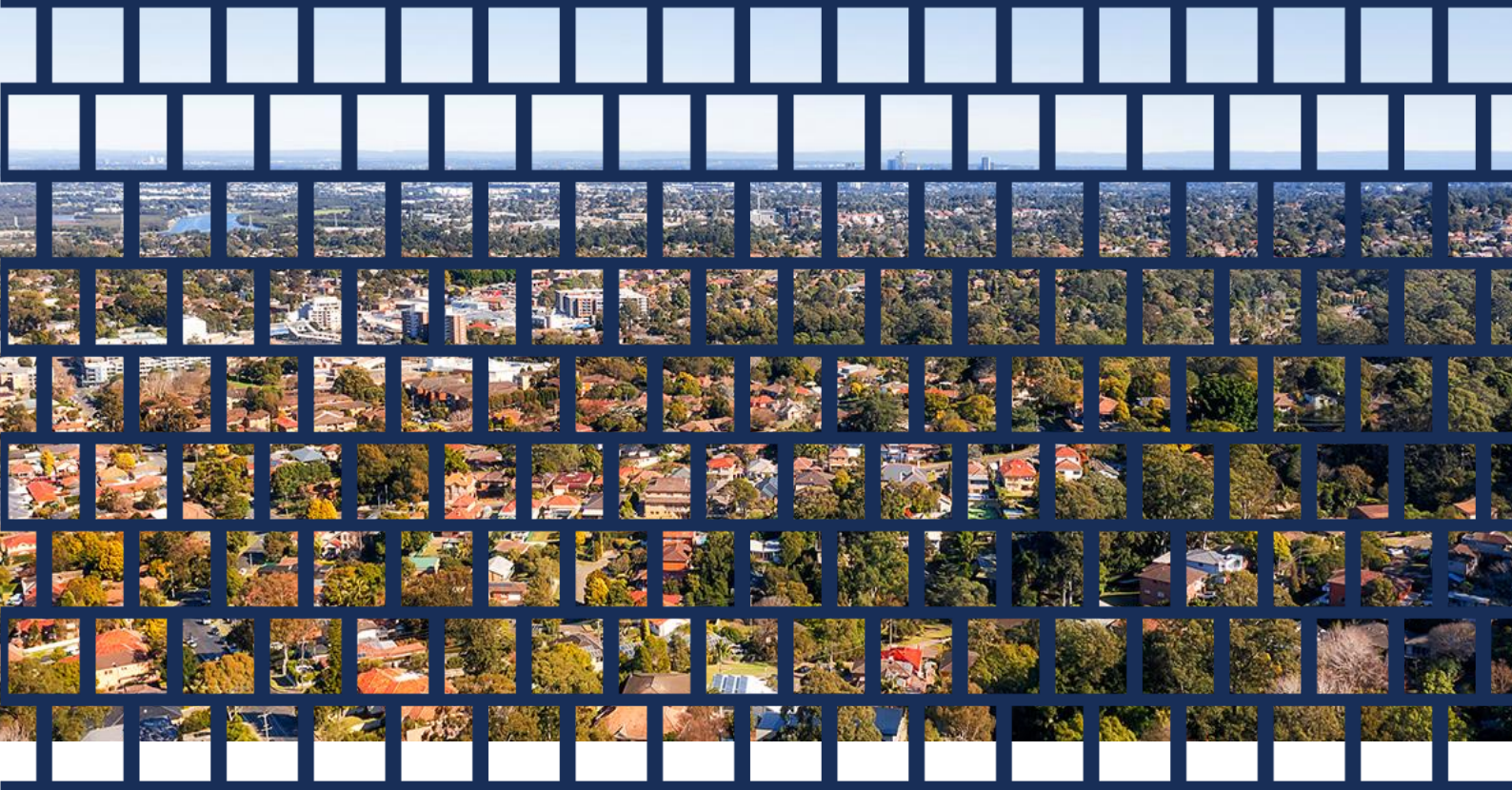
Employment land study

Background report



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HillPDA CONSULTING

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This document is for discussion purposes only unless signed and dated by a Principal of HillPDA.

Reviewer

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Acknowledgment of Country

We acknowledge the Traditional Custodians of the land on which we live, work and play.

We pay our respects to Darkinjung country, and Elders past and present. We recognise the continued connection to these lands and waterways and extend this acknowledgement to the homelands and stories of those who also call this place home. We recognise our future leaders and the shared responsibility to care for and protect our place and people.

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INTRODUCTION

1.0 INTRODUCTION

HillPDA was commissioned by Central Coast Council (Council) to undertake a review of employment lands within the Central Coast Local Government Area (LGA). This review includes an analysis of market trends and drivers, identifying supply and capacity, and projecting future floorspace/land requirements to accommodate additional growth required to meet employment/population targets.

1.1 Employment land uses

As defined by the Department of Planning and Environment's (NSW DPE), now known as the Department of Planning, Housing, and Infrastructure (DPHI), Employment Lands Development Monitor (ELDM), employment lands are defined as:

> *land zoned for industrial or similar purposes in planning instruments. They are generally lower density employment areas containing concentrations of businesses involved in: manufacturing; transport and warehousing; service and repair trades and industries; integrated enterprises with a mix of administration, production, warehousing, research and development; and urban services and utilities.*

Employment lands are vital to the functioning of urban areas, providing space for:

- Essential services such as waste and water management, repair trades and construction services
- Warehousing, logistics and distribution centres
- Areas for businesses that design, manufacture and produce goods and services.

Employment lands primarily encompass land zoned as E3 Productivity Support; E4 General Industrial; W4 Working Waterfront; and SP4 Enterprise.

1.2 Employment land strategy objectives

The purpose of the employment land study and strategy is to:

- Provide a clear vision and strategic direction to inform preparation of future LEPs and DCPs and appropriate development controls regarding land uses and development, and
- Provide clear principles and actions to guide future decision making by Council regarding preparation of planning proposals for suitable and capable employment lands, particularly to:
    - Protect strategically important employment lands; and
    - Inform consideration of planning proposals (rezoning) of new employment lands.

1.3 Approach

A two-phase approach was undertaken for the project resulting in a background evidence base report and a separate strategy document.

- Phase 1: The Background Report provides a robust evidence base to inform the strategy. It identifies and catalogues all employment lands in the LGA, explores planning, market and location context, considers constraints, analyses demographics and supply and demand, and describes consultation outcomes. The Background Report was prepared in 2023 and reflects a point in time.
- Phase 2: The Strategy: applies at an LGA level with precinct specific actions and recommendations. Overall, the Strategy establishes a clear direction for future industrial and urban service development across the Central Coast over the next 20 years.

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The following diagram provides an overview of the steps undertaken to prepare the Background report and Strategy.

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LOCATION CONTEXT

2.0 LOCATION CONTEXT

The Central Coast contains a significant amount of land zoned as employment lands. From Figure 1 and Figure 2 it can be seen that the Central Coast has the following strengths and opportunities:

- The Central Coast is uniquely positioned, being around 39 kilometres (km) to the north of Sydney and
- Parramatta Central Business Districts (CBD) and around 38 km to the south of Newcastle CBD.[1]
- This proximity and connection, via the M1 Pacific Motorway, to these locations provides an opportunity for increased investment for warehousing, freight and logistics businesses.
- The Central Coast contains Gosford Regional City and five Strategic Centres, these being Erina, Woy Woy, Wyong, Warnervale and Tuggerah. Future employment and population growth is to be concentrated in and around these centres. Most of the employment precincts are uniquely positioned near transport connections to provide industrial and urban support services to local and State population catchments.
- The South Growth Corridor extends from Somersby in the west to Erina in the east. Expansion of employment opportunities in this area coupled with the $170 million upgrade to the Central Coast Highway will generate opportunities and demand for employment precincts.
- The North Growth Corridor extends from Tuggerah in the south to Warnervale in the north. It includes Warnervale Town Centre, which will emerge as a new mixed-use strategic centre to service new communities and be potentially supported by a new transport interchange. The town centre and the wider Greater Warnervale area is expected to grow by 40,000 persons. These new residents will require employment opportunities and urban support services. The proximity of employment lands in this location could generate employment and services for the expanding population.
- The construction of transport infrastructure outside the region, such as the North Connex link between the M1 Pacific Motorway and the sqm Hills Motorway, is likely to drive demand for employment lands across the Central Coast; particularly those near major haulage routes and transport nodes.
- Clustering of warehousing, freight and logistics businesses is emerging around the M1 Pacific Motorway interchanges at Somersby, Tuggerah and Warnervale.
- The area's employment precincts are uniquely located near major transport links, large population and commercial centres, future release areas and identified growth areas. This provides them with high connectivity to these current and future population/employment areas both within the Central Coast and in surrounding localities. This increases their attractiveness for further investment and therefore may increase demand.

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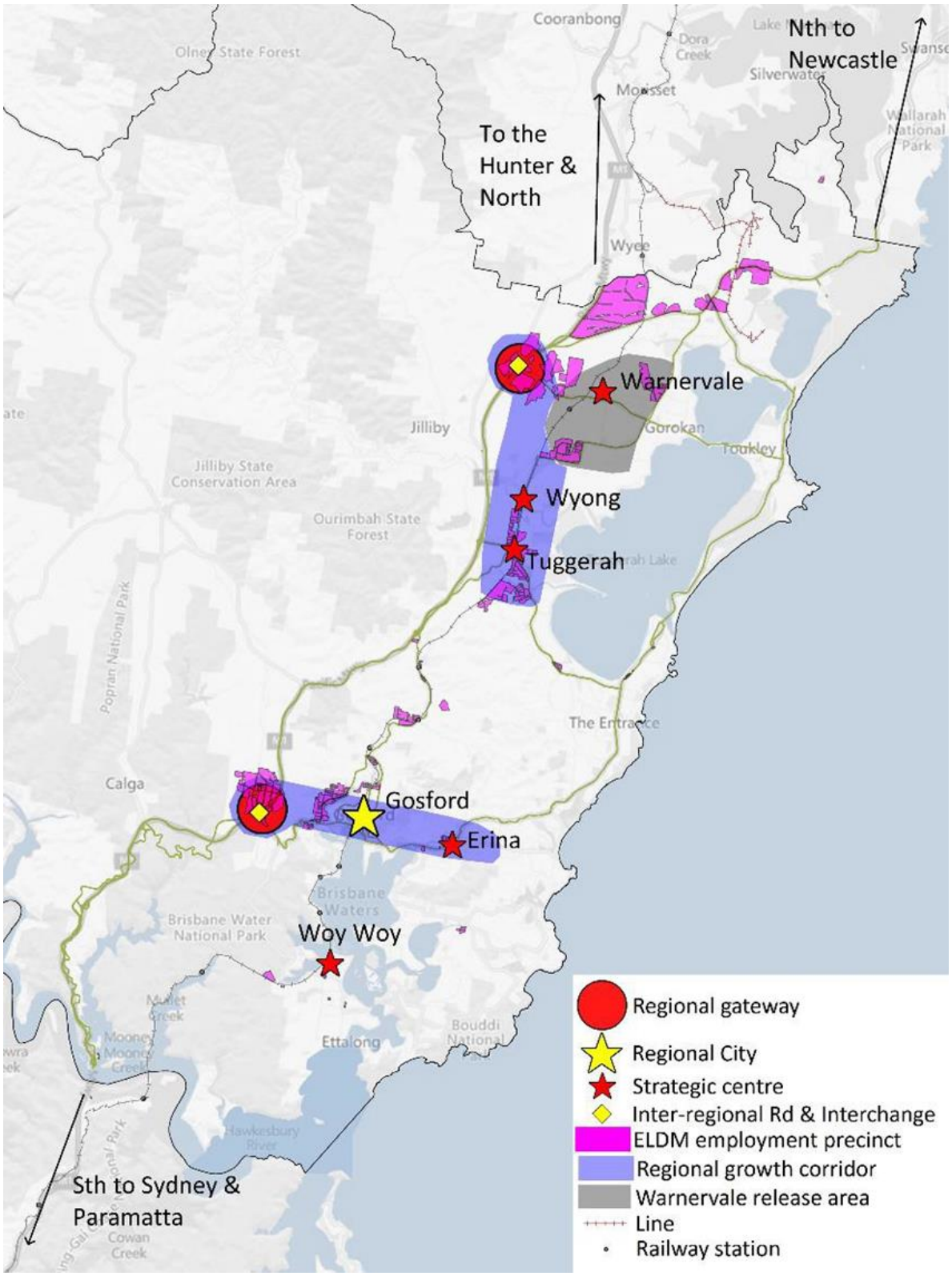
[1] Measured as the crow flies from northern and southern extent of the LGA boundary

Figure 1: Local context and key infrastructure/planning priorities



Source: HillPDA 2019

Figure 2: Central Coast regional connections

Source: Central Coast Regional Plan 2022

POLICY CONTEXT

3.0 POLICY CONTEXT

This chapter provides an overview of the relevant State and local government planning documents that can influence employment land.

These have been grouped by the strength of the relationship between the document and the impact on employment lands.

3.1 Group 1 – Direct impact for employment lands

a) Central Coast Regional Plan 2041 (2022)

Overview and purpose

The Central Coast Regional Plan 2041 (CCRP 2041) sets the long-term vision for the region. It provides clear objectives to pursue the vision and approaches for districts and growth areas.

The following objectives are of direct relevance to the ELS:

- Objective 1: A prosperous Central Coast with more jobs close to home.
- Objective 3: Create 15-minute neighbourhoods to support mixed, multi-modal, inclusive and vibrant communities.
- Objective 8: Plan for businesses and services at the heart of healthy, prosperous and innovative communities.

Impact on employment lands

The CCRP 2041 provides a strategic land use framework for continued economic growth and revitalisation. It articulates a regional vision with the below statement of relevance to the ELS:

> *'Continued supply of employment land in varying lot sizes and locations will help meet growing demand and provide for large and small businesses. With a shifting focus on supply chain reliability and timely access to goods and services, opportunities for strategically located employment lands will help meet these needs and challenges.' (p. 15)*

The Plan identifies the urban development program for managing land and housing supply and assisting infrastructure coordination. The program establishes benchmarks around land supply and engages a program committee to address barriers, oversee a pipeline of sustainable land supply and monitor progress.

b) Central Coast Regional Plan Implementation Plan (2018-2020)

Overview and purpose

The *Central Coast Regional Plan Implementation Plan 2018-2020* (Implementation Plan) identifies two-year priorities for the ongoing delivery of the Regional Plan. The Implementation Plan identifies 7 implementation focus areas.

Impact on employment lands

Focus areas one and three are most relevant to the employment land study – it is presented in the below graphic.

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Figure 3: CCRP Implementation Plan relevant focus areas

FA1 Promote economic growth, jobs and development in strategic centres and growth corridors.	Deliver the Southern Growth Corridor Strategy.	Central Coast Council
	Commence preparation of a precinct plan for one centre and deliver a precinct plan for another centre within the Southern Growth Corridor.	Central Coast Council
	Deliver the Northern Growth Corridor Strategy.	Central Coast Council
	Deliver the Lake Munmorah and Greater Warnervale Structure Plans.	Central Coast Council
FA3 Improve knowledge of housing and employment land supply and demand to support better decision making	Deliver a regionwide Special Infrastructure Contributions Plan.	Department of Planning and Environment
	Continue the Housing Supply Monitoring Program (including industry consultation).	Department of Planning and Environment
	Continue the Employment Lands Monitoring Program (including industry consultation).	Department of Planning and Environment
	Deliver the Future Transport Plan for the Central Coast.	Transport for NSW
	Deliver Central Coast Place Plans.	Transport for NSW
	Deliver an Active Transport Program.	Transport for NSW

Source: Central Coast Regional Plan Implementation Plan 2018-2020

c) Employment Strategy Guideline

Overview and purpose

The Department of Planning and Environment, now DPHI, published *A guideline for local employment land strategies* in July 2022. The guideline supports the development of strategies to shape future employment land within LGAs. The guideline assists Councils with the creation of a robust evidence base for future land use decisions.

Impact on employment lands

It is intended that following this guideline will ensure Councils' strategies align with regional and district planning and allow for successful implementation.

d) Somersby to Erina Corridor Strategy (2020)

Overview and purpose

The *Somersby to Erina Corridor Strategy* (SECS) arose from the Central Coast Regional Strategy 2036 and is reinforced in the CCRP 2041. The Somersby to Erina Growth Corridor is a regionally significant collection of six precincts linked by the Central Coast Highway. The corridor is centred around Gosford as a regional metropolitan centre and includes five other centres.

Impact on employment lands

The SECS directs the ELS to consider the sufficiency of the industrial land supply within the Somersby Employment Area, opportunities for the reuse for the Old Sydney Town site that are compatible with current employment and tourism uses, and implications of the Mount Penang Masterplan for the availability of employment lands. The strategy also states that the ELS should inform a new structure plan for the renewal of West Gosford as an employment area.

Council has reviewed land uses as part of the preparation of the ELS and employment zone review and the recommended actions for amendments to the CCLEP 2022 are included in the ELS implementation plan.

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e) Tuggerah to Wyong Economic Corridor Strategy (2020)

Overview and purpose

The *Tuggerah to Wyong Economic Corridor Strategy* (TWECS) arose from the CCRS 2036 and is reinforced in the CCRP 2041. The Tuggerah to Wyong Growth Corridor forms a vital component of this, comprising the 3 existing precincts at the southern end of the corridor, with the Greater Warnervale Structure Plan separately considering the release areas to the north. Significant employment land areas are located within the corridor surrounding the centre, including Tuggerah Business Park, Tuggerah Straight and North Wyong.

Impact on employment lands

The TWECS calls for the existing value of the area to be capitalised upon, and for Council to plan for the increased specialisation of industrial lands within the corridor, which should be considered in the strategies of the ELS.

The TWECS identifies a need to provide certainty about the future of employment lands, by resisting the urge to allow rezoning to residential uses. To that end, the strategy recommends attracting and retaining business and limiting extraneous uses (e.g. serviced apartments). The TWECS identifies a need to maintain and encourage employment uses in North Wyong and Tuggerah precincts to support future growth and development. The TWECS points to opportunities for increased specialisation in E3 Productivity Support areas (formerly B6) in North Wyong, with existing uses in Tuggerah Straight and Tuggerah Business Park to be maintained and enhanced.

Council has reviewed land uses as part of the preparation of the ELS and employment zone review and the recommended actions for amendments to the CCLEP 2022 are included in the ELS implementation plan.

f) Central Coast and Lake Macquarie Regional Economic Development Strategy – 2023 Update

Overview and purpose

Following the Regional Economic Development Strategy (REDS) 2018, a 2023 update was commissioned to respond to events following publication, including bushfires, floods, COVID-19, the mouse plague, and new economic opportunities. With an updated evidence base, the 2023 REDS Update reflects the altered landscape and sets out the long-term economic vision and strategy for the LGAs of Central Coast and Lake Macquarie.

Impact on employment lands

The aims and relevant specific actions of the REDS Update are to:

- Facilitate commercial, and industrial development through improved transport links.
- Support activation of commercial and industrial land identified under the Hunter and Central Coast Regional Plans, including the planning, prioritisation and delivery of enabling infrastructure to drive growth, including in support of the Hunter Central Coast REZ.
- Continue to prioritise transport infrastructure upgrades with a central focus on improved rail and freight links, arterial roads, and active transport infrastructure.
- Invest in the growth of innovative industries and employment opportunities.
- Develop collaborative education and employment programs between local education providers and emerging skills requirements, including in circular economy processing.
- Enhance the economic self-determination and socioeconomic wellbeing of Aboriginal communities by investing in and enabling Aboriginal-led economic development initiatives and programs.
- Realise economic opportunity in the health, aged care and education sectors.
- Investigate opportunities to facilitate increased provision of affordable key worker housing, including innovative approaches and delivery models, to meet current and future needs.
- Be a highly liveable region that is attractive to both commuters and visitors.
- Undertake precinct and master planning for key visitor nodes and interchanges.

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- Improve access to national parks and state forests to boost visitor capacity, especially during peak periods.

g) Central Coast Economic Development Strategy (2020)

Overview and purpose

The *Central Coast Economic Development Strategy* (CCEDS) provides Council's vision for the future of the LGA's economy to 2040. At the core of the strategy is a desire to future-proof the region's economy by building upon existing strengths and seizing emerging opportunities. The CCEDS was prepared during the COVID-19 pandemic and includes an Economic Recovery and Resilience Framework, which lays out Council's response to the economic challenges arising from the pandemic.

Impact on employment lands

The CCEDS identifies the strongest Central Coast industries as manufacturing (advanced manufacturing and food manufacturing), tourism, education (particularly universities), and health care and social assistance. It identifies opportunities for growth in aviation, education and tourism, while also identifying the opportunities presented by a broader relocation and decentralization trend, suggesting that the region can capitalise upon existing lifestyle and amenity benefits, with lower costs for businesses and workers.

The *Central Coast Economic Recovery and Resilience Framework* (CCERRF), aligned with the CCEDS, also includes a range of actions and an implementation framework aimed at supporting the region's recovery from the economic impacts of the COVID-19 pandemic. It will guide the ELS in terms of proposing to bring forward infrastructure expenditure, expedite processes, and reduce entry costs for firms.

h) Central Coast Local Environmental Plan 2022

Overview and purpose

The CCLEP 2022 is the local statutory framework that guides development and land use decisions throughout the Central Coast LGA. This is achieved through zoning and development standards, which provide a framework for the way land can be developed and used.

On 23 November 2016, Council resolved to prepare a planning proposal to consolidate the provisions of the Local Environmental Plans (LEPs) operating across the Central Coast LGA). Previously, the Central Coast operated under several planning instruments, each with different planning controls. Council also resolved to prepare a consolidated Development Control Plan (DCP) to harmonise planning controls.

Council undertook extensive consultation over a four-year period (between 2016 and 2020) with the community and stakeholders including agencies and Councillors. On 14 December 2021, Council adopted the *Central Coast Local Environmental Plan* 2022 (CCLEP 2022) and *Central Coast Development Control Plan 2022* (CCDCP 2022) and they came in to effect on 1 August 2022.

Impact on employment lands

A full review of the Local Environmental Plan and Development Control Plan is contained in Chapter 11.

i) Greater Warnervale Structure Plan 2024

Overview and purpose

The Greater Warnervale Structure Plan 2024 provides a high-level strategic framework to guide the sustainable growth of the Greater Warnervale study area over the next 20 years, accommodating an increase in population from approximately 20,162 to 57,000 people. The plan divides the study area into 10 distinct precincts:

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- Precinct 1 – Wyong Employment Zone
- Precinct 2 – Warnervale Village
- Precinct 3 – Wallarah Residential
- Precinct 4 – Warnervale Town Centre
- Precinct 5 – Wadalba
- Precinct 6 – Hamlyn Terrace
- Precinct 7 – Woongarrah Residential
- Precinct 8 – East Wadalba
- Precinct 9 – Medical
- Precinct 10 – Charmhaven

The plan reviews economic trends, demand for employment lands, housing needs, land use and infrastructure requirements. The plan includes a detailed implementation strategy that identifies the key actions, along with the expected timing and responsible organisations. While the plan does not directly amend current planning controls, it anticipates that its outcomes will be realised through local planning proposals, rezoning efforts and supporting documents like Place Plans and public domain strategies.

Impact on employment lands

The plan includes direct implications for employment lands in Greater Warnervale. This encompasses undeveloped employment lands in Precinct 1 – Wyong Employment Zone, a new employment precinct in Precinct 2 – Warnervale Village, and an expansion to the employment lands within Precinct 10 – Charmhaven. Accordingly, the strategy should closely align with the proposed employment precinct.

j) Greater Lake Munmorah Structure Plan 2022

Overview and purpose

The Greater Lake Munmorah Structure Plan provides a 20-year framework to guide the area's growth from 8,407 to approximately 15,000 people. The study area covers the suburbs of Lake Munmorah, Kingfisher Shores, Doyalson North, Chain Valley Bay and a small area of Crangan Bay. It is further divided into 10 distinct precincts, identified based on existing and future predominant land use directions:

- Precinct 1- Biodiversity Corridor
- Precinct 2- Employment Lands
- Precinct 3- Kingfisher Shores
- Precinct 4- Sporting field
- Precinct 5- Saliena Avenue
- Precinct 6- Kamilaroo Avenue
- Precinct 7- Chain Valley Bay
- Precinct 8- Northern Lake Munmorah
- Precinct 9- Southern Lake Munmorah
- Precinct 10- Carters Road School Precinct

The plan aims to establish a comprehensive development framework supporting future growth and prosperity by defining suitable areas for new residential and employment developments. It identifies appropriate transport, environmental and open space networks to accommodate projected population growth, while guiding the development of detailed planning instruments and higher-level planning tools like Place Plans and Public Domain Plans.

Impact on employment lands

The plan specifically impacts employment lands in Precinct 2- Employment Lands within the study area. The plan proposes new employment land, aiming to facilitate the development of a large employment zone in the western part of the study area. Accordingly, the strategy should closely align with the proposed employment precinct.

3.2 Group 2 – Broader impact for employment lands

a) Greater Cities Commission Six Cities Region Discussion Paper

Overview and purpose

The six cities concept, outlined in the Greater Cities Commission Six Cities Region Discussion Paper, evolved from the 2018 Greater Sydney plan, A Metropolis of Three Cities. The Greater Sydney Plan presented a vision and actions for managing Greater Sydney's growth and improving liveability, establishing the Western Parkland City, Central River City and the Eastern Harbour City. Since the release of this document, issues associated with declining housing affordability and supply, climate vulnerability, social inequality and challenges with infrastructure alignment have emerged.

In response, the Greater Cities Commission (now DPHI) released the Greater Cities Commission Six Cities Region Discussion Paper in September 2022. The Discussion Paper establishes a Six Cities Region which spans the Parkland City, Central River City and Eastern Harbour City. The Paper provides a vision for developing Australia's first global multi-city region.

The Plan proposes six 'Region Shapers' to frame the future Six Cities Region Plan and guide conversations with government, business, community, the not-for-profit sector and universities and research institutions, including:

- An embedded First Nations voice.
- A connected Six Cities Region.
- Housing supply, diversity and affordability.
- Inclusive places connected to infrastructure.
- Powering local jobs and economies.
- Climate-resilient green cities.

b) Hunter – Central Coast Renewable Energy Zone

Overview and purpose

The Hunter-Central Coast Renewable Energy Zone (REZ) has been identified as one of five Renewable Energy Zones. The REZ was formally declared by the Minister for Energy under section 19(1) of the Electricity Infrastructure Investment Act 2020 (the Act) and published in the NSW Gazette on 9 December 2022. REZs refer to areas with the greatest potential for renewable energy, such as wind, sunshine, rain, tides, waves and geothermal heat. These areas have been identified as geographically important locations where large-scale renewable energy projects can cluster to capitalise on economies of scale. The Hunter – Central Coast regions were selected for their energy resource potential, and the ability to utilise existing power stations, rehabilitated mining land, electricity network infrastructure, port and transport infrastructure and a skilled workforce.

c) Central Coast Strategy:

Recommended Priorities for Economic Growth was published in January 2023 by the Greater Cities Commission (GCC). In partnership with NSW Government agencies, local businesses, the local community, and Central Coast Council, the GCC developed the Central Coast Strategy to identify priority areas for action to generate employment in the region to meet anticipated population growth.

The Central Coast Strategy identifies seven 'priorities', within four overarching themes: jobs for the future, health and education, precinct connectivity, and planning. Those priorities and actions most relevant to the employment land strategy include:

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Table 1: Priorities and actions from the Central Coast Strategy

Priority	Action(s)
Priority 1: Driving innovation and industry collaboration	1. Develop innovation skills and a commercialisation program to support food tech start-ups and a food roundtable 3. Progress Central Coast innovation district vision and investment attraction
Priority 2: Unlocking employment lands and accelerating employment precincts	5. Seek funding or exchange land to support biodiversity offset scheme 7. Progress Central Coast Airport and Warnervale Employment Zone and coordination of plans 8. Progress Munmorah Power Station revitalisation and future land use. 9. Undertake traffic analysis for Mount Penang Employment Precinct 10. Progress Mount Penang employment precinct and Somersby Growth Area 11. Progress Tuggerah urban and business centre 12. Undertake Southern and Northern Growth Corridor traffic studies
Priority 5: Improving transport connectivity	22. Complete bus network review to connect to employment centres and rail stations
Priority 6: Delivering a high-speed internet network	23. Prepare a business case for a high-speed internet network for the Central Coast City 24. Request NBN to designate Warnervale a Business Fibre Zone
Priority 7: Planning	26. Support Council in the assessment of development applications and regionally significant development

Source: Greater Cities Commission (2023)

d) Future Transport Strategy (2022)

Overview and purpose

The *Future Transport Strategy* replaced the *Future Transport 2056: Shaping the Future* plan, published in March 2018. Developed in consultation across the NSW Government, the strategy guides future planning, investment, delivery and operations.

The Future Transport Strategy identified Transport's three high-level outcomes, those being:

1. Connecting customers' whole lives
2. Successful places for communities
3. Enabling economic activity

The Future Transport Strategy establishes intent to balance the needs of movement and efficient transport corridors with the desire for attractive places.

e) NSW State Infrastructure Strategy 2022-2042 (May 2022) Infrastructure NSW

Overview and purpose

The State Infrastructure Strategy 2022-2042: Staying Ahead establishes the Government's priorities for the next 20 years in terms of infrastructure delivery and investment. The plan identifies the following objectives:

Productivity and competitiveness

- Servicing growing communities
- Embedding reliability and resilience
- Transitioning to net-zero
- Water security
- Protection of biodiversity
- Emerging digital technologies
- Integration of infrastructure, land use and service planning, and infrastructure investment.

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f) Draft Central Coast Regional Transport Plan

Overview and purpose

The *Draft Central Coast Regional Transport Plan* is intended to act as a blueprint for how Transport for NSW will address the key trends and transport needs of the Central Coast through to 2041. The Plan provides a vision to ensure transport can support sustainable growth for an area predicted to grow by 70,000 people by 2041.

The need to coordinate key infrastructure, services and policy interventions has been identified. Presented through a series of challenges, opportunities and initiatives needed to address them, the Plan presents a strategic framework for how Transport will proactively respond to anticipated changes in land use, population, and travel demand across the region.

The plan further aims to encourage active transport by making walking, cycling and public transport an attractive alternative to private vehicles. The transport vision for the Central Coast will be achieved through the implementation of 16 key objectives and 80 supporting initiatives.

g) Employment Land Development Monitor 2022 Summary Report NSW Government

Overview and purpose

The *Employment Lands Development Monitor* (ELDM) presents an overview of the supply of industrial and business zoned land across the Sydney, Central Coast, Illawarra-Shoalhaven and Hunter Regions. It includes information relating to land stocks and availability, whether employment lands are serviced, where new or pipeline development is occurring, and the location of potential future employment lands identified in local and state government planning policies.

The Central Coast comprises the Central Coast LGA (previously reported as the Gosford and Wyong LGAs). As of January 2022, the ELDM identified a total of around 2,031ha of land zoned as employment lands across the Central Coast. Of this, only around 921ha (45%) was developed, with the remaining 1,110ha (55%) remaining undeveloped. In addition to zoned employment lands, the ELDM 2022 identified an additional 467ha of potential future industrial land within the North Wyong Shire Structure Plan area, with further investigation into these areas expected to occur at the precinct planning stage to assess suitability for development.

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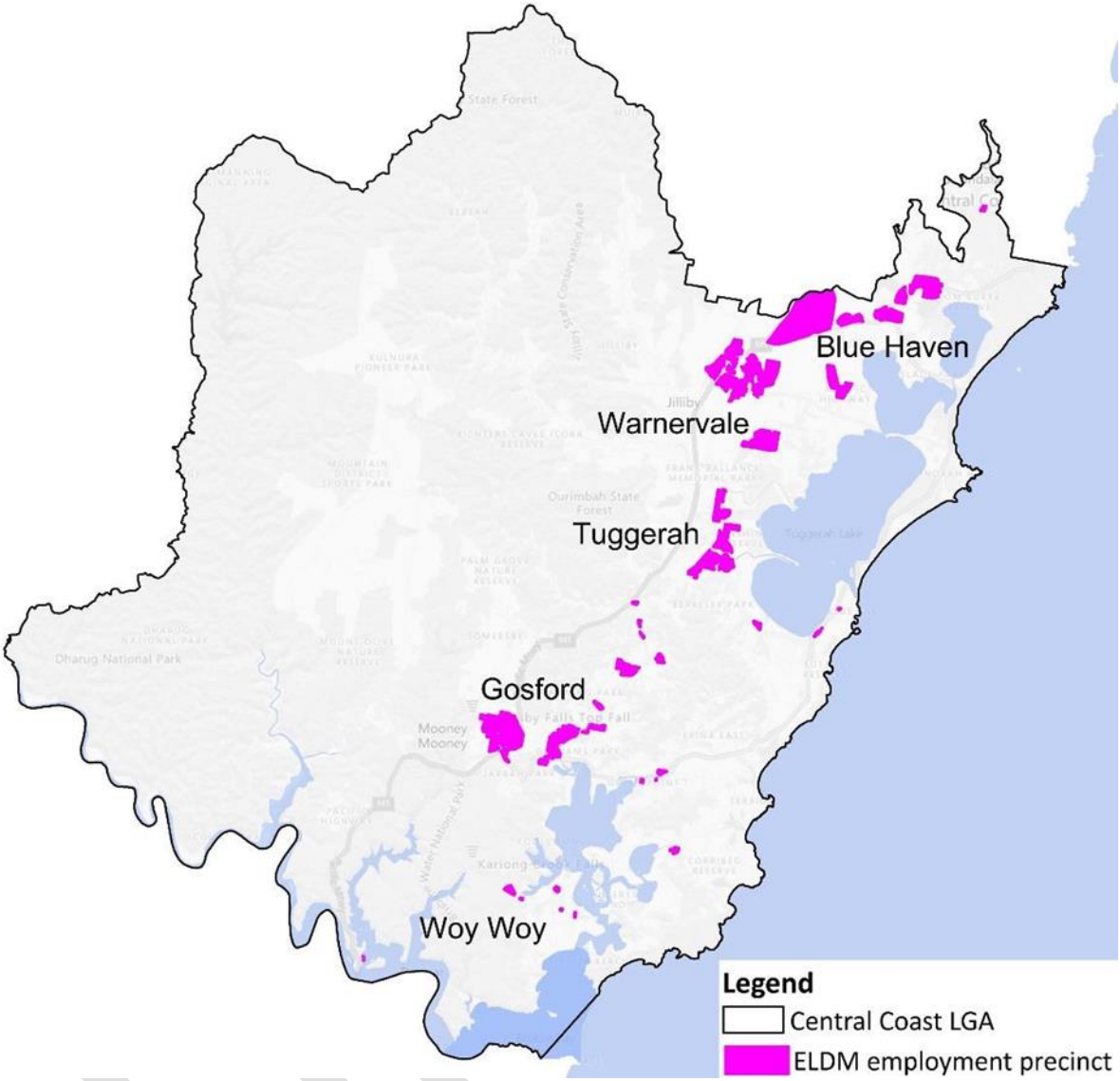
Figure 4: ELDM employment precincts

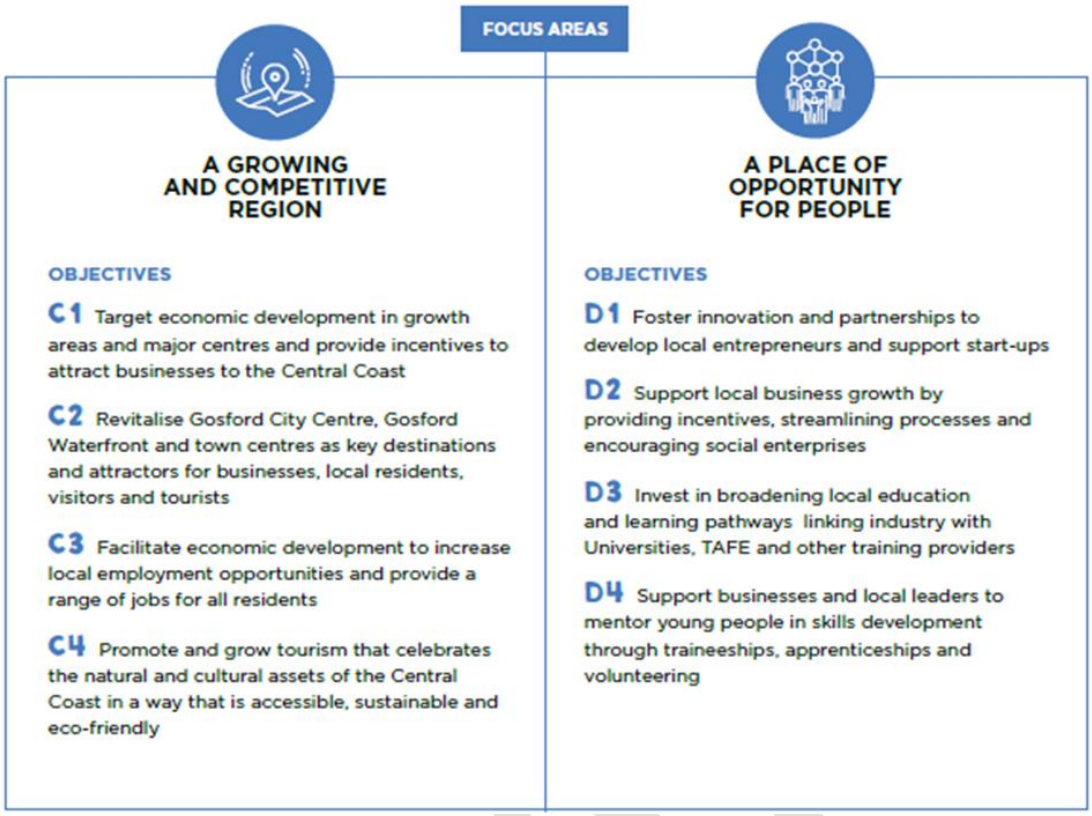


Source: HillPDA 2019 – information from ELDM 2018

h) One Central Coast Community Strategic Plan 2018

One Central Coast (Strategic Plan) is the strategic plan for the Central Coast community. The Strategic Plan identified a number of themes and focus areas to guide the future of the LGA. Of relevance to this strategy is the 'Smart' theme that incorporates the focus areas of:

Figure 5: Strategic Plan focus areas



Source: Central Coast Council, 2018

The objectives C1, C3 and D1 are of relevance to this study. Enhancing synergies between businesses and exploring partnerships with education institutes can also benefit employment lands.

i) Central Coast Local Strategic Planning Statement

Overview and purpose

The Central Coast Local Strategic Planning Statement (LSPS) provides a spatial framework to guide sustainable growth and development in the region through 2036 and beyond. It outlines the strategic direction that will shape future planning instruments, policies, and actions, which will be reflected in upcoming Central Coast Council Delivery Programs and Operational Plans.

The following planning priorities identified in the LSPS are of particular relevance to this Strategy:

- Planning Priority 11: Facilitate emerging logistics, warehousing, manufacturing and innovative green economy enterprises
- Planning Priority 12: Build the knowledge economy and support health and wellness industries
- Planning Priority 13: Grow regionally competitive tourism destinations across the Central Coast
- Planning Priority 14: Facilitate economic development to increase local employment opportunities for the community.

j) Central Coast Biodiversity Strategy 2020

Overview and purpose

The Central Coast Biodiversity Strategy 2020 responds to community feedback to prioritise the natural environment, as well as the amalgamation of the former Gosford and Wyong LGAs. It builds upon previous Council strategies to protect and enhance biodiversity across publicly and privately-owned lands. The strategy identifies priority conservation areas and aims to mitigate habitat loss and fragmentation, addressing emerging threats like climate change. Approximately 6,000 ha of Council-owned bushland and broader public reserves contribute to these preservation efforts, alongside national parks and state forests. The strategy outlines a 5-year plan focusing on conservation planning, community engagement, resourcing, land use planning and leadership in biodiversity conservation to ensure sustainable development and community benefit.

Impact on employment lands

The strategy does not directly impact employment lands given its primary focus on conserving biodiversity values and habitats. However, the strategy outlines high-priority conservation areas that should be considered when identifying suitable sites for new employment lands.

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MARKET TRENDS

4.0 MARKET TRENDS

The following section documents historic and emerging industry trends and resultant future implications to planning/demand for such land uses in the Central Coast.

4.1 Broader trends

Globalisation

Automation

Information technology

The demand for industrial floorspace in Australia continues to be influenced by the globalisation of trade, labour and production costs, the increasing dominance of information technology in production processes and access to primary goods.

4.2 Globalisation

The globalised economy comprises sophisticated linkages between businesses, which are adept in the efficient sharing of information and delivery of goods through a global supply chain. This supply chain, once thought of as the flow of goods through production to the end user, is now seen as an alignment of firms that design, develop, market and produce goods and services, and deliver them to the customer when needed.

Globalisation and the free movement of people, goods and services has increased the amount of competition and has resulted in a decline in the proportion of jobs within manufacturing industries.

Industrial floorspace used primarily for business related storage is in secular decline, whereas space built for the transferral of goods is increasing. This 'high throughput distribution' space is essentially designed to facilitate the rapid movement of goods through the supply chain. Businesses with low inventory turnover are gravitating to inexpensive land and low-cost buildings.

In contrast, businesses that have high inventory turnover and high value products, and typically provide value added functions (including product customisation, packaging and customs) are more prepared to pay a premium for superior access to a large customer base and proximity in time and space to roads, ports and airports.

As a result of the industrial trends described above, over the last thirty-eight years (1985-2023) the development of industrial land and floorspace in NSW has generally occurred at a rate slower than overall employment growth. This, however, has varied considerably between specific sectors of industrial activity. Employment in manufacturing and wholesale trade has steadily decreased in NSW over the period (overall employment down 33% and 23%, respectively). In contrast to this pattern has been the performances of transport and storage, which have shown strong growth with a 77,380 (52%) increase in jobs. This is partly a result of increased demand for 'last mile' delivery and storage spaces close to where customers reside.

This economic trend may be summarised by the fact that traditional manufacturing is changing and becoming more efficient in its processes because of the use of new technologies and equipment. These greater efficiencies in many cases have not resulted in a decline in output or the need for floorspace, but rather a reduction in the number of employees required. It must be noted that the COVID-19 pandemic disrupted global supply chains, which resulted in a renewed focus on locally manufactured goods. This is reflected in the recent growth in

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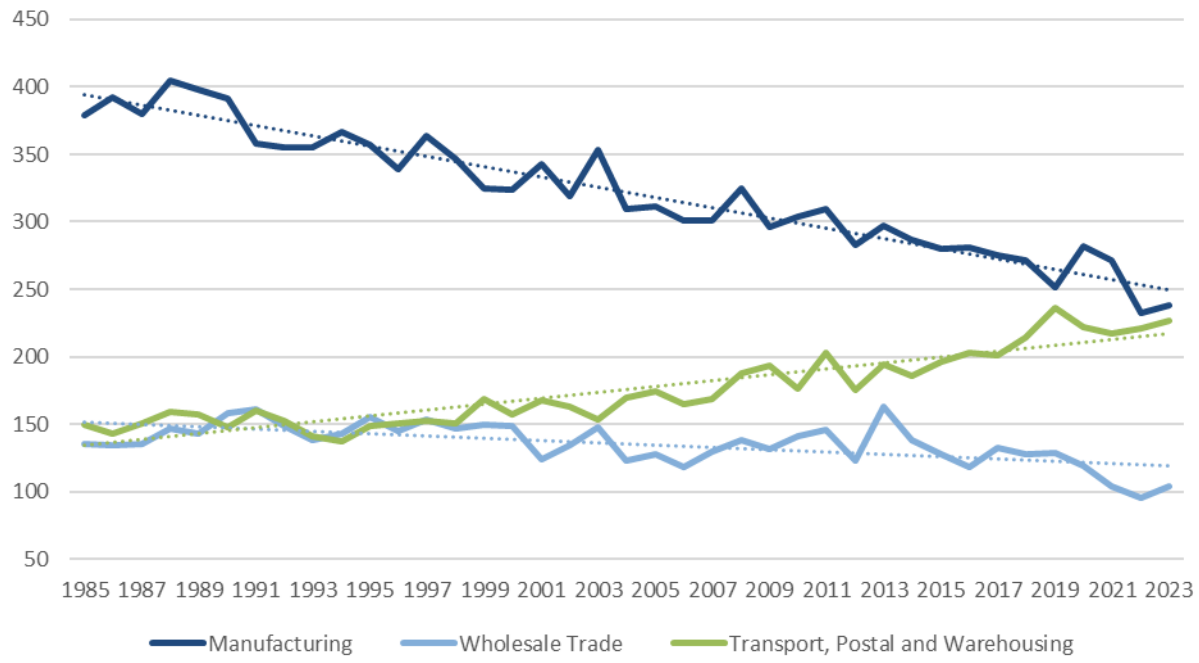
manufacturing between August 2019-21 (+27,553 jobs); assuming an occupancy rate of 80m2 per employee, this could have resulted in just over 2.2 million m2 of industrial floorspace space being occupied over the period in NSW. These gains, however, seem to have been lost, with manufacturing recording 37,291 fewer jobs between August 2021 and February 2023.

Conversely, employment in wholesale trade and transport/warehousing decreased between August 2019-21 period (-26,298 and -15,765 jobs, respectively), likely in anticipation of reduced demand and subsequent sales. However, the rate of employment loss slowed in wholesale trade with only 795 fewer jobs being recorded between August 2021 and February 2023. Meanwhile, transport/warehousing rebounded with 14,023 additional jobs over the period.

Figure 6: Employed persons by selective industry, NSW (,000)



Source: ABS Labor Force – March 2023 release

4.3 Non-traditional uses within industrial precincts

In addition to the more traditional industrial and urban service uses, industrial precincts are increasingly being occupied by other non-traditional uses such as knowledge intensive businesses, large format retailers and factory outlets and education/health services.

This is evident in our land use survey (collected 2019 and updated in 2023), which indicated that around 35-38% of the occupied employment floorspace across all Central Coast's industrial precincts was attributed to non-traditional uses. Typically, these uses are attracted to industrial precincts given their relatively lower land values and market rents when compared to commercial centres and the need for large lots with good access to the local road network.

The presence of these uses, however, can increase market rents and land values in industrial precincts as space becomes limited and these types of uses are typically more willing and capable of paying higher rent.

4.4 Motorway accessibility

The proximity of employment precincts to key transport routes has emerged as a key priority for industrial occupiers. The preference for industrial tenants to be located close to a motorway was evident in CBRE research

which found that every additional minute drive closer to a motorway equated to a 2.1% spike in rent. Occupiers were paying on average $3 per sqm more than those further away from a motorway.[2]

The reason for this locational preference stems from transport costs typically comprising a large share of an industrial businesses' operational cost base, compared to its rental cost. As such, an industrial business makes costs savings by locating themselves nearer to key infrastructure. The Central Coast's employment precincts are uniquely positioned to leverage off this trend with a number being located in close proximity to transport corridors.

4.5 An increasingly automated workplace

The impact that automation will have upon the labour force has been a topic of discussion since the start of the industrial revolution - it will either cause mass unemployment or continue a natural evolution of human based employment, with replaced employees being 'upskilled' into more complex jobs or the creation of and employment in new industries that cannot be imagined today.

This 'upskilling' or transference of employment into more complex or knowledge-based industries can be seen in the agricultural industry. At the start of the twentieth century, agriculture comprised a significant proportion of employment, however, with increased mechanisation of farm equipment, scores of people moved into cities for employment opportunities. Other industries such as retail, professional and financial services grew as a result. This trend has continued with the creation of new industries, which 30 years ago most people could not conceive, such as employment within IT services, coding, web design or application development.

Automation trends and 'upskilling' may be navigated by employees, companies, and institutions remaining agile and embracing life-long learning and continued education to stay competitive and skilled. Currently, industries associated with manufacturing, transport, warehousing and distribution are at the forefront of this change. The impact that automation is likely to have upon these industries is a reduction in overall employment generation. However, it is important to note that this does not directly translate into a reduction in the amount of floorspace or land required. As such, although these industries may need fewer people for their operation needs, they would still require appropriate floorspace and land for their increasingly automated factories/warehouses. Although this trend may be countered somewhat with less land needed for parking requirements, it is prudent to appropriately plan for the future land needs of these industries even as their projected employment levels decline.

4.6 Broader freight and logistics 'last mile' services

The rise of e-commerce has seen significant growth in the demand for freight and logistics industrial space in close proximity to customers, often referred to as 'last mile' customer logistics. This decreases the delivery time of products, with some companies offering same day delivery services. With e-commerce's market share growing at a faster rate than traditional retail, there is likely to be a growing demand for industrial space in good locations for last mile services.

Goodman estimates that e-commerce tenancies account for about 60% of their global customer base with Amazon recently occupying 70,000sqm of warehouse space across two facilities, in Sydney's Moorebank and Dandenong South in Melbourne.[3]

With the Central Coast's resident population forecast to reach 404,250 by 2041, there will be a growing demand from last mile logistics occupiers. The growth of these types of services in the Central Coast is evident in the creation of almost an additional 300 jobs over the last 15 years in the postal and courier pick-up and delivery

[2] CBRE - Motorway access drives rental shift in Sydney's industrial powerhouse market, Natasha Pierson 2018
[3] Ecommerce and last-mile logistics reshape property fortunes, AFR, Tim Boreham August 25, 2018

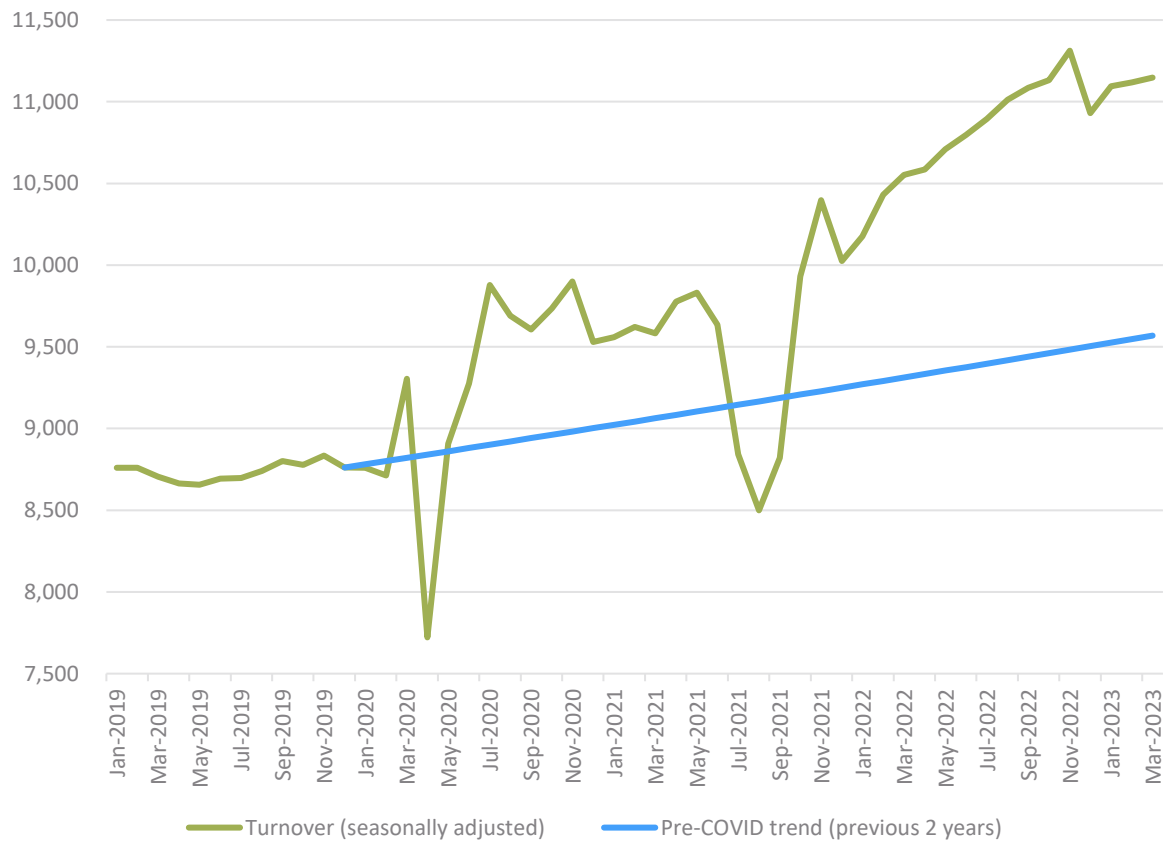
services sub-industry. Several current and proposed employment precincts could provide ideal locations for these services as they are close to population centres with good access to major highways and motorways.

In 2019, a CBRE report estimated that an additional 350,000sqm of distribution space would be required annually to service e-commerce growth across Australia.[4] This was a pre-COVID estimate. As seen in the figure below, the proportion of online retail sales significantly increased from March 2020, peaking at around 15% of all retail sales in September 2021. The proportion of non-food online retail sales peaked at 25.5% in the same month. Despite a reduction being recorded since September 2021, the proportion of online retail sales remains well above pre-COVID levels.

The executive GM of the Dexus industrial, retail and healthcare portfolios estimates that by 2030, 25% minimum of Australian retail sales will be online. This will see continued strong demand for industrial space to service it[5].

With population in the wider freight catchment of the Central Coast expected to increase over the coming decades, it could become attractive to last mile logistics occupiers, and hence there could be a growing demand for additional land and space.

Figure 7: Retail turnover NSW - seasonally adjusted ($m)



Source: Retail Trade, Australia March 2023 (Table 12), HillPDA

[4] The Rise of Multistorey Warehousing in Australia, CBRE Research 2019
[5] E-commerce growth driving Dexus industrial real estate demand, Inside Retail, March 2022

4.7 Changing nature of industrial development

Historically, industrial developments typically have been single level, on large lots, with at grade parking and on relatively level ground. However, this development model has been challenged in recent years resulting from limited land stocks, high land values and high rents.

These market trends have resulted in 'vertical' industrial development being explored within Sydney. This model has been successfully delivered in Asia by Goodman with a company spokesperson suggesting,

> *Scarcity of sites in infill areas close to urban centres and consumers, combined with competing demand for quality locations is creating land use intensification. We are increasingly seeing a shift towards multi-storey industrial facilities or changes of use to commercial and residential*[6].

If this trend was implemented in the Central Coast, the implication is that its employment precincts would have additional capacity through 'upward redevelopment' over that capacity provided in its current undeveloped land supplies. Though while vacant land stocks remain readily available across the Central Coast, it is unlikely that this trend will emerge in the foreseeable future.

4.8 Vertical, high-tech farming on city fringes

While the concept of indoor vertical farming has existed for some time, its success has been limited by high productivity costs, largely due to the significant investment required for necessary systems, including energy-intensive electricity demands. The comparatively limited number of crops that can be grown in vertical systems also presents a challenge. Compared to conventional agriculture, indoor farming enables the climate to be controlled year-round, minimises pests and the need for pesticides and can produce more food per hectare of land compared to traditional forms.[7] Its capacity to be developed in urban areas also enhances supply chain efficiencies, meaning people can obtain fresher food, more quickly.

A new model has emerged from Silicon Valley (Plenty) that grows plants in recycled plastic bottles (no soil involved) on 20-foot vertical towers under LED lamps. The gravity fed system then disperses water and nutrients to the plants and any water, including condensation, is collected and recycled8. A monitoring system of infrared cameras and sensors takes measurements and feeds data back to agronomists and artificial intelligence to fine tune plant requirements.

Unlike traditional agriculture, this new model is largely automated, with robots germinating, planting, monitoring, processing and picking the produce for distribution. Jobs in this sector are high-tech and skilled. While it is unlikely indoor farming will completely replace traditional methods, it will become necessary in some areas as farmlands are transferred to urban development and land availability shrinks. The opportunity for this use to be developed in factories the size of basketball courts, in industrial and higher order business zones, means that once economically feasible, it will be globally rolled out.

There is not a clear land use classification for these types of uses within the NSW Standard Instrument. Council has a current position that the proposed development of Vertical Farming would best fall within the definition of "light industry". It is considered that an industrial activity includes the production of any food, and includes any storage or transportation associated with any such activity so long as it does not adversely affect the amenity of the area. This means that vertical farming would be permitted in any zone where 'light industry' is permitted.

[6] Goodman looks to go vertical, Carolyn Cummins – the Sydney morning herald

[7] Roberts, D 2018 'Vertical farming may finally be growing up', Vox, cited at https://www.vox.com/energy-and-environment/2017/11/8/16611710/vertical-farms on 8 April 2020

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4.9 Employment land values in the Central Coast

As seen in Table 2, most industrial land zoning types across the Central Coast have experienced growth in land values over the period since 2018. The greatest growth was recorded for E4 General Industrial, which increased by 108% to an average of $231/sqm in 2022.

Hunter Region comparative land values

Compared to the wider Hunter Region, average industrial land values in the Central Coast have generally remained lower. However, both the Central Coast and the wider Hunter Region have experienced a significant increase in the value of industrial land, increasing by 108% and 149%, respectively. The increase in industrial land values in the Central Coast likely highlights the growing preference and attractiveness of the Central Coast to industrial occupiers. The right balance of land supply will ensure that there is enough supply for current and future occupiers, while also helping to place downward pressure on land values contributing to development feasibility and activity. Although E4 General Industrial land values, on average, were higher across the Hunter Region, it must be noted that this area includes Newcastle LGA. The scarcity of appropriately zoned industrial land in the Newcastle area is likely the main driver of this higher average $/sqm rate.

North District comparative land values

All industrial land zonings in the Central Coast were significantly lower in value than those recorded for Greater Sydney's North District[8]. In 2022, the combined average land value for industrial zoned land across the North District was $1,742/sqm. This was $1,299/sqm higher than that recorded for the Central Coast ($443/sqm).

Table 2: Industrial land values by zoning 2018-2022 ($/sqm)

Location	Year					Change	
Central Coast	2018	2019	2020	2021	2022	Number	Percentage
E4	214	258	258	326	445	231	108%
W4	154	183	169	180	243	89	58%
Average	213	258	257	325	443	230	1%
Hunter Region	2018	2019	2020	2021	2022	Change	% Change
E4	225	323	276	424	540	315	140%
IN1	41	43	43	43	43	2	5%
W4	139	159	159	159	159	20	14%
Average	222	318	273	417	531	309	139%
North District	2018	2019	2020	2021	2022	Change	% Change
E4	1,192	1,236	1,195	1,371	1,763	571	48%
W4	612	594	608	657	761	149	24%
Average	1,180	1,223	1,182	1,356	1,742	561	48%
Newcastle	2018	2019	2020	2021	2022	Change	% Change
E4	459	573	577	769	940	481	105%

Source: NSW Valuer General, HillPDA 2022

What does it mean?

The lower land values in the Central Coast and its good transport connections to both Sydney and the wider Hunter Region are significant positive attributes. These factors increase its attractiveness to further investment and development. If land value rates increase at the same rate over the next eight years, the Central Coast would be comparable in price to the wider Hunter Region. This increases the need to understand the future land requirements for the Central Coast to ensure it remains a competitive and attractive alternative location over more metropolitan markets.

[8] Combination of the eight local government areas of Hornsby, Hunters Hill, Ku-ring-gai, Lane Cove, Mosman, North Sydney, Northern Beaches and Willoughby

ECONOMIC ENVIRONMENT

5.0 ECONOMIC ENVIRONMENT

The following section undertakes a review of the economic and employment trends within the Central Coast LGA and wider locality. It reflects a point in time when the data was sourced from the Australian Bureau of Statistics (ABS), Transport, Performance Analytics (TPA) and community/economy id.

Where relevant, economic performance indicators of the Central Coast have been benchmarked against the Hunter Region to further identify any industry specialisation or opportunities for the LGA.

5.1 Resident working population characteristics

The resident population refers to persons living within the LGA.

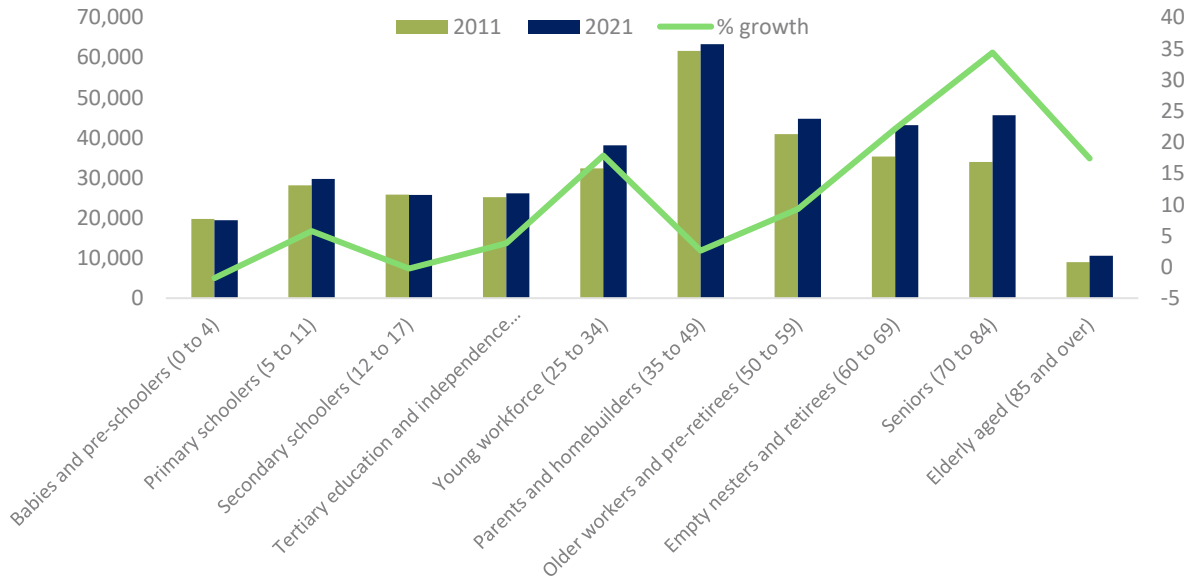
5.1.1 Resident population and age composition

Over a ten-year period to 2021, the population within the Central Coast increased by around 34,410 residents or 11%, reaching a total of around 346,596 residents (see Figure 8).

Over this period, the Central Coast has experienced an ageing of the population, with persons aged 50 years and over comprising 72% of the net growth (around 24,868 persons). The age group that experienced the most significant population growth during this period were those aged 70-79 years, increasing by 10,746 persons or 44%. This will likely increase the demand for aged care and health-related services to be provided in and around the Central Coast's employment precincts and demand for services in Gosford and Wyong hospitals.

Despite this, the tertiary education and independence and young workforce age groups (18 to 34 years) experienced positive growth, increasing by around 6,742 persons or 12% over the period. Residents in this age cohort would benefit from increased employment opportunities, such as those provided within employment precincts.

Figure 8: Central Coast population change by service age group



Source: ABS Census 2021 collated by Community id, sourced 2023

5.1.2 Resident industry of employment and location quotient

Between 2011 and 2021, employed residents in the Central Coast increased by around 19,834 residents or 15%. The top five growth industries that residents were employed in over the period were:

- Health Care and Social Assistance – 8,174 additional jobs
- Construction – 4,793 additional jobs
- Education and Training – 2,993 additional jobs
- Professional, Scientific and Technical Services – 1,825 additional jobs
- Accommodation and Food Services – 1,069 additional jobs

From the above, the ageing of the population over the last ten years has likely seen significant growth in the demand for health-related services as seen in the significant growth in residents working in this type of employment. Residents working in construction has also seen significant growth, a direct effect of the housing boom over the period. The presence of a number of TAFEs and a university has likely contributed to more residents working in education and training jobs.

Over the same period, four industries experienced a reduction in employment. These were:

- Manufacturing – 2,502 fewer jobs
- Wholesale Trade – 1,230 fewer jobs
- Retail Trade – 1,001 fewer jobs
- Electricity, Gas, Water and Waste Service – 325 fewer jobs
- Transport, Postal and Warehousing – 82 fewer jobs

The significant decrease in industrial related sectors (manufacturing, transport, postal and warehousing and wholesale trade) may impact the demand for additional services, land and space within the Central Coast's employment precincts, as residents seek employment within more 'white collar' industries.

Location quotient (LQ) is a simple way of assessing which are the main industries in an area relative to a comparable area.

- Where LQ=1, the identified industry is as prevalent as in the comparable area.
- An LQ greater than 1.2 indicates a significant specialisation of the industry in the study area – indicating possibly a key economic strength. Higher numbers indicate a greater specialisation with anything exceeding 2 being a major specialisation.
- An LQ between 0.8 and 1.2 means the industry is broadly similar in importance in the study area compared to the comparison region and could be seen as representative.
- An LQ under 0.8 indicates an industry which is more important in the comparable area than the study area and may represent an economic weakness or opportunity for growth[9].

From Table 3, it can be seen that the Central Coast's employed residents:

- Are significantly specialised in the Information Media and Telecommunications industry when compared to the wider Hunter Region
- Have a weakness/opportunity for growth in Agriculture, Forestry and Fishing and Electricity, Gas, Water and Mining.

All other industries were of similar importance within the Central Coast and across the wider Hunter Region.

[9] Economy id (2022)

Table 3: Resident employment by industry and location quotient

Industry	Central Coast		Change		LQ Hunter Region
	2016	2021	#	%	
Information Media and Telecom.	2,685	2,608	-77	-2.9	1.7
Financial and Insurance Services	4,660	4,929	269	5.8	1.2
Construction	15,723	17,381	1,658	10.5	1.1
Professional, Scientific & Technical Ser.	7,521	8,995	1,474	19.6	1.1
Rental, Hiring & Real Estate Ser.	2,433	2,353	-80	-3.3	1.1
Arts and Recreation Services	2,127	2,000	-127	-6.0	1.1
Health Care and Social Assistance	26,789	26,789	5,373	0.0	1.0
Retail Trade	15,491	15,419	-72	-0.5	1.0
Education and Training	10,584	12,405	-25	17.2	1.0
Public Administration and Safety	8,698	10,559	475	21.4	1.0
Manufacturing	8,728	8,971	243	2.8	1.0
Transport, Postal and Warehousing	5,260	5,600	340	6.5	1.0
Wholesale Trade	3,442	3,300	-142	-4.1	1.0
Other services	5,869	5,803	-66	-1.1	1.0
Accommodation and Food Services	10,708	12,405	1,697	15.8	0.9
Electricity, Gas, Water and Waste Ser.	1,554	1,536	-18	-1.2	0.8
Agriculture, Forestry and Fishing	1,114	1,245	131	11.8	0.5
Mining	764	760	-4	-0.5	0.2
Inadequately described	5,836	6,083	247	4.2	
Total	**139,599**	**150,848**	**11,249**	**8.1**	

Source: ABS Census 2021 collated by Community id, sourced 2023

Figure 9: Table LQ key

Economic weakness/ opportunity for growth	Similar in importance between areas	Significant specialisation	Major specialisation

Source: ABS 2021

5.1.3 Employment status by broad industry type

Please refer to section 5.2.1 for a description of broad industry types discussed in this section.

Overall, the status of the Central Coast's employed residents was comparable to that of the wider Hunter Region. Most Central Coast residents (52.5%) were employed full-time, followed by part-time (35.1%) while the remaining 9.1% were employed, away from work.

As seen in the table below, industrial related industries had a significantly higher proportion of their employees working full-time (70.8%) followed by knowledge intensive industries with 65.6% of workers employed full-time.

Supporting increased employment opportunities within these sectors would increase both the overall productiveness of the Central Coast's economy and the earning potential of its residents. Ensuring that there is an adequate supply of appropriately zoned employment land would contribute to the Central Coast achieving this goal.

Table 4: Employed residents employment status by broad industry

Broad industry	Employed, worked full-time	Employed, worked part-time	Employed, away from work
Industrial	70.8%	22.5%	6.7%
Knowledge intensive	65.6%	26.9%	7.6%
Population serving	41.5%	39.2%	19.3%
Health and education	47%	44.8%	8.3%
Central Coast total*	**52.5%**	**35.1%**	**12.3%**
Hunter Region total*	55.4%	35.5%	9.1%

Source: ABS 2021, * includes industries inadequately described or not stated

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5.1.4 Population projections

Over the next 20 years, the Central Coast's resident population is projected to increase by around 57,669 people or 16.5%, reaching a total of 404,265 residents by 2041.

According to DPHI, the Central Coast population is forecast to continue to age. Persons over 50 years are forecast to increase by 30,378 between 2021 and 2041, representing 53.5% of the total net growth. As stated, this would increase the demand for health and aged care related services. This, in turn, may increase the demand for pharmaceutical and medicinal product manufacturing within the Central Coast. As of the 2021 Census, there were around 144 residents in the Central Coast employed in this industry, which is over half of that employed across the wider Hunter Region. Between 2016 and 2021, the number of people employed in pharmaceutical and medicinal product manufacturing within the Central Coast increased by 44%.

The age group projected to experience the most significant population increase in the 20 years between 2021 and 2041 are those aged 75 and older, who are forecast to increase by 23,418 people or 67%.

Persons aged between 15 and 44 are also projected to experience significant growth over the period. This age group is projected to increase by around 19,959 residents, representing 35% of the total net growth. Increased employment opportunities would need to be provided for these new residents, a role that the Central Coast's employment precincts can provide and accommodate.

Table 5: Central Coast population projections

Age group	2021	2031	2041	Change 2021-2041	% change
0-14	64,266	63,873	67,580	3,314	5%
15-29	60,223	66,821	68,438	8,215	14%
30-44	60,761	67,381	72,504	11,744	19%
45-59	66,103	65,680	72,909	6,806	10%
60-74	60,924	64,280	64,218	3,294	5%
75-85+	35,197	47,254	58,616	23,418	67%

Source: DPE Population Projections (2022)

Applying a benchmark provision of 3sqm for industrial/urban service land per person, as identified by the Greater Sydney Commission, the growth in the resident population alone could result in a demand for 170,375sqm of associated space. Excluding current vacant space, this would likely require between 34 and 55ha of land.

5.1.5 Where residents work

As shown in Table 6, of the approximately 150,767 employed residents in the Central Coast, around 105,655 or 70.1% worked within the Central Coast (self-containment rate). The second most common destination for residents to seek employment was Sydney LGA with 7,339 residents or 4.9% working in that LGA. Lake Macquarie was the third most common destination for work (around 3,860 residents or 2.6%), followed by Hornsby and Newcastle LGAs with around 2.3% and 1.7% of residents employed there, respectively.

As of 2021, around 56% of residents over 15 years participated in the labour force. As of 2041, DPHI projects there to be around 53,477 additional residents aged 15 years and over. Assuming 56% of these are in the labour force there would be around 29,947 additional working residents on the Central Coast.

Applying the above self-containment rate, it is estimated that 20,993 of these employed residents could work and live within the Central Coast. However, if employment growth is higher, it would likely lead to a corresponding higher self-containment rate.

A significant proportion of these new jobs could be accommodated in the Central Coast's employment precincts, increasing the demand for additional floorspace and land.

Table 6: Employment self-containment

Location	Number	%
Live and work in the area	105,655	70.1
Live in the area, but work outside	36,355	24.1
No fixed place of work	8,757	5.8
Total employed residents in the area	150,767	100

Source: Economy id, 2021

5.2 Employment characteristics

Employment refers to persons aged 15 years and over working in the Central Coast, regardless of their place of usual residence.

5.2.1 Terminology

In line with the Greater Sydney Commission's (GSC) employment categories, in some sections in this chapter and preceding chapters, employment industries have been aggregated into four broad employment sectors. These are based on the Australian and New Zealand Standard Industrial Classification (ANZSIC).[10] These four broad job sectors are as follows:

- **Knowledge intensive**: Information, Media and Telecommunications; Financial and Insurance Services; Rental, Hiring and Real Estate Services; Professional, Scientific and Technical Services; and Public Administration and Safety.
- **Health and education**: Education; Health Care; and Social Assistance.
- **Population serving**: Retail Trade; Accommodation and Food Services; Arts and Recreation Services; Construction; and Other Services.
- **Industrial**: Agriculture; Forestry and Fishing; Mining; Manufacturing; Electricity, Gas, Water and Waste Services; Wholesale Trade; and Transport, Postal and Warehousing.

5.2.2 Employment generation in the Central Coast

Over a ten-year period to 2021, total jobs generated within the Central Coast increased by 26,693 jobs or 30%, reaching a total of around 116,787 jobs. Despite this overall growth in jobs, some industries experienced a decline in employment generated.

Of note were those within the industrial category, which recorded a total increase in employment of around 221 jobs, representing a slight increase of 1.4 per over the ten-year period (to 16,135 jobs in 2021). Though the overall employment in the industrial sector saw a slight increase over the period, the manufacturing and wholesale trade industries recorded 1,144 fewer jobs, a 10% decline in employment.

The health and education sector experienced the most significant employment increase over the ten-year period to 2021. Overall, the sector increased from around 23,331 jobs in 2011 to 34,245 jobs in 2021, representing an overall increase of 47%. This growth can be largely attributed to the growth in Health Care and Social Assistance services, which increased by 8,473 jobs over the period or 55%, with 24,007 total jobs in 2021. Though it experienced less significant growth than Health Care and Social Assistance, Education and Training also experienced high growth over the period with 2,441 additional jobs, representing an increase of 31%. The growth in these sectors reflects population growth and the need to cater to an ageing population. Growth can also be attributed to investment in the Education and Employment precinct, including a new university campus in Gosford to open in 2025, a state-of-the-art innovation hub in close proximity to TAFE and schools, and the Health

[10] Greater Sydney Commission (2018), Employment Land Analysis

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and Wellbeing precinct anchored by Gosford Hospital, the Central Coast Research Institute for Integrated Care and the Central Coast Clinical School.

The knowledge intensive sector increased in overall employment by around 3,699 jobs or 21% over the period (21,127 total jobs in 2021). This was primarily a result of the Professional, Scientific and Technical Services recording a 1,473 job or 34% increase over the period. Financial and Insurance Services also experienced high growth in employment, with an additional 534 jobs, representing a 26% employment increase over this period.

The population serving sector recorded a 25% increase in employment, with an additional 8,080 jobs recorded over the ten-year period (40,711 total jobs in 2021). Within this sector, Construction jobs increased significantly, growing from 5,596 jobs in 2011 to 10,626 in 2021. The additional 5,030 Construction jobs represent a 90% increase in employment over the period. Accommodation and Food Services also increased considerably with an additional 1,772 jobs, representing an increase of 22%.

Figure 10: Employment change 2011-2021 by industry

Source: ABS 2021

5.2.3 Manufacturing employment

Despite employment within manufacturing declining by 589 jobs over the last ten years, in 2021 it accounted for around 7% of all local employment. Manufacturing therefore accounts for a significant portion of the region's employment, despite the negative average growth since 2011. While the industry as a whole has declined since 2011, analysis of industries at the ANZSIC 4-digit level[11] reveals that around 57 manufacturing sub- categories increased in employment over the period, with a total of around 1,612 additional jobs. The top ten of these industries, by net employment growth, were:

- Wooden Structural Fitting and Component Manufacturing – 345 additional jobs
- Food Product Manufacturing – 135 additional jobs
- Bread Manufacturing (Factory based) – 132 additional jobs

[11] The lowest industry level that the ABS provides and undertakes employment analysis

- Fruit and Vegetable Processing – 109 additional jobs
- Cleaning Compound Manufacturing – 105 additional jobs
- Cereal, Pasta and Baking Mix Manufacturing – 97 additional jobs
- Architectural Aluminium Product Manufacturing – 75 additional jobs
- Ready-Mixed Concrete Manufacturing – 64 additional jobs
- Poultry Processing – 52 additional jobs
- Other Non-Metallic Mineral Product Manufacturing- 49 additional jobs
- Wooden Furniture and Upholstered Seat Manufacturing – 40 additional jobs

Twenty-nine per cent of manufacturing in the Hunter Region occurs in the Central Coast LGA. It has also been noted that the following manufacturing industries are highly concentrated in the Central Coast when compared to the wider Hunter Region, with over 75% of employment within the below industries being located within the Central Coast.

- Sugar Manufacturing
- Printing and Printing Support Services
- Pesticide Manufacturing
- Non-Ferrous Metal Casting
- Fruit and Vegetable Processing
- Cereal, Pasta and Baking Mix Manufacturing
- Pulp, Paper and Converted Paper Product Manufacturing
- Timber Resawing and Dressing
- Paper Stationery Manufacturing
- Grain Mill Product Manufacturing

5.2.4 Transport, postal and warehousing

The industry of transport, postal and warehousing is a key driver for industrial land and space. This industry generally has low employment densities, that is, the amount of floorspace required per employee. Over the coming decades, this is likely to decrease with further automation. This implies that as employment decreases within this industry there will still be an increasing demand for additional land and floorspace.

The top ten of these industries, by net employment growth, were:

- Courier Pick-up and Delivery Services – 262 additional jobs
- Other Warehousing and Storage Services – 186 additional jobs
- Freight Forwarding Services – 111 additional jobs
- Transport, Postal and Warehousing – 110 additional jobs
- Urban Bus Transport (Including Tramway) – 102 additional jobs
- Taxi and Other Road Transport – 83 additional jobs
- Postal Services – 56 additional jobs
- Rail Transport – 43 additional jobs
- Air and Space Transport – 37 additional jobs
- Rail Passenger Transport – 27 additional jobs

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5.2.5 Location quotient

Location quotient (LQ) is a way of assessing which are the main industries of employment in an area relative to a comparable area, please refer to section 5.1.2 for a more comprehensive description of LQ definitions.

Table 7: Employment by industry and location quotient

Industry	Central Coast				LQ to Hunter Region
	2011	2021	Change #	Change%	
Agriculture, Forestry & Fishing	752	1,113	361	-32.4	0.6
Mining	388	482	94	-19.5	0.1
Manufacturing	8,346	7,757	-589	7.6	1.1
Electricity, Gas, Water & Waste	1,168	1,171	3	-0.3	0.8
Construction	5,596	10,626	5,030	-47.3	1.1
Wholesale Trade	2,621	2,066	-555	26.9	0.9
Retail Trade	13,667	13,913	246	-1.8	1.1
Accommodation and Food Ser.	8,207	9,979	1,772	-17.8	1.0
Transport, Postal & Warehousing	2,640	3,547	907	-25.6	0.9
Information Media & Telecom.	1,218	1,383	165	-11.9	1.5
Financial and Insurance Services	2,022	2,556	534	-20.9	0.9
Rental, Hiring & Real Estate Ser.	1,715	1,849	134	-7.2	1.1
Professional, Scientific & Tec Ser.	4,376	5,849	1,473	-25.2	0.9
Administrative and Support Ser.	2,586	3,229	643	-19.9	0.9
Public Administration and Safety	5,511	6,261	750	-12.0	0.9
Education and Training	7,797	10,238	2,441	-23.8	1.0
Health Care & Social Assistance	15,534	24,007	8,473	-35.3	1.1
Arts and Recreation Services	1,327	1,517	190	-12.5	1.1
Other Services	3,834	4,676	842	-18.0	1.0
Inadequately / not stated	784	4,569	3,827	-83.8	
Total	**90,094**	**116,787**	**26,293**	**29.6**	

Figure 11: Table LQ key

Economic weakness/ opportunity for growth	Similar in importance between areas	Significant specialisation	Major specialisation

Source: ABS Census 2021 collated by Community id, sourced 2023

The Central Coast has a significant specialisation in the Information Media and Telecommunications industry when compared to the wider Hunter Region.

Relative to the Hunter Region, the Central Coast also has economic weakness/opportunity specialisation in the following industries:

- Agriculture, Forestry and Fishing
- Mining
- Electricity, Gas, Water and Waste.

All other industries were similar in importance between the areas. These findings are relatively consistent with the industries where residents are working.

5.2.6 Employment to workers ratio

In 2021/2022 Economy id. estimated that the Central Coast generated around 133,045 jobs while there were 165,367 working residents living within the LGA. This indicates there being around 0.8 jobs per working resident, implying that there is capacity for additional employment within the LGA.

Industries that have the greatest capacity for growth - that is, have an employment to worker ratio of under 0.8 jobs per working resident - are:

- Financial and Insurance Services
- Information Media and Telecommunications
- Transport, Postal and Warehousing
- Electricity, Gas, Water and Waste Services
- Construction
- Wholesale Trade
- Public Administration and Safety
- Professional, Scientific and Technical Services
- Mining
- Arts and Recreation Services

Most of the above industries are either primarily present or predominantly located within employment precincts. As such, increased employment growth within these industries would likely increase the demand for employment lands.

Table 8: Employment capacity by industry 2021/22

Industry	Local jobs	Employed residents	Ratio of jobs to residents
Agriculture, Forestry and Fishing	1,205	1,213	0.99
Mining	505	742	0.68
Manufacturing	8,992	11,087	0.81
Electricity, Gas, Water and Waste Services	1,490	2,290	0.65
Construction	15,870	20,353	0.78
Wholesale Trade	2,606	4,228	0.62
Retail Trade	14,683	16,460	0.89
Accommodation and Food Services	10,447	9,074	1.15
Transport, Postal and Warehousing	4,634	7,378	0.63
Information Media and Telecommunications	1,917	4,074	0.47
Financial and Insurance Services	3,057	6,316	0.48
Rental, Hiring and Real Estate Services	1,933	2,214	0.87
Professional, Scientific & Technical Services	7,245	11,417	0.63
Administrative and Support Services	4,770	6,154	0.78
Public Administration and Safety	6,778	9,999	0.68
Education and Training	12,097	14,330	0.84
Health Care and Social Assistance	27,661	29,211	0.95
Arts and Recreation Services	1,844	2,648	0.7
Other Services	5,312	6,176	0.86
Total industries	133,045	165,367	0.8

Source: Economy id 2022

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5.2.7 Employment status by broad industry category

Of the employment generated in the Central Coast, as of 2016, the majority (48.6%) were workers employed full-time. This was followed by part-time workers (38.5%) and lastly employed, away from work (12.9%).

As seen in the table below, industrial related industries had a significantly higher proportion of workers employed full-time (68.9%) when compared to the other broad industries. This was followed by knowledge intensive industries with 60.8% of its employees working full-time.

Central Coast's employment precincts provide space for industrial and knowledge intensive employment sectors. Ensuring there is an adequate supply of employment land available will support increased employment opportunities within the sectors. This would increase the overall productiveness of the Central Coast's economy and the earning potential of its workers.

Table 9: Employment status by broad industry category

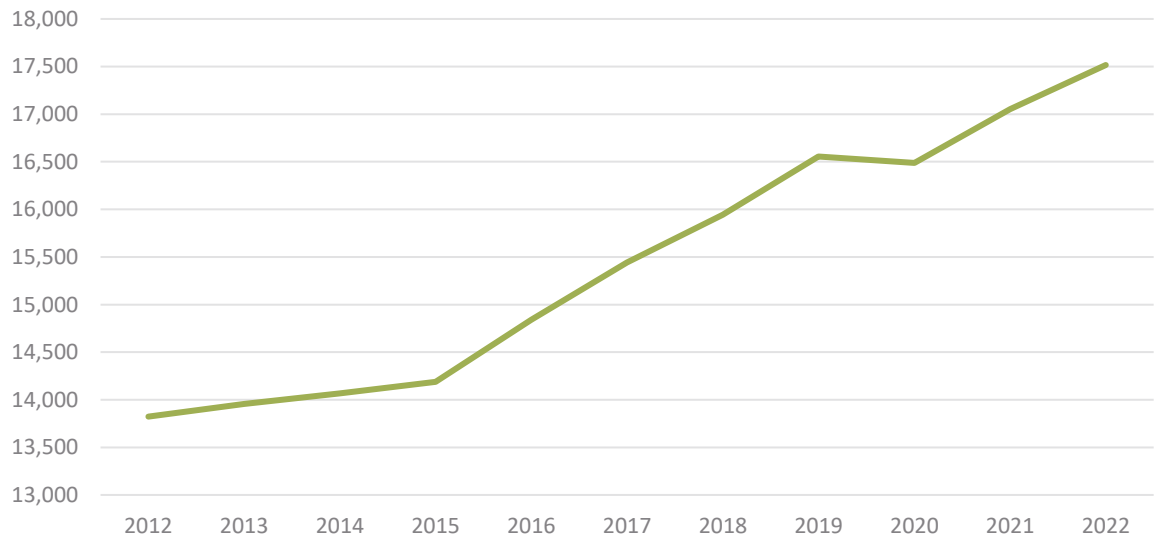
Industry	Employed, worked full-time	Employed, worked part-time	Employed, away from work	Total
Industrial	69%	25%	6%	100%
Knowledge intensive	61%	31%	8%	100%
Health and education	47%	45%	8%	100%
Population serving	36%	43%	21%	100%
Overall total*	**49%**	**39%**	**13%**	**100%**

Source: ABS 2021, *includes inadequately described and not stated industries

5.2.8 Gross Regional Product

Gross Regional Product (GRP) is a measure of size or net wealth generated by the local economy. At the year ending June 2022, Central Coast's GRP was estimated at $17.52 billion, increasing by 2.7% from the previous year and representing around 2.5% of the State's Gross State Product (GSP). Over the ten-year period from 2012, the Central Coast's GRP increased by around $3.7 billion or 26.7% with an average annual growth rate of 2.4% per annum. During the Covid-19 pandemic, growth declined slightly in 2018 and 2019. Between 2019 and 2020 the Central Coast's GRP decreased by 0.4%.

Figure 12: Growth in Central Coast GRP 2006-2022



Source: Economy id 2023

5.2.9 Industry value added

It is estimated that as in 2021/22, industries within the Central Coast contributed around $13.42 billion to its Gross Regional Product (GRP). The top five industries by value added in 2021/22 were:

- Health Care and Social Assistance – $2.13 billion
- Construction – $1.27 billion
- Manufacturing - $1.21 billion Retail trade – $1.03 billion
- Professional, Scientific and Technical Services - $0.94 billion

When looking at the four broad employment sectors, the highest contribution is provided by the knowledge intensive sector ($4.07 billion) followed by the population serving sector ($3.21 billion), the industrial sector ($3.08) and lastly the health and education sector, which contributed $3.06 billion to the local economy.

It must be noted that the industrial sector was the lowest employment generator of the four job sectors, however, it had the second highest worker productivity rate at around $158,330 per worker.

This implies that the industrial sector is generally more productive than other sectors. Although it may not be a high employment generator, it significantly contributes to the overall economic growth and sustainability of the Central Coast's economy.

- Knowledge intensive – $158,350/worker
- Industrial – $158,332/worker
- Health/education – $76,908/worker
- Population serving – $66,739/worker

Figure 13: Industry value added by industry 2021/22

Source: Economy id, HillPDA

5.2.10 Employment projections

The NSW Transport, Performance and Analytics (TPA) released updated employment projections in July of 2022, in which they forecast that the number of jobs within the Central Coast will increase by just over 12,505 jobs or 9.4% between 2021 and 2041.

Most of this growth is forecast to be within the health and education sector, projected to comprise of an additional 4,586 jobs by 2041, and accounting for 37% of projected employment growth. Knowledge intensive industries are forecast to have significant growth with an additional 4,099 jobs, representing an increase of 16% over the period. By 2041, knowledge intensive jobs are expected to account for 33% of projected total employment growth in the region.

The industrial sector is projected to increase by a total of 2,500 jobs by 2041, representing an increase of 8.4%. Within the industrial sector, mining is the only industry where NSW TPA anticipates a decline, with a loss of 146 jobs (27.4%) by 2041. Though the industrial sector is projected to experience less significant growth than knowledge intensive industries and health and education sectors, it may still generate significant floorspace demand.

Manufacturing and transport/warehousing industries are fast changing, with increased automation. This will likely increase the demand for appropriate land and space. This continued demand is a result of the need to have space to accommodate an increased number of machines even as the number of real employees required to oversee or operate these processes declines.

Table 10: Central Coast employment projections

Industry	2021	2031	2041	Change	% change
Agriculture, Forestry and Fishing	1,129	1,202	1,414	285	25.2
Mining	533	511	387	-146	-27.4
Manufacturing	19999	20,693	21,798	1,799	9.0
Electricity, Gas, Water and Waste Ser.	1,486	1,589	1,694	208	14.0
Construction	14,799	14,637	15,173	374	2.5
Wholesale Trade	2,293	2,329	2,473	180	7.8
Retail Trade	17,288	16,94	17,167	-121	-0.7
Accommodation and Food Services	11,622	10,960	11,966	344	3
Transport, Postal and Warehousing	4,368	4,309	4,542	174	4.0
Information Media and Telecom	1,345	1,237	1,397	52	3.9
Financial and Insurance Services	2,786	3,112	3,559	773	27.7
Rental, Hiring and Real Estate Services	2,383	2,629	2,828	445	18.7
Professional, Scientific &Technical Ser.	7,718	8,813	9,538	1,820	23.6
Administrative and Support Services	4,416	4,820	5,212	796	18.0
Public Administration and Safety	6,958	7,111	7,171	213	3.1
Education and Training	11,194	11,838	12,018	-824	7.4
Health Care and Social Assistance	25,624	27,748	29,386	3,762	14.7
Arts and Recreation Services	2,289	2,571	2,797	508	22.2
Other Services	6,107	6,552	6,997	890	14.6
Total	133,617	138,356	146,122	12,505	9.4

Source: TPA 2022 employment projections by industry and travel zones 2016-2066

5.2.11 Number of jobs occupied by Central Coast residents

Of the total jobs generated within the Central Coast as of the 2021 Census, a significant proportion (90.5%) were occupied by Central Coast residents. This implies that the majority of employment growth forecast within the Central Coast over the coming decade could be occupied by residents. For example, of the forecast additional 12,505 jobs, 11,317 jobs could be occupied by residents.

Table 11: Jobs occupied by Central Coast residents

Location	Number	%
Live and work in the area	105,655	90.5
Work in the area, but live outside	11,043	9.5
Total workers in the area	**116,698**	**100.0**

Source: Economy id

5.2.12 Where workers in the Central Coast live

Around 90.5% of the jobs within the Central Coast are occupied by residents also living within the Central Coast.

Other surrounding LGAs where a significant proportion of workers come from are:

- Lake Macquarie – with around 5,049 workers or 4.3% travelling from the LGA
- Newcastle – with around 768 workers or 0.7% travelling from the LGA
- Hornsby – with around 743 workers or 0.6% travelling from the LGA
- Cessnock - with around 622 workers or 0.5% travelling from the LGA
- Maitland - with around 364 workers or 0.3% travelling from the LGA

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LAND USE AUDIT AND PRECINCT REVIEW

6.0 LAND USE AUDIT AND PRECINCT REVIEW

The following section provides a short overview of employment precincts located across the Central Coast, their size, planning attributes (zoning and FSR), vacant versus developed land and floorspace provision by broad land use category.

HillPDA originally undertook a detailed land use survey in April of 2019. This 2019 survey included three days of site visits to each precinct. Each lot was visited, with its land use and status being recorded. This was supplemented with a desktop analysis, with ABR data and Geoscape building footprint data also being used to inform the audit.

As instructed by Council, HillPDA updated this Audit in October 2023. This update was only for new building (floorspace) developed in each precinct post the 2019 detailed audit. The update involved a desktop audit of each previously identified vacant employment land lot to assess its current development status using the most recent aerial imagery (via google and metro map platforms). This was supplemented by development application and certificate of occupation data provided by Council. Where a new development had occurred on previously vacant land, the building was measured and its uses determined via online sources or Council development application and/or certificate of occupation data.

Please note that since the original and updated audit, some businesses and uses of land may have changed. Land areas are based on NSW Government cadastral GIS layer. Where identified, possible employment zoned land that was sidewalk, laneway and/or road were excluded.

This Chapter begins with a general overview of the combined employment precincts. It then breaks the Central Coast into three sub-precincts (North, Central and South) and provides an overview of the employment precincts within each sub-precinct.

6.1 Employment precinct overview

There are 29 employment precincts spread across the Central Coast, varying in size and land zonings. As of October 2023, there were around 2,190ha of employment zoned land across the LGA. Most was zoned E4 – General Industrial, accounting for 1,903ha or 87% of land stocks. The categorisation of other land included:

- E3 Productivity Support - 206ha or 9% of land stocks
- SP4 Enterprise - 81ha or 4% of land stocks
- W4 Working Waterfront - 1ha or 0.1% of land stocks.

Table 12: Employment precinct's total land area by zoning

Precinct	E3	E4	W4	SP4	Total
Berkeley Vale	0.0	8.5	0.0	0.0	8.5
Blackwall	0.0	1.6	0.0	0.0	1.6
Blackwall Road, North	0.5	0.0	0.0	0.0	0.5
Bushells Ridge	0.0	652.7	0.0	0.0	652.7
Charmhaven	0.0	35.8	0.0	0.0	35.8
Doyalson	0.0	11.7	0.0	0.0	11.7
Erina	28.9	10.1	0.0	0.0	39.0
Gwandalan	0.0	1.0	0.0	0.0	1.0
Kincumber	0.0	8.9	0.0	0.0	8.9
Lisarow	0.0	66.0	0.0	0.0	66.0
Long Jetty	5.0	0.0	0.0	0.0	5.0
Long Jetty/The Entrance	0.0	1.1	0.0	0.0	1.1

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Precinct	E3	E4	W4	SP4	Total
Mooney Mooney	0.0	0.0	1.2	0.0	1.2
North Wyong	62.8	72.2	0.0	0.0	135.1
Nth Gosford & Wyoming	6.2	27.5	0.0	0.0	33.7
Ocean Beach Rd	0.3	0.0	0.0	0.0	0.3
Ourimbah, Pacific Hwy	0.0	7.7	0.0	0.0	7.7
Pacific Highway, Doyalson	0.0	1.3	0.0	0.0	1.3
Somersby	3.9	310.2	0.0	0.0	314.1
The Entrance Rd	0.0	0.5	0.0	0.0	0.5
Tuggerah	50.8	190.8	0.0	48.1	289.6
West Gosford	43.4	122.7	0.0	0.0	166.0
West Gosford South	0.0	11.1	0.0	0.0	11.1
Woy Woy, South	0.0	15.4	0.0	0.0	15.4
Woy Woy, Alma Ave	0.0	0.9	0.0	0.0	0.9
Woy Woy, Nagari Rd	0.0	1.6	0.0	0.0	1.6
Woy Woy, Rawson Rd	0.0	4.1	0.0	0.0	4.1
Wyong	0.0	339.3	0.0	32.5	371.8
Wyong Hospital	3.8	0.0	0.0	0.0	3.8
Total	**205.6**	**1902.5**	**1.2**	**80.6**	**2,190.0**

Source: HillPDA 2023, figures may not total due to rounding

6.2 Employment land development status

The audit found that of the total 2,190ha of employment land zoned across the Central Coast, around 1,241ha or 57% was developed, 17ha or 1% was under construction while the remaining 933ha or 43% was undeveloped.

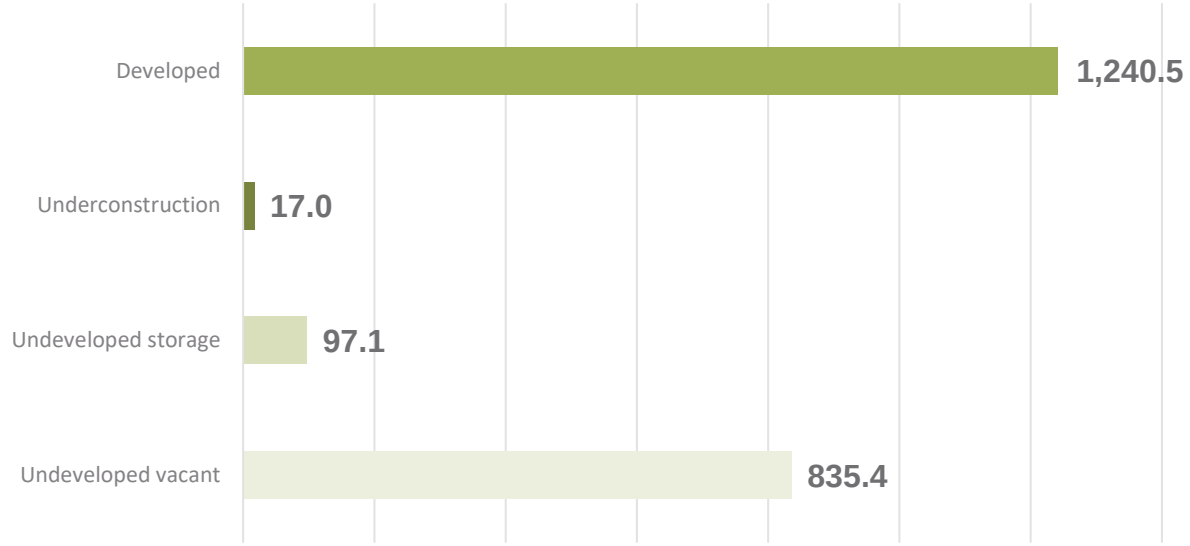
Of the undeveloped land audited, around 835ha or 89% was vacant land - this is land with no buildings or that is not being used for storage purposes or other purposes such as parking.

The remaining 97ha or 10% was vacant land which was being used for storage, parking purposes or any other ancillary uses for a business(es) (see Figure 14 below).

Figure 14: Example of land being used as storage

Source: HillPDA 2019, Charmhaven precinct

Figure 15: Developed and undeveloped land (hectares)



Source: HillPDA 2023, storage land includes land being used for storage purposes, carparking or other ancillary uses for businesses operations

6.3 Lot size by precinct

The distribution of employment land across the Central Coast was predominantly comprised of lots in the 1,000sqm to 5,000sqm size, with 55% being in this range. Around 21% were under 1,000sqm, 22% were between 0.5-10ha and 2% were over 50ha in size.

The 29 employment precincts provided varying lots sizes depending on their function, environmental characteristics, amount of developed and undeveloped land and land uses present. At the time of the audit, average lots sizes ranged from a low of 489sqm in Woy Woy, Alma Ave to 19.2ha in Bushells Ridge.

Table 13: Employment land lot sizes count by precinct

	Sqm			Ha						Average sqm
Precinct	0- 500	500-1,000	1,000-1,500	0.5 -1	1 - 5	5 -10	10 -50	50 - 100	100 +	
Berkeley Vale	0	0	32	1	0	0	0	0	0	2,562
Blackwall	0	8	5	0	0	0	0	0	0	1,256
Blackwall Road, North	6	3	1	0	0	0	0	0	0	491
Bushells Ridge	0	0	2	2	7	2	19	1	1	191,978
Charmhaven	5	0	46	12	8	0	0	0	0	5,037
Doyalson	0	1	10	2	2	0	0	0	0	7,800
Erina	2	16	96	10	6	0	0	0	0	2,996
Gwandalan	0	0	0	1	0	0	0	0	0	9,940
Kincumber	0	0	25	3	1	0	0	0	0	3,060
Lisarow	3	1	12	5	18	2	1	0	0	15,719
Long Jetty	8	42	10	0	0	0	0	0	0	829
Long Jetty/The Entrance	0	1	3	0	0	0	0	0	0	2,822
Mooney Mooney	9	6	3	0	0	0	0	0	0	691
North Wyong	4	28	107	15	26	5	0	0	0	7,302
Nth Gosford & Wyoming	83	53	86	9	1	0	0	0	0	1,454
Ocean Beach Rd	0	0	1	0	0	0	0	0	0	3,089
Ourimbah, Pacific Hwy	0	2	13	1	1	0	0	0	0	4,550
Pacific Highway, Doyalson	0	0	0	0	1	0	0	0	0	12,575
Somersby	3	2	119	49	49	9	4	0	0	13,366
The Entrance Rd	0	0	1	0	0	0	0	0	0	4,797
Tuggerah	8	20	337	66	45	4	3	0	0	5,997
West Gosford	19	60	269	46	23	2	0	0	0	3,963

Precinct	Sqm			Ha						Average sqm
	0- 500	500-1,000	1,000-1,500	0.5 -1	1 - 5	5 -10	10 -50	50 - 100	100 +	
West Gosford South	0	0	12	6	1	0	0	0	0	5,861
Woy Woy, South	0	1	0	0	1	2	0	0	0	38,484
Woy Woy, Alma Ave	16	2	0	0	0	0	0	0	0	489
Woy Woy, Nagari Rd	0	0	0	0	1	0	0	0	0	15,775
Woy Woy, Rawson Rd	10	32	9	0	0	0	0	0	0	813
Wyong	4	2	14	6	28	13	11	0	0	47,665
Wyong Hospital	1	5	5	0	1	0	0	0	0	3,141
Total	**181**	**285**	**1218**	**234**	**220**	**39**	**38**	**1**	**1**	**9,878**

Source: HillPDA 2023

6.4 Floorspace by broad zoning industry

In total, the audit found that the Central Coast's employment precincts provided just under 3.38 million sqm of employment and residential space.

Of this total floorspace, the majority 2.43 million sqm or 72% was in industrial zoned land (E4 and W4). The remaining 0.94 million sqm or 27% was located across E3 and SP4 zoned land.

The largest industries by total floorspace occupied were:

- Manufacturing – occupying 715,365sqm or 21%
- Transport, Postal and Warehousing – occupying 490,160qm or 15%
- Wholesale Trade – occupying 322,535sqm or 10%
- Retail Trade – occupying 297,290sqm or 9%
- Other Services – occupying 276,710sqm or 8% of all employment space.

Across all 29 employment precincts, there was a total of around 156,260sqm of vacant floorspace. This equates to an overall vacancy rate of around 4.7%. Although the total amount of vacant space was higher within land zoned for industrial purposes, the vacancy rate within business zoned land was significantly higher. A closer look at the business zonings reveals that E3 – Productivity Support zoned land had the highest vacancy rate at 8.8%.

There was also around 64,000sqm of residential floorspace spread across the precincts. The majority (81%) of this was located within the E3 – Productivity Support zoned land stocks while the remaining 12,240sqm or 19% was located within industrial zonings (E4 and W4). Although residential space only comprised 0.5% of the total space audited within the Central Coast's industrial zoned employment precincts (E4 and W4), its presence could reduce the overall attractiveness for investment or viability of development as a result of:

- Increasing land/market values
- Increasing the potential for land use conflicts and objections to certain types of uses.

Table 14: Floorspace by broad zoning and industry (sqm)

Floorspace	E3	E4	W4	SP4	Total
Agriculture, Forestry and Fishing	25	12,727	1,617	0	14,369
Mining	113	214	0	0	327
Manufacturing	46,141	655,301	518	13,403	715,363
Electricity, Gas, Water & Waste Ser.	13,069	76,785	0	0	89,854
Construction	19,297	193,612	0	18,337	231,246
Wholesale Trade	44,421	265,263	0	12,851	322,535
Retail Trade	191,692	105,542	54	0	297,289
Accommodation & Food Ser.	44,053	9,004	0	1,339	54,396
Transport, Postal & Wareh.	41,860	390,656	31	57,609	490,157
Information Media and Telecomm.	843	1,353	0	3,526	5,722

Floorspace	E3	E4	W4	SP4	Total
Financial and Insurance Services	22,649	35,517	0	7,741	65,907
Rental, Hiring & Real Estate Ser.	19,605	100,352	0	4,044	124,000
Professional, Scientific & Tech. Ser.	44,150	134,468	0	24,291	202,909
Administrative & Support Ser.	4,012	37,926	0	0	41,938
Public Administration and Safety	7,119	4,306	0	4,090	15,516
Education and Training	4,141	7,081	0	4,511	15,733
Health Care and Social Assistance	60,945	20,912	0	20,674	102,531
Arts and Recreation Services	21,514	61,326	0	6,011	88,852
Other Services	46,080	222,070	0	8,560	276,710
Residential	51,736	12,241	0	0	63,977
Vacant	61,056	82,863	0	12,340	156,259
Total floorspace	**744,522**	**2,429,518**	**2,221**	**199,327**	**3,375,588**

Source: HillPDA 2023

6.5 Built floorspace ratios

Determining the overall built floorspace ratios (FSRs) by precinct is achieved by dividing the amount of floorspace audited by the amount of zoned developed land. This analysis reveals that the average built FSR across all the precincts is around 0.3:1.

SP4 Enterprise zoned land recorded the highest overall average built FSR at 0.42:1. This is comparison to an average of:

- 0.42:1 for E3 Productivity Support zoned
- 0.24:1 for E4 General Industrial zoned land
- 0.18:1 for W4 Working Waterfront zoned land.

The three precincts with the highest combined (business and industrial land) built FSR, were:

- Blackwall Road, North with an FSR of 0.74:1
- Woy Woy, Alma Ave with an FSR of 0.63:1
- Erina with an FSR of 0.62:1.

The average built FSR by land zone type and precinct is provided in the table below.

Table 15: Current built floor space ratios by precinct

Precinct	E3	E4	W4	SP4	Total
Berkeley Vale		0.49			0.49
Blackwall		0.26			0.26
Blackwall Road, North	0.74				0.74
Bushells Ridge		0.02			0.02
Charmhaven		0.46			0.46
Doyalson		0.11			0.11
Erina	0.57	0.75			0.62
Gwandalan		0.36			0.36
Kincumber		0.29			0.29
Lisarow		0.20			0.20
Long Jetty	0.46				0.46
Long Jetty/The Entrance		0.37			0.37
Mooney Mooney			0.18		0.18
North Wyong	0.26	0.31			0.28
North Gosford and Wyoming	0.50	0.35			0.38
Ocean Beach Rd	0.11				0.11
Ourimbah, Pacific Hwy		0.25			0.25

Precinct	E3	E4	W4	SP4	Total
Pacific Highway, Doyalson		0.03			0.03
Somersby	0.68	0.35			0.36
The Entrance Rd					
Tuggerah	0.29	0.32		0.43	0.33
West Gosford	0.63	0.38			0.45
Gosford Industrial Area		0.39			0.39
Woy Woy		0.03			0.03
Woy Woy, Alma Ave		0.63			0.63
Woy Woy, Nagari Rd		0.23			0.23
Woy Woy, Rawson Rd		0.42			0.42
Wyong		0.07			0.07
Wyong Hospital					0.17
Total	**0.42**	**0.24**	**0.18**	**0.43**	**0.27**

Source: HillPDA 2023

6.6 Central Coast employment sub-areas

Given the size of the Central Coast and the number of employment precincts contained within, three sub-areas have been defined (south, central and north).

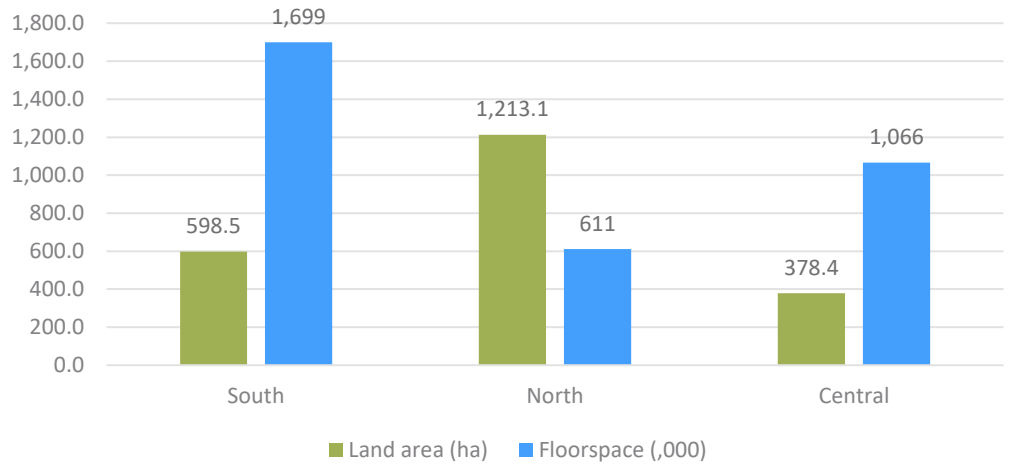
The south area contains 14 employment precincts extending from Mooney Mooney Bridge in the south to North Gosford and Wyoming in the north. This area is the second largest by zoned land area (599 Ha) although provides the most floorspace at around 1.7 million sqm.

The central area contains seven employment precincts from Lisarow in the south to Tuggerah in the north. The central area is the smallest by zoned land area (378 Ha) although provides the second largest amount of floorspace at around 1.1 million sqm.

The north area contains eight employment precincts from North Wyong in the south to Gwandalan in the north. The north area is the largest by zoned land area (1,2132 Ha), although this is mostly undeveloped land (58%). The large amount of vacant land contributes to the sub-precinct having the lowest amount of floorspace at around 611,000sqm.

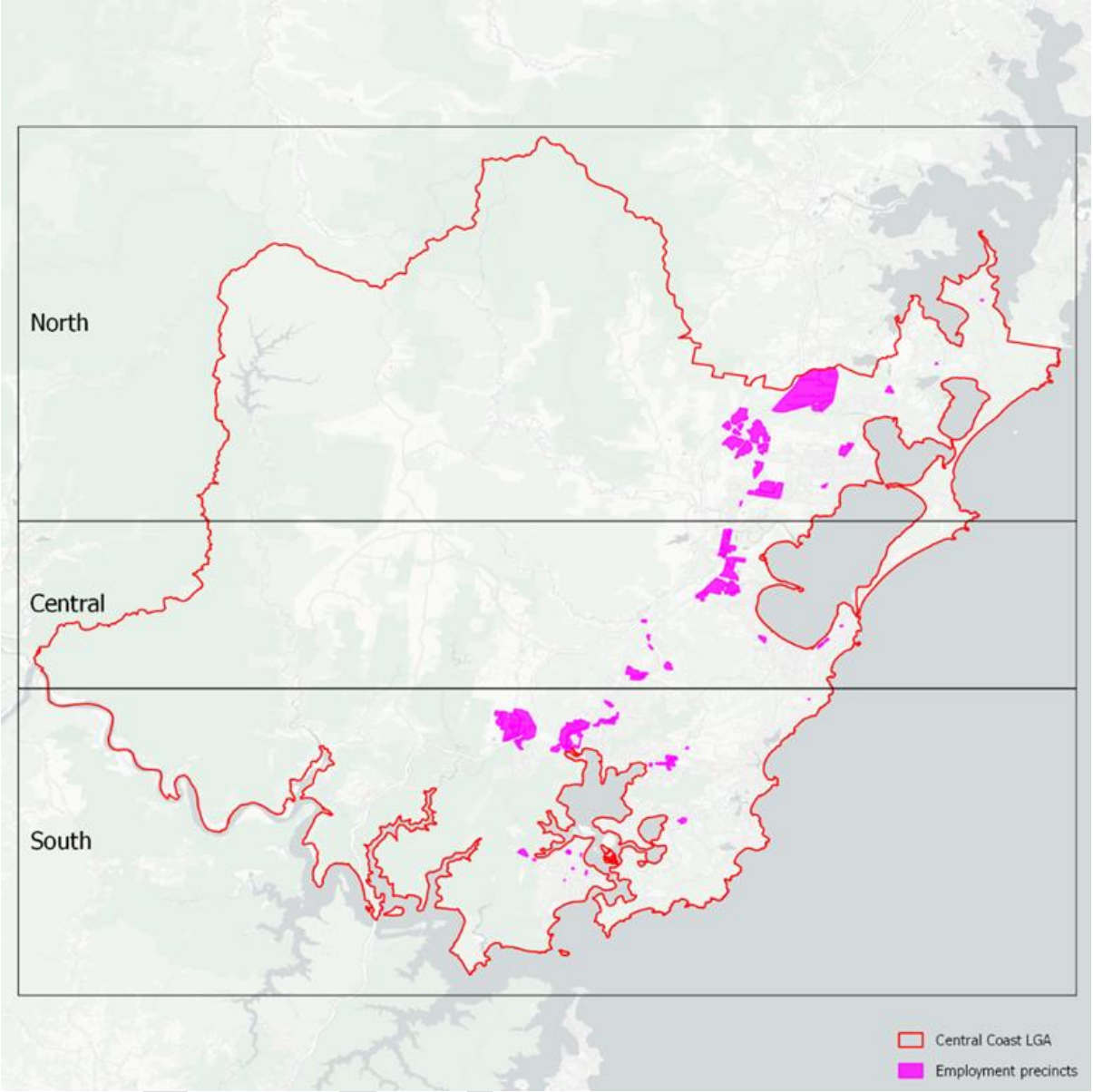
Detailed precinct profiles can be found in Appendix A.

Figure 16: Sub-areas zoned land area and floorspace provision



Source: HillPDA 2023, totals have been rounded

Figure 17: Central Coast employment precincts by sub-area



Source: HillPDA 2023

The following sections describe key employment precincts within each sub-area. Smaller precincts, that is, those that provide around 10,000sqm or under of floorspace are grouped and discussed together.

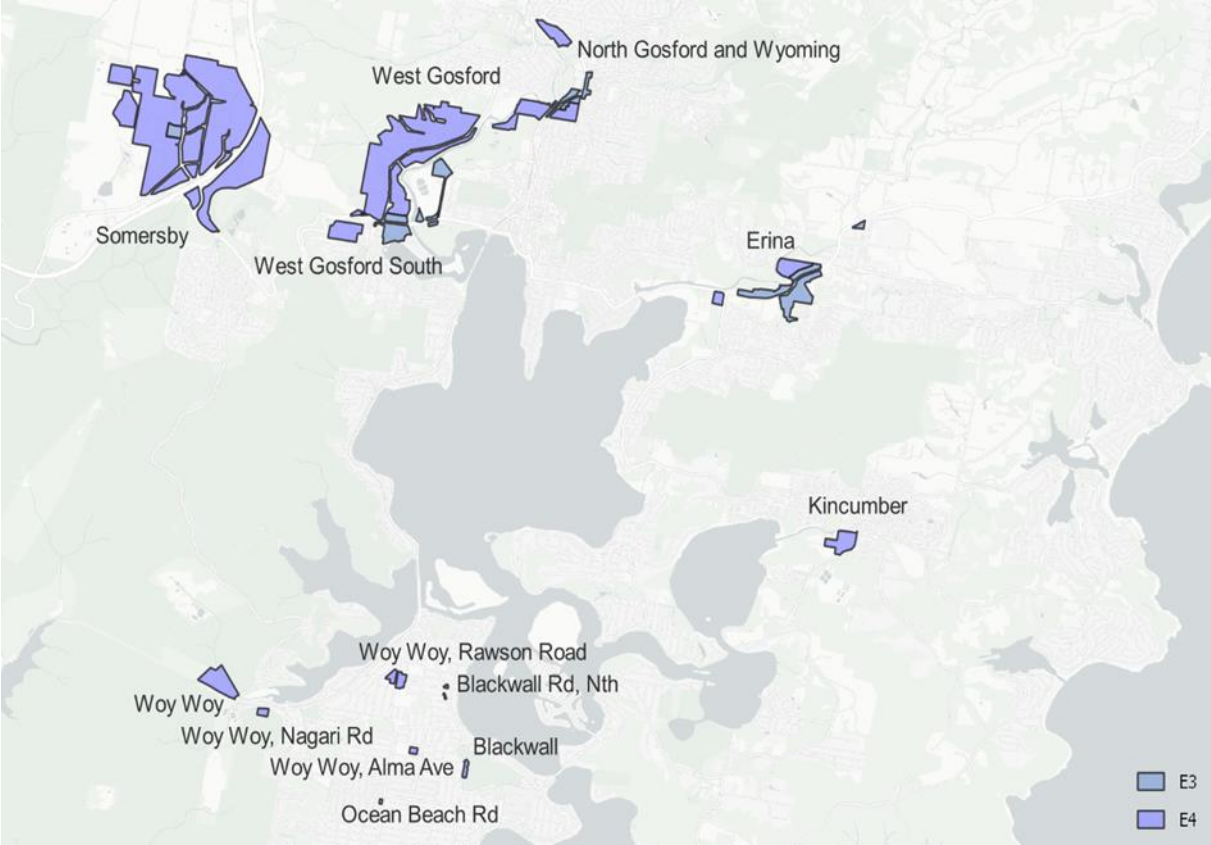
6.7 South area precincts

The south area contains 14 employment precincts. The land area by zoning for these employment precincts are provided in the figure and table below.

In total, there was around 599 hectares of employment zoned land located within the south area, representing 27% of all appropriately zoned land across the Central Coast. The majority (514 hectares or 86%) of employment land within the sub-area is zoned E4 General Industrial, with the majority of this (60%) being located within the Somersby precinct.

The next largest employment zoning within the south area was E3 Productivity Support with around 83 hectares. This represented 14% of employment zoned land within the sub-area. Erina and West Gosford employment precincts contained the majority of E3 zoned land within the sub-area at around 72 hectares combined. The table below is in order from smallest to largest precinct.

Figure 18: South area employment precinct overview



Source: HillPDA 2023

Table 16: South area employment precinct overview by land size (ha)

Precinct	E3	E4	W4	SP4	Total
Ocean Beach Rd	0.3	0.0	0.0	0.0	0.3
Blackwall Road, North	0.5	0.0	0.0	0.0	0.5
Woy Woy, Alma Ave	0.0	0.9	0.0	0.0	0.9
Mooney Mooney	0.0	0.0	1.2	0.0	1.2
Woy Woy, Nagari Rd	0.0	1.6	0.0	0.0	1.6
Blackwall	0.0	1.6	0.0	0.0	1.6
Woy Woy, Rawson Rd	0.0	4.1	0.0	0.0	4.1
Kincumber	0.0	8.9	0.0	0.0	8.9
West Gosford South	0.0	11.1	0.0	0.0	11.1
Woy Woy, South	0.0	15.4	0.0	0.0	15.4
Nth Gosford & Wyoming	6.2	27.5	0.0	0.0	33.7
Erina	28.9	10.1	0.0	0.0	39.0
West Gosford	43.4	122.7	0.0	0.0	166.0
Somersby	3.9	310.2	0.0	0.0	314.1
Total land area	**83.3**	**514.0**	**1.2**	**0.0**	**598.5**

Source: HillPDA 2023, may not total due to rounding

6.8 Central area precincts

The central area contains seven employment precincts. The land area by zoning for these employment precincts are provided in the table below and are visually represented in the figure.

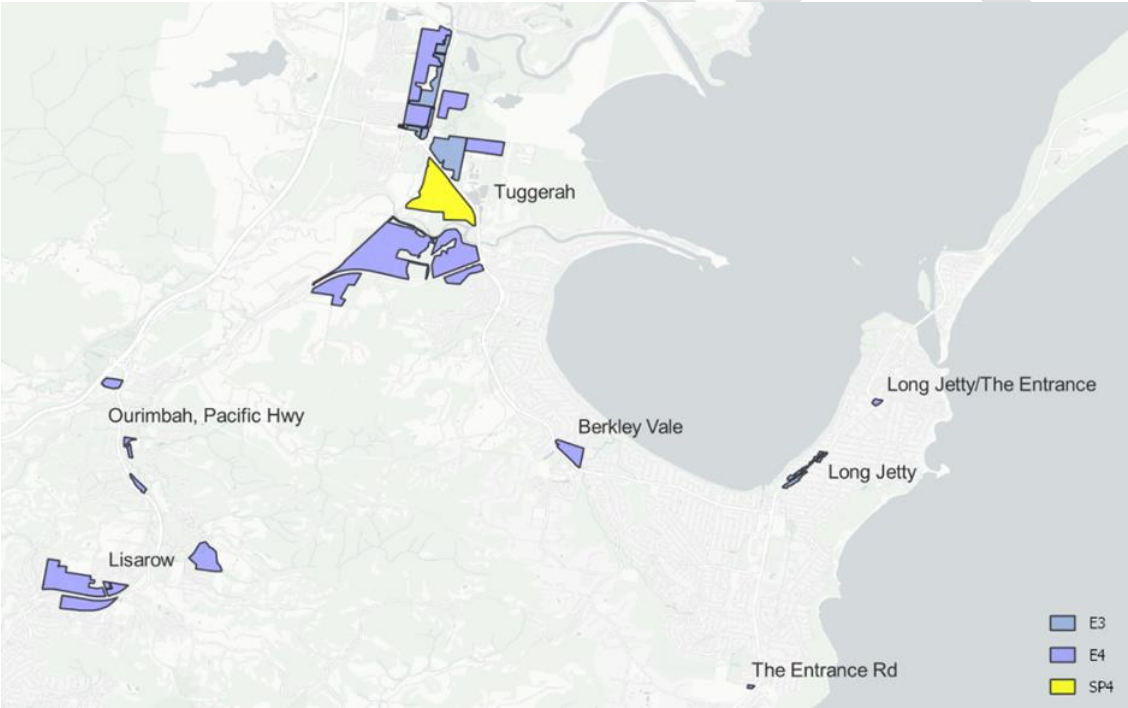
In total, there is around 378ha of zoned employment land located within the central sub-area, representing 17% of all zoned employment land across the Central Coast. The majority (275ha or 53%) of employment land within the sub-area is zoned E4 General Industrial with the majority of this (69%) being located within the Tuggerah precinct. Tuggerah also contains the greatest diversity of land zonings across all the sub-area.

Table 17: Central area employment precinct overview by land size (ha)

Precinct	E3	E4	W4	SP4	Total
The Entrance Rd	0.0	0.5	0.0	0.0	0.5
Long Jetty/The Entrance	0.0	1.1	0.0	0.0	1.1
Long Jetty	5.0	0.0	0.0	0.0	5.0
Ourimbah, Pacific Hwy	0.0	7.7	0.0	0.0	7.7
Berkeley Vale	0.0	8.5	0.0	0.0	8.5
Lisarow	0.0	66.0	0.0	0.0	66.0
Tuggerah	50.8	190.8	0.0	48.1	289.6
Total land area	**55.8**	**274.6**	**0.0**	**48.1**	**378.4**

Source: HillPDA 2023

Figure 19: Central sub-area employment precinct overview



Source: HillPDA 2023

6.9 North area precincts

The north area contains eight employment precincts. The land area by zoning for these employment precincts is provided in the following table and figure. In total, there is around 1,213ha of employment zoned land located within the north area, representing 55% of all appropriately zoned land across the Central Coast. The majority (1,114ha or 92%) of employment land within the sub-area is zoned E4 General Industrial, and most of this (59%) is located within the Bushells Ridge precinct. The north area contains the largest amount of undeveloped employment zoned land at around 695ha. This represents 74% of the undeveloped and across the Central Coast. Most of the lands is located within Bushells Ridge with around 529ha.

Table 18: North area employment precinct overview by land size (ha)

Precinct	E3	E4	W4	SP4	Total
Pacific Highway, Doyalson	0.0	1.3	0.0	0.0	1.3
Wyong Hospital	3.8	0.0	0.0	0.0	3.8
Gwandalan	0.0	1.0	0.0	0.0	1.0
Doyalson	0.0	11.7	0.0	0.0	11.7
Charmhaven	0.0	35.8	0.0	0.0	35.8
North Wyong	62.8	72.2	0.0	0.0	135.1
Wyong	0.0	339.3	0.0	32.5	371.8
Bushells Ridge	0.0	652.7	0.0	0.0	652.7
Total land area	**66.6**	**1,114.0**	**0.0**	**32.5**	**1,213.1**

Source: HillPDA 2023

6.10 Employment precinct classification

Having reviewed each employment precinct's current land uses, floorspace provision and locational attributes, each has been classified either as a local, district or regional precinct. A definition for each of these categories is provided below:

- Local precinct: contains uses that enable the locality to develop and its businesses and residents to operate. A local precinct serves a local catchment within a five to ten kilometre radius.
- District precinct: contains uses that enable the local City/LGA to develop and its businesses and residents to operate. The size and mixture of uses in a district precinct contribute to it serving a local government level.
- Regional precinct: contains uses that enable a region to develop and its businesses and residents to operate. The size, unique tenants and mixture of uses in the precinct contribute to it serving at a regional scale.

Table 19: Employment precincts by classification

Precinct	Classification	Reasoning
Ocean Beach Rd	Local	Small vacant precinct with a future service station proposed
Blackwall Road, North	Local	Provides urban and other services that support the local community
Blackwall	Local	Provides urban and other services that support the local community
Woy Woy, Nagari Rd	Local	Provides urban and other services that support the local community
South Woy Woy	Local	Provides urban and other services that support the local community
Woy Woy, Alma Ave	Local	Provides urban and other services that support the local community
Woy Woy, Rawson Rd	Local	Provides urban and other services that support the local community
The Entrance Rd	Local	Vacant at the time of auditing, although its size and surrounding residential population contributes it to serving the local community or commuters in the future
Long Jetty/The Entrance	Local	Provides urban and other services that support the local community
Long Jetty	Local	Provides urban and other services that support the local community

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Precinct	Classification	Reasoning
Berkeley Vale	Local	Provides urban and other services that support the local community
Pacific Highway, Doyalson	Local	Small service station serving the local community and commuters
Gwandalan	Local	Provides urban and other services that support the local community
Ourimbah, Pacific Hwy	Local/District	The northern sub-section which contains Ausgrid serves the district while the other two sub-sections serve the local community
Kincumber	District	Although on a smaller scale the presence of two concrete batching plants contribute to it serving at a district level
West Gosford South	District	Size and range of uses contribute to it serving at a district level
North Gosford and Wyoming	District	Size and range of uses contribute to it serving at a district level
Erina	District	Size and range of uses contribute to it serving at a district level
West Gosford	District	Size and range of uses contribute to it serving at a district level
Doyalson	District	Although small, the presence of a concrete batching plant contributes to it serving the district
Charmhaven	District	Size and range of uses contribute to it serving at a district level
Wyong	District	Size and range of uses contribute to it serving at a district level, presence of airport could increase its status if intensified
Mooney Mooney	Regional	Provides appropriate land for aquaculture industries
Somerby	Regional	Provides appropriate land for aquaculture industries
Lisarow	Regional	Size, uses and location along a major transport corridor contribute to it serving the wider region
Tuggerah	Regional	The presence of significant food manufacturing contributes this to serving a regional role
Wyong Hospital	Regional	Size, uses and location along a major transport node contribute to it serving the wider region
Bushells Ridge	Regional	The expansion of Wyong Hospital into the precinct has elevated its role to a regional precinct
North Wyong	Regional	Its size, capacity and strategic location on two major transport corridors, along with the presence of a concrete batching plant, the Boral quarry and manufacturing plant, and a gas high-pressure distribution centre, contribute to its significance

Source: HillPDA 2023 – audit findings

EMPLOYMENT FLOORSPACE DEMAND

7.0 EMPLOYMENT FLOORSPACE DEMAND

This chapter projects the amount of additional employment space to be accommodated within Central Coast's employment precincts. This growth in demand is required to support the surrounding resident, worker and visitor community. This chapter estimates how much land would be required to accommodate this projected growth.

7.1 Employment forecast approach

The methodology for projecting the demand for employment land needs under the employment approach, is as follows:

1. Analyse State Government employment projections at the LGA level.
2. Analyse population projection on which employment projections are based.
3. Identify the net growth/decline in employment at the ANZSIC 1-Digit industry level between 2023 and 2041 over five years intervals.
4. Estimate the amount of employment directed towards employment precincts for each industry, based on the industry type, land zonings, land use audit and market trends. This is achieved by applying a distribution proportion to the net growth/decline in employment at the industry level. For example, 80% of manufacturing would be expected to be directed towards employment precincts, while 10-15% of retail would be directed to the employment precincts. Proportions were based on this and previous studies land use audits, analysis of 2021 journey to work data at the travel zone level and the role and function of the Central Coast's employment precincts.
5. Translate net growth in employment directed towards employment precincts to floorspace by applying industry standard employment densities (the amount of floorspace required per worker) to the net growth/decline by industry type.
6. Convert floorspace demand into land requirements by applying various FSRs.
7. Subtract land supply from demand and account for land being used for non-employment uses to reduce additional land needed to accommodate demand.

7.2 Employment projection analysis

Employment projections are sourced from the TPA's Travel Zone Projections 2022 (TZP22), released in November 2022. Employment projections are provided for each industry sector in 5-year increments between 2016-66. These projections are based on and align with NSW DPHI 2022 population projections and NSW Government Common Planning Assumptions.

The projections are based on the best available data as at early to mid-2022 and factor in the impacts of the COVID-19 pandemic. The projections do not incorporate ABS 2021 Census data as this was not available at the time the projections were prepared.

TPA employment projections align with NSW DPHI population projections. A closer review of these against Profile .id projections shows an estimated 35,265 persons by 2041 or almost 20,000 residents aged 15 years and over.

This lower resident population may result in a corresponding underestimate of jobs provided in the Central Coast and hence employment land needs.

To account for this, HillPDA has forecasted employment under two scenarios. These being:

- Scenario 1 (TPA) | Assesses the demand resulting from TPA 2022 employment projections.

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- Scenario 2 (Profile .id) | Assesses the demand resulting from Profile .id population projections. This has been achieved through pro-rating State TPA projection to the projected Profile .id population 15 years and over.

Table 20: Population projections 2021-41

Projection source	2021	2031	2041	Net change
NSW DPHI / TPA	347,474	375,289	404,265	56,791
Profile .id	348,375	393,863	440,430*	92,055

Source: NSW DPHI 2022 projections, TPA 2022 Projections, Profile .id 2023 projections *estimates using compound growth rate between 2021-36

7.3 Scenario 1 – TPA employment Projections

Analysis of the TZP22 employment projections reveal that over the 18-year period to 2041 employment across the Central Coast is forecast to increase by just under 11,025 jobs or 8%.

Much of this growth (31%) is forecast within the health care and education industries. Overall, industrial and primary related sectors are forecast to increase by around 2,170 jobs or 20% over the period. These jobs would be primarily located within the Central Coast's employment lands. Population serving industries are also forecast to experience significant growth with an additional 3,150 jobs or 29%. A review of journey to work data shows that a significant proportion (38%) of retail, construction, other services and arts and recreation uses, which are included in the population serving land uses, are located within the Central Coast's employment precincts.

7.4 Scenario 2 – Profile .id revised employment projections

Under this scenario employment is forecast to increase by 18,120 jobs or 13% between 2023-41. In accordance with scenario 1 most of this growth (30%) is forecast within health care and education industries. Overall, industrial and primary related sectors are forecast to increase by around 3,195 jobs or 18% over the period. Population serving industries are also forecast to experience significant growth with an additional 5,763 jobs or 32%.

The following table provides an overview of net job change across the two scenarios from 2023-2041.

Table 21: Central Coast employment projection scenarios (jobs)

	TPA			Profile.id		
Industry	2023	2041	Net change	2023	2041	Net change
Agriculture, Forestry & Fish.	1,085	1,414	329	1,103	1,505	402
Mining	514	387	-127	522	412	-111
Manufacturing	9,046	10,373	1,327	9,195	11,034	1,839
Electricity, Gas, Water & Waste Ser.	1,509	1,694	185	1,534	1,802	268
Construction	14,324	15,173	849	14,560	16,140	1,581
Wholesale Trade	2,290	2,473	183	2,327	2,631	303
Retail Trade	17,387	17,167	-219	17,673	18,262	589
Accommodation & Food Ser.	10,569	11,996	1,427	10,743	12,761	2,018
Transport, Postal & Ware.	4,271	4,542	271	4,341	4,832	491
Information Media & Telecom.	1,197	1,397	200	1,217	1,486	270
Financial & Insurance Ser.	2,979	3,559	580	3,028	3,786	758
Rental, Hiring & Real Estate Ser.	2,478	2,828	351	2,518	3,009	490
Professional, Scientific & Tech. Ser.	8,940	9,538	598	9,087	10,146	1,059
Administrative & Support Services	4,585	5,212	626	4,661	5,544	883
Public Administration & Saf.	7,293	7,171	-123	7,413	7,628	215
Education and Training	11,677	12,018	341	11,869	12,784	915
Health Care & Social Ass.	26,254	29,386	3,132	26,686	31,260	4,574
Arts and Recreation Ser.	2,450	2,797	347	2,490	2,975	485
Other Services	6,251	6,997	747	6,353	7,444	1,090
Total	**135,096**	**146,122**	**11,026**	**137,320**	**155,440**	**18,120**

Source: TPA 2022, Profile .id 2023 and HillPDA

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Employment projections consider the potential job generation across the LGA. Employment is not necessarily confined to land zoned for industrial or business purposes. They also include jobs generated through other land uses including rural industries, home-based businesses and special purpose areas such as hospitals and tourism precincts.

For this reason, the following section estimates the amount of total net increase in jobs forecast across the LGA that could be directed towards and accommodated within the Central Coast's employment precincts.

7.5 Employment directed towards employment precincts

To estimate the amount of employment directed towards employment precincts, distribution is calculated based on this study and previous studies' land use audits, analysis of 2021 journey to work data at the travel zone level and the role and function of the Central Coast's employment precincts. In fact, from analysis of 2021 Census journey to work data, it was estimated that Central Coast's employment precincts could contain upwards of 40% of all jobs generated across the LGA.

In total, it is estimated that of the 11,025 to 18,120 additional jobs projected to be generated in the Central Coast over the next 18 years, between 4,250 to 6,855 or 38 to 39% would be directed to and accommodated within its employment precincts.

The following table provides a summary of the estimated employment directed to employment precincts by industry.

Table 22: Net job growth directed to employment precincts

Industry	TPA scenario	Profile .id scenario
Agriculture, Forestry and Fishing	53	64
Mining	-57	-50
Manufacturing	1,061	1,471
Electricity, Gas, Water and Waste Ser.	83	121
Construction	382	711
Wholesale Trade	138	228
Retail Trade	-77	206
Accommodation and Food Services	285	404
Transport, Postal and Warehousing	176	319
Information Media &Telecom	60	81
Financial and Insurance Services	174	228
Rental, Hiring and Real Estate Services	88	123
Professional, Scientific & Technical Ser.	179	318
Administrative and Support Services	200	283
Public Administration and Safety	-25	43
Education and Training	68	183
Health Care and Social Assistance	1,002	1,464
Arts and Recreation Services	121	170
Other Services	336	491
Total	**4,250**	**6,856**

Source: HillPDA 2023

7.6 Employment projections to floorspace

Employment is converted into floorspace needs by applying industry standard employment densities (the amount of floorspace required per worker) to the amount of employment directed towards Central Coast's employment precincts in 2023 and 2041. Employment densities for the industries of manufacturing, wholesale and warehousing have considered business practices and technologies that are changing, such as increased automation. Please note, a combination of average and observed employment densities from the audit have been applied.

Based on our assumptions it is estimated that between 2023-41:

- Under Scenario 1, employment precincts across the Central Coast would accommodate an additional 435,280sqm of occupied employment floorspace.
- Under Scenario 2, employment precincts across the Central Coast would accommodate an additional 603,505sqm of occupied employment floorspace.

It is also prudent to plan for additional demand over that forecasted to accommodate the employment growth. This avoids artificial increases in land prices as land becomes limited or tenants seek other locations as prime sites are taken up.

This additional requirement ranges from 20% to 40%. Accounting for some additional demand and a vacancy rate, we have applied the lower range of 25%. Accounting for the additional demand increase, the overall net increase in demand is between 544,100sqm and 754,380sqm over the next 18 years.

Table 23: Total net growth in occupied floorspace demand by industry (2041)

Industry	TPA scenario	Profile .id scenario
Agriculture, Forestry and Fishing	1,581	1,929
Mining	-1,714	-1,495
Manufacturing	250,873	294,258
Electricity, Gas, Water and Waste Ser.	20,845	30,204
Construction	11,459	21,338
Wholesale Trade	85,198	97,129
Retail Trade	-3,071	8,249
Accommodation and Food Services	7,992	11,301
Transport, Postal and Warehousing	115,040	142,075
Information Media &Telecom	1,803	2,428
Financial and Insurance Services	5,224	6,825
Rental, Hiring and Real Estate Services	15,780	22,061
Professional, Scientific & Technical Ser.	5,381	9,531
Administrative and Support Services	7,015	9,892
Public Administration and Safety	-736	1,288
Education and Training	2,046	5,491
Health Care and Social Assistance	35,078	51,226
Arts and Recreation Services	4,855	6,787
Other Services	26,888	39,247
Sub-total	591,538	759,762
Vacant space (minus)	156,259	156,259
Total net occupied space*	435,279	603,503
Total employment space**	**544,099**	**754,379**

Source: HillPDA 2023 *accounts for vacant floorspace being occupied, **includes an additional 25%

7.7 Future land requirements to accommodate employment growth

Net growth in floorspace is converted into land requirements by applying typical built FSRs for developments in employment precincts.

Typically, the building areas of industrial developments do not encompass the entirety of the land parcels they reside within. This is a result of the specific site requirements of typical industrial occupiers, which require setbacks from property boundaries, turning areas, parking areas, loading and unloading, landscaping etc. In our experience, although employment (industrial) precincts typically have an allowable FSR around 1:1—that is, the amount of floorspace that could be developed is equal to the properties' total land area—the actual built FSR typically ranges from between 0.3:1 to 0.6:1.

For this assessment, HillPDA has distributed the forecasted floorspace requirements across the Central Coast's employment land zones. The propensity for each industry floorspace type to be located within a particular zone type was based on the land use audit. Average built FSRs, also identified in the land use audit, were then applied to each zone's total net floorspace demand to determine land requirements.

Based on this methodology, it is estimated that between 208 and 286ha of additional employment land stocks would be required to accommodate demand. Of this demand it is estimated that between:

- 17 to 27ha of the demand would be zoned E3 Productivity Support.
- 184 to 248ha of the demand would be zoned E4 General Industrial.
- 0.2ha of the demand would be zoned W4 Working Waterfront.
- 7 to 11ha of the demand would be zoned SP4 Enterprise.

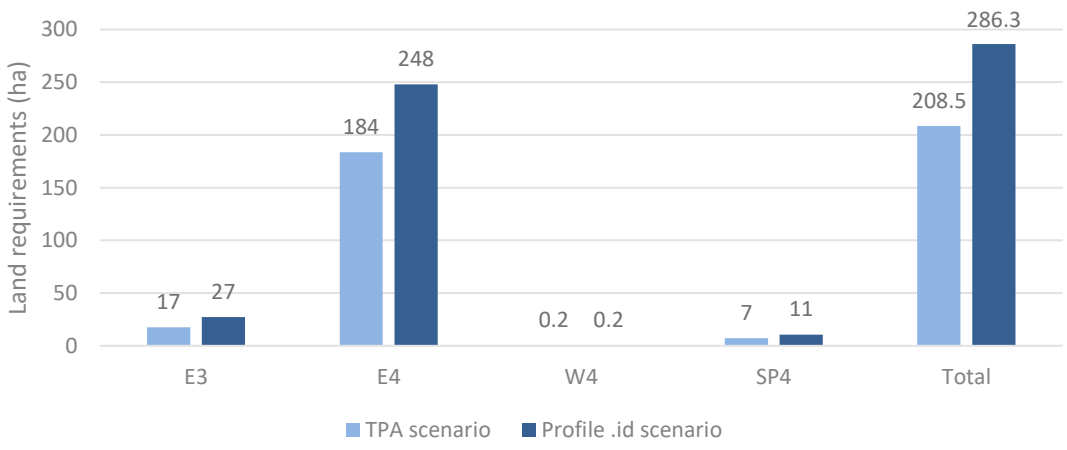
Table 24: Additional floorspace land stocks required to accommodate demand by scenario

Floorspace net demand (sqm)	Zone type				
	E3	E4	W4	SP4	Total
TPA scenario	72,420	439,856	337	31,486	544,099
Profile .id scenario	113,687	594,455	438	45,799	754,379
Land requirements	**Average built FSR X:1**				
	0.42	**0.24**	**0.18**	**0.43**	**Total**
TPA scenario	17	184	0.2	7	**208**
Profile .id scenario	27	248	0.2	11	**286**

Source: HillPDA 2023

The additional land requirements under each demand scenario by zone type is visually provided below. At least 12ha to 16ha of market ready land needs to come on the market each year to meet requirements.

Figure 20: Additional land stocks to accommodate demand



Source: HillPDA 2023

SERVICABILITY AND CONSTRAINTS ANALYSIS

8.0 SERVICABILITY AND CONSTRAINTS

Several factors have an impact on the supply of land. These factors include environmental constraints, infrastructure issues (including servicing), land ownership patterns, withholding issues, highest and best use of land, presence of residential development, the suitability or unsuitability of the land and the existing planning framework.

This chapter undertakes a review of the Central Coast's undeveloped employment land stocks (combination of developed and vacant storage land) to determine their availability for development, i.e. the future supply of land. Constraints analysed are of an environmental and infrastructure perspective and performed through a desktop analysis. Any rezoning or future development will require further investigation prior to approval.

As the constraints analysis is being undertaken at a broad level, it is not possible to determine if the remaining 'developable' area of a site or development parcel is logical for development. I.e. If a site contains 90% constraints, and the remaining portion is at the rear of the site and not accessible, the likelihood of development is low. This detailed analysis would need to be undertaken on a site-by-site level. Therefore, the assessment provides a high-level estimate of land supply and capacity only.

8.1 Servicability analysis

This section reviews undeveloped employment land stocks to determine if they are serviced or not serviced (unserviced). Unserviced parcels may incur additional developer costs, reducing the attractiveness for development.

8.1.1 Serviced land definition

For the purposes of this report the definition of 'serviced land' as defined by the ELDM has been applied: 'Serviced land' is land where a sewerage and potable water service may be available for connection (lead-in water and wastewater infrastructure). It is acknowledged that the servicing data does not include servicing in terms of power, roads or other infrastructure. This is a consistent approach to that in the ELDM.

The ELDM defines serviced land as land being located within a five-metre buffer from a sewerage or potable water service. Serviced land is assumed to have a greater capacity to be developed over unserviced land primarily a result of the lower costs incurred during development.

8.1.2 Undeveloped and serviced land

Currently, the Central Coast contains around 933ha of undeveloped land. Of this, around 284ha or 30% is serviced land, with the remaining 649ha or 70% being unserviced.

Somersby employment precinct contains the largest amount of serviced undeveloped land at around 120ha, representing 42% of the Central Coast's undeveloped and serviced land stocks. Wyong contains the second largest amount of undeveloped serviced land, at around 51ha or 18%. North Wyong contains the third largest amount of serviced land, at around 37ha or 13%.

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Table 25: Undeveloped land servicing status (ha)

Precinct	Serviced			Unserviced		
	Vacant	Storage	Total	Vacant	Storage	Total
Berkeley Vale	0.0	0.0	0.0	0.0	0.0	0.0
Blackwall	0.0	0.0	0.0	0.1	0.0	0.1
Blackwall Road, North	0.0	0.0	0.0	0.0	0.0	0.0
Bushells Ridge	19.4	0.0	19.4	454.6	54.5	509.1
Charmhaven	3.1	0.5	3.6	0.0	0.0	0.0
Doyalson	4.4	0.0	4.4	0.0	0.0	0.0
Erina	0.4	0.2	0.6	0.0	0.0	0.0
Gwandalan	0.0	0.0	0.0	0.0	0.0	0.0
Kincumber	0.0	0.0	0.0	0.0	0.0	0.0
Lisarow	5.4	0.0	5.4	0.0	0.0	0.0
Long Jetty	0.3	0.1	0.4	0.0	0.0	0.0
Long Jetty/The Entrance	0.0	0.0	0.0	0.0	0.0	0.0
Mooney Mooney	0.0	0.0	0.0	0.0	0.0	0.0
North Wyong	27.8	2.3	30.2	0.1	0.0	0.1
Nth Gosford & Wyoming	0.7	1.5	2.3	0.2	0.3	0.5
Ocean Beach Rd	0.0	0.0	0.0	0.0	0.0	0.0
Ourimbah, Pacific Hwy	1.1	0.0	1.1	0.0	0.0	0.0
Pacific Highway, Doyalson	0.0	0.0	0.0	0.0	0.0	0.0
Somersby	110.9	9.5	120.4	24.1	2.7	26.7
The Entrance Rd	0.5	0.0	0.5	0.0	0.0	0.0
Tuggerah	13.4	14.8	28.2	1.8	1.0	2.9
West Gosford	7.8	5.0	12.8	2.9	0.5	3.4
West Gosford South	3.1	0.0	3.1	0.0	0.0	0.0
Woy Woy, South	0.0	0.0	0.0	3.0	0.0	3.0
Woy Woy, Alma Ave	0.0	0.0	0.0	0.0	0.0	0.0
Woy Woy, Nagari Rd	0.0	0.0	0.0	0.0	0.0	0.0
Woy Woy, Rawson Rd	0.2	0.0	0.2	0.0	0.0	0.0
Wyong	46.9	4.2	51.1	103.0	0.0	103.0
Wyong Hospital	0.3	0.0	0.3	0.0	0.0	0.0
Total	**245.7**	**38.2**	**283.9**	**589.8**	**58.9**	**648.7**

933 hectares

Total undeveloped land stocks

284 hectares

30%

Serviced

649 hectares

70%

Unserviced

8.2 Constraints analysis

The following section undertakes a constraints analysis on zoned undeveloped employment land stocks. In conjunction with the NSW DPHI, two constraint categories were developed to assess the availability of the Central Coast's undeveloped and zoned employment land stocks for development.

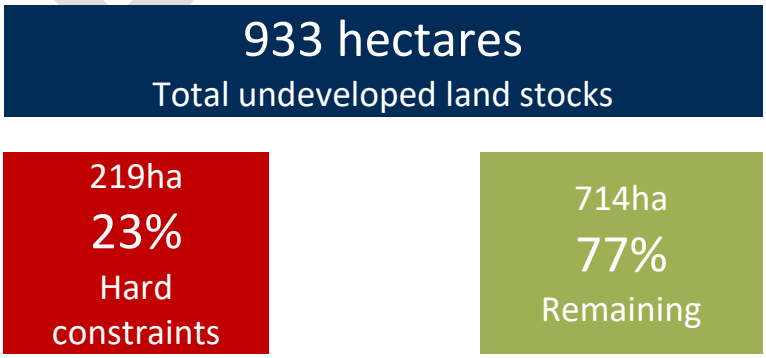
These two constraint categories were:

- Hard constraints - these are restrictions that would reduce the availability and appropriateness of land for development. As such, land identified as being affected by a hard constraint is considered unavailable for development. Hard constraints analysed included:
  - Flooding (land below the flood planning level (FPL))
  - Heritage
- Partial constraints - these are restrictions on the development of land which are considered partial, that is, with appropriate planning, off-setting, and design concessions the development of land is achievable. Partial constraints analysed included:
  - Flooding (land between the FPL and PMF)
  - Strategic agricultural land
  - Wildlife corridors
  - Key habitat for threated species
  - Bushfire
  - Drinking water catchment
  - SAL biophysical
  - Vegetation 2019 V1.5

Land area that is not subject to partial or hard constraints is considered unconstrained. Note, while the resulting land may be unconstrained, the analysis does not undertake a site-by-site analysis of each unconstrained lot. As such, the analysis does not consider the location, shape or other attributes of each unconstrained parcel. Therefore, the analysis does not consider if the resulting portion of unconstrained land is viable or logical to develop. A more detailed fine grain analysis should be undertaken to determine a site's developability.

8.2.1 Hard constraints analysis

Of the around 933ha of undeveloped employment land stock across the Central Coast, around 219ha or 23% was affected by hard constraints. This land is considered less suitable for development. The remaining 714ha or 77% was viewed as developable.



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The following table provides analysis on the amount of undeveloped land stocks that are affected by hard constraints across each of the Central Coast's employment precincts and the amount of undeveloped land which remains for possible development.

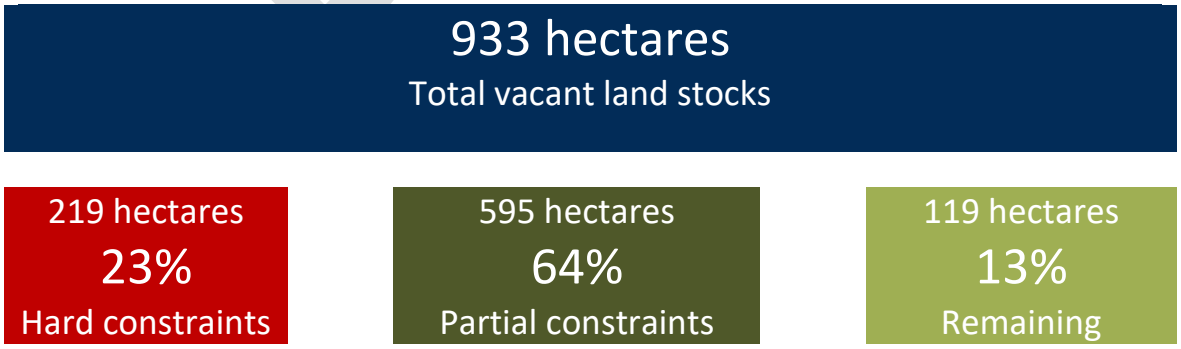
Table 26: Central Coast's undeveloped employment land stocks hard constraint analysis (ha) by precinct

Precinct	Total vacant land	Hard constraints present	Remaining vacant land
Berkeley Vale	0.0	0.0	0.0
Blackwall	0.1	0.0	0.1
Blackwall Road, North	0.0	0.0	0.0
Bushells Ridge	528.5	67.5	461.0
Charmhaven	3.6	0.0	3.6
Doyalson	4.4	1.9	2.5
Erina	0.6	0.3	0.4
Gwandalan	0.0	0.0	0.0
Kincumber	0.0	0.0	0.0
Lisarow	5.4	0.5	4.9
Long Jetty	0.4	0.3	0.1
Long Jetty/The Entrance	0.0	0.0	0.0
Mooney Mooney	0.0	0.0	0.0
North Wyong	30.2	21.6	8.7
Nth Gosford & Wyoming	2.7	1.9	0.8
Ocean Beach Rd	0.0	0.0	0.0
Ourimbah, Pacific Hwy	1.1	1.1	0.0
Pacific Highway, Doyalson	0.0	0.0	0.0
Somersby	147.1	11.1	136.0
The Entrance Rd	0.5	0.4	0.1
Tuggerah	31.1	26.3	4.8
West Gosford	16.1	5.0	11.1
West Gosford South	3.1	1.1	2.0
Woy Woy, South	3.0	1.3	1.7
Woy Woy, Alma Ave	0.0	0.0	0.0
Woy Woy, Nagari Rd	0.0	0.0	0.0
Woy Woy, Rawson Rd	0.2	0.1	0.1
Wyong	154.1	78.5	75.6
Wyong Hospital	0.3	0.0	0.2
Total	**932.6**	**218.8**	**713.8**

Source: HillPDA 2023

8.2.2 Partial constraints analysis

Of the remaining 714ha of undeveloped employment lands stock across the Central Coast not affected by hard constraints, around 595ha was affected by partial constraints. This results in a residual 119ha or 13% of total undeveloped land stocks being considered unconstrained.



To note, while 'partial' constraints are considered capable of being addressed through a design and planning phase, they often require detailed technical reporting and can result in more expensive design requirements or reduced yields. This can substantially reduce the certainty and viability of development. Land that is subject to flooding or contains significant vegetation is often considered higher risk and less appealing to the market for development.

The significant ecological constraints of around 286 ha area that is present within partial constraints category will have 50% less development prospect for future employment lands.

The following table provides analysis on the amount of remaining undeveloped land stocks (after removing land affected by hard constraints) that are affected by partial constraints across each of the Central Coast's employment precincts and the amount of undeveloped land which is considered unconstrained.

Table 27: Central Coast's undeveloped employment land stocks partial constraints analysis by precinct (ha)

Precincts	Total remaining undeveloped land stocks*	Partial constraints present	Potentially unconstrained land
Berkeley Vale	0.0	0.0	0.0
Blackwall	0.1	0.1	0.0
Blackwall Road, North	0.0	0.0	0.0
Bushells Ridge	461.0	438.4	22.6
Charmhaven	3.6	1.3	2.3
Doyalson	2.5	0.0	2.5
Erina	0.4	0.0	0.4
Gwandalan	0.0	0.0	0.0
Kincumber	0.0	0.0	0.0
Lisarow	4.9	3.6	1.4
Long Jetty	0.1	0.0	0.1
Long Jetty/The Entrance	0.0	0.0	0.0
Mooney Mooney	0.0	0.0	0.0
North Wyong	8.7	1.8	6.9
Nth Gosford & Wyoming	0.8	0.1	0.7
Ocean Beach Rd	0.0	0.0	0.0
Ourimbah, Pacific Hwy	0.0	0.0	0.0
Pacific Highway, Doyalson	0.0	0.0	0.0
Somersby	136.0	88.4	47.6
The Entrance Rd	0.1	0.1	0.0
Tuggerah	4.8	0.9	3.9
West Gosford	11.1	3.3	7.8
West Gosford South	2.0	0.2	1.8
Woy Woy, South	1.7	1.3	0.4
Woy Woy, Alma Ave	0.0	0.0	0.0
Woy Woy, Nagari Rd	0.0	0.0	0.0
Woy Woy, Rawson Rd	0.1	0.0	0.1
Wyong	75.6	55.3	20.3
Wyong Hospital	0.2	0.0	0.2
Total	**713.8**	**594.7**	**119.0**

Source: HillPDA 2023 *amount remaining after proportion affected by hard constraints has been removed

8.3 Combined servicing and constraints analysis

This analysis has identified the amount of land that is subject to partial constraints or is unconstrained and considered whether it is serviceable. Land that contained hard constraints was not included as the likelihood of development was lower due to the challenges that would need to be overcome to make the land suitable.

This analysis found that of the 119ha of unconstrained undeveloped land stocks around 82ha or 69% was serviceable, while the remaining 37ha or 31% was not serviceable. Of the 595ha of partial constrained

undeveloped land stocks around 119ha or 20% was serviceable, while the remaining 476ha or 80% was not serviced.

Table 28: Employment land availability by constraint and serviceability (ha) – precincts order from most land to least

Precinct	Serviceable and unconstrained	Un-serviced but unconstrained	Serviceable and partial constraints	Un-serviced and partial constraints	Total vacant land
Bushells Ridge	3.2	19.5	14.7	423.6	461
Somersby	40.2	7.5	69.5	18.9	136
Wyong	13.5	6.8	24	31.3	75.6
West Gosford	5.2	2.7	3	0.3	11.1
North Wyong	6.8	0.1	1.8	0	8.7
Lisarow	1.4	0	3.6	0	5
Tuggerah	3.6	0.4	0.5	0.4	4.8
Charmhaven	2.3	0	1.3	0	3.6
Doyalson	2.5	0	0	0	2.5
West Gosford South	1.8	0	0.2	0	2
Woy Woy, South	0	0.4	0	1.3	1.7
Nth Gosford & Wyoming	0.6	0.1	0.1	0	0.8
Erina	0.4	0	0	0	0.4
Wyong Hospital	0.2	0	0	0	0.2
Blackwall	0	0	0	0.1	0.1
Long Jetty	0.1	0	0	0	0.1
The Entrance Rd	0	0	0.1	0	0.1
Woy Woy, Rawson Rd	0.1	0	0	0	0.1
Woy Woy, Alma Ave	0.05	0	0	0	0.05
Berkeley Vale	0	0	0	0	0
Blackwall Road, North	0	0	0	0	0
Gwandalan	0	0	0	0	0
Kincumber	0	0	0	0	0
Long Jetty/The Entrance	0	0	0	0	0
Mooney Mooney	0	0	0	0	0
Ocean Beach Rd	0	0	0	0	0
Ourimbah, Pacific Hwy	0	0	0	0	0
Pacific Highway, Doyalson	0	0	0	0	0
Woy Woy, Nagari Rd	0	0	0	0	0
Total	**81.6**	**37.4**	**118.8**	**475.9**	713.7

Source: HillPDA 2023

Addressing servicing and constraints on land can add to development cost and increase timeframes. It is therefore less likely that land would be market ready in the short term (0-5 years). It is assumed that if a proponent only has to address either servicing or constraints, land could be made available in the medium term (5-10 years). If a proponent is required to address servicing and constraints, the viability of development becomes questionable and the likelihood of supply coming online reduces. This will vary depending on the strength of the market and the value of land. The following summarises the estimated employment land supply pipeline for the Central Coast with consideration of constraints and servicing.

Less suitable for development	Developable in longer term	Developable in medium-long term	Developable in medium term	Developable in short term

8.4 Supply and demand gap analysis

This study estimated that, to accommodate the projected growth in employment, there was demand for between an additional 208 and 286ha of employment land across the Central Coast to 2041.

The cumulative Central Coast servicing and constraints analysis identified that in the:

- Short term (0-5 years) – around 82ha could be brought online.
- Medium term (5-10 years) – around 156ha could be brought online.
- Longer term (10+ years) – around 476ha may become available.

If the gap analysis was to consider the market ready land supply only (serviced and unconstrained – referred to as short term supply) the Central Coast would require between 126 and 205ha of additional zoned employment land. Most of this additional supply would be for E4 General Industrial zoned land.

If it was assumed that both the short- and medium-term pipeline would come online, there would be a surplus of 30ha of zoned employment land under the TPA scenario and a deficit of 48ha under the Profile .id scenario. With consideration of the full pipeline of vacant land, there would be a surplus under both scenarios of between 428 to 505ha. The following table summarises the supply and demand gap assessment. This has been undertaken for each scenario and employment zone type.

Table 29: Supply and demand gap assessment (ha)

Scenario	Zone	Total demand (a)	Vacant land supply pipeline			Gap analysis		
			Short (b)	Medium (c)	Long (d)	Including short term supply only (b-a)	Including short-medium supply (b+c)-a)	Including all vacant land supply ((b+c+d)-a)
TPA	E3	17	10	2	1	-7	-6	-5
	E4	184	61	134	476	-123	11	487
	W4	0.2	0.0	0.0	0.0	-0.2	-0.2	-0.2
	SP4	7	11	20	0	4	24	24
	Total	**208**	**82**	**156**	**476**	**-126**	**30**	**506**
Profile .id	E3	27	10	2	1	-17	-15	-15
	E4	248	61	134	476	-187	-53	423
	W4	0.2	0.0	0.0	0.0	-0.2	-0.2	-0.2
	SP4	11	11	20	0	0	20	20
	Total	**286**	**82**	**156**	**476**	**-205**	**-48**	**428**

Regardless of the scenario, the analysis is saying that:

- If only the land that was serviced and unconstrained (short term supply) was considered, the Central Coast would not meet the demand requirements by 2041.
- If both the short and medium term supply (unconstrained land and land restricted by servicing or constraints) there could still be a deficit in employment land provision.

- If all vacant land was capable of being developed, there would be adequate provision to meet future land requirements.

Finding unconstrained and serviced land across the region is a challenge. It is therefore advisable that council seeks to inform the Urban Development Program focusing on unlocking the less constrained yet unserviced land supply (around 37ha). This would help alleviate some of the supply pressure being experienced across the region over the short to medium term (0-10 years). There may be opportunities for council, developers and infrastructure providers to collaborate on the delivery of infrastructure.

It is noted that, even accounting for medium term supply, under the Profile .id demand scenario there would be a deficit in supply of around 48ha. This does not consider the additional factor that a large portion of the 'medium term' supply contains land with ecological value, which could vastly reduce possible yield and the viability of projects.

To secure appropriate supply and availability of land to meet demand to 2041, it is recommended that additional employment land stocks be identified and released. Taking the 48ha, combined short and medium supply deficit identified in the above table, and allowing for an additional 20% for precinct planning (roads, sidewalks, servicing and other infrastructure/services), it is recommended that a minimum of 60ha of serviceable and unconstrained land be brought online.

It is recommended a major policy focus for government should be to unlock at least 60 Ha of employment land to properly plan for an expansion of industrial land supply by ensuring that biodiversity issues and infrastructure servicing issues are resolved.

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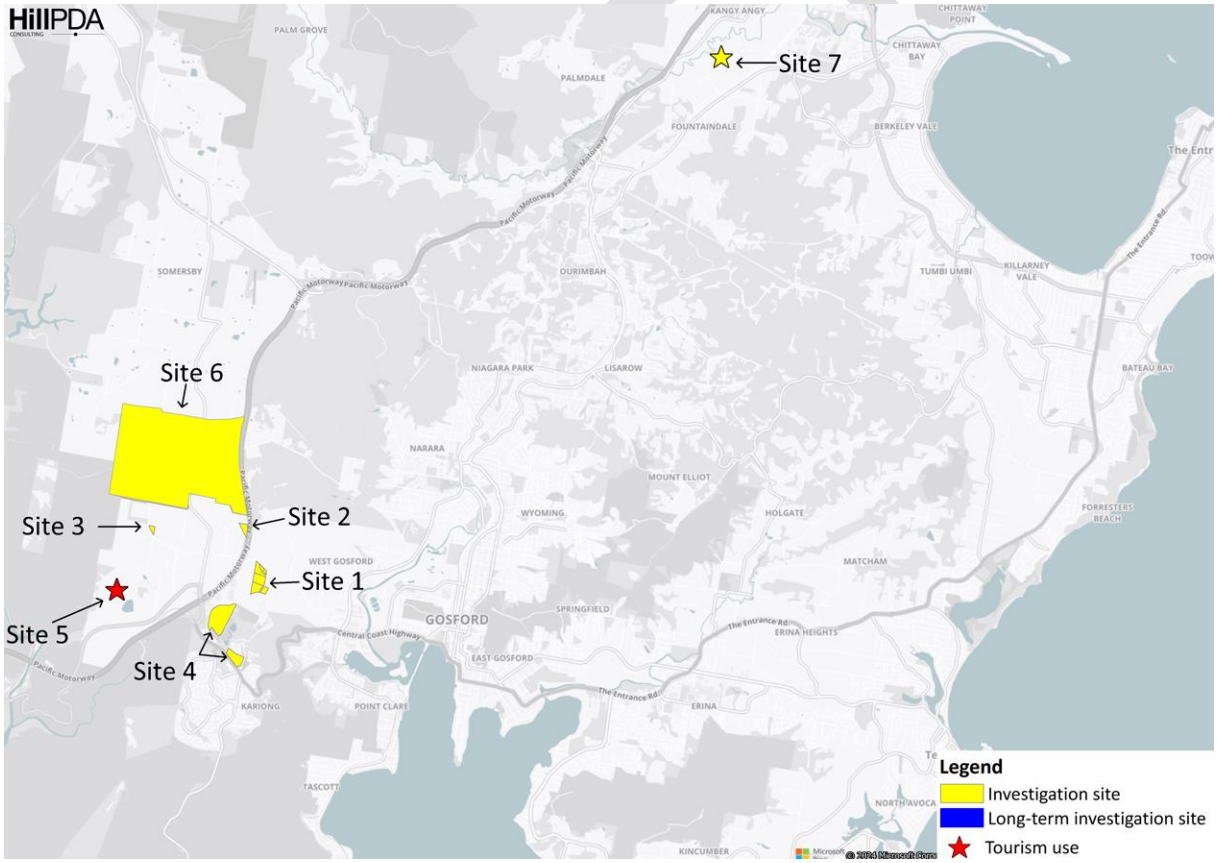
FUTURE EMPLOYMENT INVESTIGATION AREAS

9.0 FUTURE EMPLOYMENT INVESTIGATION AREAS

The previous chapter identified that a conservative minimum 60ha of 'market ready land' should be identified to cater for future employment requirements. Enhancing the development density and improving the utilisation of existing employment land would also assist in reducing the extent of land required.

Future employment investigation areas have been identified for consideration as part of this study. It should be noted that constraints mapping was not available to determine the extent of land available for development. The parcels have used aerial mapping and applied the suitability principles. Environmental and feasibility analysis will be required before the land is considered for rezoning. The possible investigation areas can be seen in the below figures and have been expanded on in the table. Any future rezoning would be subject to further investigation and consultation.

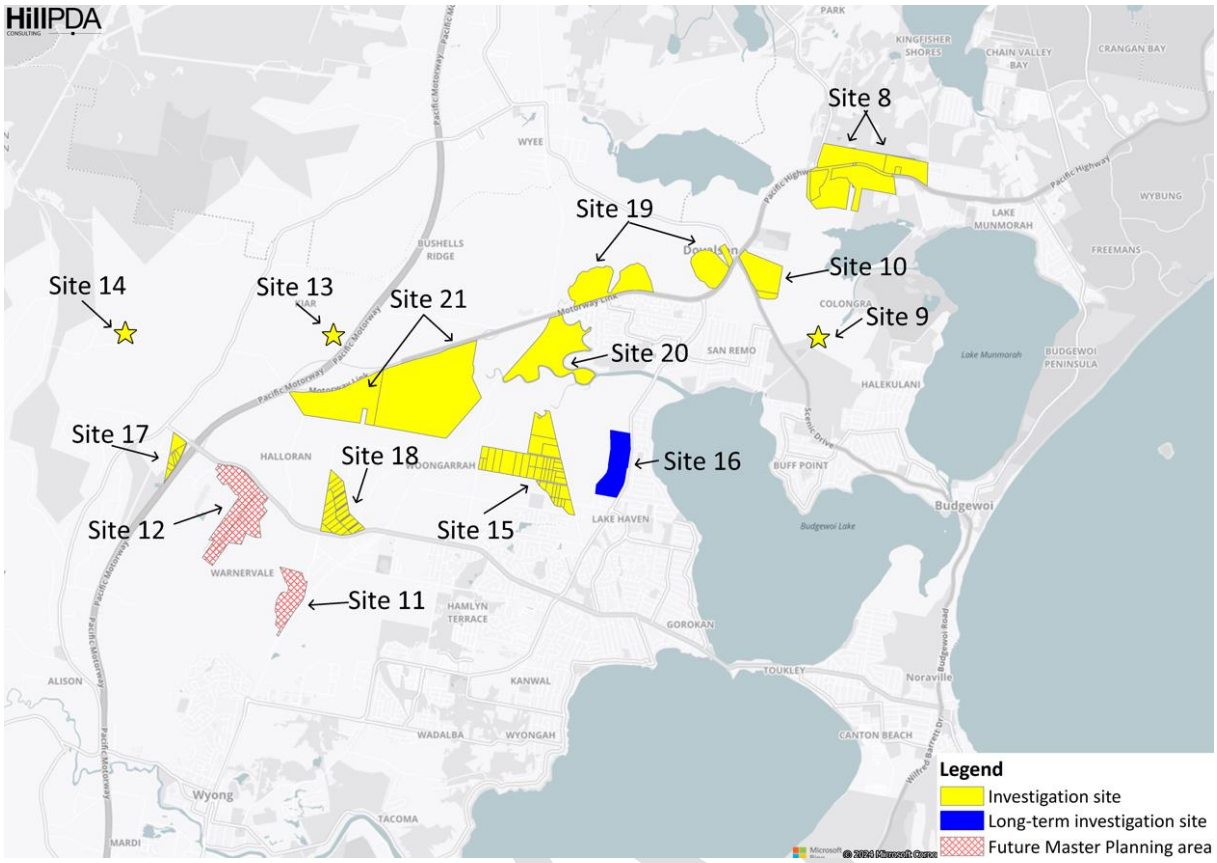
Figure 21: Future investigation sites – southern areas



Source: HillPDA 2024

Note: Site numbers linked to below table

Figure 22: Future investigation sites - northern areas



Source: HillPDA 2024

Note: Site numbers linked to below table

The *Central Coast Regional Plan 2041* identify around 870ha of additional employment land that is yet to be zoned.

It is recommended that environmental studies are undertaken to determine the extent and suitability of land that has development capacity. If the land is deemed unsuitable or heavily constrained, it should not be rezoned for employment use.

As identified in the above chapter, historic take-up of employment land has been around 9ha per year, however to keep up with demand at least 12 to 16ha would be required to 2041. Considering the extent of land that has been identified, it is not necessary that all land is released within the immediate future. It is, however, advised that the land identified for release is appropriately staged to respond to market need. As indicated in the demand study, a surplus of 20% above demand should be available to the market at any given time. Land identified but not rezoned should still be flagged as a future investigation area for employment uses to deter allocation for other use.

Table 30: Future employment investigation areas

Investigation area	Potential gross area	Comment
Site 1 - Acacia and Debenham Road, Somersby	22ha	The site is a logical expansion area for the existing Somersby Employment Area. It has strong transport and service connections and is relatively free of constraints. The site is already cleared due to its existing use as a quarry and primary production. The size, location and site conditions will allow for a variety of possible end users including warehousing and distribution, specialised industries, general manufacturing/industry and light industries.

Investigation area	Potential gross area	Comment
Site 2 – Debenham Road North, Somersby	2.23ha	The site is to facilitate the development of 3 industrial lots and 1 dwelling house lot which will be the subject of embellishment and protection of the environmentally valuable areas in the Eastern and North-eastern portion of the site under the provisions of the E4 and C4 zoned lands under the CCLEP 2022. The site has been the subject of extensive ecological and environmental studies for Ecological constraints. A Bushfire study needs to be considered. Requires a concept design of the sewer servicing strategy and the potential loading from the potential development.
Site 3 – Somersby Falls Road, Somersby	1.064ha	Potential to rezone the land from RU1 Primary Production to E4 General Industrial. The rezoning of the subject site would allow future development to be compatible with existing surrounding uses of the Somersby Employment land. The site is not identified on any known contaminated sites register, heritage register or protected flora or fauna register and could therefore be suitable for re-zoning.
Site 4 – Mount Penang, Kariong	25ha	The site comprises two employment precincts that were formerly part of the Parklands but have been sold for employment generating uses. It currently contains gardens, restaurants, internet and interactive computer facilities, legacy facilities of permanent gardens and community, cultural and accommodation facilities. This could attract tourism and provide a commercial base for development, private sector investment and sponsorship. The area is relatively free from constraints and servicing issues are currently being investigated and addressed. Traffic and heritage would need to be considered when determining future opportunities. The site is appropriately located, and with servicing could contribute to supply in the next 5-10 years.
Site 5 – Old Sydney Town, Somersby	74ha	The Old Sydney Town precinct has heritage and environmental constraints, there is capacity to address these through effective design provisions. The site is identified as 'tourism precinct' under the Central Coast Regional Plan 2041. A key objective is to '*Maintain and expand tourism uses at the site of the Australian Reptile Park' which presents opportunities for future employment*. A future planning proposal on the site has the potential to act as a catalyst for the former Old Sydney Town site and broader Somersby Employment Area by delivering tourist, community, commercial and retail opportunities in a strategic location.
Site 6- North Somersby Industrial Area	395ha	The North Somersby Investigation Area (NSIA) is an extensive mapped area within the CCRP 2041 as an Employment Investigation area, 15% of the NSIA footprint perhaps facilitates a sizeable employment outcome and 85% is undevelopable. There are constraints on the existing transport network and even under existing planning controls, there would be limits to development on the NSIA. The traffic modelling investigations of the Mt Penang / Somersby Integrated Transport Plan have indicated the existing transport network is not capable to support predicted growth in this area without upgrades and additional service investments. Assumptions on indicative land uses of the 15% developable area are likely to be warehouses, industries, offices, manufacturing and service businesses.
Site 7- Kangy Angy	44ha	Land surrounding the Kangy Angy rail maintenance facility may be suitable for E4 General Industrial uses. The land is relatively clear and flat due to its existing rural land use, however, does have minor flood constraints. The site would be a logical extension for the growing food manufacturing cluster adjacent. Through appropriate design, there could be potential to connect the two precincts to enhance clustering opportunities. There could also be potential to leverage the rail siding for distribution.
Site 8– North Doyalson	114ha	The site is identified in the CCRP2041 and would provide a logical expansion for employment uses. It is largely undeveloped land with areas of extensive vegetation and several large allotments with single dwellings. The land is currently zoned RU6 Transition, utilised as a holding zone prior to investigations being carried out to determine suitability for future uses. Located on a main thoroughfare, the site would be appropriate for a mix of industrial and E3 Productivity Support uses.

Investigation area	Potential gross area	Comment
Site 9 – Lake Munmorah Power Station, Colongra	595 ha	The northern portions of the site are identified as a Proposed Employment Area under the Greater Lake Munmorah Structure Plan. The site is close to the Pacific Highway. It benefits from remnant infrastructure and facilities that have the potential for reuse and repurposing to facilitate future development. There are potential opportunities for a range of industrial and manufacturing uses including recyclable energy production, heavy industry, biodiversity offsets and a large-scale battery energy storage facility. The site has significant environmental and ecological constraints which will require proper management of conservation lands and staging and sequencing of infrastructure delivery for future use.
Site 10 – Doyalson 1	33ha	The site is identified as Employment Investigation area within CCRP 2041.The Doyalson site provides a logical expansion area of the existing industrial and has good road access connections. The site would be appropriate for an industrial zoning subject to further investigation of environmental constraints and feasibility. The site is located within the growth corridor and would contribute to providing jobs for the local community. The site would be appropriate for a diversity of lot sizes, mostly around 2000 to 4000sqm.
Site 11 – Warnervale Business Precinct Area	34ha	Future master plan site to suit highest and best uses around employment land zones. The site outcomes may include medical and health, large format retail, education, residential, seniors living, or business park, commercial, community facility and aquatic centre. Investment in education, office space and retail facilities would generate significant direct economic output from construction activity. It would also facilitate the operations of business services, retail spending and education/training, which will have longer lasting impacts on the local community. This site is impacted by ecological constraints, which require a biodiversity certification study before any masterplan for future employment land use.
Site 12 –Central Coast Airport, Warnervale	85ha	Future master plan site owned by Central Coast Council. The site could generate jobs allied with and in aviation. Adjoining areas could be developed for new businesses such as aircraft manufacturing and maintenance as well as subdivision for advanced manufacturing activities (subject to land servicing and traffic management at Sparks Road). The site is impacted by ecological constraints which require a biodiversity certification study.
Site 13 – Wallarah 2 Coal Project	88ha	The Project would bring significant economic and employment benefits to the region and NSW. If developed, it would involve the construction and operation of an underground coal mine and associated facilities for 28 years. There may be opportunities to promote mine-related developments and businesses which service the mining industry near Bushells ridge area. There are potential mine subsidence impacts as well as ecological and environmental constraints to be reviewed.
Site 14 - Buttonderry Waste Management Facility	115ha	This site surrounding areas would provide opportunities for employment industries which rely on being proximate to Buttonderry Waste Disposal Facility. Landfill gas, air quality, noise and visual amenity constraints will need to be reviewed. There may be future mine subsidence impacts due to the nearby Wallarah 2 Coal Project.
Site 15 – Charmhaven Sewerage Treatment Plant site	110ha	The surrounding area to the North-east of the STP site is located within the Greater Warnervale Structure Plan study area. Further investigation will be required to determine any additional capital work needed at the Charmhaven Sewage Treatment Plant to minimise the extent of the odour impacts for any surrounding future proposed land uses. A key constraint in this area is the ability to service the land and manage potential odour issues from the Charmhaven Sewage Treatment Plant (STP). The northern portion of the precinct has been identified as subject to further investigation. Pending further odour studies and refinement of the odour buffer zone, this land may be suitable for residential or employment purposes.

Investigation area	Potential gross area	Comment
Site 16- Pacific Highway, Charmhaven	39ha	The new-release area within Charmhaven is identified within the CCRP 2041 for Mixed-Use investigation purposes. Due to the prominent location alongside the Pacific Highway, this precinct has the potential to develop in the long term for employment purposes subject to resolving strategic constraints such as ecology and mining. This change of proposed future use will also require justification from an economic land use perspective. An appropriate mix of residential and/or employment can be determined once land use compatibility and sewer odour buffer zone planning requirements have been clarified. The key constraints in this area are mining, odour and ecology.
Site 17- Sparks Road, Jilliby	12ha	The area is within Wyong Employment Zone of Greater Warnervale Structure Plan. The area is identified as Employment investigation area in CCRP 2041. A small pocket of land that is well located on the M1-Sparks Road Interchange and well buffered from adjoining rural-residential uses has been identified for future employment under GWSP. The future land uses will need to be compatible with the environmental characteristics of the precinct including Porters Creek Wetland and the Warnervale floodplain.
Site 18- Bruce Crescent, Wallarah	44ha	The area is identified within CCRP 2041 as Employment investigation area. The small size of land parcels and fragmented ownership in Bruce Crescent, which creates difficulty to convert the lands for employment purposes. This land use outcome would be reliant on employment land values being significantly higher than rural-residential use.
Site 19 –Doyalson 2 &3	85ha	Both the areas are identified within CCRP 2041 as Employment investigation area. Development of these sites must be balanced with biodiversity conservation, within the broader context of the green corridor. Detailed ecological investigations required to measure the extent of potential biodiversity losses from development and the need for, and extent of, offsets.
Site 20 – Mona Road, Charmhaven	83ha	The site is adjacent to Charmhaven sewerage treatment plant and referred as Employment investigation area in CCRP 2041. Development of the sites must be balanced with biodiversity conservation, within the broader context of the green corridor and odour buffer impact. Detailed ecological investigations and an appropriate odour buffer area and measures to mitigate odour impacts.
Site 21 – Mountain Road,Wallarah	280ha	The area is identified within CCRP 2041 as Employment investigation area. The area is strategically located. Further investigation is required for land located with access to existing and proposed major roads and utilities infrastructure that will also contribute to the formation of the green corridor. Investigations into ecology and stormwater management are required to determine conservation and development potential.

Source: HillPDA and Central Coast Council, 2024

ENGAGEMENT FINDINGS

10.0 ENGAGEMENT FINDINGS

10.1 Consultation method

Consultation was undertaken over the months of September and October 2019, in the form of targeted phone calls. Participants included local business owners, major landowners, real estate agents, government agencies and industry groups. An internal stakeholder consultation workshop was also conducted. The findings from consultation reflect the perceptions and ideas of people that participated in the activities.

10.2 Consultation findings

Consultation findings have been collated into themes for easy reference.

Industry in the area

- Businesses that are currently operating in the area include manufacturing, concreting, freight and logistics, urban services and food-related industries.
- Comments highlighted that businesses are attracted to the area from elsewhere (Western Sydney or the Northern Beaches) because of the more affordable property, allowing new businesses to build to their own needs.
- The local workforce occasionally lacks the skills for certain jobs, and sometimes businesses need to bring up workers from Sydney.
- Some businesses do not build to the extent of the site to allow for potential expansion, and on other occasions they are constrained and must streamline their business to fit within their space.
- Some businesses prefer to cluster together; food businesses are clustering in Berkeley Vale.
- Offensive industries such as asphalt plants are very difficult to gain approval given their effects on amenity.

Land supply

- Comments indicated that there is a shortfall in industrial zoned land that is serviced and not overly constrained.
- One comment noted that there is a fair amount of suitable cleared areas for employment land, however it needs to be rezoned and serviced as a matter of priority.
- The encroachment of urban/residential development on industrial lands is impacting on the operation of businesses and reducing available land.
- A broad spectrum of lot sizes from 500sqm to 24ha (mostly 1-10ha) is required to satisfy demand for industrial sites, including some larger lots.
- While lot sizes may seem appropriate, the useable footprint of the site is often smaller than desired given environmental constraints and buffers required in the LGA.
- One comment suggested to leave it to the market to do the final subdivision to avoid smaller lots from the outset as this results in greater initial road infrastructure costs.
- Large food manufacturers have been unable to find land and operate to their maximum potential, which results in less investment in the area.

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Development application process

- A large portion of stakeholders expressed concern that the planning approval process has numerous recurring issues and that this is inhibiting the expansion or development of employment lands in the Central Coast.
- Planning proposals and development applications take too long to process.
- Council imposes cookie-cutter requirements for industrial developments which are uninformed and not responsive to unique business operations.
- Several comments highlighted that Council does not have a proactive approach to businesses developing in the area.
- Overall, the stakeholders indicated that more support from Council was required to facilitate development within existing employment lands and unlock new employment areas.

Business parks

- Business parks are generally supported by the stakeholders, particularly specialised around the food or logistics clusters.
- One comment mentioned a landowner's interest in creating a new business park/light industry in David Street at Doyalson to coincide with the development of the RSL.
- Several comments indicated that the food cluster in Berkeley Vale is a suitable location for business park-type development as it would allow supply chain efficiency and support innovation.
- Car parking should be streamlined and made more readily available if business parks are to be developed in the Central Coast.
- The poor access to NBN in Central Coast employment lands deters tech companies and other businesses.

Biodiversity and environmental management

- Several comments indicated that industrial sites are overly constrained, and this is a barrier to expansion or new development.
- Council buffer requirements and vegetated strips sterilise sites and make it difficult to operate a viable business.
- Additional unconstrained land is required to develop industry while protecting existing areas of ecological value.
- Some employment lands are constrained by ecological silos where animals become stuck in bushland refuges between lots and roads.
- A consistent, centralised approach to environmental management to State standards is required.

Transport infrastructure

- Several comments were made concerning the lack of a gateway/transport interchange for freight and logistics between Newcastle and Sydney. Somersby and Sparks Road were raised as potential locations for this.
- Movement across the LGA is difficult for commuters in part due to natural constraints; there is a need for public transport improvements.
- Bus connectivity is poor, and stops are infrequent.
- Sparks Road needs improvements including a dual carriageway; however, funding is an issue.
- Infrastructure issues need to be raised with RMS, Treasury and Infrastructure NSW.

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- Anecdotally, RMS don't want to support any changes to the national highway network - this makes road openings onto the highway difficult.
- Dispatch needs to be managed and operated 24 hours to avoid peak hour traffic.
- Future industrial or business park areas need to include access for B-double trucks.

Potential industrial lands

- Industrially zoned land at the airport at Warnervale and remaining lands in Somersby and David Street are under investigation for development, however they are constrained.
- Decontamination is underway at Lake Munmorah Power Site – investigation is warranted as to whether this land could be used for industrial.
- The airport site could provide around 60+ha of employment land, however the costs to service the land would likely price out developers.
- On the western side of Somersby North there is existing farmland which may be ripe for release as industrial. However, a rural lands study needs to be completed to ensure it is no longer viable rural land.
- Industrial developments need a lot of infrastructure and there are not large developers to deliver this; Council and the State Government should roll out new infrastructure to grow business and investment.

Strategic vision

- Several comments expressed that food industries can be a real asset if properly assembled and marketed.
- Comments vocalised that economic development is not a focus of the Council, and that more could be done to deliver on the area's potential.
- There is a new interest in the hospital and university in Gosford being upgraded, however a perceived resistance by Council to large scale development could hinder potential for economic growth.
- Programs around innovation are being provided by the University of Newcastle and federal funding is offered to create an innovative region, however the funding has to be matched by industry.

Commercial and business centres

- Residential towers are being approved in West Gosford with little commercial.
- Ground floor retail or commercial offering is tokenistic.
- Council is a large landowner in Wyong with 200ha owned by Council.
- North Wyong is identified for future development in the Structure Plan; staging and priority development should be made into a list.

Quick thoughts

- A special infrastructure contribution could be prepared for the Central Coast focusing on intersections with the highway and main roads.
- Funds collected from development contributions are not being spent on infrastructure for industrial lands.
- The Southern Growth Corridor Plan needs to be reviewed for priority actions.

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10.3 Consultation with real estate agents

What type of industries are looking to locate to the area?

- Small manufacturing, construction, packaging, scrapping.
- Distributors and warehousing are growing industries.
- Businesses from Sydney's northern beaches are relocating to the area.
- Limited enquiries for bigger industrial uses.

Do these industries have specific requirements?

- Small manufacturing: 200-500sqm GBA on 1,000 to 2,000sqm lot size.
- Service industries: 1,000-2,000sqm GBA on 1,000sqm+ lot size.
- Manufacturing: 1,000-2,000sqm GBA on 2,000-4,000sqm lot size.
- Warehousing: 1,000-6,000sqm GBA on 5,000-10,000sqm lot size.
- Food services: 3,000-5,000sqm GBA on 5,000-10,000sqm lot size.
- Ease of access to M1 is a priority.
- Large floor plates.
- High voltage power and natural gas are important requirements.

What lot sizes are in demand or lacking in the Central Coast?

- 1,000-4,000sqm is lacking.
- Anything more than 4,000sqm is difficult to sell.
- Some comments indicated a lack of 5,000-10,000sqm lots.
- There are not enough enquiries for 10,000sqm+ lots.
- Lack of industrial land in Somersby as Warnervale is further from Sydney.

What locational attributes are buyers/tenants looking for?

- Easy access to the M1 freeway.
- Retail and social amenities are a secondary priority.
- Easy access and turn points for large trucks.
- Somersby, due to proximity to Sydney and North Wyong.

Are there specific locations they are interested in?

- Somersby and Warnervale were identified as the most in-demand areas for industrial, particularly for businesses focussed in Newcastle and Sydney.
- There is interest in West Gosford (mostly for businesses servicing the coast) although this area has no more capacity.
- Some demand for Tuggerah.
- Increased demand for Erina.

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What are the biggest constraints stopping people or challenging businesses/investors to move into the area?

- Clients have complained of lengthy DA process.
- There is a lack of direction for lots affected by transitional zones and what can be built on them.
- Shortage of suitable land.
- Access on-site and ease of access to arterial roads.
- Bank lending, staffing, relocation costs.

Is there demand for business parks in the area?

- Almost all comments indicated a demand for business parks in the LGA, although it depends on more knowledge intensive businesses.
- Locations suited for business parks include Doyalson, the northern end of Warnervale, Somersby and Woy Woy.
- A business park should be close to a train station.

Are there any industries being pushed out of the area?

- Comments mostly indicated that there were not any industries being pushed out of the areas.
- One comment highlighted that there were fewer larger manufacturers, but this is due to the move of operations to overseas.

What is the general opinion on affordability and appropriateness of floorspace?

- Most comments mentioned that there is no issue with affordability.
- Prices have increased by 50-60% over recent years, however it is still more affordable than Sydney.

Is there a lack of industrial zoned land across the Central Coast?

- Most comments mentioned a shortage of IN1 and IN2 (now E4) in Somersby.
- There is a shortage of IN1 (now E4) in the West Wyong growth corridor.
- One comment mentioned a shortage of B6 (now E3); Doyalson or northern end of Warnervale could be suited to this.
- One comment mentioned that more industrial lands should be focused in Gosford rather than Erina and Tuggerah.
- Anywhere along the Pacific Highway corridor is suited to more industrial land.

Should more commercial or industrial land be made available – where?

- The comments indicated that there is sufficient commercial land available, particularly in Tuggerah.
- More industrial was recommended in Somersby and Warnervale.
- One comment suggested investigating B7 zoning (now SP4) along Pacific Highway.
- Lisarow was proposed for manufacturing.
- Ourimbah was proposed for mixed use.

Would the provision of IN3 (E5) be beneficial for the Central Coast?

- Almost all comments indicated that IN3 (E5) would be beneficial for Central Coast.
- E5 should be located away from residential.

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- There is currently a low level of enquiries for this type. Government intervention would be required to incentivise heavy industries to move here.

What uses do you think the land around the airport should support?

- Primarily IN1 and IN2 (now E4), potentially IN3 (now E5).
- Industrial land is supported but this must be supported by road upgrades and freight plane capacity at the airport.
- Other comments mentioned that commercial and residential could suit the site.

Are there any uses located within the employment precincts which are forcing out more traditional industrial uses?

- Most of the responses indicated that there were no uses pushing out traditional industrial uses from employment precincts.
- There are increased support services (childcare centres) and retail, particularly in enterprise corridor areas, however it is perceived that these support industrial businesses.
- One comment mentioned Tuggerah business park as an example of commercial pushing out industrial.

Strengths

- Strong food manufacturing industry
- Affordable compared to Sydney or Northern Beaches
- Great access to highway and train line
- Good pipeline for commercial floorspace (Gosford, Tuggerah)
- Clustering of food businesses indicate a regional specialisation
- Interest from a diverse range of businesses to establish in the area

Threats

- Encroachment of residential lands near industrial areas causing conflict
- Other nearby industrial lands offering cheaper property
- Increased support services (e.g. childcare or retail) may conflict with enterprise corridor businesses
- Development financing impacts from banking reforms

Weaknesses

- Lack of unconstrained and appropriately zoned land suited for industrial development
- Large areas with environmental constraints near industrial areas
- Slow planning approval process
- Lack of strategic planning for employment lands in the LGA
- Poor public transport accessibility
- Poor NBN access in some areas
- Local workforce sometimes lacks skills for large jobs
- No economic identity for employment lands
- Buffer requirements impact development feasibility

Opportunities

- Build a transport interchange near the Somersby industrial area
- Expansion of the University provides opportunity to collaborate with nearby food manufacturing
- Clustering together industries like food manufacturing can streamline supply chain and waste management and facilitate innovation
- Airport site, David Street, Lake Munmorah Power site, Somersby North could offer additional industrial land
- Business park development is suited in Doyalson, north of Warnervale and Woy Woy

PLANNING REVIEW

11.0 PLANNING REVIEW

11.1 Central Coast Local Environment Plan 2022

The *Central Coast Local Environmental Plan 2022* (CCLEP 2022) is a consolidation of the Gosford Local Environmental Plan 2014 and the Wyong Local Environmental Plan 2013. The CCLEP 2022 was finalised and notified on the NSW Legislation website on 24 June 2022 and came into effect on 1 August 2022.

The CCLEP 2022 is structured in accordance with the requirements of the Standard Instrument—Principal Local Environmental Plan (Standard Instrument). Land uses are permitted via a land use table with specific requirements for development outlined based on location, use or other triggers.

A review of the CCLEP 2022 controls applicable to each zone has been undertaken with consideration of the objective of the zone and ability to meet the objective. Considerations for future reviews have been provided in the below table.

Table 31: CCLEP objective and use permissibility review

Zone	Objective	Considerations for future reviews
E3 Productivity Support	• To provide a range of facilities and services, light industries, warehouses and offices. • To provide for land uses that are compatible with, but do not compete with, land uses in surrounding local and commercial centres. • To maintain the economic viability of local and commercial centres by limiting certain retail and commercial activity. • To provide for land uses that meet the needs of the community, businesses and industries but that are not suited to locations in other employment zones. • To provide opportunities for new and emerging light industries. • To enable other land uses that provide facilities and services to meet the day to day needs of workers, to sell goods of a large size, weight or quantity or to sell goods manufactured on-site. • To ensure the locations of businesses requiring large floor plates do not adversely affect commercial or residential areas. • To ensure business areas are not adversely affected by residential development. • To provide for residential uses, but only as part of mixed-use development. • To provide primarily for businesses along key corridors. • To permit limited residential accommodation that contributes to the provision of employment opportunities.	• The permissibility of uses is largely appropriate to meet the objectives of the zone. • Objectives generally focus on larger format retailing and lower impact manufacturing and storage uses. Proposed permissibility of all commercial premises, including supermarkets, may conflict with these objectives with additional supporting clauses. • Certain water and sewerage uses have the potential to cause amenity issues. Shop top housing may result in land use conflict with more intense commercial and industrial uses. • Consider the removal of shop top housing permissibility. This use should instead be focused in centres and along enterprise corridors. • Consider the removal of the potentially offensive water and sewerage uses so not to create amenity issues. • Consider refining the zone objectives to remove repetition and provide greater clarity of role and function.
E4 General Industrial	• To provide a range of industrial, warehouse, logistics and related land uses. • To ensure the efficient and viable use of land for industrial uses. • To minimise any adverse effect of industry on other land uses. • To encourage employment opportunities.	• The permissibility of uses is generally appropriate, presenting a zone that is primarily for industrial and urban services related development, with limited supporting uses, such as small-scale food and retail.

Zone	Objective	Considerations for future reviews
	• To enable limited non-industrial land uses that provide facilities and services to meet the needs of businesses and workers. • To ensure that retail, commercial or service land uses in industrial areas are of an ancillary nature. • To support and protect industrial land for industrial uses.	• E4 General Industrial zones are also best buffered from amenity-sensitive centres or residential areas to ensure that they remain available for industrial uses that have the potential to conflict with sensitive receivers.
SP4 Enterprise	• To provide for development and land uses that support enterprise and productivity. • To provide a range of office and light industrial uses. • To encourage employment opportunities. • To enable other land uses that provide facilities or services to meet the day to day needs of workers in the area.	• Objectives and permitted uses are somewhat conflicting. Residential development would be constrained by the Clause 7.11 floorspace limit for shop top housing. Other housing types are prohibited, meaning the practical delivery of housing is very limited. Likewise, the level of office development is also limited based on the floorspace of the lot.
W4 Working Waterfront	• To permit limited residential accommodation that contributes to the provision of employment opportunities. • To retain and encourage industrial and maritime activities on foreshores. • To identify sites for maritime purposes and for activities requiring direct foreshore access. • To ensure that development does not have an adverse impact on the environment and visual qualities of the foreshore. • To encourage employment opportunities. • To minimise any adverse effect of development on land uses in other zones.	• The W4 Working Waterfront zone permits industrial and commercial uses that have acceptable impacts on the environmental and amenity values of waterfront lands. • The uses permitted generally align with the zone intent.

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11.2 Land use encroachment impacts

Continued pressure for industrial and business zones to permit additional uses particularly; residential, retail and office space has raised questions regarding the ongoing viability of certain lower order land uses to continue operating in the desired zone.

This pressure is a combination of both market forces for additional floor space for these uses and the economics of their development feasibility viability. A key component in any feasibility is the cost of land. If there are no planning controls relating to land use, then the land use that can afford to pay the highest amount for that parcel will dominate its use. This in valuation terms is referred to as 'highest and best use' which is used to value development parcels. The land value for any vacant site will be set by those uses that can afford to pay the highest price.

To illustrate this concept, HillPDA has produced an indicative land value hierarchy by use, as depicted by a land value ladder (to right).

Prime retail and residential have the highest propensity to pay for a given parcel of land, out of the range of uses tested. At the bottom of the ladder, industrial uses have the lowest propensity to pay for a given parcel of land.

In a scenario where bulky goods and industrial can compete for the same site, bulky goods can typically afford to pay a higher rent due to the higher financial return on their business operations and thus they can afford to pay a higher land value in their development feasibility. As a result, in zones where both uses are permitted, land value will increase to the land value benchmark set by bulky goods. Industrial uses that cannot afford this higher land value will be displaced. If demand for bulky goods is limited or restricted, the balance of land will fall back to a residual land value that is affordable to industrial uses. A similar principle would apply to mixed use residential and commercial zones, with the residential uses typically dominating. There will obviously be variances based on the location and market demand.

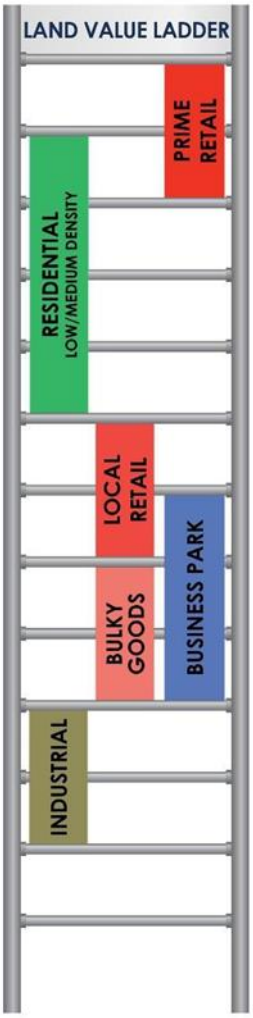

Figure 23: Land value hierarchy by use

When considering how some uses can crowd out other uses, consideration must be made to:

- Level of co-dependence between uses. For example – the operation of a take-away store in an industrial zone or business park that is reliant on the other employment use for its clientele. In this situation the uses can co-exist in the same zone without the risk of one displacing the other.
- Could the use proposed to be introduced successfully operate if the other use was removed? An example of where this could occur would be where bulky goods retail is allowed into a business park. In this situation, if the customer base does not relate to the businesses in the precinct, as its catchment is the region's population, closure of the existing businesses in the business park would not impact on the bulky goods retailer.

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Table 32: Competitive use viability considerations

Competitive uses	Retail setting (i.e. an area dominated by retail uses)	Business park setting (i.e. dominated by office uses)	Industrial setting (i.e. dominated by industrial uses)
Business Premises (i.e. an occupation, profession or trade (other than an industry) is carried on for the provision of services directly to members of the public on a regular basis)	• N/A (already permitted in relevant zones)	• Locate in areas where they can have a sufficient customer base. • If business parks are well located, business premises are more likely to compete with office uses for sites with small floor plates rather than large floor plates (which are more attractive for office use). • Displacement risk: Low • Co-location impact: Positive (potential for some negative amenity impacts e.g. parking)	• Locate in areas where they can have a sufficient customer base. • If industrial areas are well located, business premises are more likely to compete with industry for sites with small floor plates rather than large floor plates (which are more attractive for industry). • Displacement risk: Low • Co-location impact: Positive (potential for some negative amenity impacts e.g. parking)
What happens if small-scale, complimentary retail uses are introduced (aligned with current neighbourhood shops and food and drink premises)	• N/A (already permitted in relevant zones)	• N/A (already permitted in relevant zones) • Co-location impact: Positive. The presence of these uses provides amenity for workers. • Displacement risk: Low	• N/A (already permitted in relevant zones) • Co-location impact: Positive. The presence of these uses provides amenity for workers. • Displacement risk: Low
What happens if service industries are introduced (non-manufacturing services that are defined as being an industrial use – e.g. a mechanic)	• Lower capacity to pay land values in a retail dominated area. • More of an amenity consequence than an economic impact. • Displacement risk: Low	• Service industries have a lower capacity to pay land values in a business park. • Displacement risk: Low	• N/A (already permitted in relevant zones)
Office (aligned with current 'office premises' definition in the NSW SILEP)	• Office complements the retail centre as it creates a customer base. • Retail uses would generally have a greater capacity to pay for premium ground floor locations. • Displacement risk: Low • Co-location impact: Positive	• N/A (already permitted in relevant zones)	• Generally, demand for office in a traditional industrial environment is not high, as office uses are usually attracted to higher amenity areas (e.g. centres close to public transport, retail and services). • If an industrial precinct is located in an area of high amenity, the attractiveness of that area to an office market is higher. Considering trends in enterprise/small business, there is a likelihood for this to occur in areas where office uses can no longer afford rents in nearby business precincts. • This can push up land values and increase competition, potentially displacing some less viable industrial uses.

Competitive uses	Retail setting (i.e. an area dominated by retail uses)	Business park setting (i.e. dominated by office uses)	Industrial setting (i.e. dominated by industrial uses)
			• Businesses such as start-ups and emerging technologies may be attracted to industrial areas due to the lower land prices. • Ancillary office space compliments industrial uses as it supports the industrial business rather than competing against it. • Displacement risk: Medium
Specialised retail (aligned with current 'specialised retail' definition in the NSW SILEP)	• Net leasable area rates are higher in areas that permit all retail, therefore specialised retail would more likely operate in a lower order centre. • The impact on traditional retail is not significant. • Appropriate for specialised retail to operate within retail areas: contribute to the clustering of retail, enhance customer turnover, enhance viability in areas where there is limited demand for sites from other retail uses. • Displacement risk: Low • Co-location impact: Positive (potential for some negative amenity impacts)	• Specialised retail has the propensity to pay a higher amount for sites. • If there is higher demand for specialised retail, this has the potential to push out office uses, damaging the core function of a business park. • If specialised retail is able to cluster within a business park, pressure on prices is magnified and increases the premium on remaining office space, due to the reduced land availability. • Displacement risk: Medium-High	• Specialised retail can pay twice the land value compared with general industrial uses, crowding out traditional industrial uses. Once clustering occurs, land prices could inflate to up to five times the amount, compromising industrial areas further and stymying traditional industrial activities. • No longer complement industrial uses as they become the dominant use in some areas. • Compete for large sites, reducing the quantum of land available for traditional industrial uses. • Reduce the availability of large land parcels. This means that competing uses would be forced out of the catchment. This creates economic inefficiencies as a catchment loses its service capability. • Prohibiting specialised retail in the general industrial areas is a prevention mechanism. • Displacement risk: High
Storage (aligned with current 'storage premises' definition in the NSW SILEP)	• Potential for fragmentation of retail to occur if it becomes the dominant use. • Potential amenity impacts in retail setting.	• N/A (already permitted in relevant zones)	• N/A (already permitted in relevant zones)
Manufacturing	• New manufacturing formats based on advanced technologies and smart manufacturing would be able to compete for sites and is an appropriate use. • Traditional manufacturing would be unlikely to compete against retail uses. • Displacement risk: Low	• New manufacturing formats based on advanced technologies and smart manufacturing would be able to compete for sites and is an appropriate use. • Traditional manufacturing would be unlikely to compete against office uses. • Displacement risk: Low	• N/A (already permitted in relevant zones)

Competitive uses	Retail setting (i.e. an area dominated by retail uses)	Business park setting (i.e. dominated by office uses)	Industrial setting (i.e. dominated by industrial uses)
Residential	• Ability to pay a considerably higher price for land [if an FSR of more than 1:1], with which retail is unable to compete. • In relation to mixed use development and capacity to pay for a floorplate, retail is able to compete with residential for ground floor space, especially if in a retail precinct. • More viable use on higher levels of a mixed use development compared with retail. Higher levels of a mixed use development are generally less attractive to retailers as they are not exposed to foot traffic. • Shop top housing allows retail (and other uses) to operate on the ground floor at an effectively subsidised rent as they would be more expensive (higher rent) as a standalone site. • An active street frontage overlay located within Local Environmental Plans will assist in ensuring ground floor retail is clustered in parts of the centre best suited to retail. • Displacement risk: High • Co-location impact: Positive	• Capacity to pay a considerably higher price for land compared with office uses and would have a detrimental impact on operation. • Live-and-work development will push up land values and have a similar impact on office uses as residential due to ability for it to be used entirely as residential. • Evolution of business parks has the potential to foster mixed use precincts without displacing office space. • Displacement risk: High • Co-location impact: Traditionally negative	• Residential uses would have significant impact on industrial areas due to amenity impacts and harming viability for industrial uses. • Displacement risk: High • Co-location impact: Traditionally negative
Retail (aligned with 'retail premises' definition in NSW SILEP)	• N/A (already permitted in relevant zones)	• Depending on market demand, has the potential to pay like for like for floor space. • A more likely scenario is where retail demand reduces the viability or the capacity for traditional office premises to buy into that area. • If retail is able to cluster within a business park, pressure on prices is magnified and increases the premium on remaining office space, due to the reduced land availability. • Displacement risk: Medium-High	• Retail can pay considerably more for land compared with industry, crowding out traditional industrial uses. Clustering of retail uses inflates land prices even further, compromising industrial areas further and stymying traditional industrial activities. • Displacement risk: High
Warehouse (aligned with warehousing or distribution centre'' definition in NSW SILEP)	• Unlikely to be viable in a traditional retail location and if viable, would have a minimal impact on the economic function of a centre. • Displacement risk: Low	• N/A (already permitted in relevant zones)	• N/A (already permitted in relevant zones)

11.3 Preserving and encouraging industrial and other employment uses

As noted above, several opportunities have been identified to clarify the purpose of and differentiate the employment focused zones in the CCLEP 2022. Currently, the high order business zones permit a mix of residential, commercial, industrial and infrastructure uses that have the potential to conflict. The permissibility of amenity- sensitive uses may limit the potential delivery of amenity-impacting uses.

The future CCLEP 2022 review could consider utilising the E3 Productivity Support and SP4 Enterprise zones as commercial and light industrial buffers between more intense industrial uses and residential and retail areas that are sensitive to amenity impacts.

A spatial-focused review should consider transitioning business zone lands that mainly incorporate light industrial uses to the E3 Productivity Support zone. This will help ensure that these vital urban-service focused lands are maintained into the future. This review should also identify any E4 General Industrial land that is operating as light industrial for transition. Where appropriate and close to sensitive uses, consider buffering the E4 General Industrial zones with E3 Productivity Support and SP4 Enterprise land to ensure that future industries can be established without prohibitive amenity management measures that can affect development feasibility.

11.4 Wyong employment zone

Several historical urban release areas have been identified across the Central Coast, with the largest areas centred around Warnervale, including the Wyong Employment Zone. Part 6 of the CCLEP 2022 relates to urban release area, requiring the provision of infrastructure prior to subdivision, as certified by the Director-General (Secretary). The Urban Release Areas are also reliant on a bio-certification process to property define the developable areas, optimise asset sizing and reduce infrastructure costing.

The Wyong Employment Zone includes a mix of E4 General Industrial and C2 Environmental Conservation zone land. These lands are generally flood affected and are understood to be of high biodiversity value.

Provision of upgraded infrastructure in this area would represent a significant cost, potentially including stormwater, water, sewerage, electricity, telecommunications and other services. This would require coordination between several public and private entities to eventuate, requiring significant project management investment and development timelines.

Given these complexities and the nature of the land, additional consideration should be given to the feasibility of development in this area in the next ten to twenty years. Should development not be feasible for private developers, public coordination and subsidisation may be required to make the land suitable for development.

11.5 E3 land in Kanwal Enterprise Zone

Clause 7.15 limits the development of office premises and specialised retail premises on E3 Productivity Support Corridor in Kanwal, along the Pacific Highway, immediately south-east of Wyong Hospital. The purpose of this is to promote the viability of existing premises in Kanwal and promote health service facilities.

Areas around hospitals are well suited for clustering of medical uses, with neighbouring residential areas potentially being used for small practices, retail areas including pharmacies and office areas including larger centres and specialist facilities. This is typically a market-driven outcome, with medical development being the highest and best use for the land.

Construction of a private hospital on a large portion of the site has been completed, with the remaining portions being a veterinary hospital and a private residence. Given the relatively low cost associated with refitting an office premises to allow for medical uses, and the small size of the remaining undeveloped land on the site, this clause is likely unnecessary and is unlikely to benefit the CCLEP 2022.

11.6 Incentives to deliver land

Conveying the 'open for business' message is key for attracting and retaining businesses in the LGA. Actively targeting and facilitating the establishment of key industry clusters can catalyse investment.

Feedback from consultation indicated that there were a number of barriers that act as deterrents for companies to move to the Central Coast. These included obstacles relating to the release and development of greenfield land, servicing delays, lengthy and unnecessarily complex assessment processes and resistance or lack of support from Council. Maximising flexibility in the planning framework, reducing costs and removing red tape can incentivise businesses to establish themselves in the LGA.

The current development contribution plans can be cost prohibitive for businesses seeking to establish themselves in new employment areas. Several of the employment areas are also highly constrained and require significant upfront investment that affects the viability of development. While the land has been zoned for employment purpose, the need to undertake extensive technical studies and determine infrastructure delivery and provisions becomes cost prohibitive.

While it is acknowledged that Council has finite funding to deliver infrastructure and undertake technical studies, undertaking the technical studies upfront (potentially in collaboration with State Government) and developing an infrastructure delivery program and cost schedule would provide clarity for the developers. The interested proponents could then decide whether they want to invest in accelerated infrastructure delivery or wait. Maintaining open dialogue and allocating a Council liaison to work with proponents on larger developments could be beneficial.

Exploring other opportunities to incentivise development through fast-tracking processes or incentivising planning controls could also be favourable.

11.7 Monitor employment land

Preparing and maintaining an industrial land supply monitor is a useful tool to assist Council in planning, prioritising and delivering employment land. The purpose of the tool would be to:

- Monitor the supply and release of land within employment precincts
- Coordinate and prioritise the delivery of infrastructure
- Analyse the land take-up rate and adjust the land release program accordingly
- Provide informed knowledge to potentially interested parties seeking to establish themselves in the LGA
- Enable the adjustment and review of strategies to respond to market trends
- Enable trends to be identified in the type and location of land being taken up by the industry to inform future land use planning decisions.

The employment land monitor could include variables such as (not exhaustive):

- Property address details
- Services available or requirements
- Constraints register
- Lot size and configuration
- Estimated net developable area
- Stock of vacant land
- Type and condition of building
- Development activity/interest.

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The system should be regularly maintained and updated through the development application system and as new information becomes available.

11.8 Central Coast Development Control Plan 2022

The Central Coast Development Control Plan 2022 (CCDCP 2022) is a consolidation of the Gosford Development Control Plan 2013 and Wyong Development Control Plan 2013. The CCDCP 2022 came into effect on 1 August 2022.

The CCDCP 2022 is divided into several chapters, each focused on a different development type (Chapter 2) or planning consideration (Chapter 3). Site specific DCPs are provided for major centres (Chapter 4) and other locations (Chapter 5). A total of 61 site specific DCPs are provided as part of the CCDCP 2022. This review focuses on Chapter 2 controls, noting that the numerous site specific DCPs are not identified on a map, likely making it difficult for businesses to identify the exact requirements put forward by Council.

11.9 Commercial development

The relevant CCDCP 2022 section for commercial development is 2.5 Commercial Development. It applies to business, office or retail development. It includes requirements for preparation of assessments, as well as physical development controls. The controls are well suited for centre commercial development, where public domain interfaces are a high priority. These include height requirements for ground floors, mix use considerations and active street frontages.

However, more remote commercial development (e.g. E3 Productivity Support or SP4 Enterprise), may not have the same sensitivities, and such controls may prohibitively increase the cost of development, or result in a building that is not fit for purpose (e.g. a garden centre, hardware store or vehicle hire premises). Furthermore, the site and context analysis requirements may present onerous assessment requirements for matters that may not be relevant. As such, centre-focused controls may be best translated to centre specific DCPs.

11.10 Industrial development

The relevant CCDCP 2022 section for industrial development is 2.9 Industrial Development. The section places a large emphasis on the materiality and bulk and scale of development. Office components of buildings are to be masonry and glass, corrugated iron is not to be a predominant wall cladding, and articulation/design features are to be incorporated into buildings. Furthermore, significant landscaping may be required to screen development from the street, as identified by a Landscape Design Report.

Amenity impacts are first managed by locating air/odour pollution uses away from residential areas, with no point of pollution discharge within 300m of the nearest dwelling. Industrial development within 50m or a residential boundary is to be accompanied by an acoustic report, showing compliance with NSW Noise Policy for Industry.

The controls demonstrate the potential conflict issues between industrial uses and sensitive receivers:

- Maintaining high visual amenity and suitable landscaping is a long-term concern, with setting standards early being important for setting expectations for future development. However, the built form of industrial development should be informed by the requirements of the internal uses. Council's controls largely acknowledge that balance.
- Air pollution is a relevant consideration both for nearby residents and workers. Reference to relevant EPA modelling and assessment criteria requirements may be more appropriate for development than setting a blanket prohibition on polluting works.
- Acoustic amenity is a relevant concern for future development, with potential impacts from idling trucks, dropped materials and operating machinery. These impacts may be substantial outside of the 50m

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identified area, further highlighting the importance of limiting residential encroachment into employment lands. The NSW Noise Policy for Industry provides relevant guidance for assessments.

11.11 Transport and parking

Relevant controls for car parking and vehicle movements are identified in Section 2.13 Transport and Parking. Car parking requirements are generally high, with notable examples including:

- Nurseries/landscaping: 15 parking spaces or 1 per 200sqm of site area
- Bulk goods: 1 parking space per 50sqm
- Hardware and Building Supplies: 1 parking space per 50sqm
- Industrial floor area: 1 parking space per 100sqm

Car parking rates should be led by the number of employees and visitors expected as part of a development. Excessive car parking rates may result in increased impermeable surfaces, clearing and reduced circulation space. A provision for car parking to be justified by a traffic report would help ensure a balance between car parking and more productive/amenity focused elements.

The CCDCP 2022 appears to require land that is adjacent to a B-Double route to be able to accommodate B-Double access. This would be unnecessary for many types of businesses and should only be considered where relevant.

It is also noted that a traffic impact study is referenced in the CCDCP 2022, however it is unclear when such a study is required. The requirements for the study are considerable and may not be required for smaller developments (e.g. 10-year cumulative impact assessment).

Otherwise, provision relating to layout, circulation and safety are well considered and appropriate matters for development.

11.12 Facilitating new uses in employment areas

There is growing demand and opportunity for hydroponic agriculture uses. These uses are currently limited to non-urban areas. There could be potential to allow these uses in E4 General industrial zones to create greater opportunity. There could also be opportunity to expand the opportunity in the W4 Working waterfront zone to allow for more tourism and charter industries. This would include allowing as permissible uses boat sheds, charter and tourism boating facilities, marinas, mooring pens, and moorings. There would also be a need to identify additional W4 land as the current provision is minimal. To help relieve demand for industrial land, there could also be opportunity to allow for light industry uses to be permissible within centres. These uses do not impact on amenity and can help revitalise and support local centre productivity.

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APPENDICES

APPENDIX A : PRECINCT PROFILES

The following section details the employment precincts identified in Chapter 6.

A.1 South area

A.1.1 Somersby

Land use	Floorspace	%
Health/education	6,476	1%
Industrial	402,062	69%
Knowledge intensive	46,105	8%
Population serving	116,257	20%
Residential	938	0%
Vacant	9,725	2%
Total floorspace	581,564	100%
Land area (ha)		
Developed/under construction	167.0	53%
Undeveloped/storage	147.1	47%
Total land area	**311.8**	**100%**

Somersby Precinct is the largest precinct by land area within the south area, with around 312ha of employment zoned land. Most of Somersby (310 Ha) is comprised of E4 General Industrial zoned land with the remaining 4ha being E3 Productivity Support.

Somersby contains a significant amount of manufacturing, warehousing, wholesale trade and distribution companies. In total, Somersby provides around 581,565sqm of floorspace with industrial related floorspace occupying 69% of this floorspace at around 402,105sqm. The second largest amount of floorspace is attributed to population serving industries with a total of around 116,260sqm or 20% of the floorspace in Somersby. However, most of this population serving space (54%) is attributed to construction related activities, including a concrete batching plant.

Key assets and opportunities for Somersby include its strategic location on the M1 Pacific Motorway providing good connectivity to other parts of Greater Sydney, Newcastle, Wyong and the wider Hunter Region. The Central Coast Highway also connects Somersby to Gosford Strategic Centre and other industrial precincts in proximity. The relative isolation of the precinct and available land for further development are also key assets of Somersby, as it reduces potential land use conflicts. The presence of residential accommodation on rural properties within and on Somerby's northern border could be a threat or weakness of the precinct. There is land available to create appropriate buffers, reducing the development of any potential land use conflicts.

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A.1.2 West Gosford

Land use	Floorspace	%
Health/education	20,280	3%
Industrial	207,842	31%
Knowledge intensive	77,596	12%
Population serving	260,796	39%
Residential	37,543	6%
Vacant	64,009	10%
Total floorspace	**668,067**	**100%**
Land area (ha)		
Developed/under construction	149.9	90%
Undeveloped/storage	16.1	10%
Total land area	**166**	**100%**

West Gosford Precinct is the second largest precinct by land area, at around 166ha. Most of West Gosford (123ha or 74%) is zoned as E4 General Industrial with the remaining 43ha or 26% being zoned E3 Productivity Support. West Gosford is characterised by having a significant amount of essential urban services, wholesale trade, bulky goods, retail and manufacturing and distribution companies.

In total, the precinct provides around 668,070sqm of floorspace with population serving industries occupying the majority at around 39% or 260,795sqm. A significant portion of this space is attributed to other services (around 72,730sqm), which contains vital urban services such as automotive repair yards. Retail uses also comprise a significant portion of this floorspace (over 118,390sqm) with over half of this located within E3 zoned land, which provides good visibility and access to the Central Coast Highway. Industrial uses also comprise a significant portion of floorspace in West Gosford with around 207,840sqm or 31% of floorspace being occupied by such uses.

Key assets and opportunities for West Gosford include strong local population growth. Its strategic location close to Gosford City and strong population and worker catchment. The precinct has a supply of undeveloped land (around 16 Ha). A significant amount of residential space exists in the E3 portion of West Gosford, which could reduce the viability of future development or increase the potential land use conflicts in this area.

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A.1.3 Erina

Land use	Floorspace	%
Health/education	25,469	11%
Industrial	27,386	12%
Knowledge intensive	80,767	34%
Population serving	95,588	41%
Residential	255	0%
Vacant	4,968	2%
Total floorspace	**234,433**	**100%**
Land area (ha)		
Developed/under construction	38.3	98%
Undeveloped/storage	0.6	2%
Total land area	**39.0**	**100%**

Erina Precinct is the third largest precinct by land area, with around 39ha of employment zoned land. Most of Erina (29ha) is zoned as E3 Productivity Support with the remaining 10ha being zoned E4 General Industrial.

Erina is characterised by having a significant amount of bulky goods, automotive repair services, specialised retailing, wholesale trade and knowledge intensive companies. In total, the precinct provides around 234,435sqm of space with population serving industries occupying the majority of this floorspace (95,588sqm or 68%). A significant portion of this space is attributed to retail uses at around 51,570sqm, which is predominantly located within E3 zoned land with good street frontage along The Entrance Road. Knowledge intensive or professional services (around 80,770sqm or 34%), are primarily located within E3 zoned land. The industrial part of Erina is predominately comprised of urban services such as auto repair yards, wholesaling and storage/distribution services. A childcare and learn to swim centre are also located in this industrial zoned area.

Key assets and opportunities for the Erina Precinct include its strategic location along The Entrance Road, which provides good connectivity westward to Gosford City Centre and northward to Long Jetty. The locality around Erina is forecast to experience modest population growth that would further increase the demand for urban support services. The precinct contains a limited amount of vacant land for any further development with surrounding residential areas also limiting further expansion options. The presence of The Entrance Road, although providing good exposure for uses along its length, somewhat limits the movement of vehicles throughout the precinct.

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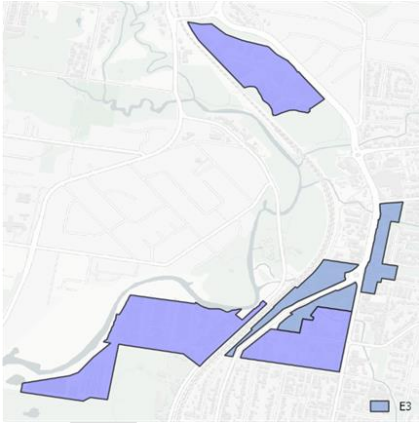
A.1.4 North Gosford and Wyoming

Land use	Floorspace	%
Health/education	25,469	11%
Industrial	27,386	12%
Knowledge intensive	80,767	34%
Population serving	95,588	41%
Residential	255	0%
Vacant	4,968	2%
Total floorspace	234,433	100%
Land area (ha)		
Developed/under construction	38.3	98%
Undeveloped/storage	0.6	2%
Total land area	**39.0**	**100%**



North Gosford and Wyoming Precinct is the fourth largest precinct by land area, with around 34ha of employment zoned land. Most of the precinct (28 Ha) is zoned as E4 General Industrial with the remaining 7ha being zoned E3 Productivity Support.

The precinct is characterised by urban services (such as automotive repair services), light manufacturing, transport/distribution, wholesale and specialised retail companies. The precinct is split by the railway line and Pacific Highway, forming three distinct areas. The south-westernmost area is primarily comprised of light industrial and urban services while the south-eastern area is mostly comprised of retail, wholesale, professional and take-away food services. The northern area is comprised of urban services, recreation, retail, storage and wholesale trades.

In total, the precinct provides around 118,050sqm of floorspace with population serving industries occupying much of this space (49,060sqm or 42%). Retail services comprise most of this population serving space (33%) with urban services also comprising a significant proportion (53%). Industrial uses such as manufacturing and warehousing/distribution companies also occupy a significant portion of this space at around 43,260sqm or 37%.

The precinct's proximity to Gosford City Centre and access to the Pacific Highway provide key assets and opportunities. However, the presence of residential properties in the south-western portion may increase the potential for land use conflicts, while the railway line splitting the precinct decreases connectivity and movement throughout.

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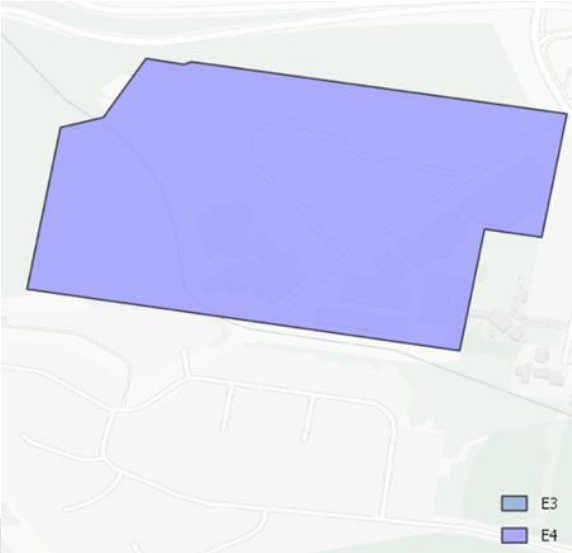
A.1.5 West Gosford South

Land use	Floorspace	%
Health/education	363	1%
Industrial	21,312	68%
Knowledge intensive	2,835	9%
Population serving	6,825	22%
Residential	-	0%
Vacant	-	0%
Total floorspace	**31,334**	**1%**
Land area (ha)		
Developed/under construction	8.0	72%
Undeveloped/storage	3.1	28%
Total land area	**11.1**	**100 %**



West Gosford South Precinct provides around 11ha of E4 General Industrial zoned employment land. The precinct is characterised by manufacturing, particularly food manufacturing, wholesale, warehousing/distribution and some professional companies. In total, the precinct provides around 31,335sqm of floorspace with industrial uses occupying much of this, at around 21,310sqm or 68%. A childcare centre is located within the precinct, which likely provides services for those working nearby and in the West Gosford Precinct, as well as the surrounding residential population.

Key assets and opportunities for the precinct include its strategic location to Gosford City Centre and the Central Coast Highway providing good connectivity to the M1 Pacific Motorway. The precinct also has the opportunity for further development with around 3.1ha currently undeveloped. This could be achieved while still maintaining an appropriate buffer with the residential precinct to the south, reducing the potential for land conflicts to arise.

The undeveloped part of the precinct, however, is absent of some vital infrastructure such as roads and water connections. The provision of this infrastructure may incur additional costs to potential developers, which may have contributed to subdued developer interest.

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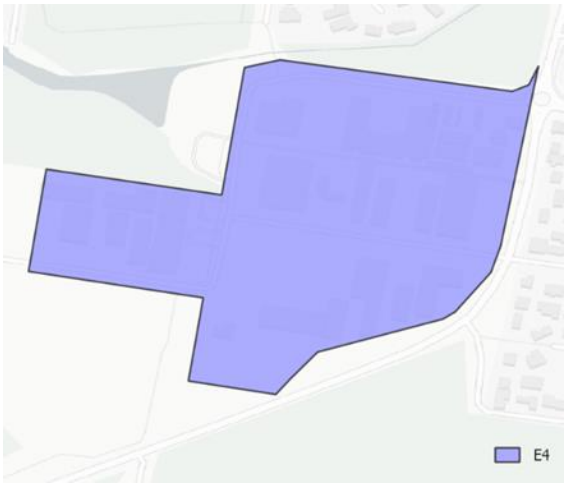
A.1.6 Kincumber

Land use	Floorspace	%
Health/education	861	3%
Industrial	10,115	39%
Knowledge intensive	2,910	11%
Population serving	10,234	39%
Residential	-	0%
Vacant	1,819	7%
Total floorspace	25,940	100%
Land area (ha)		
Developed/under construction	8.9	100%
Undeveloped/storage	0	0%
Total land area	**8.9**	**100%**



Kincumber Precinct provides around 9ha of E4 General Industrial zoned employment land. The precinct is characterised by construction, urban services (primarily auto repair), manufacturing, wholesale and retail companies. In total, the precinct provides around 25,940sqm of floorspace with industrial uses occupying much of this, at around 10,000sqm or 39%. Population serving uses such as urban services, retail and recreation companies also occupy a significant proportion of space at around 10,230sqm or 39%.

The precinct contains childcare services, a learn to swim centre, gyms, a party and play centre and two concrete batching plants. These uses contribute to it being a significant precinct to the local community. The precinct also contains a small neighbourhood supermarket. Key assets and opportunities for the precinct include the strategic presence of two concrete batching plants and a bus depot (Busways Gosford), which increase its regional significance. The precinct also has good road connections to both Gosford and Woy Woy. Possible threats and weaknesses of the precinct include the presence of a small 'neighbourhood' centre at the junction of Keta Road and Empire Bay Drive. Its presence may artificially increase land prices in this locality, although it likely provides goods and services to the local employees. The precinct also has limited expansion options. It also has few green spaces for employees - during the visit, employees were observed to gather in the limited green spaces to enjoy their breaks.

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A.1.7 Woy Woy, Rawson Road

Land use	Floorspace	%
Health/education	427	3%
Industrial	5,453	33%
Knowledge intensive	1,371	8%
Population serving	6,726	40%
Residential	401	2%
Vacant	2,331	14%
Total floorspace	16,709	100%
Land area (ha)		(Ha)
Developed/under construction	3.9	95%
Undeveloped/storage	0.2	5%
Total land area	**4.1**	**100%**

Woy Woy, Rawson Road Precinct provides around 4ha of E4 General Industrial zoned employment land.

This precinct is characterised by construction, urban services (primarily auto repair), wholesale and retail companies. In total, the precinct provides around 16,710sqm of floorspace with population serving uses occupying 6,730sqm or 40%. Much of this is attributed to urban services such as automotive repair yards. Industrial uses such as wholesale trade also occupy a significant proportion at around 3,450sqm or 33%. There is some recent development activity within the precinct, likely indicating that its location in proximity to Woy Woy town centre is a key attractor to potential occupiers.

The precinct also contains an early learning and childcare centre, learn to swim centre, gyms, an electricity substation and petrol stations. These local urban services, coupled with the numerous mechanics, increase its local importance.

Its proximity to Woy Woy town centre and surrounding residential population are key assets and opportunities of the precinct, however, this inner suburban location provides limited opportunities for expansion. The local road network may also reduce the efficiency of traffic to and from the centre.

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A.1.8 Smaller south precincts

There are eight smaller precincts located within the south sub-precinct. The majority of these (see figure below) are located within Woy Woy suburbs, while one is located along the Hawkesbury River at Mooney Mooney Bridge, and another is located at the junction of Passage and The Entrance Road in the suburb of Bateau Bay.

Land use	Woy Woy, Alma Ave		Woy Woy, South		Woy Woy, Nagari Rd		Blackwall		Blackwall Road, North		Mooney Mooney		Ocean Beach Rd	
Floorspace	**SQM**	**%**	**SQM**	**%**	**SQM**	**%**	**SQM**	**%**	**SQM**	**%**	**SQM**	**%**	**SQM**	**%**
Population serving	2,823	54	0	0	0	0	2,858	78	258	7	54	2	0	0
Knowledge intensive	0	0	0	0	0	0	458	12	0	0	0	0	0	0
Health/ education	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Industrial	2,404	46	3,910	100	3,694	100	360	10	1,872	52	2,167	98	0	0
Vacant	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Residential	0	0	0	0	0	0	0	0	1,500	41	0	0	0	0
Total floorspace	**5,227**	**100**	**3,910**	**100**	**3,694**	**100**	**3,676**	**100**	**3,630**	**100**	**2,221**	**100**	**0**	**0**
Land area	Ha	%	Ha	%	Ha	%	Ha	%	Ha	%	Ha	%	Ha	%
Developed/ under-construction	0.8	100	12.4	80	1.6	100	1.5	93	0.5	100	1.2	100	0.3	0
Undeveloped / storage	0.0	0	3.0	20	0.0	0	0.1	7	0.0	0	0.0	0	0.0	100
Total land area	**0.8**	**100**	**15.4**	**100**	**1.6**	**100**	**1.6**	**100**	**0.5**	**100**	**1.2**	**100**	**0.3**	**100**

Ocean Beach Road is currently a vacant precinct, however there is a development application for a service station. Site preparation for the development is currently being undertaken.

Mooney Mooney Employment Precinct is the only W4 Working Waterfront precinct in the Central Coast. It provides essential land for aquaculture, fishing and marine repair activities including oyster farming and prawn fishing.

Backwall Road, North is zoned as E3 Productivity Support with it being primarily occupied by a hardware and furniture store. A portion of the precinct (south of Terry Avenue) has a recently built residential flat building, which has no ground floor employment space. Given that it is unlikely that this building would be redeveloped for employment uses, a rezoning of this section to one more reflective of its residential nature is a possible action.

Blackwall Employment Precinct is zoned E4 General Industrial and is primarily characterised by urban services with some retail and professional services. Its location along Memorial Avenue provides good connectivity to Woy Woy town centre.

Woy Woy, Alma Avenue is zoned E4 General Industrial and is primarily characterised by urban services, manufacturing, construction and wholesale companies. There are limited expansion options for this precinct given its location surrounded by residential uses.

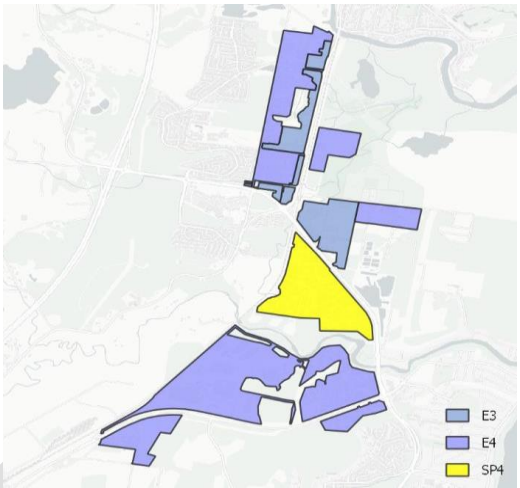
Woy Woy, South is zoned E4 General Industrial and is primarily characterised by small agricultural (mushroom farm) and storage services.

Woy Woy, Nagari Road is zoned E4 General Industrial and is primarily used for long term storage services.

A.2 Central area

A.2.1 Tuggerah

Land use	sqm	%
Health/education	39,878	5%
Industrial	409,436	47%
Knowledge intensive	132,373	15%
Population serving	228,899	26%
Residential	3,707	0%
Vacant	49,678	6%
Total floorspace	**863,972**	**100%**
Land area (ha)	**ha**	**%**
Developed/under construction	258.6	89%
Undeveloped/storage	31.1	11%
Total land area	**289.6**	**100%**



Tuggerah Precinct is the largest precinct by land area, providing around 290ha of zoned employment land. The majority (66%) is zoned as E4 General Industrial, followed by E3 Productivity Support (18%) and SP4 Enterprise (17%).

The precinct's size and multitude of land zonings lend to it having a high diversity of uses across its 863,970sqm of floorspace. It is characterised by urban services, manufacturing, warehousing/distribution, wholesale and professional services.

Industrial uses occupy the majority of floorspace, with around 409,440sqm or 47% being categorised as such. Population serving industries occupy the second largest amount of space at around 228,900sqm or 26%, followed by knowledge intensive uses at 132,370sqm or 15% and health/education services at 49,680sqm or 6% of space. There is a small number of residential uses in the precinct occupying some 3,710sqm or 0.4% of space.

Key assets and opportunities for the precinct include its strategic location along the M1 Pacific Highway with a good connection to the Pacific Motorway. Tuggerah Station also provides good connectivity for its current and future employees. The precinct has the opportunity for further development, with around 30ha currently undeveloped. There is limited residential uses adjoining the precinct with good buffers present to reduce any potential land use conflict. The precinct is somewhat fragmented, although it is connected by the local road network. Traffic congestion reduces the flow and connectivity in peak times.

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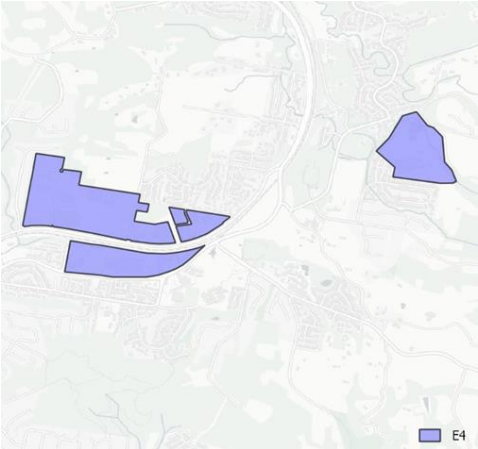
A.2.2 Lisarow

Land use	Sqm	%
Health/education	-	0%
Industrial	84,405	71%
Knowledge intensive	22,855	19%
Population serving	10,632	9%
Residential	-	0%
Vacant	659	1%
Total floorspace	118,550	100%
Land area (ha)		
Developed/under construction	60.6	92%
Undeveloped/storage	5.4	8%
Total land area	**66**	**100%**



Lisarow Precinct provides around 66ha of E4 General Industrial zoned employment land. The precinct is divided into three sub-sections by the railway line and the Pacific Highway. The precinct provides around 118,550sqm of employment floorspace of which a significant amount is occupied by industrial uses (84,405sqm or 71%).

This industrial space contains food manufacturers such as McCain Foods and Inghams Chicken. Storage/warehousing, wholesale and other manufacturing comprise the remaining bulk of industrial occupiers in the precinct. Lisarow also contains around 22,855sqm of knowledge intensive and professional services.

Key assets of the precinct include the presence of regionally significant food manufacturers. The precinct is also well located along the Pacific Highway and between two railway stations, allowing greater connectivity for potential workers.

The precinct, however, is fragmented by the railway line and Pacific Highway. Connectivity around the local road network is limited with the right-hand turn from Railway Crescent onto the Pacific Highway being difficult and restrictive during peak times due to congestion. As such, movement in and around the various sub-sections is reduced. The Pacific Highway is currently being upgraded, with these issues possibly being addressed.

There is vacant land present in the precinct for possible further development if required.

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A.2.3 Berkley Vale

Land use	sqm	%
Health/education	420	1%
Industrial	12,770	31%
Knowledge intensive	4,796	12%
Population serving	22,044	54%
Residential	-	0%
Vacant	1,070	3%
Total floorspace	**41,100**	**100%**
Land	**Ha**	**%**
Developed/under construction	8.5	100%
Undeveloped/storage	0	0%
Total land area	**8.5**	**100%**

Berkley Vale Precinct provides around 8.5ha of E4 General Industrial zoned employment land.

The precinct is characterised by construction, urban services (mostly auto repair), transport/distribution, wholesale trade and specialised retail companies. In total, the precinct provides around 41,100sqm of floorspace with population serving uses occupying 22,044sqm or 54%. Much of this is attributed to urban services such as automotive repair yards. Industrial uses such as wholesale trade and light manufacturing also occupy a significant portion at around 12,770sqm or 31%.

The precinct services the local area providing urban services and wholesale to the local population and businesses from Bateau Bay to The Entrance and Chittaway Bay.

Key assets and opportunities for the precinct include its location along Wyong Road connecting the precinct to the surrounding residential population, business centres and other employment precincts such as Tuggerah, Long Jetty and Erina.

The precinct also has good buffering from surrounding residential uses, although there are limited expansion options.

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A.2.4 Long Jetty

Land use	sqm	%
Health/education	1,540	7%
Industrial	4,737	22%
Knowledge intensive	578	3%
Population serving	11,595	54%
Residential	2,103	10%
Vacant	948	4%
Total floorspace	21,500	100%
Land area	**Ha**	**%**
Developed/under construction	4.6	93%
Undeveloped/storage	0.4	7%
Total land area	**5.0**	**100%**

Long Jetty Precinct provides around 5ha of E3 Productivity Support zoned employment land, with a total of 21,500sqm of floorspace contained within this area.

The precinct is characterised by wholesale trade, manufacturing, retail, and urban service companies. Population serving services occupy the majority of floorspace (11,595sqm or 54% of space), over half of this (54%) is attributed to retail uses, which is not surprising given the location along a main road and proximity to Long Jetty village. A further 26% of this population serving space is comprised of urban services such as auto repair yards and laundry services. Around 4,740sqm is occupied by industrial uses with this predominantly being wholesale trade (67% of industrial occupied space).

Some detached and shop top housing exists within the precinct. Shop top housing is a permitted use in the zoning, however coupled with the presence of detached dwellings it may limit the redevelopment potential for increased employment uses.

The precinct is uniquely positioned along The Entrance Road allowing it to serve the needs of its local catchment, which is likely to extend from The Entrance to around Foresters Beach.

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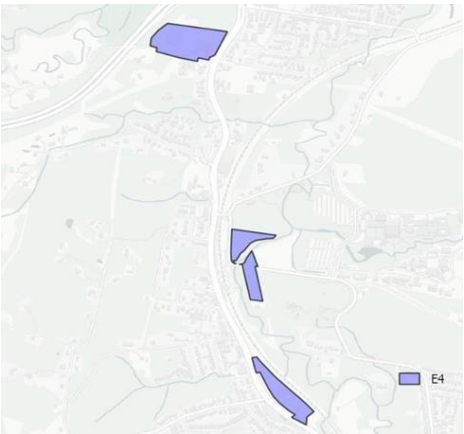
A.2.5 Ourimbah, Pacific Highway

Land use	sqm	%
Health/education	-	0%
Industrial	11,677	71%
Knowledge intensive	2,783	17%
Population serving	1,343	8%
Residential	550	3%
Vacant	109	1%
Total floorspace	**16,462**	**100%**
Land area	Ha	%
Developed/under construction	6.6	85%
Undeveloped/storage	1.1	15%
Total land area	**7.7**	**100%**



Ourimbah, Pacific Highway Precinct provides around 8ha of E4 General Industrial zoned employment land, with a total of 16,460sqm of floorspace contained within this area.

The precinct comprises three smaller sub-sections located along the Pacific Highway. The northern sub-section is occupied by the Ausgrid headquarters and main equipment warehousing area. The middle sub-section is predominately comprised of wholesaling and transport/warehousing uses. The southern sub-section precinct is predominately comprised of a vet, petrol station, construction materials and some wholesaling.

The three sub-sections act independently of each other and serve different roles however they are connected to each other via the Pacific Highway. There is around two hectares of undeveloped land located in the middle sub-section while the northern sub-section has a possible opportunity for expansion northward.

The southern sub-section has good exposure to the Pacific Highway, which also provides good connectivity to other parts of the Central Coast.

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A.2.6 Smaller central precincts

There are two smaller precincts located within the central area (identified by the labelled precincts in the figure above).

The first of these is located to the south of Long Jetty along The Entrance Road. This precinct is called The Entrance Road and is 0.5 hectares of undeveloped land. The site has good exposure and access to the local road network. It is surrounded by low density housing with undeveloped residential land adjoining it. This precinct could provide land for essential urban services for the current and future population in this locality.

The second precinct is located to the north and is referred to as Long Jetty/The Entrance Road. This precinct comprises 1.1 hectares of E4 General Industrial zoned employment land. The precinct is completely developed providing around 4,225sqm of floorspace. Around 51% of this space is population serving services including an automotive repair yard, retail, a gym and food retailing. Industrial uses occupy the other large portion of this space (33%), which is comprised of wholesale and manufacturing trades.

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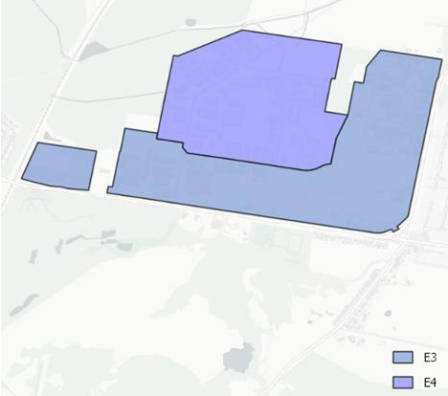
A.3 North area

A.3.1 North Wyong

Land use	Floorspace	%
Health/education	9,587	4%
Industrial	140,323	53%
Knowledge intensive	45,767	17%
Population serving	56,706	21%
Residential	6,700	3%
Vacant	5,660	2%
Total	264,743	100%
Land	**Ha**	**%**
Developed/under construction	104.8	78%
Undeveloped/storage	30.2	22%
Total land area	135.1	100%



North Wyong Precinct provides around 135ha of employment zoned land. Of this, around 78ha was zoned as E4 General Industrial and 63ha as E3 Productivity Support.

The precinct is characterised by manufacturers, wholesale, professional services, urban services, long term storage and retail companies. In total, the precinct provides around 264,745sqm of floorspace with industrial uses occupying 140,325sqm or 53% of the total space, with the bulk being manufacturing activities. Population serving uses occupy 56,705 or 21% of the total floorspace, primarily comprising retail and urban services, such as automotive repair yards. The precinct also contains a large amount of knowledge intensive space at around 425,770sqm or 17% of total floorspace. This is primarily located in the E3 zoned portion. The precinct also contains two early learning/childcare centres, a learn to swim centre, gyms, an electricity substation and a concrete batching plant. These local urban services, coupled with numerous mechanics, increase its local importance, while the concrete batching provides a district role.

Key assets and opportunities for the precinct include its proximity to the Pacific Highway and high growth areas, the large amount of manufacturing space, the presence of a concrete batching plant, and the large amount of undeveloped land. It is noted that the Pacific Highway becomes congested on occasion, which may reduce travel efficiencies to and from the precinct.

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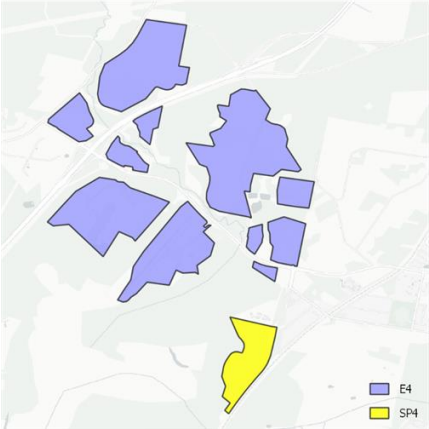
A.3.2 Wyong

Land use	Floorspace	%
Health/education	-	0%
Industrial	124,013	79%
Knowledge intensive	11,719	7%
Population serving	19,303	12%
Residential	1,711	1%
Vacant	1,000	1%
Total	**157,746**	**100%**
Land	Ha	%
Developed/under construction	217.7	59%
Undeveloped/storage	154.1	41%
Total land area	**371.8**	**100%**



Wyong Precinct provides around 370ha of employment zoned land. Most of this is zoned as E4 General Industrial (339 Ha) with the remaining 33ha being a SP4 Enterprise zoning.

The precinct is characterised by wholesale, manufacturing and transport/distribution companies. In total, the precinct provides around 15,745sqm of floorspace with industrial uses occupying 124,015sqm or 79%. Industrial uses are predominantly transport and distribution services (58%), with a large Woolworths distribution centre (around 54,000sqm) located in the precinct. All the floorspace surveyed is located within the industrial component of the precinct, with the business park (SP4) portion being undeveloped.

The presence of the large Woolworths distribution centre, Warnervale Airport and the concrete batching plant increase the precinct's regional significance. Key assets and opportunities for the precinct include its location at the junction of the Pacific Highway and Sparks Road, which give it good connectivity to all areas of the LGA and beyond. This is likely a key attractor to the various transport/distribution businesses. The precinct is well positioned to serve the future needs of the Warnervale locality, which is forecast to experience strong growth over the coming decade and has available zoned land for development. The precinct is somewhat fragmented with environmental zonings separating the various industrial zonings.

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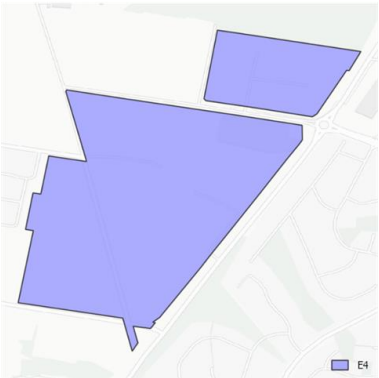
A.3.3 Charmhaven

Land use	sqm	%
Health/education	1,732	1%
Industrial	88,127	60%
Knowledge intensive	12,917	9%
Population serving	34,240	23%
Residential	594	0%
Vacant	9,152	6%
Total	**146,763**	**100%**
Land	ha	%
Developed/under construction	32.2	90%
Undeveloped/storage	3.6	10%
Total land area	**35.8**	**100%**



Charmhaven Precinct provides around 36ha of E4 General Industrial zoned employment land.

The precinct is characterised by urban services (primarily auto repair), wholesale, manufacturing and transport/distribution companies. In total, the precinct provides around 146,765sqm of floorspace with industrial uses occupying 88,130sqm or 60%. Industrial services are predominantly manufacturing uses (38%) followed by wholesale trade (32%), and transport and distribution services occupying 29% of the industrial floorspace. Population serving services occupy around 34,240sqm or 23% of the floorspace. This is comprised of urban services, retail and construction companies.

The precinct also contains a childcare centre and a learn to swim centre. Development activity was observed during the site over three developments, which will provide around 1,370sqm of factory space and 450sqm of general industrial space.

Key assets and opportunities for the precinct include its location along the Pacific Highway, available undeveloped land, developer interest and appropriate buffering from surrounding residential areas. The precinct is also in proximity to the Warnervale growth area and could help to serve its future needs.

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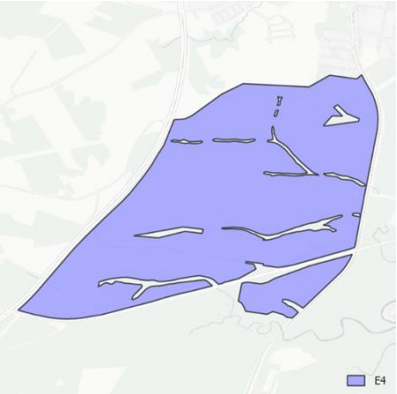
A.3.4 Bushells Ridge

Land use	Floorspace	%
Health/education	-	0%
Industrial	21,113	89%
Knowledge intensive	-	0%
Population serving	2,005	8%
Residential	628	3%
Vacant	-	0%
Total	**23,745**	**100%**
Land area (ha)		
Developed/under construction	124.2	19%
Undeveloped/storage	528.5	81%
Total land area		**100%**



Bushells Ridge provides around 653ha of General Industrial zoned employment land. The precinct is characterised by manufacturing, utilities and construction companies. In total, the precinct provides around 23,745sqm of floorspace with industrial uses occupying 21,115sqm or 62%. The precinct contains a large concrete batching plant, a Boral quarry and manufacturing centre and a gas high pressure distribution centre.

Key assets and opportunities for the precinct include its strategic location and access to the Pacific Motorway and the Pacific Highway giving it high connectivity across the LGA and beyond. The precinct also contains a large amount of undeveloped zoned land, which could significantly contribute to the Central Coast's and wider localities' needs.

It was noted, however, that high-power lines transect the precinct and there are signs warning of high-pressure gas mains underground. These factors could reduce the amount of land available for development. Rural properties are in the precinct, which could further reduce the amount of available land for development.

The Southern extent of this precinct is owned by Wallarah Coal Project and is proposed to be used to support a future coal mine. All approvals for this land use are in place.

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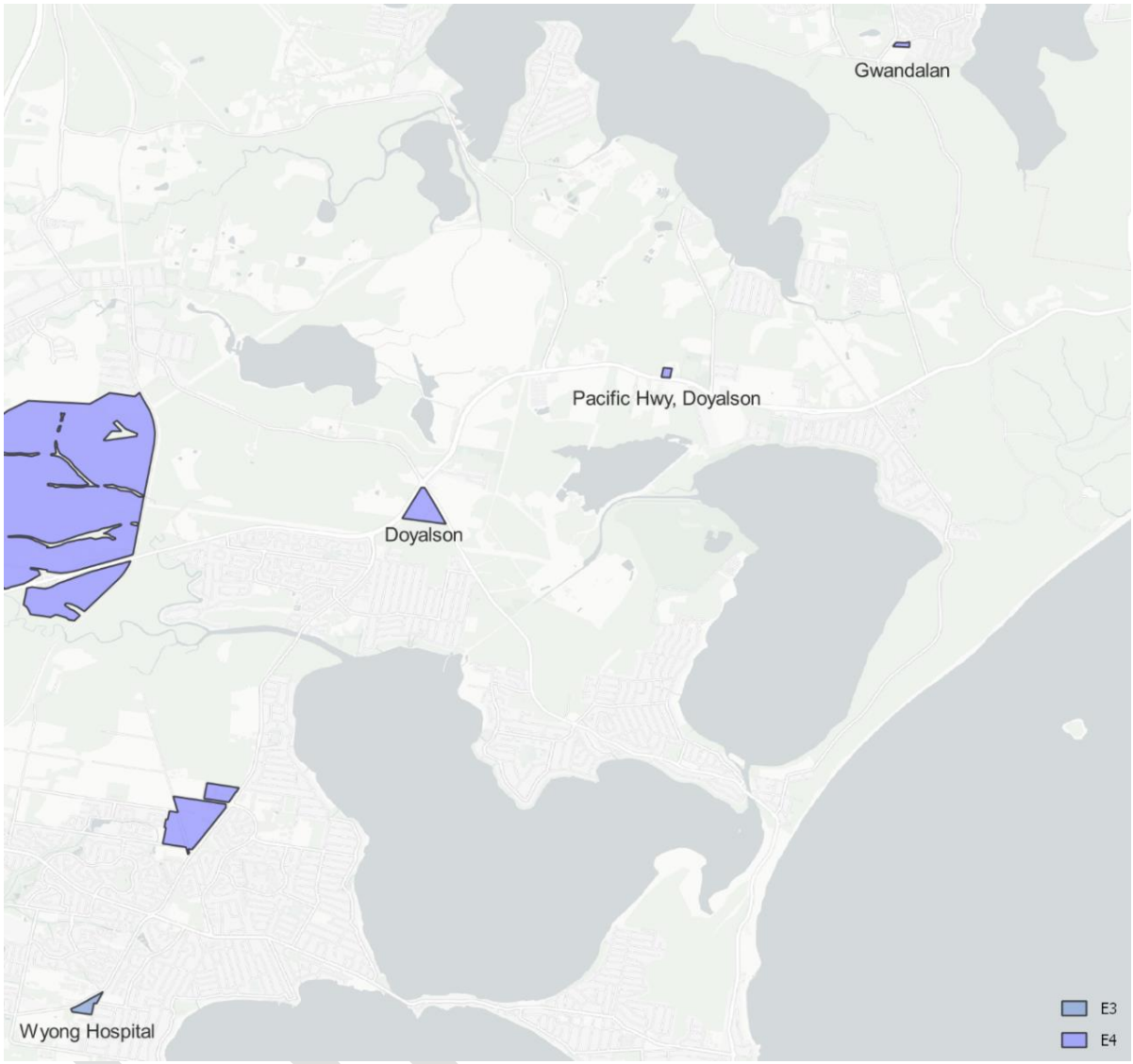
A.3.5 Smaller north precincts



There are four smaller precincts located within the north area (identified by the labelled precincts in the figure above).

Doyalson Precinct comprises around 12ha of E4 General Industrial zoned employment land and provides around 7,970sqm of floorspace. The majority of this (4,215sqm or 53%) is comprised of other services, which include urban services such as automotive repairs. Transport/distribution companies occupy around 2,255sqm or 28% of space. A concrete batching plant is located within the precinct.

Wyong Hospital Precinct comprises around four hectares of E3 Productivity Support zoned employment land and provides around 5,855sqm of floorspace. Recently Wyong Hospital, located across the road, has developed into this precinct and occupies 4,170sqm or 71% of the total floorspace. A vet, service station and some residential properties are also located in the precinct. A large lot with two small residential buildings on it provides a good opportunity for precinct expansion.

Pacific Highway, Doyalson Precinct comprises around one hectare of E4 General Industrial zoned employment land and contains a service station of around 350sqm.

Gwandalan Precinct comprises around six hectares of E4 General Industrial zoned employment land and provides around 3,540sqm of floorspace across two buildings. Land uses in the precinct include a café, a vet, automobile repair yards and a childcare centre. Around five hectares of the site is undeveloped. A new residential estate is

being developed in proximity. As such, this precinct could cater for the future needs of the locality, however, would need to manage land use conflicts. Despite the zoning, there has been limited take-up of the land for industrial purpose, likely due to the sole land ownership.

T: North sub-precinct smaller employment precincts

Land use	Doyalson		Wyong Hospital		Gwandalan		Pacific Highway, Doyalson	
	sqm	%	sqm	%	sqm	%	sqm	%
Health/education	0	0%	4,170	71%	450	13%	0	0%
Industrial	2,255	28%	0	0%	525	15%	0	0%
Knowledge intensive	0	0%	311	5%	800	23%	0	0%
Population serving	5,443	68%	200	3%	1,765	50%	350	100%
Residential	0	0%	1,115	19%	0	0%	0	0%
Vacant	269	3%	60	1%	0	0%	0	0%
Total	**7,968**	**100%**	**5,856**	**100%**	**3,540**	**100%**	**350**	**100%**
Land	**Ha**	**%**	**Ha**	**%**	**Ha**	**%**	**Ha**	**%**
Developed/under construction	7.3	62%	1.7	45%	1.0	17%	1.3	100%
Undeveloped/storage	4.4	38%	2.1	55%	4.7	83%	0	0%
Total land area	**11.7**	**100%**	**3.8**	**100%**	**5.7**	**100%**	**1.3**	**100%**

Source: HillPDA 2023

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APPENDIX B : DEVELOPMENT PIPELINE

The following table details the proposed projects which have been included within the development pipeline. The source of this data is CordellConnect and includes new developments with a status of either development approval or building approval. Combined these proposed developments would contribute an additional 67,463sqm to the Central Coast's employment precincts.

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Table 36: Current development pipeline (commercial, industrial and retail space)

Project Title	Project Address	Suburb	Project Details	Floorspace (sqm)
Mammoth Equipment & Exhausts Warehouse	15 Somerby Falls Rd	Somersby	Construction of a 2 storey with mezzanine warehouse building to include 1032sq m warehouse area, 187sq m office space on ground floor 1 & 175sq m mezzanine area. Metal roof sheeting, metal wall sheeting, framed wall aluminium cladding, concrete floor, timber & steel frame structure. Associated car parking & landscaping.	1394
Pioneer Ave Factory Units	8 Pioneer Ave	Tuggerah	Construction of 4 factory units. Concrete tilt panels with a mixture of brick veneer & glass to the front of the single storey units with a steel roof & lightweight steel cladding to the rear & sides. Carparking for 33 cars. Landscaping	1151
Warnervale Business Park	1 Burnet Rd	Warnervale	Construction of 11 light industrial units varying in size from 109sq m to 194sq m in 2 separate buildings. Each unit will contain a loading area, workspace, amenities, kitchenette & mezzanine. Aluminium highbay windows with awning, precast concrete panels, metal roller door & colour coated metal roof sheeting. Car parking for 28 vehicles including 1 accessible bay & 1 shared space. Associated landscaping.	1914
Myoora Road & Pinnacle Pl Industrial Development	25 Myoora Rd & 17 Pinnacle Pl	Somersby	Construction of a specialised lubricants production, research & development facility. Stage 1 - Construction of the processing facility & warehouse on Lot 141 GFA 6246sq m. Provision of services & infrastructure. Internal access road, delivery truck unloading areas & vehicle parking areas. Construction of road access from Pinnacle Pl. Site regrading & landscaping of areas surrounding carparks & access ways. Stage 2 - Construction of an office building on Lot 11 GFA 310sq m.	6556
Dell Road Factory Units	12 Dell Rd	Gosford West	Construction of a single storey factory building to comprise 1 large & 4 small units. Unit 5 will contain an office & small mezzanine. Concrete or slate floor tilt up concrete panels, concrete slab with blockwork foundation walls or concrete edge beams, prefinished metal capping, steel roof & frame & concrete or stone walls. Basement car parking for 8 vehicles. Associated landscaping.	1230
Wisemans Ferry Commercial Development	85 Wisemans Ferry Rd	Somersby	Construction of a commercial development over 3 stages. Stage 1 - Construction of a service station (187.29sq m) & a fast food outlet (260.85sq m) Stage 2 - Construction of 7 industrial units with ancillary office space & 2 bulk retail units (586.9sq m). Stage 3 - Construction of 9 industrial units with ancillary office space. Total industrial & ancillary office floor area of 4630.35sq m & 729.35sq m. Off-street car parking for 143 vehicles. Landscaping over 2915.25sq m.	6395
Somersby Falls Road Industrial Units	35 Somersby Falls Rd	Somersby	Site works, services reticulation & excavation of the vacant block. Construction of a single storey industrial building to comprise 3 industrial units over 2 stages. Stage 1 - Unit 1 & pavement areas. Stage 2 - Units 2 & 3. Concrete or slate floor & walls, steel roof & frame, metal gutter, black powder coated aluminium framed windows, deck roof & capping, glass block wall, precast concrete & aluminium framed glazed wall. Car parking for 11 vehicles including 1 accessible space. Associated landscaping.	972
Arizona Road Factory - Stages 1-2	35 Arizona Rd	Charmhaven	Construction of a factory over 2 stages. Stage 1 - Construction of Block A & B building (2 x 540sq m). Stage 2 - Construction of Block C building (290sq m). Reinforced concrete floor slab, reinforced concrete tilt-up walls, timber frame construction, metal roof sheeting, aluminium	1370

Project Title	Project Address	Suburb	Project Details	Floorspace (sqm)
			framed glass windows, hollow core internal doors & steel framed awning. Car parking for 11 vehicles. Associated landscaping.	
Caltex Service Station & Woolworths Convenience Store Lisarow	900 Pacific Hwy	Lisarow	Construction of service station comprising 4 double-sided fuel dispenser, fuel canopy, underground tanks & 120sq m convenience store (Woolworths). Rendered concrete block walls, fibrous cement sheeting, aluminium framed glazed auto sliding entry doors. Car parking for 8 vehicles including air & water space. Associated landscaping.	120
Donaldson Street Warehouses	22 Donaldson St	Wyong	Construction of a warehouse to comprise of 3 units with a gross floor area of 1624sq m to include a mezzanine floor level, amenities & small kitchenette in each unit. Concrete floor, metal roller shutter door, steel frame awnings, metal roof sheeting, glazed windows awning, solid core door, painted precast concrete panels, aluminium panels & aluminium sheeting. Car parking for 28 vehicles. Associated signage. 735sq m landscaping.	1642
Sailfind Place Light Industrial Warehouse	3 Sailfind Pl	Somersby	Construction of a single storey light industrial warehouse (800sq m) with associated office (87.1sq m), kitchen & amenities. Concrete tilt slab, black powder coated metal spear, dark colour powder-coated aluminium framed windows, galvanized roof, black roller shutter doors & galvanized chainmesh fence. Car parking for 8 vehicles. Associated landscaping & boundary retaining walls to support site excavations.	887
Gindurra Road Plant Storage Shed	90 Gindurra Rd	Somersby	Demolition of existing structures. Construction of a plant storage shed with offices & amenities including an employee recreation room. 2m high metal fencing along Gindura Road frontage. Sliding electric gates & a 6m wide gate for emergency vehicle access. Car parking for 12 vehicles. Associated landscaping.	1226
Amsterdam Circuit Warehouses	29 & 31 Amsterdam Cct	Wyong	Construction of light industrial warehouses. Metal roof sheeting, masonry precast walls, aluminium shop front & glazing & structural steel components. Car parking for 8 vehicles. Associated landscaping.	417
Pacific Highway & Johnson Road Industrial Buildings	186 Pacific Hwy & 2A Johnson Rd	Tuggerah	Construction of 3 industrial buildings on a vacant site to comprise 6 individual units in Stages 1-3. Stage 1 - Building 1 to comprise Units 1-4 (1500sq m, 912sq m, 898sq m & 735sq m) & internal access. Stage 2 - Building 2 to comprise Unit 5 (557sq m). Stage 3 - Building 3 to comprise Unit 6 (1547sq m). New freestanding pylon sign with 13 signage panels & demolition of existing pylon sign. Painted finish masonry walls, colour coated metal roof sheeting, roller shutters, gutter & downpipes, aluminium powdercoated shopfront windows & doors, pre-cast concrete panels, steel framed awning & painted doors. Car parking for 129 vehicles to include 12 accessible spaces.	6149
3S Lighting	110 Somersby Falls Rd	Somersby	Demolition of existing structure, excavation of the site & removal of on site trees, vegetation & dam. Construction of a 2 storey industrial warehouse facility to comprise warehouse area (5608.7sq m), industrial area (2000sq m), design workshop/testing area (946sq m), storage area, office on the ground floor & first floor (724sq m & 904sq m) & facilities. Provision of a substation to the south of the site. Stormwater retention & detention system. Fire tank, pump room & firefighting equipment. Construction of a 2.1m high security fence on the west, north & east boundaries not including the aboriginal heritage management zone. Road access to	10185

Project Title	Project Address	Suburb	Project Details	Floorspace (sqm)
			Somersby Falls Road, linked to hardstand parking areas to the south of the site. Glass wall, laminated cladding, roller shutter door, colour coated metal cladding, precast concrete panel & aluminium wall cladding sheet. Car parking for 92 vehicles including 2 accessible spaces. Associated landscaping.	
Corella Close Depot	5 Corella Cl	Berkeley Vale	Construction of a storage depot to include a small office, amenities building, security fence & 2 vehicular accesses (1 off Apprentice Drive & 1 off Corella Close). Colour coated metal wall sheeting & metal roof sheeting. Associated car parking & landscaping.	70
Warren Road High Technology Industry	3 Warren Rd	Warnervale	Construction of a high technology industry to include a glass roof building (3000sq m) that will be utilised for intensive plant agriculture & a 2 storey pharmaceutical laboratory & processing facility (2800sq m) including staff amenities & administration offices. Associated car parking & landscaping.	5800
Palm Tree Road Plant Nursery	7 Palm Tree Rd	Wyong	Construction of a plant nursery & an amenities & sales building (270sq m) consisting of modified shipping containers. Car parking for 15 vehicles. Associated landscaping.	270
Hogans Heavy Haulage	5 & 7 Warren Rd	Warnervale	Construction of 2 industrial buildings. Building 1 (3120sq m) - Workshop, warehouse & storage area. Building 2 (297sq m) - 2 storey office. Precast concrete panel, concrete block retaining wall, steel frame, fibre cement sheeting & colour coated metal roof sheeting. Car parking for 29 light vehicles, 22 truck & trailer including 1 bicycle & 3 visitor bays. Associated landscaping.	3417
Amsterdam Circuit Light Industrial Units	35 Amsterdam Cct	Wyong	Construction of 15 light industrial units plus a caretakers unit. 2067sq m hardstand. Precast concrete wall panels, aluminium framed windows, colour coated metal fascia/barge, roller doors & roof sheeting. Associated car parking & signage. 901.4sq m landscaping.	2067
Lucca Road Industrial Units	6 Lucca Rd	Wyong	Construction of 4 industrial units to comprise 2 x 1 storey & 2 x part 2 storey buildings with associated offices & amenities. Units 1 & 2 Combined measurement of 32.05m in length, 36.050m in width & 11m in height with a total gross floor of 2460sq m. Units 3 & 4 - Combined measurement of 32.4m in length, 36.050m in width & 11m in height with a total gross floor of 2510sq m. Amenities consist of a foyer, change rooms, water closets & a lunchroom. Both first floor offices measure the gross floor area of 180sq m & ancillary to the main use. Removal 30 trees including 3 street trees. Concrete panel, eaves gutter, steel framed awning & roof, aluminium framed glazed windows, framed glass balustrade, powdercoated aluminium framed louvre & splayed steel framed facade. Car parking for 56 vehicles including 2 accessible spaces & 1 motorcycle/scooter bay. Associated landscaping.	4970
Lucca Road Industrial Building	15 Lucca Rd	Wyong	Construction of a new industrial building (1152sq m) including internal accessible amenities suitable for use either industrial activities or warehousing. Hardstand area for access & manoeuvring. 2 (6000L) rainwater reuse tanks. 6 bay loading access to the building. Powdercoated aluminium fixed glass window, automatic roller door, colour coated metal gutters, downpipes & roof flashing & painted finish wall. Car parking for 10 vehicles. Associated landscaping.	1152
Primo Fine Foods	41 Somersby Falls Rd	Somersby	Construction of a single storey warehouse (1043.5sq m) to be occupied by Primo Fine Foods with ancillary office (278sq m). Construction of a vehicular driveway crossing within the public	1320

Project Title	Project Address	Suburb	Project Details	Floorspace (sqm)
			road reserve to Somersby Falls Road. Concrete floor, steel frame & aluminium roof. Car parking for 11 vehicles. Associated signage, landscaping, earthworks & stormwater drainage.	
Young Street & Central Coast Highway Mixed Development	10 Young St & 61 Central Coast Hwy	Gosford West	Construction of an 8 storey mixed use development comprising 70 hotel suites, 28 x studio, 30 x 1 & 12 x 2 bedroom, ground floor retail & 18 x 2 bedroom shop top residential apartments. The hotel will be 4 to 4.5 star AAA rated aimed at corporate stays and tourist accommodation. Ground floor GFA 499.5sq m will comprise hotel foyer, lobby, reception & luggage areas; conference room; staff kitchen; comms room; male, female & disabled amenities; switch room; offices; housekeeping, laundry & storage; separate lifts for hotel & apartments, stairs; refuse areas for hotel & bike storage; & retail unit 65.5sq m. Level 1 will contain carparking. Level 2 GFA 1,264sq m will comprise 22 x hotel suites; gym; housekeeping/linen room; garbage chute. Levels 3 & 4 GFA per level 1,264sq m will each comprise 24 x hotel suites; housekeeping/linen room; garbage chute. Levels 5, 6 & 7 GFA per level 751sq m will comprise 6 x private apartments on each level; garbage room & chute; storage. Timber look cladding, glass balustrading, metal screens, aluminium framed windows. Carparking for a total of 85 vehicles at grade & on level 1. Landscaping.	65
Ghersi Av Mixed Development - Marque	3 Ghersi Av	Wamberal	Construction of a mixed use development comprising 5 x 2 storey x 3 bedroom townhouses & 71sq m of retail floor space. Basement carparking for 14 vehicles. Landscaping.	71
The Palisades	17 Mann St	Gosford	Construction of a mixed use development within 2 separate towers. The development will comprise 44 apartments, 39 x 3 & 5 x 2 bedrooms. Commercial area over 2 levels of 1069sq m. Retail space of 140sq m on ground level. Basement parking over 3 levels for 79 vehicles. Landscaping.	1209
Wisemans Ferry Commercial Development	85 Wisemans Ferry Rd	Somersby	Construction of a commercial development over 3 stages. Stage 1 - Construction of a service station (187.29sq m) & a fast food outlet (260.85sq m) Stage 2 - Construction of 7 industrial units with ancillary office space & 2 bulk retail units (586.9sq m). Stage 3 - Construction of 9 industrial units with ancillary office space. Total industrial & ancillary office floor area of 4630.35sq m & 729.35sq m. Composite aluminium pre finished cladding, off form concrete, aluminium framed doors & windows, aluminium weatherboard cladding, metal roof sheeting & roller shutters, steel parapet framing, glass balustrades. Off-street car parking for 143 vehicles. Landscaping over 2915.25sq m.	1035
Main Road Mixed Use Development	360 Main Rd	Toukley	Proposed construction of 2 storey mixed used development to include 2 ground floor shops & 2 residential units above. Brickwork, timber cladding, timber stud framed, steel, hardwood, aluminium louvres, timber cladding, concrete slab, metal sheeting & stainless steel. At-grade car parking for 8 vehicles. Associated landscaping.	392
That Big Self Storage Place	7 Palm Tree Rd	Wyong	Proposed construction of self storage facility to include 130 containers. Stage 1 - Installation of 20 storage containers, amenities & office building (73sq m). Proceeding stages - Installation of 10 containers. Stormwater drainage. Car parking for 84 vehicles to include 76 caravan spaces & 8 car spaces. Associated signage, landscaping, fencing & security system.	73

Project Title	Project Address	Suburb	Project Details	Floorspace (sqm)
Domayne West Gosford	79 Central Coast Hwy	Gosford West	Extension to the furniture showroom of the existing bulky goods premises for an area increase of 705sq m. Creation of an opening in the inter-tenancy walls. 3 new windows with canvas awning. Signage update.	705
Caltex Service Station & Woolworths Convenience Store Lisarow	900 Pacific Hwy	Lisarow	Construction of service station comprising 4 double-sided fuel dispenser, fuel canopy, underground tanks & 120sq m convenience store (Woolworths). Rendered concrete block walls, fibrous cement sheeting, aluminium framed glazed auto sliding entry doors. Car parking for 8 vehicles including air & water space. Associated landscaping.	120
Sailfind Place Warehouses	6 Sailfind Pl	Somersby	Construction of 2 x 1 storey warehouses to include reception area, office & staff amenities. Galvanised roof sheeting, aluminium framed glass doors & windows, metal roller doors, tilt-up concrete panel walls & concrete floor slab. Car parking for 7 vehicles. Associated landscaping.	1156
Gindurra Road Plant Storage Shed	90 Gindurra Rd	Somersby	Demolition of existing structures. Construction of a plant storage shed with offices & amenities including an employee recreation room. 2m high metal fencing along Gindura Road frontage. Sliding electric gates & a 6m wide gate for emergency vehicle access. Car parking for 12 vehicles. Associated landscaping.	1226
Ocean Beach Road Industrial Building	32 Ocean Beach Rd	Woy Woy	Demolition of existing industrial building. Construction of a single storey light industrial building to comprise 2 units. Unit 1 - 150sq m plus mezzanine (45sq m). Unit 2 - 200sq m plus mezzanine (45sq m). Both units include accessible water closet & dedicated vehicular & pedestrian access. Aluminium framed windows & doors, steel frame, colour coated metal roof & roller shutter, painted precast concrete, masonry retaining wall & clear anodised sun screens. Car parking for 5 vehicles. Associated landscaping. The existing building was demolished at the time of the Audit and was not included within overall floorspace	435
United Petroleum Service Station Umina	303-313 Ocean Beach Rd	Umina Beach	Construction of a service station comprising a single storey convenience store of 303sq m & 4 refuelling bays. Concrete floor, aluminium steel roof, brick veneer walls. Car parking for 15 vehicles. Associated landscaping	302

Source: CordellsConnect July 2019, HillPDA

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