As a point of comparison Bankstown and Sutherland LGAs have around 240-260,000 residents and only took around 50-60,000 trips per day. This demonstrates that roads in Botany are important and restricting key arterials is difficult.

Sydney Port Authority

Sydney Port Authority is planning a major expansion in port capacity. If the expansion proceeds there will be a significant expansion in the number of shipping containers being transported to and from the port. Even without the expansion, volumes of containers are expected to nearly double over 20 years. Estimated 20 year projections for transportation generated by the port are as shown in Figure 32.

Figure 32. Estimated 20 Year Container Transport Projections

	trucks	rail	road
	<i>(visits per day)</i>	<i>(containers per annum)</i>	
Present	1,450	250,000	750,000
With the port expansion	2,350	1,100,000	1,900,000
Without the port expansion	1,410	700,000	1,200,000

One truck visit is equivalent to two truck movements in and out of the port.

Source: Sydney Rail Authority

Truck movements in Botany at present are restricted to occurring 5.5 to 6 days per week. Often trucks are moving without a full load (either with one or no containers rather than two containers). This is because they are focussed on transporting the goods within a time frame, rather than improving the efficiency of transport by ensuring all are full loads.

The Sydney Port Authority is making changes to ensure that truck movements always have a full load and trucks can travel seven days per week. This will be essential for the expansion of the port and the improved efficiency of the trucks. The projection given above is a 'best case' scenario assuming all loads are full. It would be safer to assume that the truck traffic will continue to increase at rates greater than those quoted by the Port and efficiency will not be fully optimised.

Rail transportation is preferred whenever possible. RTA research on the substitution of trucks for rail found that 30-40% of the truck traffic is moving to or from a local destination, so at least that proportion is easily removed from the roads and put onto trains. The Rail Infrastructure Group has committed to duplicating the dedicated freight rail that travels from the port to Enfield whenever the demand for freight trains reaches critical mass. The freight trains, like the trucks, are also not moving with full loads of containers, so the first action will be to reduce the number of train movements, by ensuring they only travel with a full container load.

Ideally, to reduce truck traffic on roads there should be an inland intermodal terminal, such as the one that was proposed for Enfield (but rejected partly due to community opposition). The existing terminals that are on the dedicated freight line are at Chullora, Cooks River and Enfield. Other terminals exist on passenger rail lines. As passenger trains take priority over freight trains, this can lead to delays in freight delivery. These terminals on passenger lines are at Minto, Camellia, Clyde and Yennora.

This is important as it affects the potential traffic on roads in Botany. The better the inland terminal is (and on a dedicated freight line) the greater the likelihood of moving containers off the roads. A reduction in containers on roads in Botany will improve the amenity of Botany. The projections in Figure 32 assume this is achieved.

Overall it is likely that traffic movement on Botany Road will remain very high even for an inner suburban main road. Further, an unusually large percentage of that traffic will be heavy trucks.

At the present time, over half of the frontage on Botany Road between the highway and Foreshore Road intersection is industrial or commercial in nature. Much of the remainder is residential, whose

amenity is substantially affected by the heavy traffic⁴. Given that road traffic is unlikely to be reduced to the level where amenity becomes high, the use of Botany Road frontage for industrial and commercial use is most appropriate. Retaining such uses provides a buffer to dwellings located on the streets behind.

5.5 Impact of Development Controls

The *Development Control Plan No 33 – Industrial Development (Version 5)* was released in February 2003. This plan sets out the requirements for industrial sites where redevelopment or change of use occurs in industrial areas in Botany Bay. The plan has been developed to address issues associated with industrial areas including conflicts with adjacent uses and improving the appearance and operation of some areas.

The DCP includes requirements covering development design, building form and character, and environmental amenity. It strives to achieve a high level of presentation for industrial areas within Botany Bay. This will serve the City well, particularly the key gateway areas from the airport.

The controls, which include specified setbacks, landscaping to screen industrial buildings and the requirement for loading and parking to be at the rear of premises work well for larger sites. However, when applied to smaller sites they have a disproportionately large impact on the amount of usable space. The relative impact of the controls on sites of different sizes is shown in Figure 33.

Figure 33. Relative Impact of Development Controls by Site Size

Lot size	Net usable space %
less than 250	none
250 to 500	15-25
500 to 1000	25-50
1000 to 2500	50-60
2500 to 10000	60-75
10000+	75+

Some requirements such as turning vehicles on site simply cannot be met for smaller sites. A summary of some of the controls that have the greatest impact is provided in the box below.

⁴ An indication of this is the number of 'stop the port expansion' signs displayed along the road.

Building Form and Character**B3 Site Area and Frontage****Description**

There is a need to ensure that development provides adequate area so that all operations can be conducted on site and that any impacts are contained to the site.

Objectives

- O1 To ensure that site of new industrial developments are of sufficient size to provide a functional and efficient area for buildings, vehicle parking and movement, landscaping and the storage of raw materials, finished products, trade waste and recycling bins.
- O2 To ensure that all loading and unloading, turning movements, queuing and parking of vehicles including delivery vehicles associated with the new development occurs wholly within the site; and
- O3 To encourage the consolidation of small-sized allotments in the established industrial areas so that they can achieve Objectives O1 and O2 above.
- O4 To ensure that landscaping is provided.

Controls

- C1 Compliance with the provisions of this Development Control Plan.
- C2 Compliance with Council's **Subdivision DCP** for subdivision within industrial zones.

B4 Site Layout (p68)**Control**

- C2 For new development, (excluding multi unit industrial development) all loading and unloading facilities and the majority of car parking required for the development is to be provided at the rear or at the side of buildings. It is not to be provided at the front of buildings. Visitor car parking may be provided at the front of buildings behind the setback required in Section 3 Part B (General Design Elements B7 – Setbacks) of this Development Control Plan.

B7 Setbacks

Building front setbacks – 9 m (unless prevailing is less, but minimum 4 m)

Landscaping front setback – 4 or 4 m

Side – min 2 m except residential to side = 3 m

Rear = nil to 3 m

Parking and vehicular access

- G4 Separation is provided between service areas (loading and unloading) and parking.
- G5 Parking and service areas are located behind buildings away from street frontages.
- G7 Access driveways are designed to accommodate the largest vehicle expected to use the service area with specific consideration given to two-way simultaneous movements.
- G8 All vehicles can enter and leave the site in a forward direction.
- G9 All servicing, including garbage collection, is carried out wholly within the site with suitable collection points at convenient locations.
- C6 A continuous landscaped buffer strip shall be provided between the driveway and side boundary. The buffer strip shall be a minimum of 2 m, increasing to 3 m where adjoining a residential land use....

Landscaped buffer strips will also be required along side and rear boundaries where they abut residential uses...3 m in width.

Botany south has a large proportion of sites under 1000 m². With the rezoning of the Pemberton-Wilson Precinct, the proportion of sites that are under 1000m² will be over 95% with about 85% under 500 m². This is based on counting multiple small titles under a single use as one site.

The strategy for smaller lots proposed in the DCP is to encourage amalgamation of smaller lots to better enable compliance. However, the business survey clearly showed the preference of businesses for the area because small freehold sites are available. Further, the analysis above identified the additional value of having a community of like-minded smaller manufacturing enterprises located in the area.

Whatever solution is proposed for this situation, the current effects are clear:

- Redevelopment of most sites under existing guidelines makes the resulting usable space among the most expensive in inner suburb in terms of usable space and simply cannot work for many sites at all;
- There is substantial reluctance to redevelop existing sites or to reinvest in existing buildings with many occupants 'making do' with the status quo;
- There is substantial speculation that at least parts of the area may be rezoned leading to speculation on property values even while there is limited industrial reinvestment.

The overall effect of these controls at least in the short to medium term, is to contribute to a running down of the standard of presentation, the opposite of the intended effect.

5.6 Industry and Residential Conflicts

Botany has seen a gradual reduction in industrial land and a growth in residential land. In some respects there has been a consolidation of industry to 'core' areas. Outside of those core areas the remaining industry is becoming fragmented.

Restrictions already occur on operating hours and truck movements where industry is adjacent to residential areas. Those locations where industry and housing are most mixed (eg Aylesbury Street, Daphne Street, Banksia Street, Rancom Street and Tenterden Road) are likely to have the greatest potential conflict between residents and business operators. Within the Botany south study area, industry is still relatively separated from housing with the exception of a few individual houses and the interface at the edges.

Most traffic access, particularly larger trucks, occurs from Botany Road. Industrial activities on Pemberton and Sir Joseph Banks Streets have very little direct interface with residents. In contrast parts of the current industrial zone (eg south side of Aylesbury Street) are located such that trucks accessing these industries must pass through residential areas. These sites also directly address residential areas across a relatively quiet suburban street.

Interviews with stakeholders and other agencies showed a strong consensus that mixed residential and industrial uses do not work. Industry suffers from constraints that reduce viability and

operating flexibility. With increasing mechanisation and capital intensity of manufacturing, it is more important to be able to operate double or even triple shifts and up to seven days a week. Some businesses have significant seasonal peaks requiring long operating hours for shorter periods during the year. An industrial area catering to manufacturing, warehousing and transport needs to permit this operating flexibility.

Problems with adjacent residential areas arise just from intense 'activity' as peak traffic, cars starting and noisy conversations during shift changes and late night deliveries as from noisy equipment, smells, etc. More subtle conflicts arise when younger children walk through the area en route to school, shops or to visit friends creating a hazard for trucks or other heavy vehicles.

Some 'industrial' uses do not require extended operating hours. In particular, those that serve consumers are more likely to operate normal business hours, as do offices and showrooms. However, with retail trading extending to longer hours and seven days, even this is becoming less clear-cut.

Wherever there is an interface between residential areas and industry there is some potential for conflict. However, a buffer area within which a higher degree of restriction on operating hours, truck sizes, overlooking etc. can provide a transition between more 'active' industrial areas and residents. The buffer can be aided in some cases by topography, wide streets or other specific conditions. Keeping the length of the boundary to a minimum can also contribute.

5.7 Potential for Residential Use

There has been some conversion of industrial land in nearby areas to residential use. The Pemberton-Wilson Street Precinct provides additional opportunity and encouragement to residential development. Some land owners have the view that further redevelopment to residential use at the edge of the industrial area is likely.

One of the perceived benefits of residential development is the reduction in truck traffic in the local area. Controls already limit the size of trucks on some streets. Much of the truck traffic generated locally arises from the transport and storage enterprises. The Pemberton-Wilson Street Precinct rezoning will lead to the movement of the main transport and storage businesses out of the area, substantially reducing truck movements.

Our assessment is that current land prices are such that residential densities would need to be high to achieve viable developments. This may involve concentrations of five to eight storey buildings adjacent to the industrial area, a development that would be questionable in this location. Such higher densities are usually associated with proximity to commuter rail transport, retail or services or other high amenity areas. By having them overlooking industrial areas, conflicts arising from noise and activity would increase.

While residential development would reduce truck traffic, the area is not well served by public transport. It is likely that intensive residential development of the kind required to support current

land values would lead to increased peaks of car traffic. This could potentially increase the conflicts with busy Botany Road.

The fragmented land ownership and long term tenure of many businesses make rapid conversion to residential unlikely if it is rezoned. The degree of conflict between residential and industrial uses will increase during this period.

It is hard to achieve a perimeter where residential meets industry that will be significantly shorter than it is at present. Even if all industrial use were eliminated, it would only put residential right against busy Botany Road with a level of 'conflict' from road noise far higher than that currently experienced.

There have been proposals to rezone the fringe as a way of overcoming existing conflicts. This does not address the underlying problem, but moves it in the short term. Further, it reduces the confidence of business in the area, which is essential if it is to undertake the investments required to maintain the standard of the area and address the causes of conflicts in the long term.

The Pemberton-Wilson Street Precinct Rezoning has been proposed and in progress for over a decade. Some existing landowners have positioned their holdings to take advantage of the expected rezoning. Vacancies are relatively higher and lot sizes larger in this portion of the study area facilitating a faster change than would be possible in other parts of the study area. The industrial land parcel sizes and uses displaced are mostly comparable in character to parcel sizes and uses available in nearby industrial estates – ie are more easily replaced if lost – than for other parts of the study area.

Wilson Street is currently residential on one side and industrial on the other – the only street with this character apart from the much shorter Aylesbury Street. The Pemberton-Wilson Street Precinct proposal explicitly establishes a buffer zone along Pemberton Street, which should assist the co-existence of industry and residential uses along this edge. For these reasons the rezoning of the Pemberton-Wilson Street Precinct should not undermine the viability of the remaining industrial area substantially and may even contribute to its long term viability. Further residential conversion would however be seen as problematic.

5.8 Summary of Industry Viability

The biggest threats to loss of viability of industrial use of the study area are the 'push' factors identified in section 5.1:

- Increasing commuter time and distance for the workforce;
- High land costs in inner areas and strong competition from competing higher value uses;
- Increasing fragmentation of land and difficulty in expanding in existing locations;
- Conflicts with adjacent land uses, particularly residential areas, leading to restrictions on operating hours or vehicle movements;
- Congestion and poor access in local streets.

However, this site is less affected by these factors than many other inner city sites, and where it is, they remain manageable to a greater extent than in some other locations. The main requirement is to 'mute' the degree of conflict with residential use for land that is retained for industry and provide the maximum operating flexibility through effective buffers and interfaces with surrounding land uses. Encouraging a mix of industry and residential is not a sustainable strategy.

It is the view of the consultants that the industry based in the study area has a significant contribution to Botany Bay and the wider Sydney Metropolitan area that is worth sustaining given the area's attributes.

The other major 'push' factor is the impact of the DCP on reinvestment in the area. While the DCP is effective and workable for most industry areas in Botany Bay consisting of larger lots, an alternative approach is required in the study area. This should also seek to sustain the objectives of the DCP but in a way that is responsive to the lot sizes and layout of the area.

Figure 34 summarises the result of retaining the industry with an improved buffer and revised development controls under a range of criteria grouped as financial, economic, social and environmental factors.

Figure 34. Botany south: Assessment of Retaining Industry with Improved Buffer

Viability Criteria	Rating	Assessment
Financial		
Maximise Land Value	✓✓✓✓	May be small drop but sites will be more attractive with less conflict with neighbouring residents.
Rate Revenue for Council	✓✓✓✓	Industrial uses achieve generally higher rates than residential.
Economic		
Demand Supply Balance	✓✓✓✓✓	Industrial land in inner Sydney likely to become increasingly valuable for businesses that find a competitive advantage in locating close to the city centre.
Effect on Local Jobs	✓✓✓✓	Employment may decline slowly on this site.
Supports strategic, niche industry	✓✓✓✓✓	Retains spirited niche manufacturing area with good local links and small freehold sites.
Certainty for reinvestment	✓✓✓✓	Demonstrated commitment to maintaining industrial use in designated area with workable development controls.
Social		
Local service needs met	✓✓✓✓✓	Retains local service industry in accessible location.
Sustaining social mix	✓✓✓✓✓	Retention of historical use and support for those who live and work in the area.
Environment/ Amenity		
Minimisation of conflicts	✓✓✓	Significant reduction in disputes with residents as houses are better buffered from industry.
Traffic Impacts	✓✓	Improvements to truck circulation and movement possible. Reduced traffic conflict.
Overall appearance, circulation, access	✓✓	Potential to improve landscaping, pedestrian amenity and access.

The next section looks at specific strategies that can achieve the desirable outcome of retaining the industrial area while improving presentation and reducing conflicts with adjacent areas.

6 Proposed Approach for the Area

There is a need for improved interfaces between residential and industrial uses. Further, a different approach is required to development controls that recognises the value of smaller freehold lots to industry while seeking to ensure environmental, amenity and safety standards for the area.

The following principles are derived from the site analysis of the study area. They outline the goals and expectations for any future development in the Botany south area.

The principles are directed at improving the amenity of the industrial area, whilst providing mechanisms to support the continued existence, refurbishment and revitalisation of small lot industrial development in Botany south.

6.1.1 Residential/Industrial transition

There should be a clear definition between the residential and industrial zones.

It is important to define the industrial area and ensure it is perceived as permanent and not under threat of encroaching residential development. The transition between the residential and industrial areas should be highlighted to create awareness of this. The transition should be marked by an acknowledgment of the threshold between the residential and industrial areas.

Recommendations:

- Acknowledge the **threshold** between the residential and industrial areas on the ground plane in the public domain with a change in materials (treatment of the road/footpath surfaces) wherever this threshold occurs.
- Increase **public domain planting** in the industrial area to improve the visual quality of the area and counter the inability to accommodate large areas of landscaping in the private domain.
- Use the contrast in **treatment of front setbacks** to accentuate the transition between residential and industrial areas. Hardstand areas required for truck movements in the front of industrial zoned buildings limit the area available for landscaping. Residential areas have consistent vegetated front setbacks in contrast to varied setbacks in the industrial area.

Figure 35 illustrates the location of these key thresholds and changes in treatment.

Figure 35. Transition in the Public Domain



A “buffer zone” should be created within the transition area between industrial and residential development zones.

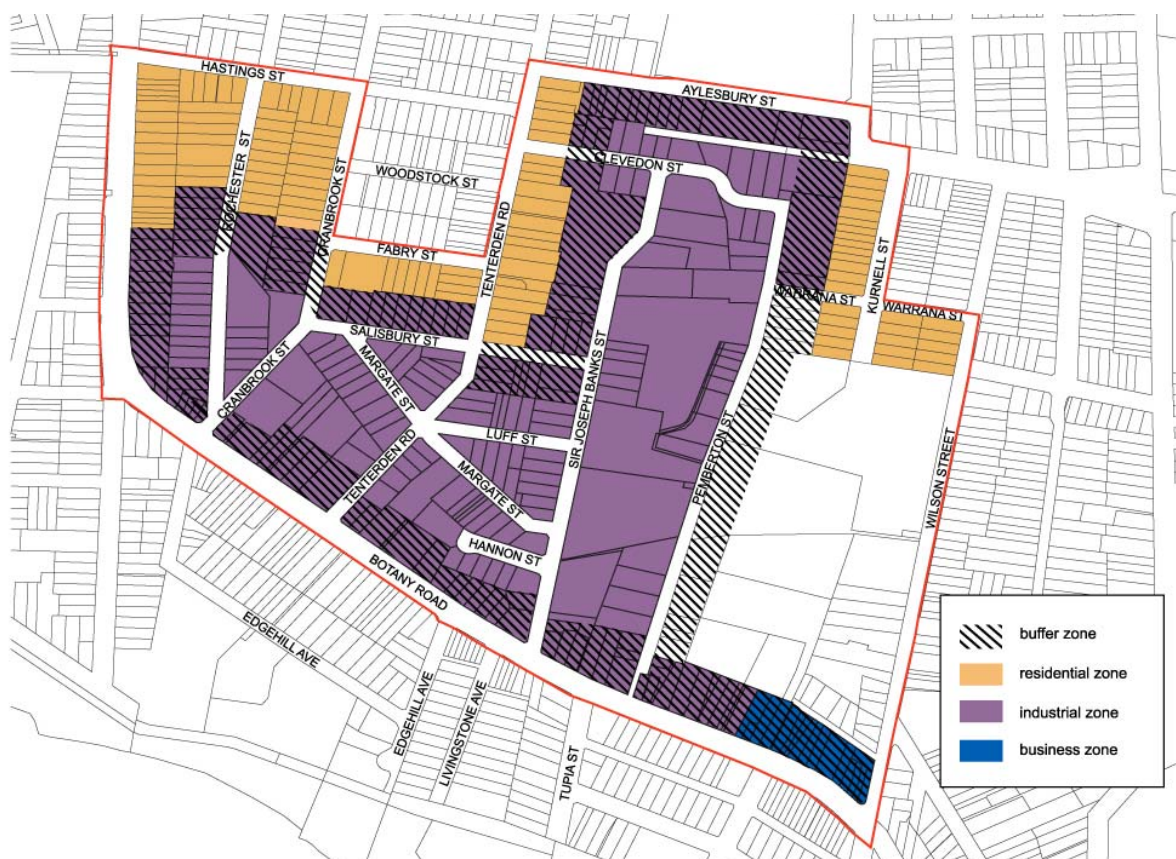
Uses located on the fringe of the industrial area would be subject to greater operating restrictions creating a ‘buffer zone’ between the residential and heavier industrial uses (Figure 36). These restrictions would have the effect of excluding uses that require long operating hours or are likely to generate excessive noise, odours or heavy truck movements. This will provide a softer edge to the residential uses, reducing the impact of the industrial area on these dwellings and increasing the level of amenity for residents.

Industrial uses that are appropriate in the transitional area include those that emit low levels of noise, provide high levels of privacy for residents (limited overlooking) and create a positive perception of the industrial area (contained uses that are not easily viewed from the public domain or present well to it). Such uses may include offices, light assembly, wholesale and light warehousing facilities.

Recommendations

- Amend the current LEP to provide specific controls for the buffer zone within Botany south.
- Amend DCP 33 as it applies to Botany south to encourage appropriate landscape treatment within allotment boundaries (see Section 6.2).
- Incorporate public domain proposals within ongoing capital works budgets for progressive implementation.

Figure 36. Proposed Buffer Areas



6.1.2 Pedestrian access

Pedestrian access through the industrial area should be encouraged in streets with low-level truck movements and high levels of pedestrian amenity.

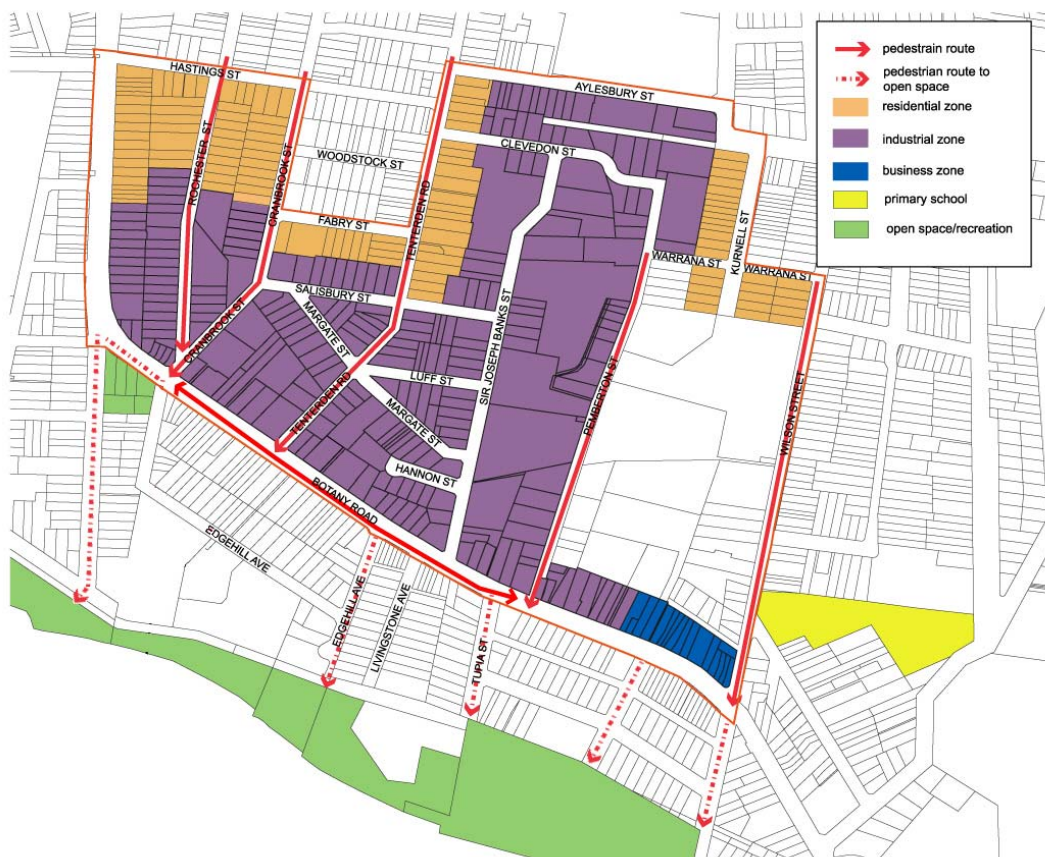
Desired destinations for pedestrians travelling from residential areas through the industrial are likely to be the retail area on Botany Road, near Wilson Street; Sir Joseph Banks Park to the south of the study area and the local primary schools. Pedestrians should be encouraged to take preferred routes through the industrial area by designing these routes to ensure a high degree of pedestrian amenity and safety. To encourage usage, the pedestrian access streets should:

- Provide routes to known destinations that are reasonably direct.
- Provide a wider footpath on at least one side of the street.
- Provide street trees for shade.
- Be located along streets where truck movements are limited and heavy vehicles prohibited.
- Provide for cyclists.

Recommendations:

- Implement the Botany south Transport Study and Action Plan.
- Incorporate public domain proposals within ongoing capital works budgets for progressive implementation.

Figure 37. Pedestrian Routes



6.1.3 Site utilisation and access

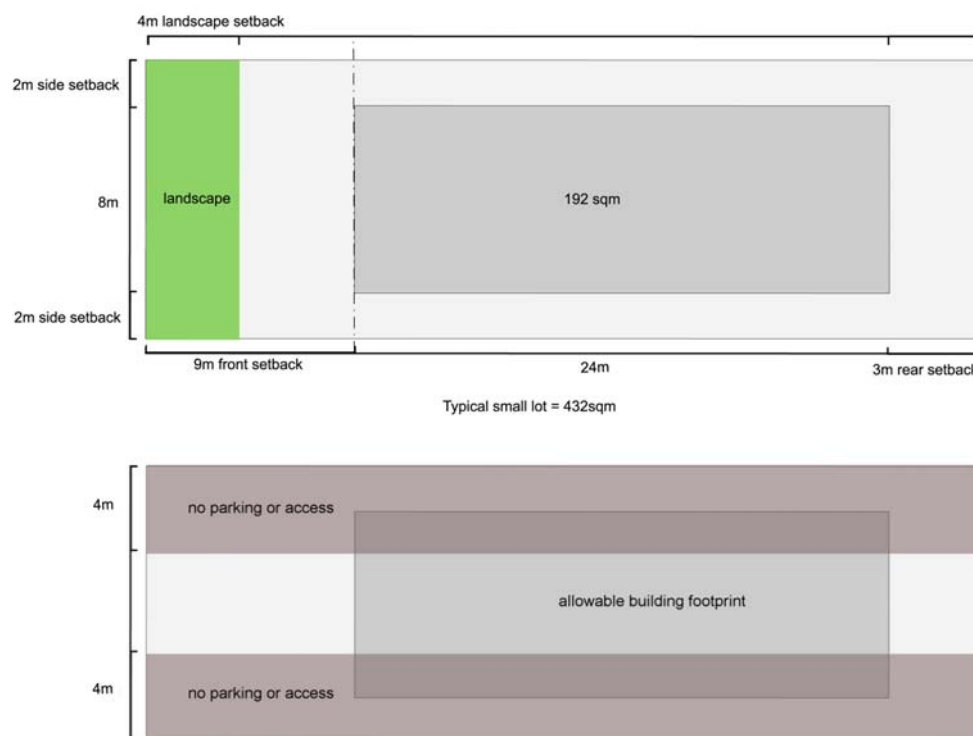
Revise existing development controls to address issues of truck access and allow small to medium sized lots to be upgraded and redeveloped without the need for amalgamation.

The majority of the sites within the study area are small in area and have narrow frontages. This presents problems for their operation in terms of site access and manoeuvring, and for the potential development and improvement of existing operations. Broadly, this is recognised within Development Control Plan 33 – Industrial Development, through a general policy of encouraging amalgamations and the inclusion of provisions that restrict the operability of small industrial sites.

The strategy recognises the importance of the existing industries within the study area and provides mechanisms for their continued location and prosperity. In order to achieve this outcome, it is important that a planning framework is established that recognises the particular requirements of small industrial sites. Under current conditions, the implementation of DCP 33 controls serve to render individual sites in the study area un-developable. In this respect, particular attention should be paid to revising the current requirements for setbacks, access and landscaping.

Figure 38 illustrates the key implications of the present DCP33 on usable land area for a typical lot size in Botany south. The controls restrict development on small sites to a level where it is not feasible. Meeting the setback requirements shown would still not permit front entry and exit of vehicles as is also required by DCP33.

Figure 38. Key Implications of the present DCP33



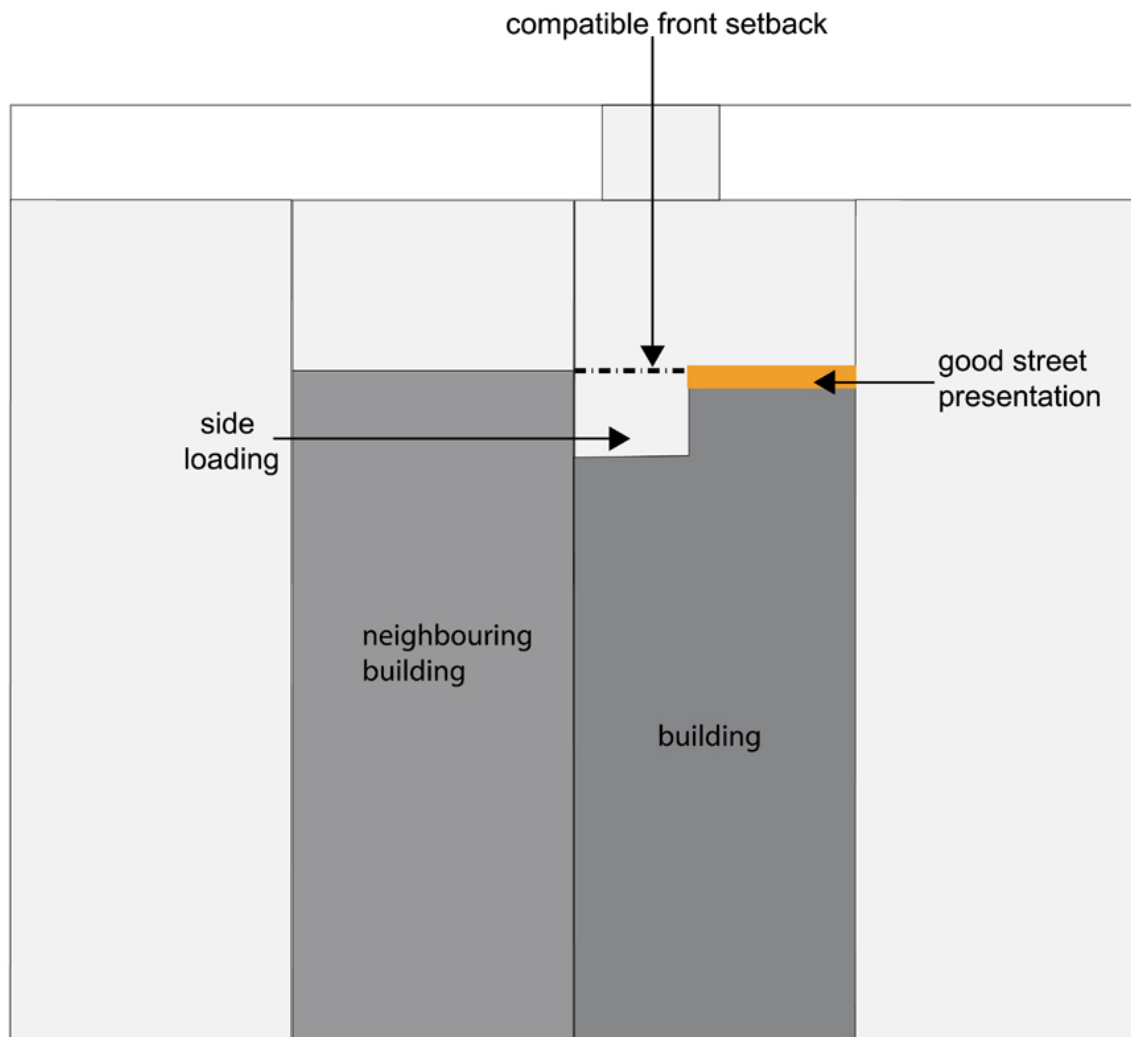
The following principles have been developed to address these issues.

Site Configuration

Recommendations:

- Narrow frontage sites may locate driveway and loading areas along one boundary, provided the boundary does not adjoin a residential use.
- Front setbacks should be considered a “merits” issue consistent with the needs of access and parking, appropriate landscape and presentation to the street. Buildings are not required to set back a minimum of 9 metres from the front boundary.
- On small frontage sites, buildings may align to the side boundary in all locations except where a residential zone adjoins. In cases where an existing industrial building is built to the boundary and predates the current occupancy of the adjoining residential zone, this exception may be relaxed. (Figure 39)

Figure 39. Site Configuration

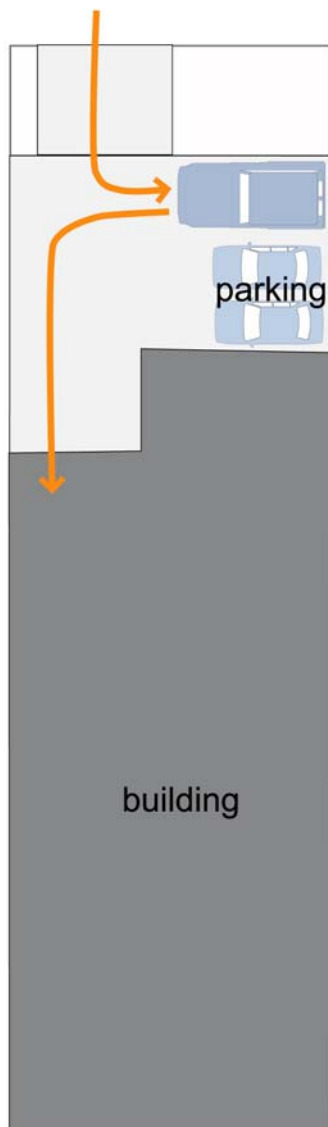


Parking and Access

Recommendations:

- Parking and vehicle manoeuvring areas may be located within the front setback area, provided minimum landscape requirements are met (see "Landscape", below).
- A proportion of the on-site parking requirement may be accommodated on the adjacent street, or preferably, if the required parking quota cannot be reached on-site, a financial contribution to a car parking plan should be provided. This requires the preparation of a Section 94 car-parking plan.
- An area for delivery vehicle access/manoeuvring may be provided within the frontage area in order to allow such vehicles to enter and leave in a forward direction. (Figure 40)
- Access driveways should be paired, with adjacent properties locating driveways side by side (Figure 41).

Figure 40. Vehicle Access and Manoeuvring



Landscape

Recommendations:

- If buildings are set back from a side boundary, appropriate landscaping is to be provided.
- A landscape zone is to be provided adjacent to the front property boundary of no less than 1.5 metres. This zone should accommodate shade trees for adjacent parking, interspersed with screen planting/hedging of 1.2 metres in height (Figure 41).
- Landscape planting (public and private domain) should be focused on the larger areas created between sites by the collocation of driveways (as suggested by Figure 42).

Figure 41. Proposed Treatment of Landscape Zone

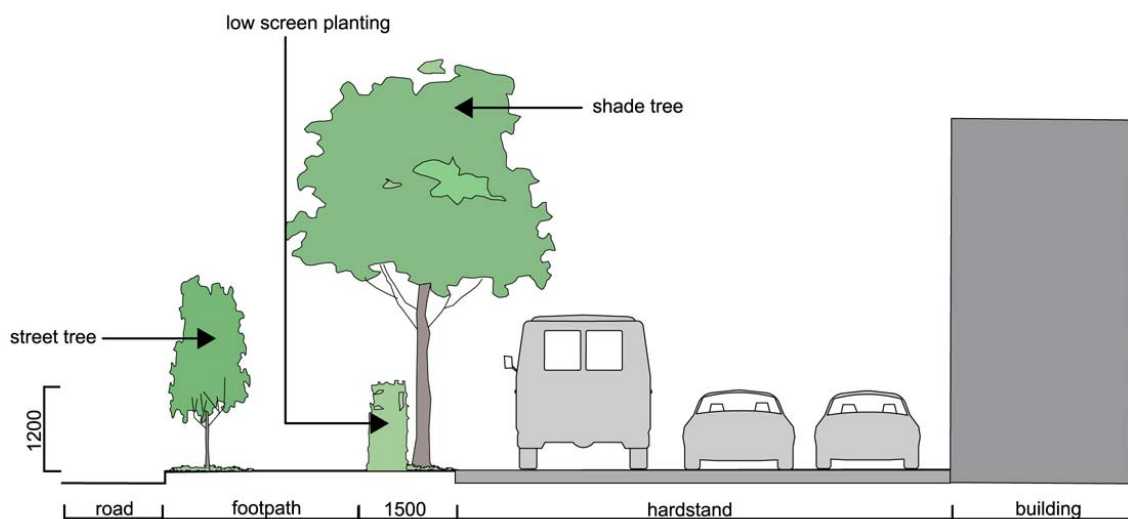
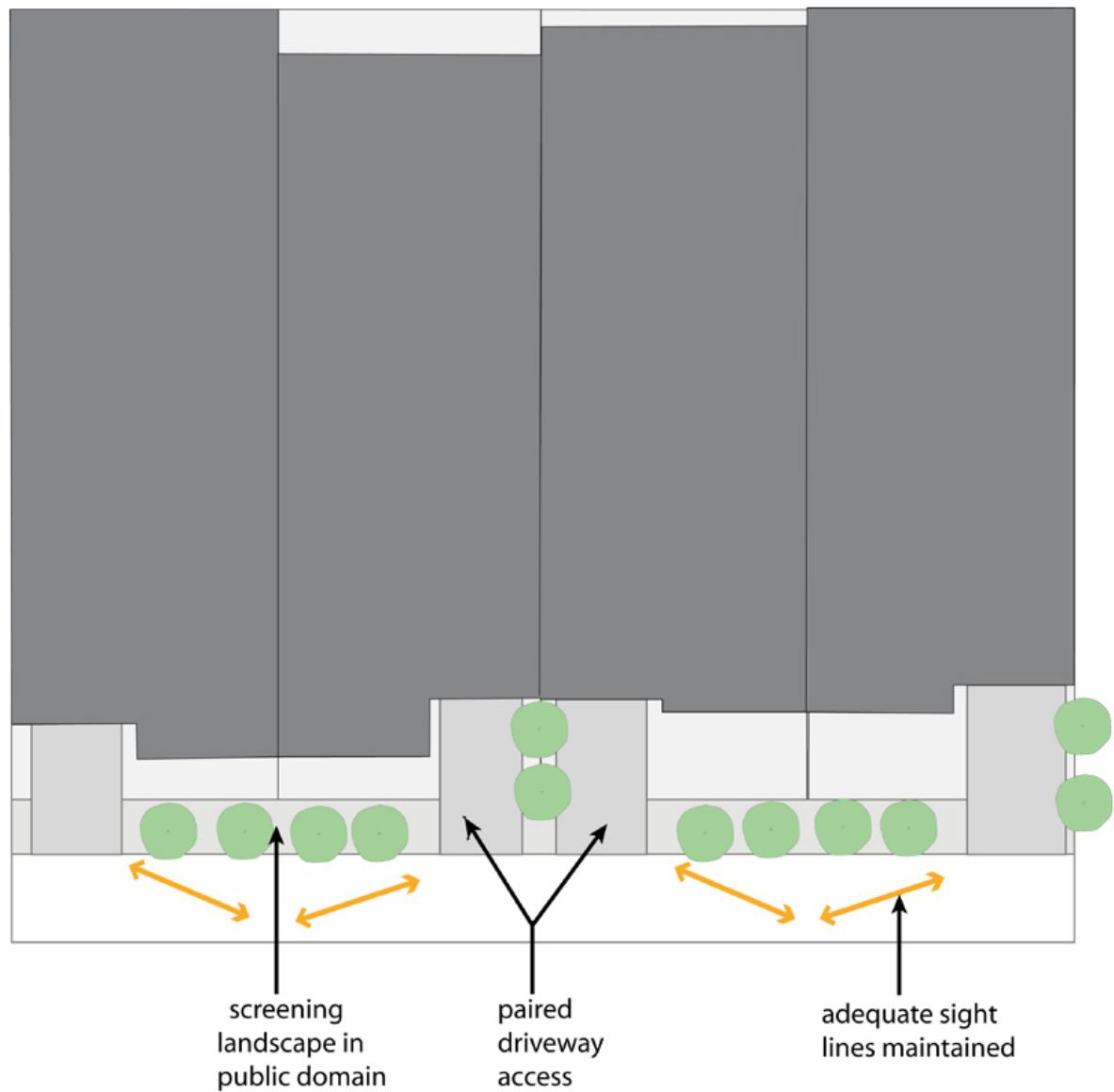


Figure 42. Proposed Landscape Zone

6.2 Implementation Issues

The principles and recommendations identified within this report have implications for both Council and landowners in both a statutory and management sense. Public domain proposals are a management issue for Council, and will be implemented over an extended timeframe in line with the timing of detailed design and budgetary constraints. Proposals applying to the private domain however, may be addressed in a statutory manner and handled at the time of development applications.

6.2.1 Transition Zones

The proposal for a transition zone between core industrial uses and adjoining residential zones requires implementation through the LEP and therefore necessitates amendments. While a number of options are potentially available, possibly the most straightforward involves the insertion of a Special Clause within the appropriate Industrial Zone.

Recommendation:

Amend the LEP by inserting a special clause within the appropriate Industrial Zone stating:

“Consent will not be granted to proposed development within the Botany south Transition Area (see Map) unless the proposed development achieves the following: *(insert appropriate performance standards relating to vehicle and operating noise, operating hours, height/overlooking neighbours)*”

Performance standards provide an alternative to specifying particular uses that may or may not comply with the requirements of compatibility with residential uses.

6.2.2 DCP Controls

This report has highlighted the inadequacy of the current DCP 33 controls in respect of the particular requirements of the Botany South Area. Fortunately, DCP 33 has been formatted in a manner that allows easy adaptation to meet the needs of Botany south. In this respect, Section 2.6 Botany Central Industrial Precinct highlights the progress of the Botany south Study and identifies a range of interim controls, subject to amendment following completion of the study.

This appears to be the appropriate position for specific Botany south strategy and controls, which should be formatted in a manner that they will take precedence over any potential conflicts arising with other controls in the document.

Recommendation:

- Amend DCP 33 to incorporate site utilisation, access and landscaping recommendations described above within a specific Botany south section.

7 Conclusions

It is the view of the consultants that the industry based in the study area has a significant contribution to Botany Bay and the wider Sydney Metropolitan area that is worth sustaining given the area's attributes.

The biggest threats to viability of industrial use of the study area are common to many inner suburban industrial sites. However, as noted earlier, this site is less affected by these factors than many other inner city sites, and they remain manageable to a greater extent than in some other locations.

An additional threat is the impact of the DCP on reinvestment in the area which has a high proportion of smaller sites, an attractive feature to much of the industry located there. The DCP requirements have led to declining reinvestment and poor presentation. An alternative approach is required in the study area, which sustains the objectives of the DCP, but in a way that is responsive to the lot sizes and layout of the area.

The recommended approach should support the continued viability of the area while sustaining reinvestment, improving presentation of the area in a sustainable way and minimising future industrial residential conflicts.

Appendices

Appendix A Data Sources

- Australian Bureau of Statistics [ABS] '**2001 Census of Population and Housing**' ABS, Canberra, 2001.
- <http://www.apmforum.com/emerald/manufacturing-management.htm>

Interviewees

Organisation	Name
Botany Bay Business Enterprise Centre	Aub Eardley
LJ Hooker	Charlotte Harvey-Jones
Knight Frank	Tim Cassidy
Jones Lang Lasalle	Artie Kalpidis
Ray White	Andrew Cassar and Tony Vella
Rail Infrastructure Group	Renee Zaia and Peter Milton
Sydney Port Authority	Marika Calfas
Roads and Traffic Authority	Angelo Arup and Charles Wiafe
Department of Infrastructure, Planning and Natural Resources	Andrew Jordan
Sydney Airport Corporation	Joseph Chan
ING Real Estate Asset Management Australia Pty Ltd	Doug Auchterlonie
Macquarie Goodman	Colin Rockliff

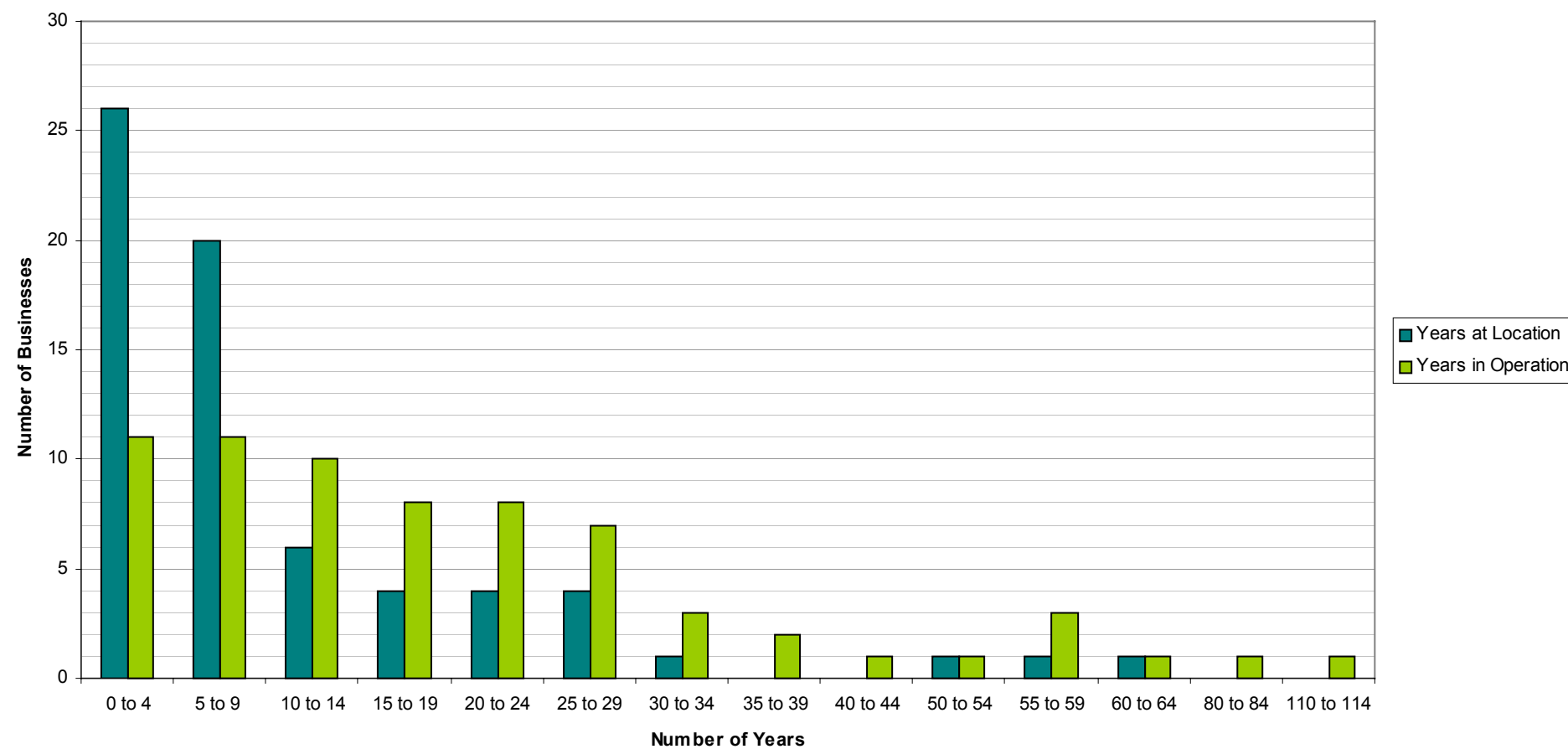
Appendix B Company Survey Analysis

SGS undertook a series of surveys for companies in the Botany south area. To begin with all 197 companies in the area were posted a simple survey to ascertain details about their business such as the number of staff, number of years in operation and in Botany south, customer and supplier catchments, and the reasons why they chose to be located in Botany south. Forty one of these surveys were returned (21%). Following this SGS selected a random sample of companies in the area and conducted one-on-one detailed interviews with 30 companies. The detailed interviews covered the same areas as the simple surveys and then expanded on details of why the companies chose to locate in Botany south, what was important for their business and plans for expansion as well as suggestions about how to improve the area. There was a total of 71 surveys received, but of these three companies were included in both the simple and detailed surveys so where relevant their information has not been repeated. Therefore there are 68 companies represented. The survey respondents were from a range of industries and company sizes in the Botany south area, giving an indicative representation of the entire area.

B.1 Botany south Business Longevity and Ownership

As shown in Figure 43, companies surveyed tended to be well established with an average of 20 years of operation and businesses had been based at their current location in Botany south for an average of 10.8 years. The oldest company in Botany south has been there for 64 years, while there were a handful of companies that had only been there for one year. That said, two thirds (67.6%) of companies in Botany south had been there for less than 10 years, with a break down of 38.2% located at their current location in Botany south for 0-4 years and 29.4% for 5-9 years. This contrasts to the length of time that companies had been in business, as only two thirds (32.3%) of the businesses had been in operation for less than 10 years and 70% had been there for less than 25 years.

The majority of businesses in Botany south own their own properties (60%), which confirms the observations made by property agents interviewed, that people are tending to purchase rather than rent in the low interest rate environment. Note that 65% of respondents from the original simple survey owned their own land (it is expected that a higher proportion of owner/operators will respond given that they tend to have a more vested interest in the area), while 50% of the randomly selected one-on-one interviewees were owner/operators.

Figure 43. Number of Years Companies in Operation and at Botany south Location

Source: SGS Botany south Company Survey

B.2 Botany south Business Customer and Supplier Catchment

Figure 44 shows the average proportions of business that companies in Botany south estimated they were doing within four geographical ranges. This demonstrates that the bulk of business for companies in Botany south is coming from the greater Sydney metropolitan area, similarly the majority of their suppliers are also from the greater Sydney metropolitan area. However the level of local trade is high compared to many industrial areas.

Many of these respondents commented that they primarily deal with customers or suppliers in the eastern suburbs/south Sydney area, with some being highly dependent on the Port or other local businesses for customers or supplies. A very small amount of product from Botany south is being exported overseas (0.3%) and a modest but significant amount of business is staying within the confines of Botany south (15% suppliers and 22% customers).

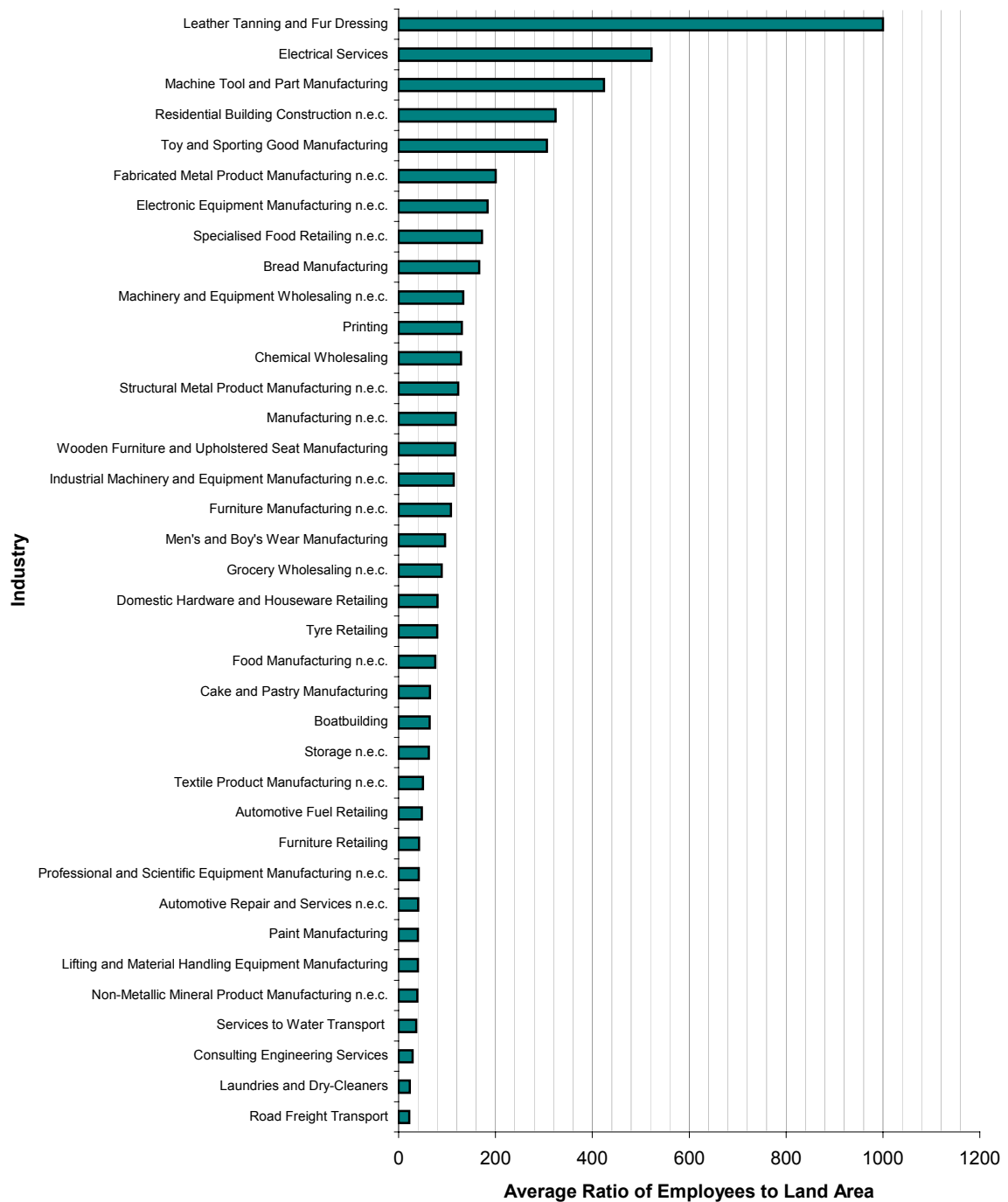
Figure 44. Catchments for Botany south Businesses

	Suppliers	Customers
Location	%	%
Botany south	15	22
Sydney Metropolitan	60	62
Rest of Australia	15	15
Overseas	9	0
Total	100	100

Source: SGS Botany south Company Survey

B.3 Botany south Comparison of Land Area to Employment

The average ratio of employees to land area for the 68 companies surveyed was 62 employees per ha. Figure 45 shows that the road transport industry had the lowest ratio of employment to land area, followed by laundries and dry-cleaners and consulting engineering services. These are based on small samples for each industry category, but give an indication of the types of industry that are likely to be contributing smaller amounts of car congestion and car parking demand. The most intensive employment to land uses in the area are leather tanning and fur dressing industries, electrical services and machine tool and part manufacturing. These manufacturers and service providers are likely to be contributing more car traffic and require more car parking in the area. This analysis does not take into account truck traffic and parking, which is a key issue in the area.

Figure 45. Ratio of Employees to Land Area by Industry

Source: SGS Botany Bay South Company Survey

B.4 Botany south Location and Attribute Rankings

The most important reasons why people chose to locate their businesses at Botany south were proximity to their customers and access to the major arterial roads such as the M5,

Eastern Distributor and Southern Cross Drive. The availability of a suitable building ranked equally as high as the location.

Proximity to the residence of the owner or manager of the business was also an important factor to consider. It was clear that people chose to locate in Botany south because of its proximity to the city, the eastern suburbs and the houses and businesses in Botany and surrounding suburbs.

The airport and port were important for a minority of businesses with the port important more often than the airport. It should be noted though that the port and airport were vital for a few companies that had strategically located there to have a competitive advantage over competitors in servicing the port, airport or related companies.

Contrary to the observations of the property agents land / rental price was usually not identified as a key factor in people's decision to locate their business in Botany south.

Figure 46. Importance Rankings for Botany south as a Business Location

	Not Important	Sometimes Important	Average	Fairly Important	Very Important	Overall Rating
Access to Arterial Roads	1	1	6	10	12	4.0
Nature of Building	0	2	4	16	8	4.0
Proximity to Customers	6	0	4	8	12	3.7
Proximity to Owner/Manager	5	5	2	9	9	3.4
Proximity to Staff	4	8	7	7	4	3.0
Proximity to City/CBD	8	5	7	3	7	2.9
Land / Rental Price	5	9	7	3	6	2.9
Proximity to Suppliers	10	4	8	6	2	2.5
Proximity to Sydney Port	16	4	2	3	5	2.2
Proximity to Sydney Airport	16	7	4	0	3	1.9

Source: SGS Botany south Company Survey

Figure 47 shows the rankings survey respondents gave to the quality of different attributes in Botany south. Most found that the buildings they were operating from were suitable and many commented that they had carefully renovated their premises to achieve this. Other strong positives included the location and the positive business spirit in the area.

Availability of street parking for trucks was rated poorly by about a third of respondents and had the lowest overall ranking. Most were satisfied with the access for trucks into their premises, because if it is required they have designed their properties as such. Many commented that the streets could be improved to better accommodate trucks and found their businesses were constrained by the limitations on trucks allowed into the area.

The majority of businesses were also more than satisfied with the local business services, yet a couple respondents commented that the retail area had become increasingly run-down over the last couple of years.

Figure 47. Attributes Rankings for Botany south

	Very Poor	Fairly Poor	Average	Fairly Good	Very Good	Overall Rating
Area as Business Location	0	4	3	11	12	4.0
Suitability of Building	0	1	8	12	9	4.0
Local Business Spirit	0	4	3	15	8	3.9
Ease of Access for Trucks	1	4	6	13	6	3.6
Local Services	2	3	7	12	6	3.6
Availability of On-Site Parking for Cars	4	3	9	7	7	3.3
Appropriate Local Planning Controls	2	3	13	10	2	3.2
Landscaping and Appearance	3	6	9	9	3	3.1
Availability of On-Site Parking for Trucks	4	8	5	9	4	3.0
Availability of Street Parking for Cars	5	7	9	7	2	2.8
Availability of Street Parking for Trucks	9	5	10	5	1	2.5

Source: SGS Botany south Company Survey

In general there is a very strong correlation between how well an item rated and how important it is considered to be.

Figure 48. Importance of Attributes of Botany south

	Not Important	Sometimes Important	Average	Fairly Important	Very Important	Overall Rating
Suitability of Building	0	0	3	12	15	4.4
Ease of Access for Trucks	2	1	2	11	14	4.1
Local Business Spirit	0	3	4	16	7	3.9
Appropriate Local Planning Controls	2	3	6	8	11	3.8
Availability of On-Site Parking for Cars	1	4	4	11	10	3.8
Local Services	1	3	8	12	6	3.6
Availability of Street Parking for Cars	2	6	12	3	7	3.2
Availability of On-Site Parking for Trucks	8	5	1	7	9	3.1
Landscaping and Appearance	10	6	7	4	3	2.5
Availability of Street Parking for Trucks	11	8	2	6	3	2.4

Source: SGS Botany south Company Survey

The most important attribute for the businesses operating in Botany south was the suitability of the building and ease of access for trucks also ranked very highly. Again business spirit rated highly as important.

Appropriate planning controls and availability of on-site parking for cars were also rated as quite important, but these did somewhat less well in the rating of standards above. Some people mentioned that public transport should be improved to better facilitate people travelling to work without driving. A few respondents mentioned that their staff were walking to work as they lived close by and this was an advantage of being in Botany south and meant they need not provide on-site parking.

In spite of Council's efforts to improve the appearance of the area by enforcing that trees and gardens be planted, most did not rate this as a priority, although they thought the area had a reasonable appearance. Many respondents commented that they had tried to plant a garden as requested by Council, but the plants had been stolen, for some businesses this occurred multiple times.

B.5 Alternatives to Botany south

A very high number of respondents stated that if they had to leave their premise in Botany south they would stay in Botany or the surrounding suburbs, such as Alexandria, Matraville and Mascot. The reasons listed included access to arterial roads, the metropolitan area and eastern suburbs, access to the rail and port, proximity to customers and affordability. Alternatives to the Botany area for the remaining respondents were larger plots of land with easier DA approvals in the western suburbs, or the Kogarah area for cheaper prices.

B.6 Botany south Present and Future

Business operators in Botany south commented that:

- Botany had distinct advantages in its proximity to managers and staff homes.
- The zoning in the area is not appropriate.
- There was a strong call for more support for businesses, many of whom felt they were being 'run out of town'. There was a predominance of complaints about Council rangers fining people for unloading trucks etc, activities necessary for their business.

Botany south also has major advantages in being close to the city and to an important customer base for many of the businesses in the area. Overall most respondents commented that they were very happy to be in Botany south and would like to continue doing business there.

The suggestions to improve Botany south were as follows:

- Industrial/ Residential conflict issues should be resolved with boundaries created between industrial and residential zones. There are some natural boundaries, such as the Council Depot and the substation at the corner of Aylesbury and Clevedon, these should be used to buffer residents from industry.
- Council should be more transparent about future zoning plans to enable businesses to plan for any changes.
- There should be a reduction in heavy industry, concentrate on light industrial.
- Need a coherent strategy to deal with flow of trucks in area. Need to stop trucks dumping trailers in Botany and along Foreshore drive. Need to stop B-doubles using Botany Road. Need dedicated truck routes ie along Pemberton road- only allow parking on one side of road on those streets.
- Expand 9-5 operation restrictions to allow business to operate effectively.
- Improve public transport.
- Realistic regulations on truck movements and truck sizes in the area are required.

- Banksmeadow shopping centre should be developed with the back to Botany Road because Botany Road should be left as a major thoroughfare without pressures from shops for parking etc. The best solution is to not only extend Rancom Street to connect to Pemberton Street, but they need to widen Rancom Road so it accommodates parking perpendicular to the road. This will make the shopping area at Banksmeadow a small village area with access from Rancom Street and less impact on Botany Road, safer for everyone and an improved area overall.
- Council needs to treat all companies the same, without picking on one company. Council also makes it very difficult for companies to set themselves up in the area and should improve to support businesses.
- Council should push for more recycling, maybe use a company in Marrickville that does recycling of industrial waste.

A number of observations were made on the distribution of firms with different future intentions based on the responses to the industry survey. However, with the small sample size they are of uncertain significance and so should be treated with some care.

Among respondents:

- 8 are planning or considering moving;
- 10 are planning or considering upgrading; and
- 12 have no plans to move or upgrade their premises.

Those planning on moving were located in:

- Aylesbury Street (1)
- Pemberton Street (2 of 2)
- Botany Road (3 of 9)
- Rochester Street (1)
- Hannan Street (1)

All proposing upgrades were on Botany Road or Cleveden Street.

Tenure was not apparently an issue as far as future intentions were concerned:

- The form of tenure did not correlate to the likelihood of moving, upgrading, or average length of time at this site.
- Among respondents there were proportionately more leases on Botany Road, while there was proportionately more ownership on Margate Street and Tenterden Road

Appendix C Company Survey Form

1. Company

Name

2. Type of Business

Activity

3. Number of

Staff

4. Does your Company: Own the Land

☐

Lease the Land

☐

5. How long has your company been at this location?

6. How long has your company been in operation?

7. Are your customers in the Botany south area?

Yes

No

8. Are your customers in the larger south Sydney area?

Yes

No

9. Are your customers from beyond the larger south Sydney area?

Yes

No

9. Does your business rely on relationships with other businesses in Botany south?

Yes

No

10. Does your business rely on relationships with other business in the larger area?

Yes

No

11. Does your business rely on relationships with business from a wider area?

Yes

No

12. Does your business intend to remain in the area?

Yes

No

13. Does your business intend to renovate/upgrade at the current location?

Yes

No

14. Does your business intend to expand at its current location?

Yes

No

Please circle the most appropriate response: (1 is poor, 5 is excellent)

	1	2	3	4	5
9. Proximity to services required for your business					
8. Proximity to owner/manager residence					
9. Proximity to staff					
10. Proximity Sydney airport					
11. Proximity to Sydney Port					

	1	2	3	4	5
12. Proximity to city					
	1	2	3	4	5
13. Quality of buildings in the street					
	1	2	3	4	5
14. Appearance of the street					
	1	2	3	4	5
15. Traffic flow (cars)					
	1	2	3	4	5
16. Parking (cars)					
	1	2	3	4	5
17. Truck access					
	1	2	3	4	5
18. Parking (trucks)					
	1	2	3	4	5
19. Council planning/zoning					

Please comment on the major constraints to operating a business in the area and any possible solutions:

Appendix D Property Agents Survey

SGS conducted detailed one on one surveys with four real estate agents active in both industrial and residential properties in the Botany south area. The results of this survey are amalgamated and outlined as follows.

Features of Industrial Sites in the Botany south Study Area

Botany south is an attractive location as it is close to Sydney Port, with access via the Eastern Distributor, it has good amenity for staff with shopping centres close by. The area is often seen to be desirable because of its proximity to staff and managers who live in the eastern suburbs. Another feature of the area is the freestanding buildings, which are very popular, as occupants prefer the independence and the absence of strata title.

A common 'pull' factor apparently attracting businesses to the Botany south area is price. As the area is more run down with poorer amenity, narrower streets and less parking than comparable industrial areas it does tend to be cheaper and can often be a last resort for businesses that cannot afford the alternatives nor find a site in a different area due to limited supply. (However capital growth has been significant in recent years – see below.)

Most industrial land users in Botany south are not dependent on the airport or the port. While they can be importing or exporting materials their business is not dependent on being in close proximity to the airport. The major airport users now have the land they require and there are presently vacancies around the airport as some other import/export related manufacturers have moved away to be nearer their employees.

Industrial Site Values in Botany south

The consensus was that while buy prices for industrial sites had increased rapidly over the last 2-3 years, the cost of leasing had remained steady, due to the low interest rate climate, in which people prefer to buy rather than lease. A key issue for industrial land users in Sydney is the scarcity of available industrial sites and property agents have found buyers to be decreasingly price sensitive in general.

The buy and lease rates in Botany south are summarised in Figures 49 and 50:

Figure 49. Buy Prices in Botany south Study Area

Type of Building	Price Range
Modern building with good amenity	Approx \$2,000 per m ²
Freestanding building 10-20 years old	\$1,300 to \$1,600 per m ² depending on size and quality
Vacant site or site with building ready to bulldoze	\$700 to \$800 per m ²

Figure 50. Lease Prices in Botany south Study Area

Size of Building	Price Range
<100 m ²	Approx \$80 per m ²
100 to 300 m ²	\$100 to \$130 per m ²

Comparative prices in nearby industrial areas are higher, for example in Alexandria run down older sites sell for \$1,800 per m², while most sites in Alexandria will sell for a minimum of \$2,000 per m² regardless of the size of the site with the average closer to \$2,700 per m². Banksmeadow has little for sale and properties tend to lease for around \$120 per m² for their very large sites. Matraville sites sell for \$1,200 to \$1,600 per m², but this area is set to increase in price. Until recently there was little interest in it, as it was not as well known as other areas to the south of Sydney. Newer industrial sites in Randwick, where older factories have been bulldozed and new buildings erected are now selling for around \$2,500 per m².

Factors Constraining Industrial Sites in Botany south

Agents cite a range of factors constraining development in industrial sites in Botany south and these along with some suggested solutions can be summarised as follows:

Problem	Suggested Solution
Not zoned for purely industrial/manufacturing use with boundaries between industrial and residential properties.	Rezone so that industrial/manufacturing areas are distinctive, have appropriate amenity for industrial use and buffer between industrial and residential properties.
Zoning transparency and predictability with claims that some potential buyers/lessors being advised by Council not to bother applying for Development Application as zoning will change in future.	Assess DAs on existing LEP and provide clear and transparent outline of Council's plans for the future of industrial sites.
Operation times allowable, Botany south restricts industrial operation times and truck movements to between 7-8am and 6pm.	Rezone so there are clear boundaries between industrial and residential areas, as there are few types of production that do not need to operate machinery 24 hours per day, for example printers must run their printers all day to gain a return on their capital investment.
Residential encroachment on industrial land means increased complaints from residents about truck movements and manufacturing noises.	Rezone so there are distinct industrial and residential areas with interfacing/buffer zones between them and no need for trucks to drive down residential streets.
Poor building quality with low clearance levels.	Create an environment in which people are willing to rebuild or refurbish industrial buildings (with higher clearance levels).
Limited off street parking.	Ensure all new developments have sufficient off-street parking.
Truck access, almost all industrial land uses require truck access and often at night as well	Widen roads or restrict industrial zones to areas where the roads are wide enough.

as during the day, therefore an area should not be zoned for industrial manufacturing use unless there is good truck access.	
Land contamination deters potential tenants or buyers who are aware that this can be a problem in the area. The community has shown that they are willing to take action on this issue, with flyers being posted in shop windows to organise a meeting about the quality of bore water in the area.	Council and the Department of Environment and Conservation to thoroughly investigate all complaints of contamination and impose strict regulations for clean-up and prohibit further contamination.
Limited public transport.	Improve bus routes to the area and preferably introduce rail or light rail.
No room for expansion.	Industry in Botany south cannot expand, there is nowhere to go as residential properties encroach the perimeter of the Botany south industrial area. As the places were built in the 50s with limited parking and insufficient truck access for what is required today this can only really be solved by changing the use of this land.

Major Competitors to Botany south Industrial Area

The major competitors for Botany south industrial area include the following areas:

- For Inner City and proximity to the airport:
 - Alexandria, in particular new Platinum Estate on Ralph Street
 - Rosebery
 - Mascot
 - Matraville
 - Banksmeadow
- For inner city and comparable land quality and price
 - Marrickville
- For more available land, better amenity and equivalent price with more certainty about future of land from Council
 - Taren Point
 - Liverpool

Cost of Botany south Residential Properties

The estimated sale prices for different types of houses and apartments in Botany south are summarised as follows:

Figure 51. Average Residential Sale Price in Botany south

Building Type	Price Range
Modern 3+ bedroom house	\$700,000 to \$900,000
Modern 2-3 bedroom house	\$600,000 to \$700,000
Older 2-3 bedroom house	\$500,000 to \$600,000
Small 2-3 bedroom semi	\$450,000 to \$600,000
New 1 bedroom apartment	\$300,000 to \$320,000
New 2 bedroom apartment	\$400,000 to \$450,000
New 3 bedroom apartment	\$550,000 to \$600,000

Source: SGS market research

Factors Affecting Demand for Residential Properties in Botany Bay

The factors noted to be contributing to demand for residential land in Botany south were:

- Affordability, this is the last stop before the eastern suburbs.
- Council takes very good care of the area, it is clean, with good gardens and parks and people say they can see the boundary between The City of Botany Bay Council and the neighbouring Councils, so it meets the high standards of people moving in from the eastern suburbs.
- New federation style developments in the area are very attractive and people see parts of the area as being very attractive.
- Parts of the area are not seen to be attractive as they are surrounded by factories, next to a panel beater (or similar), or on a busy road.
- Proximity to eastern suburbs and beaches.
- The area is seen to be an extension to the new residential areas in South Sydney.

Therefore, parts of Botany Bay that are purely residential are seen to be increasingly desirable, while those in mixed industrial/residential areas are seen to have limitations, the demand for them is lower, and prices remain lower.

Trends and Future Prospects for Botany south

Agents offered the following reflections on trends in the area. The Botany south area is traditionally a location where people lived and worked in the nearby factory. Residents tend to be people who have lived and worked in the area for 30+ years. With the ignition of the housing market and the major development in medium density housing the house prices have taken off around Sydney. The property boom took longer to reach Botany south, but in the last 12 months properties in this area have risen in price by at least 20%. The demographics of the area is changing with people from the eastern suburbs being priced out of the market and choosing Botany Bay as a close alternative. These people see their investment in residential property as a step into the eastern suburbs market. They paid relatively more for their properties than the influx of buyers 30 years ago so they are lobbying Council to improve the amenity of the residential properties to ensure their investment pays off.

As the residential developments encroach on the industrial properties in Botany south, the small and medium sized family businesses are leaving the area. New investment in the industrial land has been limited to date as businesses and investors are uncertain as to what Council plans for the area and they need to know the clear plan before launching into renovations or new developments. Where once the manufacturers would locate in Botany south because their staff were there and it was a well-functioning industrial area, they are now deterred by the residential encroachment and only choose this area if it is convenient for their own residence in the eastern suburbs. This said, as long as there are industrial properties available in Botany south people will use them because they are close to their eastern suburb houses, not because there is a strategic advantage to being in the area.

A few alternative prospects for the area were suggested. These are not necessarily compatible, but are summarised below:

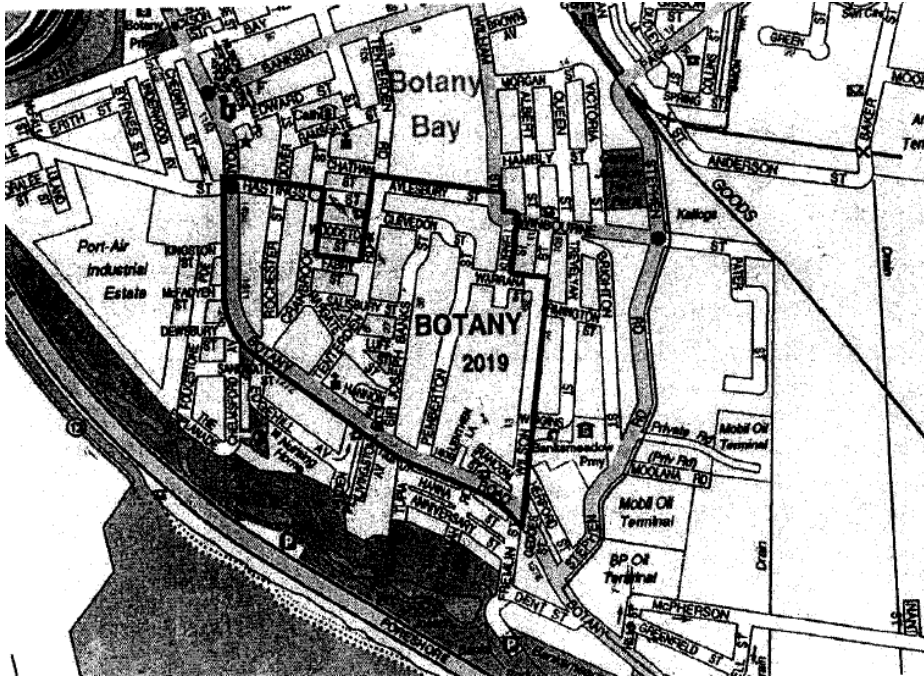
- Rezone and reconfigure so that industrial areas are bound by wide streets and have good 24 hour truck access, off street parking and buffer zones such as parks and open spaces adjacent to the residential areas. It is important that industrial areas have regulations that are compatible with the types of businesses working there. For example contemporary industrial land users tend to require large truck access. Operation hours must also be 24 hours in an industrial area for businesses to operate successfully, if this is not possible then the land may not be appropriate for industrial land use.
- Direct industrial development so as to encourage 'cleaner' industrial companies, which will also utilise the more educated residents in the area, for example high technology type industrial uses. It is predicted that this will occur anyway with the natural forces of the market increasing the land prices in this area.
- The area could have space available for family small and medium business and could even serve an 'incubator' role. It was acknowledged that this would serve a social benefit for nearby residents and the local economy and would need to be subsidised as land prices continue to rise. Botany Bay Business Enterprise Centre (BEC) also investigated this briefly and concluded that there was more suitable land for incubation in western Sydney, as the Botany Bay land was too valuable and better suited to high end industrial uses. BEC research also found that given the demographic of people in Botany Bay, incubated businesses were more likely to be IT firms starting up out of the home.

The main conclusion to be drawn from discussions with property agents was that in order to maximise the economy and efficiency of land anywhere it should have a clear and transparent zoning, and buffer zones to separate it from the neighbouring areas. The other key message from the property agents was that zoning and regulations for an area should be realistic and compatible with the types of businesses that will ideally locate there.

Appendix E Questions for Property Agents

SGS Economics and Planning is conducting a study of the industrial land in Botany south for Botany Bay City Council. The purpose of the study is to identify ways to revitalise the area and make it a more attractive and appealing area for people to live and work.

The Botany south study area is only a small area north of Botany Road between Wilson Street, Aylesbury Street, Fabry Street and Hastings Street, illustrated below:



Industrial Land in Botany South

1. What are the typical requirements of potential **Industrial** tenants/owners for Botany south area (characteristics, building types, locations etc)?

2. What are the average land values or lease rates for the following **Industrial** land areas?

	Land Values	Lease Rates
<300sqm		
300-599sqm		
600-999sqm		
>1,000sqm		

3. What other aspects affect the cost of **Industrial** land and what are they (e.g. location, quality etc)?

4. What areas are the major competitors to Botany south **Industrial** area, where are companies choosing to go instead of Botany South and why?

Residential Land in Botany South

5. What are the average land values or lease rates for the following **Residential** land areas?

	Land Values	Lease Rates
Larger 3 bedroom houses		
Modern 2-3 bedroom houses		
Older 2-3 bedroom houses		
Smaller 2-3 bedroom semis		
Potential price of apartments		
Other:		

6. What other aspects affect the cost of **Residential** land and what are they (e.g. location, quality etc)?

Developments in Botany South

7. What trends and changes have you noticed in the Botany south area?

8. What characteristics of the area constrain industry expansion and development (e.g. amenity, street pattern, lot configuration, residential encroachment, planning controls etc.)?

9. How does the layout and quality of this area affect the social lives of workers and residents in the Botany south area?

10. What are the future prospects for Botany south?

11. Do you have any other comments to make about the potential for the area?

Appendix F Industrial Land Use Survey

Business name/description	Address	Area M ²	Code ANZSIC Industry	Building Quality	Parking Site	Street	Presen- tation	Comments
House	1 Aylesbury St	369	Residential	3	0	Y	5	Timber house with sparse garden
House	3 Aylesbury St	235	Residential	5	0	Y	4	Plaster house painted with garden
House	5 Aylesbury St	221	Residential	4	0	Y	4	Timber painted house with plants
House	7 Aylesbury St	450	Residential	4	0	Y	3	Timber painted house with no garden
McNeil Sailmakers	9 Aylesbury St	448	2822 Boat building	4	2	Y	2	Brick building with bitumen yard and no garden
Raines Carpets	11 Aylesbury St	375	5232 Floor Covering Retailing	4	2	Y	3	Painted brick building with small garden
Beetroot Bros	13 Aylesbury St	1186	5129 Specialised Food Retailing n.e.c.	5	3	Y	5	Modern brick building with plants in front
David Lawrence and Jigsaw	17 to 19 Aylesbury St	851	2242 Women's and Girls' Wear Manufacturing	5	2	Y	6	Modern brick building with plants in front
City Electrical Services	Unit 1/23 Aylesbury St	701	4232 Electrical Services	5	6	Y	4	Brick building with big tree and garden
Fabric Cutters and Distributors	Unit 2/23 Aylesbury St	701	2215 Textile Finishing	5	6	Y	4	Brick building with big tree and garden
Budget Dist	Unit 3/23 Aylesbury St	701	4523 Chemical Wholesaling	5	6	Y	4	Brick building with big tree and garden
Merc-Talk	Unit 4/23 Aylesbury St	701	5329 Automotive Repair and Services n.e.c.	5	6	Y	4	Brick building with big tree and garden
Antique Stone	25 Aylesbury St	1512	2640 Non-Metallic Mineral Product Manuf n.e.c.	5	3	Y	5	Brick building with trees and garden cared for in front
Substation	29 Aylesbury St	1282	3610 Electricity Supply	4	3	N	5	Brick and tin building
Mobile Hose Fixers	1493 Botany Rd	490	4619 Machinery and Equipment Wholesaling n.e.c.	7	4	Y	4	Brick building with small buffer bushes on street side
Art & Framing Specialists	1495 Botany Rd	498	5233 Domestic Hardware & Houseware Retailing	7	3	Y	4	Brick building with small buffer bushes on street side
Franks Fencing	1497 Botany Rd	483	4224 Structural Steel Erection Services	9	4	Y	4	Brick building with small buffer bushes on street side
Allen W Mechanical Repairs	1499 Botany Rd	521	5329 Automotive Repair and Services n.e.c.	7	4	Y	4	Brick building with small buffer bushes on street side
Blue Triangle Smash Repairs	1501 Botany Rd	492	5329 Automotive Repair and Services n.e.c.	7	0	Y	4	Brick building with small buffer bushes on street side
Gess Trading Co.	1505 Botany Rd	493	2241 Men's and Boy's Wear Manuf	7	4	Y	4	Brick building with small buffer bushes on street side
House	1507 Botany Rd	485	Residential	3	1	Y	3	Downgraded fibro house
Botany Auto Panel Beating and Radiator Specialists	1509 Botany Rd	486	5329 Automotive Repair and Services n.e.c.	6	0	Y	3	Brick building with signage & vehicles fronting to street
Panel Beating: Botany Auto Panel Beating and Radiator Specialists	1511 Botany Rd	472	5323 Smash Repairing	6	0	Y	3	adjoining building above
Kingsford Blinds & Awnings	1513 Botany Rd	474	2229 Textile Product Manufacturing n.e.c.	6	8	Y	3	Brick Building with tree garden and concrete yard
DSK Kitchens & Furniture	1515 Botany Rd	1275	2921 Wooden Furniture & Upholstered Seat Manuf	5	12	Y	3	Modern shaped building with garden in front
DA Motor Trimming & Upholstery	1521 Botany Rd	241	2822 Boat building	4	0	Y	4	Modern paint, walls crumbling with planted garden
House	1525 Botany Rd	408	Residential	3	0	N	3	Plaster walls, brick building
House	1527 Botany Rd	244	Residential	5	0	Y	5	Timber house with painted walls and garden
House	1529 Botany Rd	142	Residential	3	0	Y	4	Timber house with painted walls and garden
House	1531 Botany Rd	160	Residential	5	0	Y	4	Timber painted house with garden
House	1533 Botany Rd	170	Residential	5	0	Y	5	Timber painted house with garden
House	1535 Botany Rd	160	Residential	2	0	Y	2	Sold sign out front, looks ready for bulldoze
Vacant former Lozmont P/L	1537 Botany Rd	488	Vacant	3	0	Y	2	Appears vacant, rundown building with vandalised walls

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DIA Office Seating	1541 Botany Rd	470	5231 Furniture Retailing	4	5	N	2	Cracking walls and vandalised, fancy paint job but degrading with no garden
Startlet Australia	1543 Botany Rd	470	2249 Clothing Manufacturing n.e.c.	6	0	N	8	Trees cover the front of a brick building
Saswud Furnishings	1545 Botany Rd	586	2929 Furniture Manufacturing n.e.c.	3	3	N	3	Building hidden from street by other buildings and tin fence
Austral Pressing Service & Commercial Laundry	1545 Botany Rd	1259	9521 Laundries and Dry-Cleaners	3	3	N	3	Building hidden from street by other buildings and tin fence
Pasteles Bakehouse	1545 Botany Rd	478	2161 Bread Manufacturing	4	3	N	3	Vandalised building on street
Di Gregg Carpentry & Joinery	1547 Botany Rd	1095	2929 Furniture Manufacturing n.e.c.	3	2	N	2	Building hidden from street by other buildings and tin fence
MB Welding	1547 Botany Rd	1095	2759 Sheet Metal Product Manufacturing n.e.c.	3	0	Y	2	Degraded brick building hidden from street by other buildings and tin fence
Activ Seating	1549 Botany Rd	795	2929 Furniture Manufacturing n.e.c.	3	0	Y	2	Degraded brick building hidden from street by other buildings and tin fence
B&M Sheet Metal	1551 Botany Rd	1064	2759 Sheet Metal Product Manufacturing n.e.c.	4	5	Y	3	Brick building with couple trees in front
Atlas Mobile Electrical & Airconditioning Services	1555 Botany Rd	620	Commercial Space Heating and Cooling 2867 Equipment Manufacturing	3	10	Y	3	Degraded brick building with machinery in yard
Omega Forklift Services	1555 Botany Rd	620	Lifting and Material Handling Equipment 2865 Manufacturing	3	10	Y	3	Degraded brick building with machinery in yard
Robway Crane Safety	1555 Botany Rd	620	Lifting and Material Handling Equipment 2865 Manufacturing	3	10	Y	3	Degraded brick building with machinery in yard
Smith Spratt Commercial Industrial Breakdown Service + House	1557 Botany Rd	420	4232 Electrical Services	10	4	Y	7	Brand new brick building with a house in front, needs buffer, some trees to the street
House	1559 Botany Rd	418	Residential	2	0	Y	2	Degraded brick house with overgrown garden
Church	1561 Botany Rd	1065	Church	3	0	Y	2	Crumbling brick building, peeling paint and no garden, old wall and gate
House	1563 Botany Rd	133	Residential	3	0	Y	3	Crumbling timber house, peeling paint with tree in front
Paul Sergis Automotive Services	1565 Botany Rd	774	5329 Automotive Repair and Services n.e.c.	4	6	Y	3	Brick building with a couple trees in front and concrete yard
Botany Automotive Repairs	1567 Botany Rd	774	5329 Automotive Repair and Services n.e.c.	4	6	Y	3	Brick building with a couple trees in front and concrete yard
Sam's Kitchens	1569 Botany Rd	416	2929 Furniture Manufacturing n.e.c.	4	6	Y	3	Brick building with a couple trees in front and concrete yard
Botany Muffler & Towbars	1573 Botany Rd	416	5329 Automotive Repair and Services n.e.c.	4	8	Y	3	Painted brick with signs on street side and cars in the yard
House	1575 Botany Rd	397	Residential	6	0	Y	8	Brick house with planted garden
Muscat Kitchens	1575A Botany Rd	352	2929 Furniture Manufacturing n.e.c.	4	2	Y	3	Brick building degraded with concrete yard and 1 tree
AB Partitions	1575 Botany Rd	479	2929 Furniture Manufacturing n.e.c.	4	2	Y	3	Brick building degraded with concrete yard and 1 tree

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Beauty & Security, Mottura Locks & Safes, Le Maison De L'Art	1577 Botany Rd	434	2769 Fabricated Metal Product Manufa n.e.c.	5	6	Y	5	Brick building, carpark and garden in front
BP Service Station	1579 Botany Rd	1251	5321 Automotive Fuel Retailing	4	8	N	4	Regular looking BP station with small shop and degraded looking buildings
Botany Cranes & Forklift Services	1581 Botany Rd	2363	2865 Lifting &Material Handling Equipment Manuf	3	6	Y	4	Big crane yard and small building with garden
Hydrotech	1591 Botany Rd	821	2412 Printing	4	5	Y	5	Brick building, carpark and small garden
Print Warehouse	1591 Botany Rd	863	2412 Printing	4	5	Y	5	Brick building, carpark and small garden
Botany Cosmopolitan Towbars & Accessories Co	1593-99 Botany Rd	876	5329 Automotive Repair and Services n.e.c.	5	8	Y	4	New brick building, signs out front and unkept garden
ACE Underground Hammers	1603 Botany Rd	269	4259 Construction Services n.e.c.	4	0	Y	4	Brick and painted timber, no garden, on street
Bober Furniture	1605 Botany Rd	699	2929 Furniture Manufacturing n.e.c.	3	0	Y	3	Glass wall to street and furniture on display
Havenhall	1609 Botany Rd	928	4523 Chemical Wholesaling	3	4	Y	4	Older style building with garden in front
Sydney Recovery Co	1611 Botany Rd	826	2921 Wooden Furniture & Upholstered Seat Manuf	3	3	Y	4	Older style building with garden in front
Aaron Upholstery Aust.	1613 Botany Rd	758	2921 Wooden Furniture & Upholstered Seat Manuf	3	0	Y	4	Older style building with garden in front, glass window at the front
Worldwide Shipping Services	1615 Botany Rd	579	6620 Services to Water Transport	3	0	Y	4	Older style building with garden in front, glass window at the front
Unknown	1615 Botany Rd	561	Unknown	3	0	Y	4	Older style building, garden in front, glass window at front
AAA Botany Mechanical Repairs	1617 Botany Rd	416	5329 Automotive Repair and Services n.e.c.	3	0	Y	3	Building concealed out back in yard
Architectural Timber Products / Original Plantation Shutters	1619 Botany Rd	601	2929 Furniture Manufacturing n.e.c.	5	3	Y	3	Brick building with concrete yard
Vacant former Steve's Butchery	1619 Botany Rd	100	Vacant	4	0	Y	2	Vandalised, rundown vacant building
Francesco's Forge	1 Clevedon St	451	2764 Metal Coating and Finishing	2	0	Y	1	Downgraded building with broken fence
Standard Knit Fabrics/ Universal Dyers	2-6 Clevedon St	7703	2229 Textile Product Manufacturing n.e.c.	3	2	Y	3	Brick warehouse and factories, old with a couple trees in front
Vacant	3 Clevedon St	920	Vacant	2	0	Y	1	Broken concrete building, unpainted and concrete footpath
Botany Engineering Supply	5A Clevedon St	227	2711 Basic Iron and Steel Manufacturing	4	1	Y	2	Brick building with crumbled concrete yard
Mascot Wrought Iron	5 Clevedon St	227	2711 Basic Iron and Steel Manufacturing	3	0	Y	2	Unpainted concrete on footpath, broken concrete building adjoining no. 3
The Converter Shop	7 Clevedon St	339	5329 Automotive Repair and Services n.e.c.	4	1	Y	2	Brick building, crumbled concrete yard
Vacant,	8 Clevedon St	480	Vacant	4	2	Y	2	Brick building with concrete yard in front
TCS Engineering	9 Clevedon St	339	7823 Consulting Engineering Services	4	0	Y	2	Brick building, crumbled concrete yard
Entertainment Product Services	10 Clevedon St	240	2854 Electric Light and Sign Manufacturing	5	1	Y	5	Modern painted brick building with 1 small tree in front
Amona Furniture & Joinery	10 Clevedon St	240	2929 Furniture Manufacturing n.e.c.					
Big Transport	11-15 Clevedon St	2713	6110 Road Freight Transport	3	6	Y	2	Brick building with big dusty yard & building flush with street
Vickers & Hoad	12 Clevedon St	480	5231 Furniture Retailing	4	1	Y	3	Brick building with 1 tree in front yard
Vacant	17 Clevedon St	753	Vacant	5	3	Y	3	Painted plaster with concrete yard and 1 tree

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Almol Casings	14-18 Clevedon St	660	2113 Bacon, Ham and Smallgood Manufacturing	4	6	Y	3	Painted brick building with gardens
Vacant, for lease formerly Goldecs	19 Clevedon St	1006	Vacant	7	3	Y	5	Modern building new paint on plaster, gardens in front
Good Food Co	21 Clevedon St	800	2161 Bread Manufacturing	4	2	Y	2	Brick building with concrete yard in front
Southern Krown Paint & Chemicals	20-22 Clevedon St	1063	2542 Paint Manufacturing	4	1	Y	3	Brick building with trees on curb building wall flush with curb
Botany City Council Depot	23 Clevedon St	790	8113 Local Government Administration	4	40	Y	3	Brick building with trees on curb building wall flush with curb
Davidson Engineering	26 Cranbrook St	2060	7823 Consulting Engineering Services	3	4	Y	2	Tin shed with barbed wire fence
SR Juice Freshly Squeezed	28 Cranbrook St	1211	2181 Soft Drink, Cordial and Syrup Manufacturing	5	0	Y	3	Brick building, no parking for staff concrete front yard, with trees. Building is for sale, tenants will remain. Bad ammonia smell in area.
B&B Gourmet Foods	30 Cranbrook St	1211	2179 Food Manufacturing n.e.c.	5	0	Y	3	Brick building, no parking for staff concrete front yard, with trees. Building is for sale, tenants will remain. Bad ammonia smell in area.
Motorworks Cars	43 Cranbrook St	4400	9220 Museums	2	20	Y	2	Tin shed with concrete yards and no signage, car museum being set up that recently moved from Ultimo
A-Z Paper Products	45 Cranbrook St	514	2339 Paper Product Manufacturing n.e.c.	3	3	Y	4	Brick building with concrete yard with trees
Vacant	47 Cranbrook St	499	Vacant	4	3	Y	4	Brick building with concrete yard with trees
Masters Equipment	49 Cranbrook St	1124	2865 Lifting & Material Handling Equipment Manuf	5	1	Y	5	Concrete yard and brick building with big trees grass in front
Clifford Powell Motor Trimmers	51 Cranbrook St	250	5329 Automotive Repair and Services n.e.c.	5	2	Y	5	Concrete yard and brick building with big trees grass in front
MS Simpson & Sons	55 Cranbrook St	250	2412 Printing	5	1	Y	5	Concrete yard and brick building with big trees grass in front
Wing Hong Foods/Fortune Cookies	4-10 Hannon St	1787	2179 Food Manufacturing n.e.c.	4	10	Y	3	Brick building with bushes & cars lined up on grass in front
Nutrisoy/Soyco Soy Food Products	15 Hannon St	1317	2179 Food Manufacturing n.e.c.	3	0	Y	2	Only vehicles and concrete in front of brick building
Triple M Car Detailing	1-3 Luff St	489	5329 Automotive Repair and Services n.e.c.	2	1	Y	3	Brick shed and big tree in front
Vacant	2 Luff St	879	Vacant	3	0	Y	3	Brick building with only 1 tree in front
Vacant	4 Luff St	508	Vacant	3	1	N	3	Brick building with concrete and trees in front
Window Tinters	5-7 Luff St	988	5329 Automotive Repair and Services n.e.c.	1	0	Y	1	Overgrown trees & foliage and broken down sheds & fences
Fibro House	6 Luff St	616	Residential	1	1	Y	2	Broken down fibro house with trees in front
Vacant	8 Luff St	335	Vacant	3	3	Y	2	Modern building with painted plaster walls, but paint is cracking and faded and trees in front of building
All Sorts Car Care	10 Luff St	277	5323 Smash Repairing	2	1	Y	1	Barbed wire fence with plastic to stop visibility into yard around a broken down shed

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Fineline Automotive Services	1 Margate St	511	5329 Automotive Repair and Services n.e.c.	4	4	Y	3	Brick building with concrete yard, grass curb, trees in front
Regency Linen & Laundry	3 Margate St	494	9521 Laundries and Dry-Cleaners	4	0	Y	3	Brick building with open factory to street, tree in front
Pynoam Engineering	5 Margate St	485	Professional & Scientific Equipment Manuf 2839 n.e.c.	3	1	Y	3	Old brick building with grassed curb in front
MB Welding Industries	7 Margate St	164	2822 Boatbuilding	3	2	Y	3	Brick and timber building with concrete entrance and 2 trees
Easo	7 Margate St	164	2759 Sheet Metal Product Manufacturing n.e.c.	3	2	Y	3	Brick and timber building with concrete entrance and 2 trees
NIX Engineering	7 Margate St	164	2919 Prefabricated Building Manufacturing n.e.c.	3	2	Y	3	Brick and timber building with concrete entrance and 2 trees
Curtrax	9 Margate St	487	4721 Textile Product Wholesaling	3	0	Y	3	Brick building with concrete in front
Sea Sea Marine	11 Margate St	749	2822 Boatbuilding	1	0	Y	3	Tin shed with brick shed and boats in yard painted fence with garden outside
Platypus Leather	13 Margate St	1178	2261 Leather Tanning and Fur Dressing	1	0	Y	1	Old broken down rickshaw house, tin and concrete sheds
Davis Glynn Mechanical Repairs	Unit 2/15 Margate St	706	5329 Automotive Repair and Services n.e.c.	4	5	Y	4	Brick painted building with brick wall and garden in front
Vacant	15A Margate St	706	Vacant	3	2	Y	3	Brick building with trees in front
Vacant	15B Margate St	706	Vacant	4	2	Y	3	Brick building with trees in front
Dennis Owen Print Services	17 Margate St	339	2412 Printing	6	0	Y	4	Brick building with painted brick and no buffer
Metro Core	19 Margate St	165	4259 Construction Services n.e.c.	4	1	Y	2	Brick building with brick signs and concrete paving on street
Metro Diamond	19 Margate St	165	2864 Machine Tool and Part Manufacturing	4	1	Y	2	Brick building with brick signs and concrete paving on street
Machinery Repairs	21 Margate St	324	2869 Industrial Machin & Equipment Manuf n.e.c.	3	1	Y	3	Brick building with unkept garden scrub out front
Primo Imports	23-27 Margate St	1429	4719 Grocery Wholesaling n.e.c.	4	0	Y	3	Brick and painted tin building with gardens and well presented office but storage warehouses open to the street.
Colour Envelope Overprint	1 Pemberton St	239	2411 Paper Stationary Manufacturing	3	1	Y	3	Brick building with 1 tree in front, For Lease sign up
Vacant	2 Pemberton St	348	Vacant	2	0	Y	1	Degraded and vandalised brick building
Prime Finish Painting & Decorating	3 Pemberton St	471	4244 Painting and Decorating Services	4	2	Y	3	Brick building with tree in yard
Endrust Corrosion Technologies	4 Pemberton St	198	2769 Fabricated Metal Product Manuf n.e.c.	5	2	Y	1	Brick building with concrete yard
King Cotton Sales/Twintex	5 Pemberton St	1179	2249 Clothing Manufacturing n.e.c.	3	0	Y	4	Brick building with cracks and garden
Armaglaze	6 Pemberton St	198	5329 Automotive Repair and Services n.e.c.	5	2	Y	1	Brick building with concrete yard
Vacant	8 Pemberton St	541	Vacant	3	0	Y	0	Vacated and moved to Matraville, vandalised and degraded
Gem Plastics	9 Pemberton St	1224	2864 Machine Tool and Part Manufacturing	3	3	Y	5	Brick building with trees in front
Scaffolding	10 Pemberton St	333	2749 Structural Metal Product Manufacturing n.e.c.	3	0	Y	1	Tin and brick shed with big yard of steel and wire fence
Perfect Spray Solutions	11 Pemberton St	1224	4244 Painting and Decorating Services	3	3	Y	5	Brick building with planted flower garden

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EI CID Marbleworks	12 Pemberton St	517	2640 Non-Metallic Mineral Product Manuf n.e.c.	4	2	Y	2	Painted brick building vandalised and looks unused/vacant
Vacant	14 Pemberton St	1473	Vacant	3	0	Y	2	Vandalised brick building
Art of Stone	15 Pemberton St	1186	2640 Non-Metallic Mineral Product Manuf n.e.c.	6	5	Y	5	Textured painted plaster with trees planted
Baxter Constructions & Refurbishment & Timber Joinery	17-19 Pemberton St	1594	2949 Manufacturing n.e.c.	5	8	Y	6	Trees in front, brick building
Nu Tek Recycled Work Stations	31 Pemberton St	837	5231 Furniture Retailing	4	2	Y	3	Brick building with sparse trees in front, mostly concrete and furniture stacked in yard
Competitive Joinery	33 Pemberton St	969	2323 Wooden Structural Component Manuf	5	0	Y	4	Painted plaster building with plants in front
Excalibur Aluminium	35-39 Pemberton St	367	2822 Boat building	4	2	Y	5	Painted brick, gardens and trees with vandalism
Eastern Suburbs Wrought Iron	35-39 Pemberton St	679	2711 Basic Iron and Steel Manufacturing	4	2	Y	5	Painted brick, gardens and trees with vandalism
Intrammar	38 Pemberton St	400	6620 Services to Water Transport	5	0	Y	4	Brick building with trees in front
UFreight	40 Pemberton St	400	6620 Services to Water Transport	5	0	Y	4	Brick building with trees in front
Storage	41 Pemberton St	286	6709 Storage n.e.c.	3	0	Y	4	Brick building with trees in front, this is storage for a shop on Botany Road
Price & Speed Containers/Price & Speed Forks	42-44 Pemberton St	33239	6620 Services to Water Transport	5	40	Y	4	Containers with trees on street and lage brick building
Budget Stickfast Labels	43 Pemberton St	277	4795 Paper Product Wholesaling	3	0	Y	3	Brick building with broken windows and 1 tree
Motor Car Workshop	45 Pemberton St	194	5329 Automotive Repair and Services n.e.c.	4	0	Y	3	Painted brick building with signs on and small scrubs in front
P&B Auto Body Repairs	47 Pemberton St	196	5323 Smash Repairing	4	0	Y	3	Painted brick building with signs on and small scrubs in front
Price & Speed Containers/Price & Speed Forks	53 Pemberton St	2305	6620 Services to Water Transport	3	0	Y	5	Tin shed, containers in yard, trees across front
Australian Dyers & Bleachers	54-58 Pemberton St	30670	2229 Textile Product Manufacturing n.e.c.	4	0	Y	5	Plaster building with trees covering the front
Lanolin Industries / Tallow Products	55 Pemberton St	1220	Organic Industrial Chemical Manufacturing n.e.c.	3	0	Y	2	Wooden fence plus 2 trees and tin shed and drums
Michael Spies & Sons P/L	2-4 Rancom St	802	4232 Storage n.e.c.	6	2	Y	6	New brick building with garden
House	6 Rancom St	302	Residential	4	1	Y	4	Part of painted timber duplex house with garden
House	8 Rancom St	302	Residential	4	1	Y	4	Part of painted timber duplex house with garden
QVS Property Maintenance	10 Rancom St	431	4112 Residential Building Construction n.e.c.	5	3	Y	6	Brick building with trees in front
House	12 Rancom St	227	Residential	2	0	Y	3	Painted fibro house with garden
Rancom AN Furniture	12A Rancom St	250	2929 Furniture Manufacturing n.e.c.	3	3	Y	2	Brick concrete, tucked behind end of street
Capitol Carpets	12 Rancom St	250	2222 Textile Floor Covering Manufacturing	3	3	Y	2	Brick concrete, tucked behind end of street
Atletico	1 Rochester St	234	2241 Men's and Boy's Wear Manufacturing	5	1	Y	5	Fence around building with trees
House	2 Rochester St	229	Residential	2	0	Y	2	Fibro House small yard with broken wooden fence
Tanti Demolition & Excavation + Former Glory	3 Rochester St	473	Industrial Machinery and Equipment Manufacturing n.e.c.	4	5	Y	6	Plaster and timber building with concrete walls to road and trees
Panasonic Service Centre	4 Rochester St	229	7833 Computer Maintenance Services	5	2	Y	5	Brick building with concrete yard and plants

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Canada bathroomware + Clear Solutions Group	6 Rochester St	383	4111 House Construction	5	3	Y	4	Concrete yard and brick house
House	7 Rochester St	467	Residential	5	0	Y	5	Timber house
Vacant	8 Rochester St	477	Vacant	5	3	Y	4	Concrete yard and brick house
Marylee & VJ Accessories	9 Rochester St	508	2249 Clothing Manufacturing n.e.c.	5	3	Y	6	Tin shed extended on brick shed, concrete yard with big trees
Vacant	10 Rochester St	490	Vacant	5	3	Y	4	Concrete yard and brick house
The Sheepskin Tannery	11 Rochester St	435	2261 Leather Tanning and Fur Dressing	6	3	Y	6	Brick building with concrete yard and big trees
Bivio Quality Food	12 Rochester St	494	4719 Grocery Wholesaling n.e.c.	5	3	Y	5	Brick building with trees in the yard
Harris Lambswool Products	13 Rochester St	482	2261 Leather Tanning and Fur Dressing	8	2	Y	5	New brick house with concrete yard and big tree
Pisani International	14 Rochester St	859	2640 Non-Metallic Mineral Product Manuf n.e.c.	7	3	Y	4	Concrete yard with trees on street and brick building
McLeods Garage and House	15 Rochester St	476	5323 Smash Repairing	2	0	Y	3	Fibro house degraded, tin shed out the back with trees in the yard
Gold Star	16 Rochester St	859	2179 Non-Metallic Mineral Product Manuf n.e.c.	7	3	Y	4	Concrete yard with trees on street and brick building
Unknown	17 Rochester St	466	Unknown	5	3	Y	4	Brick house with tree in concrete yard
Vacant	18 Rochester St	859	Vacant	7	10	Y	4	Concrete yard with trees on street and brick building
House	19 Rochester St	475	Residential	5	0	Y	6	Timber house with new paint work
Bakery Fournil 97	23 Rochester St	487	2162 Cake and Pastry Manufacturing	8	4	Y	4	Concrete yard with trees on street and brick building
Chaircraft Furniture	23 Rochester St	654	2929 Furniture Manufacturing n.e.c.	4	5	Y	4	Brick building, ugly and 2 trees in front
Quiet A Drive	27 Rochester St	502	5329 Automotive Repair and Services n.e.c.	4	0	Y	4	Brick building, ugly and 2 trees in front
AAA Bab/ Roche Motor Wrecking	29-31 Rochester St	1674	5329 Automotive Repair and Services n.e.c.	4	0	Y	4	Brick building, ugly and 2 trees in front
Wizardry Imaging & Signs	1-3 Salisbury St	1061	2854 Electric Light and Sign Manufacturing	3	1	Y	3	Cracked brick building with concrete yard and 1 tree
K&K Shopfitters	2A Salisbury St	473	2929 Furniture Manufacturing n.e.c.	4	4	Y	3	Brick building with concrete yard and grass and trees on curb
EHP Productions	4-6 Salisbury St	421	9111 Film and Video Production	4	4	Y	3	Brick building with small garden
AB Autopack	5 Salisbury St	733	2863 Food Processing Machinery Manufacturing	8	10	Y	7	Modern building with concrete yard and trees
Vacant Lot	8 Salisbury St	494	Vacant	0	0	Y	0	Grassy lot with broken wooden fence in front
Euro Automotive Service Centre	7-9 Salisbury St	494	5329 Automotive Repair and Services n.e.c.	8	1	Y	6	Modern building with planted garden well kept.
House	10 Salisbury St	252	Residential	4	0	Y	3	Timber house that requires some work
Aquaqueen Australia Spring Water	11 Salisbury St	493	5129 Specialised Food Retailing n.e.c.	4	2	Y	4	Brick building with concrete yard and 1 tree
House	12 Salisbury St	252	Residential	4	0	Y	5	Painted timber house with garden
Lane & Miles Engineering	13 Salisbury St	250	7823 Consulting Engineering Services	2	0	Y	2	Tin shed hidden behind house
House	13 Salisbury St	250	Residential	3	0	Y	3	Painted timber house with well kept garden and broken fence
House + Green Loch & Co Pty Ltd	14 Salisbury St	481	4111 House Construction	5	2	Y	3	Brick building with lots of windows, concrete yard and small trees
Apollo Partitions & Joinery	15 Salisbury St	485	2929 Furniture Manufacturing n.e.c.	4	2	Y	3	Brick building with only concrete in yard
Soche Self Service Catering	17 Salisbury St	492	5129 Specialised Food Retailing n.e.c.	9	5	Y	5	Modern building with garden that needs work

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Takeaway shop + House	19 Salisbury St	494	5125 Takeaway Food Retailing	7	0	Y	5	Modern building with signage for takeaway lunch shop right on street. Owners live in house behind.
House	21 Salisbury St	484	Residential	3	0	Y	3	Crumbling brick house with degraded garden
House	23 Salisbury St	499	Residential	4	0	Y	6	Well maintained timber house and garden
Bathis & Borg Auto Services	25-27 Salisbury St	951	5329 Automotive Repair and Services n.e.c.	6	6	Y	6	Brick and painted tin building with a tree garden
Taxi Battery Services	29 Salisbury St	476	2859 Electrical and Equipment Manuf n.e.c.	5	2	Y	4	Brick building
Ellis Plumbing behind House	31 Salisbury St	483	4231 Plumbing Services	7	3	Y	6	Modern house and brick shed for plumbing, well kept house and garden, family lives in house and he works out the back
House	33 Salisbury St	453	Residential	5	0	Y	3	Degraded timber house recently bought by a young couple for \$480,000, they are currently upgrading the inside and will upgrade the outside later.
Tinker Engineering Condensing Vaporisers	1 Sir Joseph Banks St	494	2949 Manufacturing n.e.c.	5	1	Y	3	New brick building with rubbish out front
Tinker Welding	3 Sir Joseph Banks St	733	2749 Structural Metal Product Manufacturing n.e.c.	5	1	Y	3	New brick building with rubbish out front
Upholstery Storage	4-10 Sir Joseph Banks St	3505	6709 Storage n.e.c.	3	2	Y	3	Degraded brick building with trees in front
New Era Balustrading	5 Sir Joseph Banks St	663	2769 Fabricated Metal Product Manuf n.e.c.	3	0	Y	1	Brick building with vandalised gardens overgrown
AGL Networks	7 Sir Joseph Banks St	812	3610 Electricity Supply	4	0	Y	5	Barbed wire fence surrounding brick sheds with grass and trees around
Ventshaft Restoration Services	11 Sir Joseph Banks St	541	2929 Furniture Manufacturing n.e.c.	4	3	Y	2	Brick building with concrete yard only
PIP General Engineering & Fabrication	3/12 Sir Joseph Banks St	2288	2949 Manufacturing n.e.c.	3	2	Y	3	Degraded brick building with trees in front
Eastside Collision Centre	4/12 Sir Joseph Banks St	2288	5329 Automotive Repair and Services n.e.c.	3	2	Y	3	Degraded brick building with trees in front
Carala Taverson	5/12 Sir Joseph Banks St	2288	2929 Furniture Manufacturing n.e.c.	3	2	Y	3	Degraded brick building with trees in front
Poche Engineering P/L Induction Hardening	14 Sir Joseph Banks St	2288	2764 Metal Coating and Finishing	3	2	Y	3	Degraded brick building with trees in front
Vacant	13 Sir Joseph Banks St	529	Vacant	7	1	Y	6	Modern building with concrete yard
House	15 Sir Joseph Banks St	540	Residential	2	1	Y	2	Run down timber house
	Lane, Sir Joseph Banks St	131	Laneway					
House	17 Sir Joseph Banks St	277	Residential	3	0	Y	3	Rundown brick house
Standard Knitting Mills	16-18 Sir Joseph Banks St	6305	2229 Textile Product Manufacturing n.e.c.	2	0	Y	3	Old brick sheds and new tin sheds out the back, parts are very run down and degraded, trees in from
Tree Services	19 Sir Joseph Banks St	534	4122 Non-Building Construction n.e.c.	6	2	Y	6	Timber house with new roof and well kept garden
L&T Drilling + Delta Tools	20 Sir Joseph Banks St	719	2949 Manufacturing n.e.c.	3	2	Y	3	Brick building, degraded but trees surround
Paper Manufacturer	21 Sir Joseph Banks St	538	2331 Pulp, Paper and Paperboard Manufacturing	4	1	Y	3	Brick house with big windows and big tree concrete
Lafayette Printing	22 Sir Joseph Banks St	584	2412 Printing	3	2	Y	3	Brick building, degraded but trees surround
Vacant (formerly Bart-Letts Move)	23 Sir Joseph Banks St	536	Vacant	4	1	Y	3	Brick building with concrete and garden in front of fence
Davis & Reed	24 Sir Joseph Banks St	671	2921 Wooden Furniture & Upholstered Seat Manuf	3	2	Y	3	Brick building, degraded but trees surround
Price & Speed	25 Sir Joseph Banks St	530	6622 Water Transport Terminals	4	1	Y	3	Brick building with concrete and garden in front of fence

Business name/description	Address	Area M ²	Code ANZSIC Industry	Building Quality	Parking Site	Street	Presen- tation	Comments
Furniture Manufacturer	26 Sir Joseph Banks St	439	2921 Wooden Furniture & Upholstered Seat Manuf	3	2	Y	3	Brick building, degraded but trees surround
Supply Corp	27 Sir Joseph Banks St	544	4799 Wholesaling n.e.c.	7	2	Y	8	Modern building with brick paving out front and gardens
Vacant former Greka Refrigeration	28 Sir Joseph Banks St	405	Vacant	3	2	Y	3	Brick building, degraded but trees surround
Powerflo & Amazon Controls	29 Sir Joseph Banks St	544	2849 Electronic Equipment Manufacturing n.e.c.	7	3	Y	8	Modern building with brick paving out front and gardens
Johnston Transport Industries	30 Sir Joseph Banks St	12098	6709 Road Freight Transport	4	20	Y	3	Brick building with gardens all around
FHD Forklift Services	31 Sir Joseph Banks St	437	2865 Lifting & Material Handling Equipment Manuf	4	2	Y	3	Brick building with concrete yard
Perma Donovan Industries	33 Sir Joseph Banks St	832	9521 Laundries and Dry-Cleaners	4	3	Y	3	Brick building with concrete yard
Vacant	35 Sir Joseph Banks St	615	Vacant	4	2	Y	3	Brick building with concrete yard
Precision Auto Spare	36 Sir Joseph Banks St	2305	5329 Automotive Repair and Services n.e.c.	5	8	Y	5	Brick building with gardens
Timber Storage/Manufacturers	38 Sir Joseph Banks St	1389	2313 Timber Resawing and Dressing	5	8	Y	5	New brick building with fence and trees around
Standard Knitting Mills	40 Sir Joseph Banks St	5841	2229 Textile Product Manufacturing n.e.c.	4	20	Y	4	Brick and painted tin building with fence and trees all around
Metal works	2-4 Tenterden Rd	636	2729 Basic Non-Ferrous Metal Manuf n.e.c.	9	4	Y	6	New brick building, modern with big tree
Nicoloau & Sons Wrought Iron Powder Coating, Steel Coating	5 Tenterden Rd	405	2749 Structural Metal Product Manufacturing n.e.c.	4	2	Y	3	Brick building with gates displayed on wall
Auto Repair Centre LR Prestige Performance	6 Tenterden Rd	247	5329 Automotive Repair and Services n.e.c.	4	1	Y	3	Painted brick building with big tree in front
Botany Steel Supply & Fabrication	7 Tenterden Rd	405	2749 Structural Metal Product Manufacturing n.e.c.	3	1	Y	3	Brick building with new fence and trees
Botany Tyres & Wheel Alignment	8 Tenterden Rd	247	5324 Tyre Retailing	4	1	Y	4	Run down Painted brick building with big tree
BJ Auto Repairs	10 Tenterden Rd	376	5329 Automotive Repair and Services n.e.c.	4	1	Y	2	Brick building with bare yard
Moseley Auto Repairs	12 Tenterden Rd	387	5329 Automotive Repair and Services n.e.c.	4	1	Y	2	Brick building with bare yard
Unknown	13 Tenterden Rd	623	Unknown	4	0	Y	2	Crates in front
FJB Auto Body	14 Tenterden Rd	376	5323 Smash Repairing	4	2	Y	3	Brick building with trees on street
House	15 Tenterden Rd	496		4	2	Y	3	Brick house with bare small garden
House	16 Tenterden Rd	785	Residential	6	0	Y	7	Timber house with new paint and good garden
Dawn Trading	17 Tenterden Rd	490	2942 Residential	4	2	Y	3	Brick house with bare small garden
Goodearl & Baily; Instant Commercial/Rostone Print	18 Tenterden Rd	489	2412 Printing	4	3	Y	4	Brick building with garden in front
House	19 Tenterden Rd	338	Residential	7	0	Y	9	Well kept timber house with garden
A-Z Roofing Supplies	20 Tenterden Rd	419	4223 Roofing Services	4	0	Y	4	Brick building with garden in front
House	21 Tenterden Rd	200	Residential	9	0	Y	9	Modern new house, well kept
House	22 Tenterden Rd	486	Residential	5	0	Y	4	Run down timber house peeling paint and overgrown garden
Marble Renewal + House	23 Tenterden Rd	504	Non-Metallic Mineral Product Manufacturing n.e.c.	3	2	Y	4	Timber house and brick workshop out back, walls and trees surround
House	24 Tenterden Rd	513	Residential	5	0	Y	8	Brick house, well kept

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Bulluss Bros Traditional Pie Co.	26 Tenterden Rd	258	2179 Food Manufacturing n.e.c.	4	1	Y	3	Brick building with broken bricks on footpath in front and 1 tree
House	26 Tenterden Rd	258	Residential	1	0	Y	1	Very run down house with broken glass, vandalism and looks like squatter house
House	3 Wilson St	280	Residential	6	0	Y	7	Painted brick building with garden
House	5 Wilson St	310	Residential	4	1	Y	4	Timber house with no garden and new fence
House	5A Wilson St	336	Residential	4	1	Y	4	Timber house with no garden and new fence
House	7 Wilson St	184	Residential	3	1	Y	3	Timber house with no garden
House	7A Wilson St	184	Residential					Timber house with no garden
Vacant	9-17 Wilson St	4771	Vacant	0	0	Y	1	No building, wire fence with plastic on it
Color Factory	1/19-21 Wilson St	666	2412 Printing	5	8	Y	5	Brick building with trees and garden in front
Autofridge Australia	2/19-21 Wilson St	666	4111 Household Appliance Manufacturing	5	8	Y	5	Brick building with trees and garden in front
Airgonomic Seating Systems	3/19-21 Wilson St	666	2929 Furniture Manufacturing n.e.c.	5	8	Y	5	Brick building with trees and garden in front
Vacant	4/19-21 Wilson St	666	Vacant	5	8	Y	5	Brick building with trees and garden in front
S&H Automotive + Staples Automatic Transmission	23 Wilson St	1095	5329 Automotive Repair and Services n.e.c.	2	5	Y	2	Degraded brick building with tin buildings and car yard
DHX Ocean Air Freight	25-33 Wilson St	3591	6630 Services to Air Transport	4	0	Y	4	Brick building with few trees in front and litter in yard
Gardner Perrott	25-33 Wilson St	350	4259 Construction Services n.e.c.	4	0	Y	4	Brick building with few trees in front and litter in yard