



Economic and Employment Lands Strategy: non-heavy industrial

Perth metropolitan and Peel regions

April 2012



Department of
Planning



Western
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Commission

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Minister's foreword



The State's outlook is bright with a robust Western Australian economy predicted in the medium to long term. The State Government is preparing for continued economic prosperity by ensuring there is forward planning to cater for and accommodate growth in the industrial sector.

The Economic and Employment Lands Strategy: non-heavy industrial is the State Government's response to the future of industrial land use planning for the Perth Metropolitan and Peel regions.

Guided by the themes of *Directions 2031 and Beyond*, the Strategy will provide an essential strategic planning framework for industrial land use planning and development during the next 20 years.

The strategy focuses on the identification of land that is suitable for non-heavy industrial activity in the long-term and considers ways to address constraints on the land. The Strategy also takes into account the potential impact of large scale resource projects, such as in the iron ore and natural gas sectors.

This document provides a clear strategy for industrial sites, with a particular focus on light and general industry uses required to support the continued growth of the State's key industries.

The Strategy's aim is to facilitate the restoration of the industrial land bank to an appropriate level, thus ensuring that the industrial land shortage encountered in the mid 2000s will not re-occur.

The Strategy will form a blueprint for industrial land use planning into the future.

The State Government looks forward to working with local governments, the private sector and the general community as we implement this Strategy, which will underpin Western Australia's future economic prosperity.

A handwritten signature in black ink, reading 'John Day'.

John Day
Minister for Planning



Chairman's foreword



All indications show that Western Australia's population will continue to grow and it is expected that our economic situation will remain robust. While growth is positive, it also presents a number of challenges that need to be addressed. Western Australia cannot afford to be complacent if it wants to be an attractive place for industrial investment.

It is important to ensure there is an adequate land bank of suitably zoned and serviced light and general industrial land to capitalise on and meet future growth.

The Economic and Employment Lands Strategy: non-heavy industrial for Perth and Peel sets out a broad agenda for the provision of industrial land in the Perth and Peel regions for the next 20 years.

The strategy has been designed to provide a degree of flexibility, allowing stakeholders, landowners and government agencies to contribute to the development of industrial land in Perth and Peel.

The key objectives of the strategy are centred on ensuring the ongoing availability of industrial land, delivering a rolling 20-year land-bank and protecting existing industrial land so that industrial activities can be sustained in the long-term.

The demand for well located and serviced industrial land has been strong and is set to remain so, well into the future.

Gary Prattley
Chairman
Western Australian Planning Commission

Director General's foreword



Industrial land plays a key role in the economic wellbeing of Perth and Peel, with benefits extending right across Western Australia.

There is a continued need for general and light serviced industrial land, driven by an increasing population and the demand for our resources from overseas markets.

The Economic and Employment Lands Strategy: non-heavy industrial for Perth and Peel has taken Western Australia's economic attributes into consideration and identifies the most appropriate locations for future industrial land.

This strategy makes provision for our impending industrial land requirements, so shortfalls that have occurred in the past can be avoided. By heeding these lessons, we can provide certainty that will encourage further global investment in our State.

The Strategy is the result of contribution from across State Government and has involved extensive consultation between local government and stakeholders.

The Western Australian Planning Commission and the Department of Planning will continue to work with State and local government agencies, industry groups and the community to shape the future of industrial land within the Perth and Peel regions.

The strategy will be subject to ongoing monitoring and regular review to deliver a strategic land-bank of industrial land that will sustain this State's future growth.

A stylized, handwritten signature in black ink, appearing to read 'Eric Lumsden'.

Eric Lumsden
Director General
Department of Planning



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Executive summary





As part of the State Government's response to a recognised shortfall in industrial land supply, an Economic and Employment Lands Strategy: non-heavy industrial (EELS) ("the Strategy") has been prepared that focuses on general and light industry needs. Heavy industry relies on a unique set of drivers and conditions to that of general and light industrial land and has thus been excluded from this strategy. The aim of the Strategy is to ensure that adequate forward planning is undertaken to provide employment land in both the Perth metropolitan and Peel regions over the next 20 years and beyond.

Employment land is broadly defined as land that could be used for employment generating activities, including land zoned for industrial and commercial purposes.

The Strategy was prepared in cooperation with the Department of Planning, LandCorp, the Department of State Development and the Department of Environment and Conservation, and was guided by a taskforce. The Department of Planning took on the role of lead agency in preparing this strategy.

The Strategy will provide the vital framework for this necessary strategic planning to be undertaken, to ensure ongoing economic growth and sustainability for the Perth and Peel regions, and Western Australia as a whole.

Specifically, the Strategy aims to address the following points:

- Identify the areas, type and locations of general and light industrial land required over the next 20 years.
- Review the existing industrial land development program and identify possible extension opportunities.
- Identify and evaluate the suitability of locations for new general and light industrial estates.
- Develop a strategy to facilitate the delivery of general and light industrial land and assist in the restoration of the Government's long-term general and light industrial landbank.

The study area for the Strategy relates to the statutory boundaries of the Perth Metropolitan and Peel regions, as defined by Region Schemes. This study area comprises approximately 805,633 hectares of which only 13,798 ha (1.7 per cent) is currently zoned 'Industry'.

The Strategy details a number of key initiatives that will be actively pursued by the Western Australian Government to promptly address the industrial land supply shortfall and advance planning for future industrial land supply, to ensure an adequate ongoing supply of industrial land over the next 20 years and beyond. The Infrastructure Coordinating Committee (ICC) will play a pivotal role in overseeing and delivering a coordinated industrial land release program.

Background

During the unprecedented economic growth in the late 1990s and early 2000s, industrial land values in the Perth and Peel regions increased so dramatically that the property market stagnated. Landowners who wished to sell their properties were unable to do so, and developers who wished to develop land were unable to justify the outlay involved. Consumption rates over the past decade clearly reflect this considerable drop in activity in the industrial property market.

The global financial crisis in late 2008 further exacerbated this problem, resulting in a retreat by major institutional investors from the Perth industrial property market and a dwindling confidence in general across the business sector. The inability to raise capital for major projects deterred the speculative investment that once fuelled the Perth and Peel industrial property markets. However, relative to other states, the Perth economy remained relatively unscathed.

The WA Economy is anticipated to expand by around 4.75 per cent over the 2011/12 period, with economic growth remaining robust over the next few years. The



demand for well located serviced industrial land will still remain strong, given its scarcity, and as a result land values are expected to remain buoyant.

Industry employs on average 34 per cent of the labour force in the Perth and Peel regions, accounting for approximately 336,000 people. With the industry sector supporting such a large proportion of the labour force, it emphasises the need to protect existing industrial land and provide new industrial land on a continual basis.

The EELS is the culmination of three studies: the *Industrial Land Needs Study* (ILNS) which examined the current industrial stock for the Perth and Peel regions, noted historical consumption trends and forecasted likely future demand for industrial land over the next 20 years; the *Industrial Land Capacity Assessment* (ILCA) study which, using the forecast demand figures, identified potential future industrial sites using a multi-criteria evaluation methodology, and subsequently prioritised those sites; and a market analysis to ascertain what current and potential industrial land users and owners want and need the Strategy to deliver in the sense of the right product (ie: land) for their current and future needs.

The strategy

The projected demand for industrial land to the year 2031 is 4726 ha. This estimation is based on historic and current consumption rate trends, and assumes a business as usual scenario. A key part of managing and catering for this demand in a strategic manner is to obtain as much market knowledge as possible from key industry players to ensure that their needs are catered for, and that the strategic objectives on self-sufficiency are achieved.

To meet the growing needs of industry sectors, the Strategy sets out a number of actions to provide:

- To provide and ensure the ongoing availability of a supply of industrial land, including a buffer of undeveloped industrial land to be available if demand increases.
- Identification protection of a rolling 20-year “industrial land bank” to ensure a supply of industrial land is available to meet future demand on an ongoing basis.
- Appropriate protection for existing industrial land to sustain long-term industrial activities.



Based on the current shortfalls in industrial land supply in each of the sub regions and the forecast demand for the Perth metropolitan and Peel regions over the next 20 years, it will be approximately 10 years before the market can achieve a balance in supply with industrial land demand. It is therefore crucial that priority be allocated to facilitate the release of remainder of existing industrial estates (representing 1,758 ha supply) and all necessary feasibility studies and investigations be promptly completed to enable delivery of the short, medium and long term sites that have been identified in this Strategy.

In total, 37 sites have been identified in the Strategy, totalling just under 13,000 ha of potential gross developable land fit for future industrial use. It is a reasonable expectation that this figure will be substantially less following the rationalisation of the sites through further constraints analysis and subsequent determination of the net developable area.

The industrial areas that have been identified within each sub-region have been categorised into three types and allocated estimated delivery timeframes for this land to be rezoned for industrial uses. Each category is described below, including key characteristics that have influenced to which category they belong:

An assessment has been undertaken, that identifies the opportunities for and constraints on each of the sites, and addresses the potential land use role of the site while still recognising that the key strategic employment influences must also be identified and a distinction made between population driven demand for industrial land and economic generators.

In the next 20 years industrial land supply will be met through the consolidation of existing industrial estates, extensions to existing estates and the creation of new priority industrial estates. If some of the short to medium term industrial sites are not developed in the anticipated time frame, due to land constraints and other issues, the unmet demand will be catered for by an adequate landbank of other sites that have been identified in the potential long term site category. This industrial landbank will be monitored to ensure there will be a continual supply of industrial land. The Urban Development Program (UDP) and associated land release program for industrial land, will ensure a coordinated and informed approach to the monitoring and delivery of these sites.

Table 1: Categories of Industrial Sites

Type	Timeframe	Key characteristics
Future short term industrial sites	0 - 4 years	<ul style="list-style-type: none"> Land is not yet rezoned to accommodate industrial uses Some preliminary planning has already commenced Some planning and/or environmental studies may already be completed There already exists some level of commitment that these sites will progress to the next stage of planning (i.e. rezoning)
Potential medium term industrial sites	4 - 10 years	<ul style="list-style-type: none"> Land is not yet rezoned to accommodate industrial uses Key characteristics for the subject area identified Preliminary desktop planning investigations completed for some sites accompanied by "Key Actions", generally consistent with multi-criteria analysis ranking
Potential long term industrial sites (strategic landbank)	10 years +	<ul style="list-style-type: none"> Identified as a strategic landbank Substantial planning and environmental studies required to be undertaken to determine feasibility



Key issues

As a starting point, the key issues facing industrial land development were identified and categorised as follows.

Importance of industrial land

- The vital importance of industrial land to the Perth and Peel regional economies as well as the State's economic growth overall is neither appreciated nor understood.

Current supply shortfall

- There is a marked shortfall of industrial land in both the Perth and Peel regions, due to insufficient forward planning in identifying future industrial land.
- Existing identified future industrial land is heavily constrained.
- There is a need for more development-ready land to be available to the market for general and light industrial uses.

Governance structure

- There is a need to improve coordination between infrastructure and industrial land provision in land use planning.
- There is a need for a stronger focus on industrial land use planning as part of the wider planning and economic framework for the Perth and Peel regions.
- There is an opportunity to improve the coordination of government agencies responsible for the strategic policy and planning and the delivery of industrial land.
- There is an opportunity to strengthen current governance structures for the planning and delivery of industrial land.

Monitoring mechanisms

- The current monitoring of industrial land supply, demand and utilisation can be improved to better respond to the immediate needs of the industrial property market.
- There is a need for improved and responsive market and commercial intelligence to be factored into current industrial land use planning and strategies to optimise planning outcomes.

Policy and regulation deficiencies

- Stronger planning policies and controls for industrial land use planning and strategies are needed to optimise planning outcomes.
- Industrial land use planning at a local government level needs to factor current operational advancements and innovations into planning regulations;
- There is a need for improved consistency across local government in how industrial land is defined and subsequently treated.

Competing uses

- Existing industrial estates need to be protected from the increasing encroachment of non-industrial uses in industrial zoned areas, and urban (ie residential) encroachment.
- Existing industrial land, particularly in the inner and middle areas, could be more efficiently utilised.
- There is a need to ensure industrial land development meets state needs as efficiently as possible.

Recommendations and actions

The EELS, through associated supporting studies, has examined each of these issues and developed a response resulting in the following recommendations and actions, outlined as follows:

Key Objective 1:

To provide and ensure the ongoing availability of a supply of industrial land, including a buffer of undeveloped industrial land to be available if demand increases.

Governance and coordination	
Key aim: To provide suitable governance and coordination of the planning and delivery of land for future industrial use.	
Actions	
1.	The ILS Taskforce be empowered with decision-making authority and is able to champion and monitor progress in the planning and coordination and implementation of critical infrastructure for the industrial sites.
2.	Extend the current membership of the ILS Taskforce to include key senior personnel from the Service Agencies - Water Corporation, Western Power and Department of Transport (Main Roads WA and Public Transport Authority).
3.	Establish a joint State Government, Local Government and private sector industry reference group to monitor industrial land supply, demand and utilisation issues and trends.
4.	Investigate the most effective way of sharing information and exchanging knowledge between government and the private sector, together with the formation of an Industrial Property Forecasting Group.
5.	Incorporate the EELS into the <i>Directions 2031 and Beyond</i> framework and the Urban Development Program, thereby enabling regular reviews.
6.	Investigate and determine the most effective and efficient governance frameworks for the delivery of each of the short to medium term sites, to fast-track implementation.
Forecast and monitor	
Key aim: Develop and maintain a program to forecast and monitor the demand and supply of industrial land.	
Actions	
7.	Monitor local, national and international trends in order to provide industrial land supply, location, land configuration and land use policies that will satisfy present and future industry requirements.
8.	Maintain a database, with input from State Government, local government and the private sector, to monitor industrial land supply, demand and utilisation.
9.	Benchmark the competitiveness of industrial development, land availability and land values with other major Australian cities.
10.	Institute formal engagement arrangements (a government/industry reference group) between the State Government and private sector to better understand the end user needs and requirements and to identify and develop strategies to attract key anchor tenants to future estates.
11.	Establish an Industrial Property Group comprising public and private sector organisations involved in industrial land development to provide for the sharing of information and the exchange of knowledge in order to assist with the timely provision of appropriately located and serviced industrial land.
12.	Undertake and complete an Industrial Land Use Survey every three years for the first ten years before reverting to a planned five year review period.



Key Objective 2:

To identify and protect a rolling 20-year “industrial landbank” to ensure a planned supply of industrial land is available to meet future demand on an ongoing basis.

Land supply and delivery	
Key aim: Maintain a rolling 20-year “industrial landbank” to ensure the availability of industrial land .	
Actions	
13.	The State Government will work collaboratively with Local government, infrastructure and service providers and the private sector to identify appropriate mechanisms to facilitate strategic landbanking for future industrial uses.
14.	Adopt the Assessment Framework as used in the South Australian Industrial Land Strategy (2007) for identifying prime industrial areas of economic importance to the State which must have protection from rezoning and major subdivision.
15.	Develop mechanisms to improve the coordination of supply of development-ready industrial land.
16.	Implement the action plans for each of the key medium term sites to progress them to development ready status.
17.	Coordinate the timely provision of public and private infrastructure to key industrial sites and locations.
18.	Incorporate the infrastructure requirements for key industrial sites and locations in the Urban Development Program and the State Government’s capital works program.
Key aim: Ensure the timely delivery of development-ready land.	
Actions	
19.	Prepare an Implementation Plan for the key short and medium term sites identified within the Industrial Land Strategy, to assign appropriate priority to planning and technical studies and governance initiatives to progress these sites to development ready status.
20.	Incorporate the objectives of the EELS and the related infrastructure development programs for industrial land in the Urban Development Program and the sub-regional structure plans.
21.	Undertake and prioritise the timely development of key industrial sites in government ownership.
22.	Expedite the delivery of additional industrial land in the eastern sub-regions in close proximity to Perth Airport and the Kewdale rail freight terminal.
Key aim: Maintain a significant Government role in industrial land supply and facilitate greater participation by the private sector.	
Actions	
23.	The State Government, in consultation with local government authorities, servicing and infrastructure agencies and the private sector will explore and identify appropriate delivery models to increase private sector involvement in industrial land supply. Opportunities for Private-Public Partnerships will also be explored.
24.	The State Government will actively engage with the private sector to better understand the end user needs and requirements and to identify and develop strategies to attract key anchor tenants to future estates.
25.	Industrial development should be as sustainable as possible and can be assessed for its overall sustainability using techniques and measuring tools similar to those used in residential and commercial developments and the State government through Landcorp should develop a demonstration industrial project and measure its sustainability by using the GBCA industrial tool.

26.	Examine and evaluate incentives to attract key tenants and developers to facilitate agreed visions for industrial areas, and ways of activating engagement with the local business community by local government.
27.	Investigate options for Infrastructure Delivery Models including existing models such as Development Contribution Plans and Private Agreements.
28.	Minimise risks associated with industrial land financing by getting land development-ready. As there will be limited debt funding for long term landbanking, purchasing options that are less reliant on debt funding, such as joint ventures and private-public partnerships, will need to be planned for when releasing new, larger scale industrial estates.

Key Objective 3 :

To appropriately protect existing industrial land to sustain long-term industrial activities.

Planning	
Key aim: To protect and preserve industrial sites, particularly those considered to have State and regional significance and are located within the inner and middle sectors.	
Actions	
29.	Examine opportunities for reducing the regulatory approval timeframes and their duplication, associated complexities and costs.
30.	Encourage local authorities to adopt policies and zoning provisions within local planning schemes that protect existing and future industrial areas, and secure locations for future industrial activities .
31.	Undertake master planning and feasibility studies of existing and future industrial areas in conjunction with local government.
32.	Encourage local authorities to review their town planning schemes and associated development control policies to ensure that any current or future zoning protects and stimulates industrial and mixed use developments
33.	Evaluate and implement the means whereby large lots can be protected from subdivision in the long-term, including structure planning, notification on titles and caveats with sunset clauses.
34.	Structure plans for new industrial areas should include mixed use and retail opportunities. These developments could be established in buffer areas and act as noise barriers to residential areas.
35.	Incorporate buffer zones into estates to protect both adjoining land uses and industrial operations.
36.	Review and update existing industrial land use planning policies at both State and local government level.
37.	Prepare a suite of planning controls and planning policies that better manage the protection of existing industrial estates and the expeditious delivery of future industrial estates.
38.	Encourage the consolidation of existing industrial sites through redevelopment of brownfield and infill of under-utilised sites.
39.	Incorporate the EELS, its recommendations and key findings into current and future strategic planning initiatives such as <i>Directions 2031 and Beyond</i> , sub-regional structure plans and the proposed economic and employment strategy recommended as a key action in <i>Directions 2031 and Beyond</i> .



Implementation

A key component of a coordinated and informed approach to the monitoring and delivery of those priority industrial sites will be an Implementation Plan, which will inform the Perth and Peel regions urban development program and future industrial land release programs.

The success of the Strategy will be heavily reliant on commitments from State Government (including servicing and infrastructure agencies), local government and the private sector to deliver the key recommendations and actions of this strategy. To assist with this delivery, an implementation plan is being prepared that addresses how the strategy and its key actions and recommendations will be delivered in both the strategic and statutory framework and in the land delivery sense.

The overriding implementation actions that are required to ensure the delivery of the EELS in a timely and collaborative manner have been identified as follows:

key implementation actions
Embed the EELS principles in all strategic planning initiatives across State Government.
Review the current statutory planning framework and amend as required to put in place appropriate measures to preserve, protect and prioritise industrial land uses from other competing uses.
Undertake key actions identified for each of the sub-regions.
Develop an Implementation Plan which outlines timeframes, costs and governance models, as they relate to the key actions for each short and medium term site identified in the Strategy.
Review current processes involved in environmental and planning approvals in order to create better integration between them.
Determine how infrastructure provision can be improved, including exploring different infrastructure delivery models.
Examine different options to provide incentives for developers and landowners to develop industrial land.

Summary of priority non-heavy industrial sites for further investigation

As part of a detailed site selection process, several sites identified were afforded a higher priority based on their attributes and characteristics as well as input from stakeholders, including landowners and local and state government agencies.

The following sites have been identified for further planning investigation and de-constraining analysis to be undertaken in the medium-term.

Site:	In EELS refer to:
Bullsbrook South (North-east sub-region)	P 85
Forrestfield (North-east sub-region)	P 79
Greenlands Road (Peel sub-region)	P 154
Hazelmere South (North-east sub-region)	P 95
Maddington Kenwick Strategic Employment Area (MKSEA) (South-east sub-region)	P 109
Nambeelup (Peel sub-region)	P 158
North East Baldivis (South-west sub-region)	P 135
North Ellenbrook (North-east sub-region)	P 89
Pinjar South (North-west sub-region)	P 59
South Forrestdale (South-east sub-region)	P 110
Whiteman (North-east sub-region)	P 80

It should be noted however that these sites are subject to further investigation and net developable area of these sites for industrial development is dependent upon detailed analysis at the appropriate stage.

