Coffs Harbour City Council

Coffs Harbour City Council

Local Growth Management Strategy – Industrial Lands Component

Prepared by

GeoLINK
environmental management and design

SGS
Economics & Planning

April 2009

Table of Contents

Section		Page
1.	Introduction	1
1.1	Project Background	1
1.2	Purpose of the Strategy	2
1.3	Methodology for the Strategy	2
1.4	Commitment to Ecological Sustainable Development	4
2.	Changing Economic Trends	5
2.1	Preamble	5
2.2	Globalisation	5
2.3	Increasing Lifestyle and Environmental Awareness	5
2.4	Changing Industry Structure	6
3.	Overview of Economic Profile for Coffs Harbour City Local Government Area	7
3.1	Geography	7
3.2	Population	7
3.3	Employment	13
4.	Statutory and Strategic Planning Context	23
4.1	State and Regional	23
4.2	Local	29
5.	Industrial Land Uses	35
5.1	Types of Industrial Land Uses	35
6.	Consultation	41
6.1	Preliminary Consultation	41
6.2	Community Forum	43
6.3	Public Exhibition Process	43
7.	Industrial Land Context and Supply	45
7.1	Industrial Land Context for the LGA	45
7.2	Existing Industrial Areas	45
7.3	Supply Issues from Preliminary Consultation	53
8.	Projected Industrial Land Demand	89
8.1	Industrial Land Forecasting Method	89
9.	Industrial Land Guidelines	101
9.1	Coffs Harbour City LGA Context	101
9.2	Industrial Lands Planning Approach	102
9.3	Land Suitability Assessment for Selected Sites	106
10.	Recommendations	131
10.1	Rezoning of Existing Industrial Areas	131
10.2	Identified New Sites for Rezoning to Industrial	132
10.3	General Strategies	133

Illustrations

Illustration 3.1	Coffs Harbour City Council Local Government Area	11
Illustration 7.1	Coffs Harbour and Sawtell Industrial Areas	55
Illustration 7.2	Woolgoolga Industrial Areas	57
Illustration 7.3	Bosworth Road	59
Illustration 7.4	Hurley Drive	61
Illustration 7.5	Cook Drive	63
Illustration 7.6	Mansbridge Drive	65
Illustration 7.7	Isles Drive	67
Illustration 7.8	Christmas Bells Rd	69
Illustration 7.9	Hamilton Drive	71
Illustration 7.10	Hi-Tech Drive	73
Illustration 7.11	Hulberts Road	75
Illustration 7.12	Hogbin Drive	77
Illustration 7.13	Orlando Street	79
Illustration7.14	Marcia Street	81
Illustration 7.15	Howard Street	83
Illustration 7.16	South Coffs	85
Illustration 7.17	Proposed Industrial and Commercial Aviation Subdivision	87
Illustration 9.1	North Boambee Valley (West) Structure Plan	117
Illustration 9.2	North Boambee Valley (West) Structure Plan Planning Precincts	119
Illustration 9.3	North Boambee Valley (West) Structure Plan Planning Precincts 3 and 4	121
Illustration 9.4	Investigation Area - Woolgoolga	123
Illustration 9.5	Investigation Area - South Bonville West	125
Illustration 9.6	Investigation Area - South Bonville East	127
Illustration 9.7	Investigation Area – Corindi Red Rock	129
Illustration 10.1	Recommended Zoning for Bosworth Road Industrial Area	137
Illustration 10.2	Recommended Zoning for Hurley Drive Industrial Area	139
Illustration 10.3	Recommended Zoning for Cook Drive Industrial Area	141
Illustration 10.4	Recommended Zoning for Mansbridge Drive Industrial Area	143
Illustration 10.5	Recommended Zoning for Isles Drive Industrial Area	145
Illustration 10.6	Recommended Zoning for Christmas Bells Road Industrial Area	147
Illustration 10.7	Recommended Zoning for Hamilton Drive Industrial Area	149
Illustration 10.8	Recommended Zoning for Hi-Tech Drive Industrial Area	151
Illustration 10.9	Recommended Zoning for Hulberts Road Industrial Area	153
Illustration 10.10	Recommended Zoning for Hogbin Drive Industrial Area	155
Illustration 10.11	Recommended Zoning for Orlando Street Industrial Area	157
Illustration 10.12	Recommended Zoning for Marcia Street Industrial Area	159
Illustration 10.13	Recommended Zoning for Howard Street Industrial Area	161
Illustration 10.14	Recommended Zoning for South Coffs Industrial Area	163
Illustration 10.15	Recommended Zoning for Coffs Harbour Airport Industrial Area	165
Illustration 10.16	Recommended Zoning for Potential Industrial Area – Woolgoolga	167
Illustration 10.17	Recommended Zoning for Potential Industrial Area – South Bonville West	169

Figures

Figure 3.1	Population Profile	8
Figure 3.2	Occupational Profile	15
Figure 3.3	Educational Attainment	16
Figure 3.4	Employment by Industry Sector (1 Digit ANZSIC)	17

Tables

Table 3.1	Population Projections for the Coffs Harbour Region	8
Table 3.2	Population Growth	9
Table 3.3	Key Labour Market Indicators for Coffs Harbour	13
Table 3.4	Destination LGA for workers living in Coffs Harbour LGA	13
Table 3.5	Coffs Harbour Jobs: Workers ratio (1 digit ANZSIC by 1 digit ASCO)	14
Table 3.6	Coffs Harbour Employment Change by Industry	18
Table 3.7	Mid-North Coast Region Employment Change by Industry	19
Table 3.8	LQ Analysis for Coffs Harbour over Mid-North Coast Region	20
Table 3.9	LQ Analysis for Coffs Harbour over NSW	21
Table 3.10	Largest Employing Sectors	21
Table 4.1	Information Required to be Addressed in Local Growth Management Strategies	26
Table 5.1	Definitions of types of industry	35
Table 7.1	Land Uses with the Proposed Coffs Airport Industrial Precinct	52
Table 7.2	Summary of Supply	53
Table 8.1	Employment Forecast to 2026	91
Table 8.2	Floorspace Demand Forecast to 2026	92
Table 8.3	(Baseline) Land Demand Forecast to 2026	93
Table 8.4	Standard Floor space and Land Area per Job Ratios	95
Table 10.1	Existing Industrial Land	131
Table 10.2	Recommended Future Industrial Land	132
Table 10.3	Recommended Potential Industrial Land for Future Investigation	133
Table 10.4	Existing Vacant Industrial Land	133

Appendices

A Consultation Findings

B Growth Areas Map for Coffs Harbour

C Public Exhibition Summaries

This page intentionally left blank.

Executive Summary

Introduction

The Coffs Harbour City Industrial Lands Strategy provides Council and the community with a strategic planning framework to guide the future development of industrial lands within the Coffs Harbour Local Government Area. The Strategy forms the Industrial Component of the Coffs Harbour City Local Growth Management Strategy. The main objectives of the Strategy are to:

- assist Council in preparing its new Local Environmental Plan (LEP) in accordance with the Standard Instrument (Local Environmental Plans) Order 2006 and the Standard Instrument—Principal Local Environmental Plan;
- establish the existing supply of, and future demand for industrial lands;
- provide a strategic framework for the provision of future industrial lands;
- provide a recommended zoning scheme for existing and future industrial lands; and
- assess the current and future employment opportunities and economic impacts of industrial lands within the LGA.

Methodology

The Industrial Lands Strategy includes:

- an overview of recent economic trends;
- a summary of the economic profile for the Coffs Harbour LGA;
- an overview of the local and regional planning context for industrial development within the Coffs Harbour LGA;
- a summary of the standard types of industrial uses and definitions that exist, or are likely to exist, within the study area;
- results of consultation with stakeholders and government agencies;
- an analysis and assessment of existing industrial lands supply;
- an assessment of the local demand and need for industrial land;
- guidelines and a framework for future industrial development within the LGA; and
- recommendations including an overarching strategy for future development and location of industrial lands within the LGA.

Outcomes

There are a number of changing economic trends and external factors that have and will continue to influence the development of industrial lands within the Coffs Harbour LGA. These influences include globalisation, an increase in lifestyle and environmental awareness (Sea/Tree Change Phenomenon) and a changing industry structure. These influences have also been responsible for recent and projected population increases within the LGA. The expected population growth over the next thirty years will have significant implications for the Coffs Harbour LGA. An ageing population with fewer younger people will present a number of issues to decision makers in the near future. The need to provide for increased job growth within the LGA will need to be a key policy decision of Council to assist in contributing to and servicing this population growth.

The provision of sufficient industrial and other employment lands within the LGA to cater for this population growth will be essential in providing much needed jobs for the LGA and the region. One of the main difficulties in providing land for these industries is the fact that the area is so constrained with many of the existing industrial areas fragmented and restricted from potential future expansion because of these constraints.

Other influences on the provision of Industrial lands within the LGA are the myriad of environmental planning instruments, policies and other strategies that relate to industrial land. This Strategy identifies and discusses how each document applies to the development of industrial land within the Coffs Harbour LGA.

GeoLINK and SGS Economics and Planning undertook preliminary targeted stakeholder consultation to inform this Strategy. This targeted consultation involved face to face meetings with Government Agencies, business groups and individuals identified by Council and GeoLINK as having an interest in this Strategy as well as being able to provide insight and information essential for completion of this Industrial Lands Strategy. There were a number of outcomes from this consultation with the main concern being a shortage of industrial land within the LGA especially areas with the capacity to provide for large lots. The Department of Planning was also consulted in regard to the preparation of this Strategy. This consultation importantly indicated that areas identified outside the Growth Areas Maps released as part of the Mid North Coast Regional Strategy are unlikely to be supported without substantial justification. In addition to the existing urban footprint these identified areas included North Boambee and South Woolgoolga.

The Strategy identified and analysed all of the existing industrial areas located within in the Coffs Harbour LGA. These areas are generally smaller industrial estates and are quite fragmented from each other. This fragmentation of industrial lands within the Coffs Harbour LGA has resulted in uncertainty over the role and function of each particular industrial area with none of the industrial areas having a clear function within a clearly defined industrial lands hierarchy.

Within these existing industrial areas there is approximately 70ha of vacant land that is without significant constraint and available for development. There is also a significant amount of undeveloped zoned land that is constrained by environmental factors such as vegetation, drainage lines, state significant coastal wetlands, acid sulfate soil potential and flooding. There is also limited room for expansion of the majority of the existing industrial areas as a result of further ecological constraints or existing urban development on adjoining lands.

There is however potential within these existing industrial sites (particularly in Woolgoolga, Coffs Harbour and Toormina) to deliver more intensive employment opportunities for the LGA through redevelopment and rezoning. In addition to this, some of the lands surrounding the Coffs Harbour Regional Airport offer additional industrial land which is able to be developed in the short to medium term.

SGS Economics and Planning were engaged to carry out a baseline industrial land demand forecast for the Coffs Harbour LGA which has determined that 50 ha of industrial land will be required by 2031. These figures represent underlying demand. The way that this is translated into observed demand for industrial land take up depends on a range of other market factors such as interest rates, construction costs, strength of the local, regional and national economy etc, and principally the nature of land supply within the local government area.

Recommendations

The strategy contains a number of recommendations that will guide the future development of industrial lands within the LGA. These recommendations include:

- provision of an additional 50 ha of industrial land for the Coffs Harbour LGA by 2031;
- identification of appropriate zones under the Standard Instrument – Principal Local Environmental Plan for each of the existing industrial areas;
- review of the current role and function of each of the estates and an assessment of the desired future function of each of the estates;

- the need to increase the number of zones under the new LEP in order to better regulate inappropriate land uses within industrial areas;
- identification of investigation areas for future industrial land including North Boambee Valley, South Woolgoolga and South Bonville;
- preparation of a clearly defined industrial lands hierarchical structure to ensure that each industrial zone provides for land uses that are consistent with the role and function of identified industrial areas or precincts. This hierarchical structure needs to ensure that each industrial zone provides for land uses that are consistent with the role and function of identified industrial areas or precincts and should limit commercial and retail uses such as bulky goods to specific areas.;
- encouraging further intensification and development of existing industrial areas through development of existing vacant land or redevelopment into more intensive industrial uses that have potential to provide more employment for the local government area;
- review and implementation of the findings of the Coffs Harbour Economic Development Plan 2005;
- consolidation of existing industrial lands and identifying new locations for industrial land that are adjacent to existing industrial areas;
- preparation and submission of a Development Application for the proposed future development of the Coffs Regional Airport Lands;
- identification and target for relocation the following industry targets for the LGA:
  - distribution operations;
  - light and higher technology or ‘advanced’ manufacturing;
  - value-adding services on agri-businesses;
  - State and Federal Government departments; and
  - service-orientated industries;
- preparation of a Development Control Plan for industrial development to assist in the implementation of the recommendations of the Strategy; and
- adoption of a five yearly review period for the Strategy.

This page intentionally left blank.

1 Introduction

Coffs Harbour City Council resolved to prepare an Industrial Lands Strategy for the whole of the Coffs Harbour Local Government Area (LGA) in 2007. GeoLINK in association with SGS Economics and Planning were consequently engaged by Council to prepare this strategy. The main objectives of the Strategy are to:

- establish the existing supply of, and future demand for industrial lands;
- provide a strategic framework for the provision of future industrial lands;
- provide a recommended zoning scheme for existing and future industrial lands;
- assess the current and future employment opportunities and economic impacts of industrial lands; and
- contribute to Council's preparation of its new Local Environmental Plan (LEP) in accordance with the Standard Instrument (Local Environmental Plans) Order 2006 and the Standard Instrument—Principal Local Environmental Plan.

1.1 Project Background

Coffs Harbour City Council is committed to growing sustainable industries and businesses throughout the LGA. This commitment is shown by the establishment of the Coffs Harbour Economic Development Unit in 2002 which liaises with industry, businesses and all levels of government in an effort to facilitate the establishment of economic growth and business opportunities within the LGA. This Industrial Lands Strategy was prepared to assist Council in implementing this commitment and vision for developing sustainable industries for the whole of the LGA. This Industrial Lands Strategy provides an overarching plan for future industrial development within the local government area and will inform the preparation of the proposed new Coffs Harbour City Local Environmental Plan.

As well as providing an assessment of existing industrial lands supply, both developed and vacant, and constrained and unconstrained, this Industrial Lands Strategy projects future demand for industrial land within the local government area; and provides a broad analysis of lands that may be suitable for future industrial development.

Prior to the completion of this Industrial Lands Strategy, Council produced its Our Living City Settlement Strategy (OLCSS) Interim Document 2008 for the Coffs Harbour Local Government Area. The OLCSS Interim Document 2008 examines a wide range of settlement issues, one of which is industrial zoned lands. The preliminary analysis undertaken as part of the OLCSS Interim Document 2008 revealed that only a small percentage of existing industrial land is relatively unconstrained and available for development, whilst further areas of zoned but undeveloped land are affected by a number of environmental constraints such as drainage lines, flooding, state significant wetlands and potential acid sulfate soils. The strategy also determined that existing industrial estates, particularly in Woolgoolga, Coffs Harbour and Toormina, have the potential to deliver more intensive employment opportunities through redevelopment and more intensive land uses (e.g. conversion of transport storage and warehousing to manufacturing, primary processing and shipping or more labour intensive small business clustering).

Council resolved to undertake additional studies and strategies to determine needs for employment zoned land stocks in the Coffs Harbour Local Government Area. The OLCSS Interim Document 2008 identified two special investigation areas at South Woolgoolga and North Boambee Valley. These areas were also included in the DoP's Growth Areas Map which was released as part of the Mid-North Coast Regional Strategy. This Industrial Lands Strategy, although undertaking a shire-wide investigation of industrial lands, focuses on these two special investigation areas.

1.2 Purpose of the Strategy

The purpose of the Coffs Harbour Industrial Lands Strategy is to provide Council and the community with a strategic planning framework to guide the future development of industrial lands within the Coffs Harbour Local Government Area. The Industrial Lands Strategy includes:

- an overview of recent economic trends;
- a summary of the economic profile for the Coffs Harbour LGA;
- an overview of the local and regional planning context for industrial development within the Coffs Harbour LGA;
- a summary of the standard types of industrial uses and definitions that exist, or are likely to exist, within the study area;
- results of consultation with stakeholders and government agencies;
- an analysis and assessment of existing industrial lands supply;
- an assessment of the local demand and need for industrial land;
- guidelines and a framework for future industrial development within the LGA; and
- an overarching strategy for future development and location of industrial lands within the LGA.

1.3 Methodology for the Strategy

The methodology for the Industrial Lands Strategy is summarised below:

Task 1: Project Establishment
This task involved: ▪ background research of the existing information and strategies that inform the strategy; ▪ a project initiation meeting to obtain Council's perspective and background on the project; and ▪ preliminary investigation which involved providing an overview of the existing context of industrial lands within the local government area by way of illustrations, photographs and maps.

Task 2: Key Matters Analysis
This was the main component in the preparation of the Industrial Lands Strategy and involved the following tasks: ▪ establishing the development context of industrial lands within the study area; ▪ analysis of established population profile and estimated population projections; ▪ forecasting current and future demand for industrial land within the study area; ▪ analysis and assessment of the supply of industrial land within the study area; ▪ assessment of the employment opportunities (current and future) created by industrial lands within the study area; ▪ consideration of the economic impact of industrial lands within the study area; ▪ developing recommendations for preferred location, size and amount of industrial land within the study area to guide the future rezoning process; and ▪ providing recommendations for proposed industrial zoning categories pursuant to the Standard Instrument - Principal Local Environmental Plan.

Task 3: Consultation
In accordance with the brief, GeoLINK undertook a targeted consultation strategy for the project which involved interviews and discussions with: ▪ Council staff ▪ relevant stakeholders including: - Sawtell Chamber of Commerce; - Coffs Harbour Chamber of Commerce; - Woolgoolga Chamber of Commerce; - Manufacture Coffs Coast; - Coffs Harbour Future Development Board; - Coffs Harbour Local Aboriginal Land Council; - real estate agents; and - a number of businesses within the local government area. ▪ State Government bodies including: - Department of State and Regional Development; and - Department of Planning. A Community Forum was held as part of the public exhibition phase. The community forum allowed interested residents to discuss any aspect of the Strategy with the Council staff or its consultant. The Strategy was placed on public exhibition from 13 November 2008 to 30 January 2009. Council also forwarded the Strategy to relevant Government Agencies to obtain comment during this period.

Task 4: Guidelines
The Strategy also includes guidelines for industrial development within the local government area. These guidelines are essentially a framework for the future development of industrial lands within the LGA and will assist Council in preparing development control provisions for industrial lands throughout the Coffs Harbour Local Government Area.

1.4 Commitment to Ecological Sustainable Development

Ecologically Sustainable Development may be described as development that uses, conserves and enhances the community's resources so that the ecological processes on which life depends are maintained and the total quality of life now, and in the future, can be increased (CoA, 1992).

In determining the appropriate future strategy for industrial lands within the Coffs Harbour LGA, the principles of Ecologically Sustainable Development as defined in the *Local Government Act* 1993 are relevant. Under that Act, *principles of ecologically sustainable development* means the following statements of principle:

Ecologically sustainable development requires the effective integration of economic and environmental considerations in decision-making processes. Ecologically sustainable development can be achieved through the implementation of the following principles and programs:

1. *the precautionary principle—namely, that if there are threats of serious or irreversible environmental damage, lack of full scientific certainty should not be used as a reason for postponing measures to prevent environmental degradation.*

   In the application of the precautionary principle, public and private decisions should be guided by:

   i) *careful evaluation to avoid, wherever practicable, serious or irreversible damage to the environment, and*
   ii) *an assessment of the risk-weighted consequences of various options,*
2. *inter-generational equity—namely, that the present generation should ensure that the health, diversity and productivity of the environment is maintained or enhanced for the benefit of future generations,*
3. *conservation of biological diversity and ecological integrity—namely, that conservation of biological diversity and ecological integrity should be a fundamental consideration,*
4. *improved valuation, pricing and incentive mechanisms—namely, that environmental factors should be included in the valuation of assets and services, such as:*
   i) *polluter pays—that is, those who generate pollution and waste should bear the cost of containment, avoidance or abatement,*
   ii) *the users of goods and services should pay prices based on the full life cycle of costs of providing goods and services, including the use of natural resources and assets and the ultimate disposal of any waste,*
   iii) *environmental goals, having been established, should be pursued in the most cost effective way, by establishing incentive structures, including market mechanisms, that enable those best placed to maximise benefits or minimise costs to develop their own solutions and responses to environmental problems.*

This Strategy has carefully evaluated the environmental, social and economic impacts associated with the rezoning of existing and proposed new industrial areas of the Coffs Harbour LGA. The implementation of the Strategy and its recommendations will see the following benefits will accrue:

- provision of sufficient industrial land for the Coffs Harbour LGA by 2031 to assist in creating jobs for the projected increased population;
- protection of areas of environmental and ecological value and significance;
- intensification and development of existing industrial areas through development of existing vacant land or redevelopment into more intensive industrial uses that have potential to provide more employment for the local government area;
- consolidation of existing industrial lands and identifying new locations for industrial land that are adjacent to existing industrial areas to reduce urban sprawl; and
- identification and strategic targeting of sustainable industries for relocation to the LGA.

2

Changing Economic Trends

2.1 Preamble

When preparing an Industrial Lands Strategy for a Local Government Area it is important to take into consideration the external factors that influence existing and future demand for and supply of industrial land within a community. There are a number of changing economic trends that have and will influence the development of industrial lands within the Coffs Harbour LGA. Some of the major trends are discussed in this chapter.

2.2 Globalisation

The 'modern economy' is a global phenomenon characterised by:

- increasing economic integration across national boundaries;
- increasing pace of technological and social change;
- increasing pace of flow and transformation of information and knowledge;
- productivity growth linked with rising influence of information and communication technology; and
- entrepreneurship in creating and growing firms (Spears, 2002, page 1).

The modern economy has significant implications to regional economies such as Coffs Harbour. The rapid improvement in communications technology and the tendency towards more open economies has lead to the development of the globalisation concept, which implies that the world is one big market, accessible to all regions and all communities. It should be noted that although globalisation has benefits in terms of offering markets to regional areas and thereby new opportunities for growth at the local level, it can impact negatively on regional areas in that the markets of each region can become vulnerable to exploitation by external competition.

2.3 Increasing Lifestyle and Environmental Awareness

This changing modern economy also means that it is significantly easier to work in regional areas and still have good contact with larger centres within Australia and overseas. This, coupled with the improvements in air transport and relative reductions in air transport fares, has made regional economies such as Coffs Harbour attractive for not only new residents but also companies wishing to relocate to lifestyle centres.

The 'Sea / Tree Change' phenomenon has made regional centres like Coffs Harbour attractive places for relocation for those residents seeking a change in lifestyle and leisure preferences. This coupled with the fact that many within the post-war and baby-boomer generations are retired, or are preparing for retirement, has underpinned population shifts to regions such as the Mid North Coast of NSW (Salt 2006).

Increasing population projections as a result of these trends mean that Councils like Coffs Harbour City Council will need to carefully plan for the potential impacts from this population growth and employ ecologically sustainable development principals to ensure that associated urban growth is managed so as to maintain the many positive attributes that are experienced within the Coffs Harbour LGA. At the same time Council also needs to ensure that sufficient employment lands are made available to service this increased population.

2.4 Changing Industry Structure

Over the last 10 years there has been a significant change in Coffs Harbour's economic base. The largest increase in jobs within this time period has been in construction, retail trade, accommodation, cafes and restaurants, service industries and health and education. Traditional primary industries such as agricultural, forestry, fishing and mining and extractive industries have, however, had a reduced share of employment within the Coffs Harbour LGA (Coffs Harbour City Council OLCSS Interim Document 2008, page 33). This shift from the traditional industries of agriculture, forestry and fishing to service industries, such as retail trade, accommodation and health and education, diversifies Coffs Harbour's economy and assists in reducing the impact of the cycles that can exist in some sectors of the economy.

3

Overview of Economic Profile for Coffs Harbour City Local Government Area

3.1 Geography

Coffs Harbour City Council is located approximately half way between the metropolitan areas of Sydney and Brisbane and is a regional centre providing a broad range of services to all communities within the Coffs Coast Region. The Coffs Harbour Local Government Area (LGA) is bound to the north and north-west by Clarence Valley LGA and to the south and south-west by Bellingen Shire LGA. The LGA encompasses 1174 square kilometres and has a coastline that is approximately 78.8 kilometres.

Coffs Harbour is the major centre for the LGA which also supports the major town of Woolgoolga as well as a number of other smaller coastal towns including Red Rock, Corindi Beach, Mullaway, Safety Beach, Emerald Beach, Moonee Beach, and Sawtell, and inland settlements including Coramba, Nana Glen and Glenreagh. Coffs Harbour is one of the fastest growing regional centres in NSW and is also identified as one of Australia's most recognised tourist destinations.

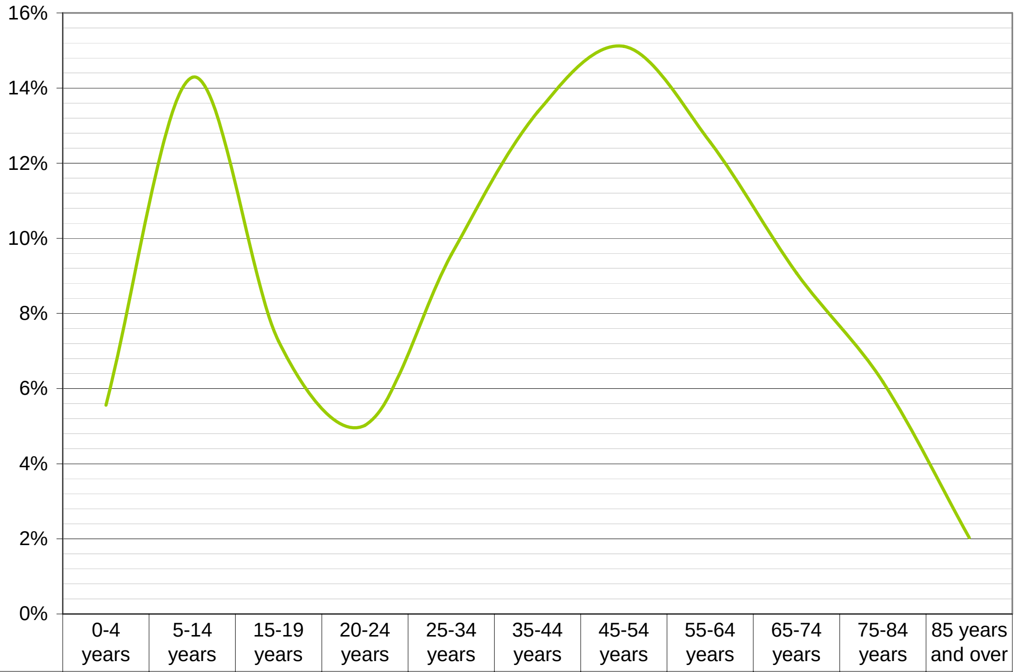
The coast line within the Coffs Harbour LGA stretches from Tuckers Rock in the south to Red Rock in the north and borders much of Solitary Islands Marine Park. Inland, the LGA contains rich farmlands, mountainous ranges, state forests and National Parks. In a number of places the Great Dividing Range is located in close proximity to the coast providing a diverse microclimate and landform which features tracts of rainforest and coastal wetlands containing a variety of fauna and flora species. The Coffs Harbour LGA is shown in **Illustration 3.1**.

The geographical features of the LGA have played a major role in its development. The LGA has a number of physical constraints, including sloping terrain, flood and bushfire hazards, vegetation and acid sulfate soils. These constraints have strongly influenced the current development pattern, which can be described as occurring linearly along the coast with a number of smaller inland villages. These geographical constraints have also had a significant influence on the recommendations of the findings of this strategy as there is limited unconstrained land suitable for industrial development left in the LGA that is in close proximity to populated areas.

3.2 Population

Coffs Harbour LGA has a population of approximately 65,000 people (ABS, 2006). This is an increase of 5.4% from the 2001 population of 63,200 (which in turn was a 5.7% increase from the 1996 population). **Figure 3.1** shows the population profile for Coffs Harbour LGA. This shows a concentration of residents in the 5-14 and 35-64 age brackets. This suggests a broadly 'older family' and 'retiree' profile. The proportion of the population of working age in Coffs Harbour was 63% in 2006. The low numbers in the 15-19 year old (7.3%) and 20-24 year old (5.0%) groups are considered to be due to the large number of young adults leaving Coffs Harbour to either attend tertiary education facilities or to find work elsewhere.

Figure 3.1 Population Profile



	0-4 years	5-14 years	15-19 years	20-24 years	25-34 years	35-44 years	45-54 years	55-64 years	65-74 years	75-84 years	85 years and over
Coffs Harbour LGA	5.6%	14.3%	7.3%	5.0%	9.6%	13.4%	15.1%	12.6%	9.1%	6.2%	2.0%

The Department of Planning undertakes research into population change within the state of NSW and produces population projections data within a range of reports. The most recent publication is the NSW Statistical Local Area Population Projections 2001 – 2031 which was released in 2005 by the department and updated in 2007. The population projections contained within this report are a view of future populations based on historical trends, current settlement patterns and demographic modelling techniques. The report states that government responses to issues raised by the projections, as well as other unforeseen societal changes, may result in a future population that is different in size, composition and distribution to the presented projections (Department of Planning 2005, P7).

Table 3.1 shows the Department of Planning population projections for the Coffs Harbour LGA. As can be identified in the table, the population projections by DoP estimate that the population for the Coffs Harbour LGA in 2031 will be 98,720 residents. This represents an average annual growth rate of approximately 1.3 – 1.4 %.

Table 3.1 Population Projections for the Coffs Harbour Region.

Coffs Harbour	*2001*	*2006*	*2011*	*2016*	*2021*	*2026*	*2031*
Part A	46,100	51,180	56,060	60,840	65,630	70,380	74,940
Part B	17,090	18,090	19,280	20,430	21,580	22,710	23,780
Total	63,190	69,270	75,340	81,270	87,210	93,090	98,720

Source: Department of Planning 2007

Council has, in its OLCSS Interim Document 2008, used similar population projections to calculate locality projections for the LGA.

Table 3.2 Population Growth

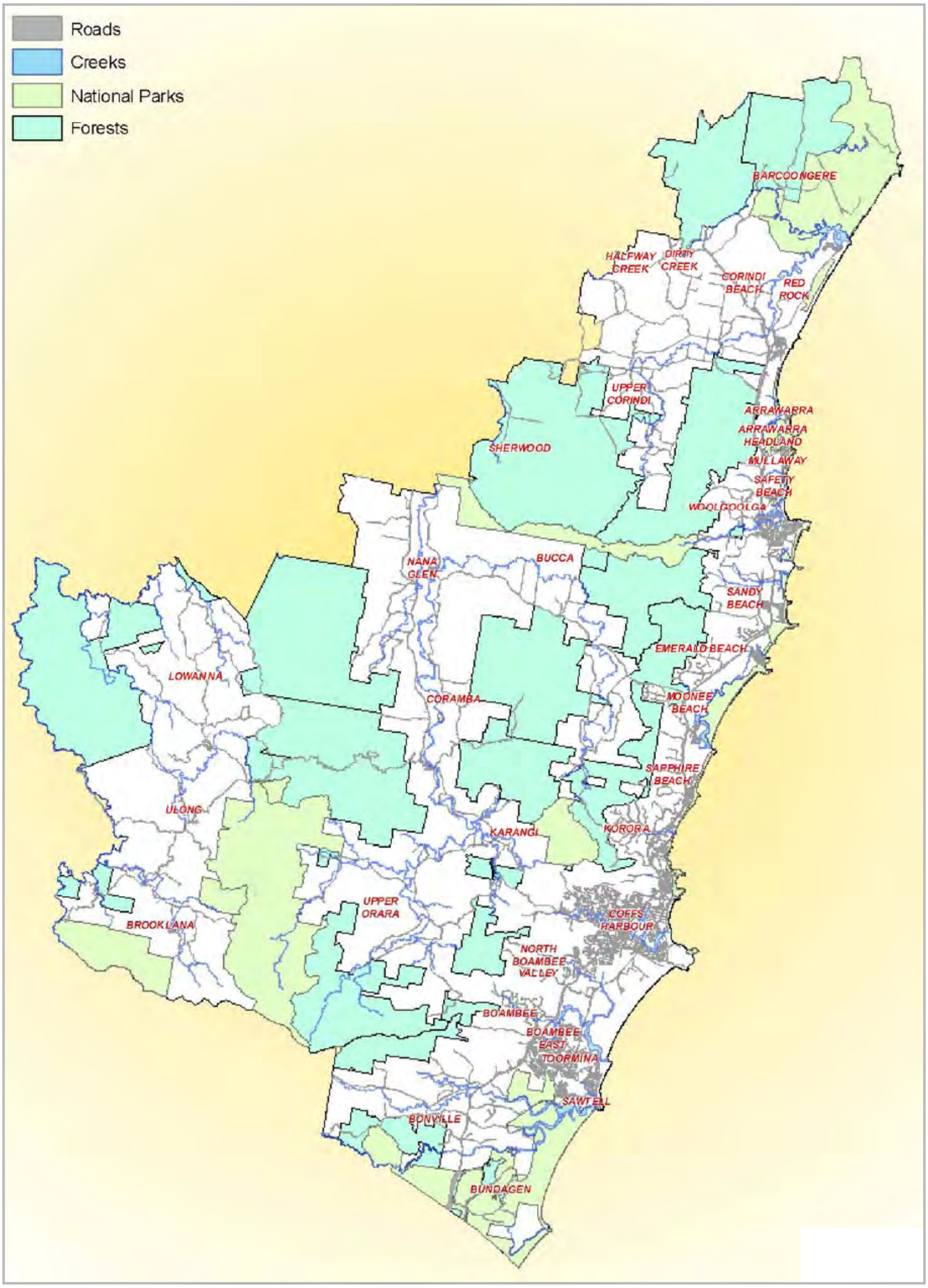
Locality	*2001*	*2006*	*2011*	*2016*	*2021*	*2026*	*2031*
Northern Beaches comprising the following localities: Red Rock/ Corindi Beach/ Corindi Plateau Arrawarra/ Mullaway/ Safety Beach Woolgoolga Sandy Beach/ Emerald Beach Moonee/ Sapphire Korora	18,022 (1.8%)	19,703 (2.5%)	22,292 (2.1%)	24,733 (1.6%)	26,776 (1.4%)	28,704 (1.3%)	30,619
Coffs Urban	23,547 (1.8%)	25,744 (1.6%)	27,870 (1.5%)	30,024 (1.4%)	32,185 (1.3%)	34,332 (1.2%)	36,442
Sawtell/ Toormina/ East Boambee	13,831 (1.8%)	15,121 (1.6%)	16,370 (1.5%)	17,548 (1.4%)	18,719 (1.3%)	19,968 (1.2%)	21,195
West Boambee	1,689 (1.8%)	1,847 (1.6%)	2,000 (1.5%	2,155 (1.4%)	2,310 (1.3%)	2,464 (1.2%)	2,615
Bonville	1,872 (1.8%)	2,047 (1.6%)	2,205 (1.5%)	2,375 (1.4%)	2,546 (1.3%)	2,716 (1.2%)	2,883
Coramba	297 (1%)	312 (0.8%)	325 (0.8%)	338 (0.8%)	352 (0.8%)	366 (0.7%)	379
Ulong	122 (1%)	128 (0.8%)	133 (0.8%)	138 (0.8%)	144 (0.8%)	150 (0.7%)	155
Nana Glen/ Bucca	1,469 (1%)	1,544 (0.8%)	1,607 (0.8%)	1,672 (0.8%)	1,740 (0.8%)	1,811 (0.7%)	1,875
Coffs Rural	2,044 (1%)	2,148 (0.8%)	2,235 (0.8%)	2,326 (0.8%)	2,421 (0.8%)	2,519 (0.7%)	2,608
Total LGA	62,893	68,594	75,037	81,309	87,193	93,030	98,771

Note: Figures in brackets represent estimated average annual population growth rates for the following five years

Source: Our Living City Settlement Strategy Interim Document, 2008

This page intentionally left blank.

Source: Coffs Harbour City Council Date: April 2009



Coffs Harbour City Local Government Area

Industrial Lands Strategy for Coffs Harbour
946349

Illustration 3.1

This page intentionally left blank.

3.3 Employment

Key labour market indicators for Coffs Harbour are shown in Table 3.3. The labour force participation rate for residents aged over 15 years is relatively low at 43.4%. This is considered to be due to the fact that 16.6% of the population in Coffs Harbour is over the age of 64. The unemployment rate for Coffs Harbour is consistently higher than the Australian unemployment rate and was almost double the Australian rate in 1996. However, the unemployment rate in Coffs Harbour has decreased by over 8% between the years of 1996 and 2006, which is faster than the decline in the Australian unemployment rate in the same period.

Table 3.3 Key Labour Market Indicators for Coffs Harbour

	1996	*2001*	*2006*
Total Population	59,818	63,213	66,613
Total Labour Force	24,662	26,253	28,667
Labour Force Participation Rate	41.2%	41.5%	43.0%
Total Employment	20,454	22,761	26,141
Total Employment (% of Total Labour Force)	82.9%	86.7%	91.2%
Full-time Employment (%)	49.8%	48.3%	49.7%
Part-time Employment (%)	28.0%	31.6%	35.1%
Unemployment (%)	17.1%	13.3%	8.8%
Australian Unemployment Rate	9.2%	7.2%	5.2%

Source: ABS 2006, 2001 and 1996

3.3.1 Self-containment and self-sufficiency

Looking beyond employment forecasts, it is useful to understand the flow of workers between Coffs Harbour LGA and the surrounding area. Using 'Journey to Work' (JTW) data we can examine employment self-containment (% of LGA's resident workers having jobs within the LGA) and employment self-sufficiency (% of LGA's jobs that are held by the LGA's resident workers).

As can be identified from Table 3.4, Coffs Harbour has a high self-containment rate. Almost 90% of resident workers have jobs in the LGA (total 20,470 workers). Further, less than 4% of workers travel out of the Mid-North Coast Region for their employment. Coffs Harbour also has a high rate of self-sufficiency, with over 86% of jobs in Coffs Harbour being occupied by local residents. In total, around 90% of workers travelling to Coffs Harbour for work come from the Mid-North Coast Region.[1]

Table 3.4 Destination LGA for workers living in Coffs Harbour LGA

	Resident Workers	*Jobs in the LGA*	*No. of resident workers*	*% Self-containment*	*% Self-sufficiency*
Coffs Harbour	20,470	21,280	18,365	89.7%	86.3%

Source: TPDC 2001

Origin and destinations of workers can be explored to reveal a jobs to workers ratio in terms of both industry sectors and occupation types. This analysis is shown in Table 3.5. This analysis broadly shows which occupations and industries have a relative leakage out of or influx into the LGA.

The data shows that the highest jobs to workers ratio within the Coffs Harbour LGA is the Financial and Insurance Services sector, especially for jobs within the Community and Personal Service Workers occupation category. This illustrates that business within this industry sector and needing these types of occupation groups would tend to source labour from other LGA's.

[1] Referring to the Mid North Coast Statistical Division as defined by ABS

Conversely, the LGA has low jobs to workers ratios for:

- sales workers within the Education & Training sector, and
- machine operators/ drivers in the Rental, Hiring and Real Estate industry sector.

Within these sectors and occupation categories, workers will tend to 'leak' from the LGA to jobs in surrounding areas.

Table 3.5 Coffs Harbour Jobs: Workers ratio (1 digit ANZSIC by 1 digit ASCO)

	Managers	*Professionals*	*Technicians and Trades Workers*	*Community and Personal Service Workers*	*Clerical and Adminis-trative Workers*	*Sales Workers*	*Machinery Operators And Drivers*	*Labourers*	*Total*
Agriculture, Forestry and Fishing	1.00	1.02	1.00	1.00	0.94	-	1.10	1.01	1.00
Mining	1.00	-	-	-	1.00	-	1.00	-	1.00
Manufacturing	0.99	1.02	1.00	1.20	1.01	1.05	1.00	0.99	1.00
Electricity, Gas, Water and Waste Services	1.33	1.00	1.05	1.00	1.04	1.14	0.97	0.88	1.02
Construction	1.00	1.00	1.01	1.20	1.01	0.94	0.99	1.01	1.00
Wholesale Trade	1.01	0.97	0.98	1.00	1.01	1.01	0.98	1.01	1.00
Retail Trade	1.00	0.97	1.00	1.00	0.99	1.00	1.02	1.00	1.00
Accommodation and Food Services	1.00	1.08	1.00	1.00	1.00	1.00	1.03	1.00	1.00
Transport, Postal and Warehousing	1.03	1.00	1.04	1.00	0.99	1.03	1.01	0.90	1.00
Information Media and Telecommunications	0.89	0.97	1.03	-	1.03	1.00	1.11	1.00	1.00
Financial and Insurance Services	1.02	0.98	-	1.67	0.99	1.00	-	-	1.00
Rental, Hiring and Real Estate Services	0.98	0.97	1.00	1.00	1.02	1.01	0.67	0.96	1.00
Professional, Scientific and Technical Services	1.02	1.00	0.99	1.00	1.00	1.00	1.00	1.04	1.00
Administrative and Support Services	1.03	1.01	0.97	0.98	1.00	1.20	1.25	1.00	1.00
Public Administration and Safety	1.04	1.00	1.00	1.01	1.00	1.00	0.94	1.00	1.00
Education and Training	0.99	1.00	0.95	1.00	1.00	0.75	1.00	1.02	1.00
Health Care and Social Assistance	1.00	1.00	1.00	1.00	1.00	0.80	0.94	1.01	1.00
Arts and Recreation Services	1.03	0.96	1.00	1.01	1.06	0.88	1.43	1.05	1.01
Other Services	0.99	1.03	1.00	0.98	0.97	0.92	1.18	1.01	1.00
Total	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00

	0.00	0.25
	0.26	0.5
	0.50	0.75
	0.76	1.00

	1.00	1.25
	1.25	1.50
	1.50	1.75
	1.75	2.00

Source: ABS 2006

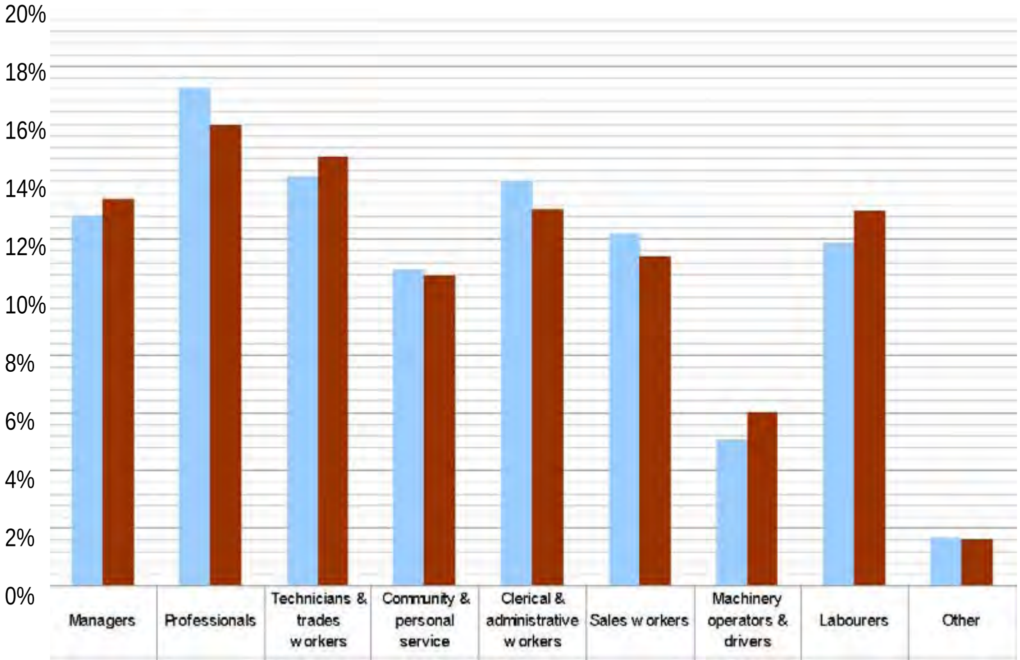
3.3.2 Home Based Work

According to 2006 ABS data, 5.7% of employed persons in Coffs Harbour work at home, compared to 6.7% in the Mid-North Coast Region.

3.3.3 Occupation Profile

Figure 3.2 shows the occupation profile for Coffs Harbour LGA. ‘Professionals’ and ‘Technicians & Trades Workers’ represent the two largest occupation groups in Coffs Harbour (17.3% and 14.2% respectively), followed closely by ‘Clerical & Administrative Workers’ (14.0%). The overall occupational profile of Coffs Harbour generally reflects that of the Mid-North Coast Region. [1]

Figure 3.2 Occupational Profile



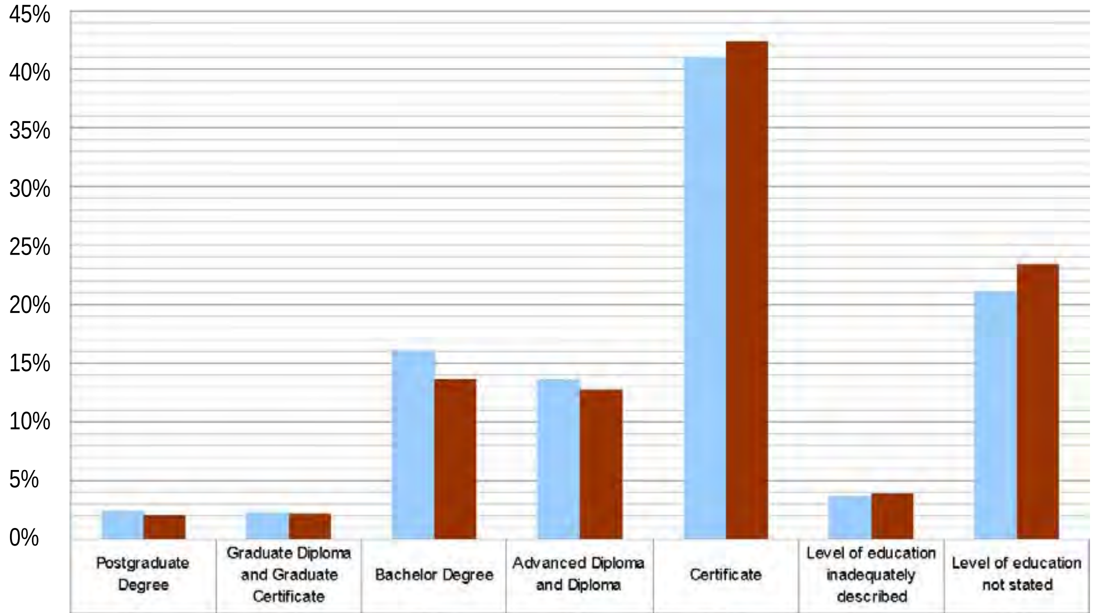
	Managers	Professionals	Technicians & trades workers	Community & personal service	Clerical & administrative workers	Sales workers	Machinery operators & drivers	Labourers	Other
Coffs Harbour	12.8%	17.3%	14.2%	10.9%	14.0%	12.2%	5.1%	11.9%	1.7%
Mid North Coast	13.4%	16.0%	14.8%	10.7%	13.0%	11.4%	6.0%	13.0%	1.6%

Source ABS 2006

The educational attainment in Coffs Harbour is shown in Figure 3.3. The LGA has a higher than average proportion of residents with university and advanced diploma qualifications. These high levels of educational attainment are in line with the high proportion of professionals in the LGA.

[1] Referring to the Mid North Coast Statistical Division as defined by ABS

Figure 3.3 Educational Attainment



	Postgraduate Degree	Graduate Diploma and Graduate Certificate	Bachelor Degree	Advanced Diploma and Diploma	Certificate	Level of education inadequately described	Level of education not stated
Coffs Harbour	2.4%	2.3%	16.1%	13.6%	41.0%	3.6%	21.1%
Mid North Coast	1.9%	2.1%	13.6%	12.7%	42.4%	3.9%	23.4%

Source ABS 2006

3.4 Business Mix and Industry Specialisation

3.4.1 Employment by Industry Sector

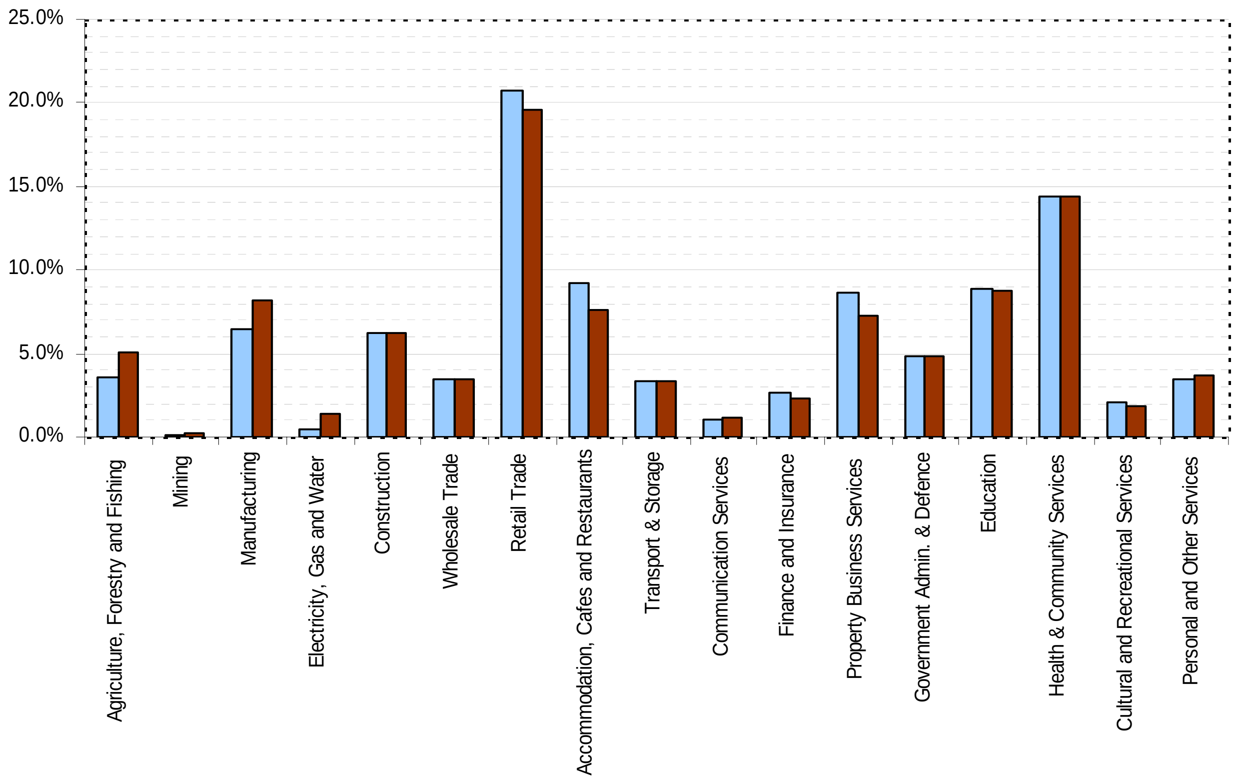
In 2006 there were a total of 82,615 people employed in the Mid-North Coast Region. Figure 3.4 shows the breakdown of total employment by industry sector (1 digit ANZSIC). The industry sectors with the highest proportion of employees are 'Retail Trade' (19.6%) and 'Health & Community Services' (14.4%).

As with the broader Mid North Coast Region, in Coffs Harbour, the sector with the highest proportion of employees is 'Retail Trade', which makes up 20.3% of total employment. Other prominent industries in Coffs Harbour include:

- health and community services (14.4%);
- accommodation, cafes & restaurants (9.2%)
- education (8.9%); and
- property and business services (8.6%).

The high proportion of workers employed in hospitality trades such as accommodation and dining can be attributed to the popularity of Coffs Harbour as a tourist destination and availability of casual workforce. Likewise, the high proportion of workers employed in education can be partly attributed to the Coffs Harbour Education Campus, which houses Southern Cross University, the North Coast TAFE as well as the number of primary and high government schools plus local non-government schools, the English Language Centre and Coffs Harbour Senior College.

Figure 3.4 Employment by Industry Sector (1 Digit ANZSIC)



CH	3.6%	0.1%	6.5%	0.5%	6.2%	3.4%	20.7%	9.2%	3.3%	1.0%	2.6%	8.6%	4.8%	8.9%	14.4%	2.1%	3.5%
MNC	5.1%	0.2%	8.2%	1.4%	6.2%	3.5%	19.6%	7.6%	3.3%	1.1%	2.3%	7.3%	4.8%	8.7%	14.4%	1.8%	3.7%

Table 3.6 shows employment trends for ten years preceding 2006. This analysis shows that several industries have substantially declined in employment terms. These industries are:

- mining (-61.9%);
- communication services (-23.8%);
- wholesale trade (-31.7%); and
- agriculture, forestry and fishing (-19.8%).

Industries that have increased in employment terms over the same period in Coffs Harbour include:

- government administration and defence (+80.4%);
- health and community services (+70.8%);
- education (+37.8%); and
- retail trade (+25.9).

Overall, retail trade and health and community services have remained as the major industry employers in Coffs Harbour.

The picture is similar for the Mid-North Coast Region, as seen in Table 3.7. Industries that have declined in employment are mining (-31%), communication services (-33.1%), agriculture, forestry and fishing (-28.5%) and manufacturing (-13.5%). The industries that have increased in employment terms include electricity, gas and water supply (+46.1%), government administration and defence (+41%) and health and community services (+42.6%).

Table 3.6 Coffs Harbour Employment Change by Industry

	1996 Total	*% of Total*	*2001 Total*	*% of Total*	*2006*	*% of Total*	*Change Jobs*	*% Change*
Agriculture, Forestry and Fishing	1,073	5.3%	811	4.0%	861	3.6%	-212	-19.8%
Mining	42	0.2%	16	0.1%	16	0.1%	-26	-61.9%
Manufacturing	1,611	8.0%	1384	6.8%	1537	6.5%	-74	-4.6%
Electricity, Gas & Water Supply	129	0.6%	113	0.6%	124	0.5%	-5	-3.9%
Construction	1,431	7.1%	1208	5.9%	1476	6.2%	45	3.1%
Wholesale Trade	1,030	5.1%	928	4.5%	806	3.4%	-224	-21.7%
Retail Trade	3,886	19.3%	4318	21.1%	4894	20.7%	1008	25.9%
Accommodation, Cafes & Rest.	1,784	8.9%	2008	9.8%	2165	9.2%	381	21.4%
Transport & Storage	628	3.1%	579	2.8%	771	3.3%	143	22.8%
Communication Services	302	1.5%	250	1.2%	230	1.0%	-72	-23.8%
Finance & Insurance	584	2.9%	517	2.5%	609	2.6%	25	4.3%
Property & Business Services	1,615	8.0%	1721	8.4%	2025	8.6%	410	25.4%
Govt. Admin. & Defence	633	3.1%	889	4.3%	1142	4.8%	509	80.4%
Education	1,533	7.6%	1726	8.4%	2112	8.9%	579	37.8%
Health & Community Services	1,988	9.9%	2506	12.2%	3395	14.4%	1407	70.8%
Cultural & Recreational Services	542	2.7%	586	2.9%	507	2.1%	-35	-6.5%
Personal & Other Services	724	3.6%	761	3.7%	818	3.5%	94	13.0%
Total	20,109	100%	20470	100%	23,657	100%	3548	17.6%

Source: TPDC 1996, 2001 and ABS 2006

Table 3.7 Mid-North Coast Region Employment Change by Industry

	1996 Total	*% of Total*	*2001*	*% of Total*	*2006 Total*	*% of Total*	*Change in Jobs*	*% Total*
Agriculture, Forestry and Fishing	6,513	7.6%	5413	6.6%	4659	5.1%	-1854	-28.5%
Mining	203	0.2%	92	0.1%	140	0.2%	-63	-31.0%
Manufacturing	8,710	10.2%	7047	8.5%	7530	8.2%	-1180	-13.5%
Electricity, Gas & Water Supply	892	1.0%	902	1.1%	1303	1.4%	411	46.1%
Construction	5,996	7.0%	4652	5.6%	5644	6.2%	-352	-5.9%
Wholesale Trade	3,840	4.5%	3601	4.4%	3161	3.5%	-679	-17.7%
Retail Trade	14,835	17.4%	16471	19.9%	17918	19.6%	3083	20.8%
Accommodation, Cafes & Rest.	6,063	7.1%	6424	7.8%	6909	7.6%	846	14.0%
Transport & Storage	2,944	3.5%	2645	3.2%	3050	3.3%	106	3.6%
Communication Services	1,536	1.8%	1145	1.4%	1027	1.1%	-509	-33.1%
Finance & Insurance	2,042	2.4%	1848	2.2%	2071	2.3%	29	1.4%
Property & Business Services	5,735	6.7%	5997	7.3%	6650	7.3%	915	16.0%
Govt. Admin. & Defence	3,132	3.7%	3530	4.3%	4417	4.8%	1285	41.0%
Education	6,554	7.7%	7003	8.5%	7994	8.7%	1440	22.0%
Health & Community Services	9,200	10.8%	10454	12.7%	13118	14.4%	3918	42.6%
Cultural & Recreational Services	1,629	1.9%	1745	2.1%	1650	1.8%	21	1.3%
Personal & Other Services	2,953	3.5%	3025	3.7%	3394	3.7%	441	14.9%
Total	85,321	100%	82615	100%	91361	100%	6040	7.1%

Source: TPDC 1996, 2001 and ABS 2006

3.4.2 Location Quotient Analysis

A location quotient (LQ) is used to examine the share of employment by industry sector relative to a benchmark geographical area. LQs provide an indication of relative industrial specialisation. Journey to work data from 2001 were used in this analysis for the calculation of the LQ for Coffs Harbour relative to the Mid-North Coast Region and NSW as a whole.

A LQ with a value greater than one indicates relative industry specialisation. Based on this measure, Coffs Harbour's areas of relative specialist industries compared with Mid-North Coast Region are listed in Table 3.8 below. Similarly, Table 3.9 shows Coffs Harbour's areas of relative specialism compared with NSW. The information presented in the table also shows the absolute number of people employed by industry to illustrate both the size and relative strength of these industries.

Table 3.8 LQ Analysis for Coffs Harbour over Mid-North Coast Region

	LQ Coffs Harbour over Mid-North Coast	No. of jobs in Coffs Harbour	No. of jobs in Mid-North Coast
91 Motion Picture, Radio, TV Services	1.8	133	296
63 Water Transport	1.8	45	101
74 Insurance	1.6	133	334
25 Petroleum Coal Chemical & Ass Prod Manufacturing	1.4	64	187
I0 Transport and Storage, undefined	1.3	39	122
92 Libraries, Museums and the Arts	1.3	181	569
57 Accommodation, Cafes & Restaurants	1.3	2,008	6,424
77 Property Services	1.2	452	1,463
93 Sport and Recreation	1.2	263	853
46 Machinery & Motor Vehicle Wholesaling	1.2	290	956
75 Services to Finance & Insurance	1.2	99	334
66 Services to Transport	1.2	91	312
27 Metal Product Manufacturing	1.2	247	862
42 Construction Trade Services	1.1	738	2,615
78 Business Services	1.1	1,269	4,528
52 Personal & Household Good Retailing	1.1	1,853	6,691
95 Personal Services	1.1	456	1,679
24 Printing, Publishing & Recorded Media	1.1	150	561
64 Storage	1.1	12	45
87 Community Services	1.1	685	2,611
45 Basic Material Wholesaling	1.1	244	935
C0 Manufacturing, undefined	1.1	131	503

Source: TPDC 2001. NB: This table excludes industries with less than 20 employees

Table 3.8 shows relative concentration of employees in the Motion Picture, Radio, TV Services and water transport industries, each with an LQ of 1.8, insurance and 'Petroleum Coal Chemical & Associated Product Manufacturing' with LQs of 1.6 and 1.4 respectively.

Table 3.9 LQ Analysis for Coffs Harbour over NSW

	LQ Coffs Harbour over NSW	*No. of jobs in Coffs Harbour*	*No. of jobs in NSW*
03 Forestry and Logging	4.6	95	2,742
04 Commercial Fishing	3.7	65	2,346
57 Accommodation, Cafes & Restaurants	1.9	2,008	142,174
63 Water Transport	1.9	45	3,207
51 Food Retailing	1.5	1,593	138,275
53 Motor Vehicle Retailing & Services	1.5	781	68,457
87 Community Services	1.5	685	60,517
52 Personal & Household Good Retailing	1.4	1,853	172,935
77 Property Services	1.4	452	43,204
O0 Health and Community Services, undefined	1.4	105	10,120
81 Government Administration	1.4	886	85,594
92 Libraries, Museums and the Arts	1.3	181	18,099
84 Education	1.2	1,726	186,769
86 Health Services	1.2	1,716	187,133
93 Sport and Recreation	1.2	263	28,922
95 Personal Services	1.2	456	50632
23 Wood & Paper Prod Mfg	1.2	176	19787
45 Basic Material Wholesaling	1.1	244	29224
G0 Retail Trade, undefined	1.1	91	10935

Source: TPDC 2001. NB: This table excludes industries with less than 20 employees

The LQ analysis of Coffs Harbour against NSW is shown in Table 3.9. Relative to NSW, Coffs Harbour has significant strength in forestry and logging and commercial fishing, with LQs of 4.6 and 3.7 respectively. 'Accommodation Cafes & Restaurants' and 'Water Transport' each have an LQ of 1.9. Overall, the largest sectors of employment are shown in some detail in Table 3.10 below.

Table 3.10 Largest Employing Sectors

	LQ Coffs Harbour over Mid-North Coast	LQ Coffs Harbour over NSW	No. of jobs in Coffs Harbour	No. of jobs in Mid-North Coast	No. of jobs in NSW
57 Accommodation, Cafes & Restaurants	1.3	1.9	2,008	6,424	142,174
52 Personal & Household Goods Retailing	1.1	1.4	1,853	6,691	172,935
84 Education	1.0	1.2	1,726	7,003	186,769
86 Health Services	0.9	1.2	1,716	7,338	187,133
51 Food Retailing	1.0	1.5	1,593	6,239	138,275
78 Business Services	1.1	0.6	1,269	4,528	289,113

Source: TPDC 2001

In terms of employment, 'Accommodation Café & Restaurants', 'Personal & Household Goods Retail' and 'Education', have the highest numbers of employees in the Coffs Harbour LGA.

3.5 Implications for Industrial Lands

The expected population growth over the next thirty years will have significant implications for the Coffs Harbour LGA. An ageing population with fewer younger people will present a number of issues to decision makers in the future. The need to provide for increased job growth for the LGA will need to be a key policy decision of Council to assist in providing and servicing this population growth.

It is considered that from the above analysis and information including employment forecasts 2006-2026 and employment specialisation (LQ values), suitable industry targets for the Coffs Harbour LGA include:

- Distribution operations;
- Light and higher technology or 'advanced' manufacturing;
- Value-adding services on agri-businesses;
- State and Federal Government departments; and
- Service-orientated industries.

The provision of sufficient industrial and other employment lands for the LGA to cater for these and other industries will be essential in providing much needed jobs for the LGA and the region. One of the main difficulties in providing land for these industries is the fact that the area is so constrained with many of the industrial areas fragmented and restricted from potential future expansion because of these constraints. These issues are discussed in Section 7 of this strategy.

4

Statutory and Strategic Planning Context

To further investigate and understand how the Coffs Harbour industrial lands have developed over time and how they are likely to be developed in the future, it is important to understand the legislation, policies and strategies that control and guide development within the State of NSW, the Mid North Coast Region and the Coffs Harbour LGA.

4.1 State and Regional

4.1.1 State Plan

The NSW Government has prepared a State Plan for a new direction for NSW. The purpose of the State Plan is to deliver better results for the NSW community from government services. The State Plan focuses on five areas of activity of the NSW government:

- rights, respect and responsibility – the justice system and services to promote community involvement and citizenship;
- delivering better services – key services to the whole population including health, education and transport;
- fairness and opportunity – services that promote social justice and reduce disadvantage;
- growing prosperity across NSW – activities that promote productivity and economic growth, particularly in rural and regional NSW; and
- environment for living, planning for housing and jobs, environmental protection, arts and recreation.

Of relevance to the Coffs Harbour Industrial Lands Strategy, is Chapter 5 of the State Plan, which is titled 'Growing Prosperity in NSW'. In the State Plan the NSW Government declares that NSW is open for business and proposes to achieve this through:

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

The State Plan indicates that being open for business is about supporting large and small business in working with the private sector to create additional highly productive jobs across a diverse range of industries and locations in NSW to realise higher standards of living for all. The State Plan also proposes increasing business investment in rural and regional NSW as a high priority.

The State Plan clearly highlights that investing in regional and rural areas to foster economic development is a key priority for the NSW Government. This will potentially impact on demand for industrial land within many regions and rural areas throughout NSW - especially attractive lifestyle areas such as Coffs Harbour LGA where many people want to relocate for lifestyle reasons.

4.1.2 Standard Instrument—Principal Local Environmental Plan

The Standard Instrument was gazetted on the 31 March 2006. The aim of the Standard Instrument Principal Local and Environmental Plan is to ensure local plans across NSW use the same plan language, making it easier for communities to understand what is planned for their local area and the zoning controls that are in place. All councils within NSW are required to use the Standard Instrument to prepare a new principal LEP for the whole of their LGA by 2011. The Standard Instrument has been amended twice with the latest amendment taking effect on the 01 July 2008.

The Standard Instrument – Principal Local Environmental Plan is of particular relevance to this Industrial Lands Strategy as one of the main reasons for preparing this strategy is to inform Council's new principal LEP. The industrial zones contained within the principal instrument along with their objectives are outlined below.

Zone IN1 General Industrial

- to provide a wide range of industrial and warehouse land uses;
- to encourage employment opportunities; and
- to minimise any adverse effect of industry on other land uses.

Zone IN2 Light Industrial

- to provide a wide range of light industrial, warehouse and related land uses;
- to encourage employment opportunities and to support the viability of centres;
- to minimise any adverse effect of industry on other land uses; and
- to enable other land uses that provide facilities or services to meet the day to day needs of workers in the area.

Zone IN3 Heavy Industrial

- to provide suitable areas for those industries that need to be separated from other land uses;
- to encourage employment opportunities; and
- to minimise any adverse effect of heavy industry on other land uses.

Zone IN4 Working Waterfront

- to retain and encourage waterfront industrial and maritime activities;
- to identify sites for maritime purposes and for activities that require direct waterfront access;
- to ensure that development does not have an adverse impact on the environmental and visual qualities of the foreshore
- to encourage employment opportunities; and
- to minimise any adverse effect of development on land uses in other zones.

There are also a number of other zones which have the potential to allow industrial land uses within them depending on how Council prepares its new LEP. These zones potentially include:

Zone B4 Mixed Use

- to provide a mixture of compatible land uses; and
- to integrate suitable business, office, residential, retail and other development in accessible locations so as to maximise public transport patronage and encourage walking and cycling.

Zone B5 Business Development

- to enable a mix of business and warehouse uses, and specialised retail uses that require a large floor area, in locations that are close to, and that support the viability of, centres;

Zone B6 Enterprise Corridor

- to promote businesses along main roads and to encourage a mix of compatible uses;
- to provide a range of employment uses (including business, office, retail and light industrial uses) and residential uses (but only as part of a mixed use development).; and
- to maintain the economic strength of centres by limiting retailing activity.

Zone B7 Business Park

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

The Standard Instrument – Principal Local Environmental Plan will have a major influence on how Council deals with industrial zonings under its new LEP. This is discussed further in Section 10.

4.1.3 Mid North Coast Regional Strategy

The Mid North Coast Regional Strategy provides a major strategic planning direction for the Mid North Coast of NSW. The key objective of the Strategy is to ensure that adequate land is available and appropriately located to accommodate the projected housing and employment needs of the region's population up until 2031. The Mid North Coast Regional Strategy applies to the eight local government areas of Clarence Valley, Coffs Harbour, Bellingen, Nambucca, Kempsey, Port Macquarie–Hastings, Greater Taree and Great Lakes.

Coffs Harbour is identified in the Strategy as a major regional centre, and is recognised as an area with significant capacity for growth, particularly for population growth and employment land expansion. The Strategy therefore has a number of implications for the future development of Coffs Harbour and future industrial land uses.

It is recognised within the Strategy that the greatest population growth within the Mid North Coast Region will be experienced around the regional centres of Coffs Harbour, Port Macquarie and Taree. It is also acknowledged that Coffs Harbour and Port Macquarie will contend with supply issues for adequate industrial land in the near future as it has become increasingly difficult to find suitable new land for industrial purposes given topographic, ecological and conflicting land use constraints.

The Strategy anticipates that the Mid North Coast will require an additional 232 ha of industrial land over the next 20 years. Due to the size and regional centre roles of Coffs Harbour and Port Macquarie, the Strategy recommends that the projected industrial land requirements will primarily be focused upon these areas to support their future growth. The Coffs Coast Region (Coffs Harbour, Bellingen and Nambucca Local Government Areas) will require an additional 86 ha of industrial land within the next 25 years. Given the focus of Coffs Harbour as a regional centre, it is considered that a greater percentage of this land will be located in close proximity to the population and services that exist in Coffs Harbour. SGS Planning and Economics baseline demand assessment indicates that of this identified 86 ha for the Coffs Coast sub-region, Coffs Harbour will need to accommodate a minimum of 50 ha of industrial land.

The Strategy also defines potential areas for growth within each LGA. The department has released these as the 'Growth Areas Map' for the region. The Growth Areas Maps indicate the land which is proposed as employment lands, which refers to land identified to provide the necessary projected industrial/commercial land. As the Strategy acknowledges the need for the provision of a minimum area of industrial land within the Coffs Harbour LGA, it can be assumed that the proposed employment lands would be predominantly for industrial uses. The proposed growth areas identified in the strategy for Coffs Harbour are confined to South Woolgoolga, on the western side of the Pacific Highway directly adjacent to the existing South

Woolgoolga industrial estate and within North Boambee Valley adjoining the existing Isles Drive Industrial Estate.

The Department of Planning has advised during consultation that new industrial lands proposed as part of this Industrial Lands Strategy should be confined to the identified areas for employment land expansion. The department also advised that any departure from these identified areas must be fully justified however may still not be supported by the department.

4.1.4 Settlement Planning Guidelines Mid and Far North Coast Regional Strategies

The Settlement Planning Guidelines for the Mid and Far North Coast Regional Strategies was released by the Department of Planning in August 2007. The Regional Strategies require Councils to prepare a Local Growth Management Strategy prior to preparing a Local Environmental Plan to rezone land for all residential, rural residential, commercial industrial land uses as well as in some circumstances, for special purposes like tourism. The Guidelines were developed to assist Councils in preparing a Local Growth Management Strategy to achieve the planning outcomes and actions in the Far North Coast Regional Strategy and the Mid North Coast Regional Strategy.

This Industrial Land Strategy is the Industrial Component of the Local Growth Management Strategy and has been prepared in accordance with the Settlement Planning Guidelines. The Settlement Planning Guidelines require that a Local Growth Management Strategy addresses certain items. These items and where they are addressed in the Strategy are outline in Table 4.1.

Table 4.1 Information Required to be Addressed in Local Growth Management Strategies

Matters	*Section*
A vision which considers regional context and influence and the role of the Local Government Area in the region.	Section 3 and Section 9.1
Commitment to achieving the principles of a sustainable development and settlement and how the strategy addresses this.	Section 1.4
A summary of any community consultation and significant changes made to the strategy as a result of the consultation.	Section 6
Information addressing the principles in Section 3 of the Settlement Planning Guidelines including - the application of the regional environmental constraints mapping and the suitability of the land identified in the local strategy.	Section 9.3
The desired character design and form of settlements covered in the strategy	Sections 9.1 and 9.2
The existing services and infrastructure network and future needs.	Section 9.2.7
The land supply and demand audit for land uses covered by the strategy and a demographic profile and population prediction summary to support future land requirements.	Section 7, section 8 and section 3
A land release program documenting the following: ▪ location maps; ▪ yield; and ▪ timing.	 Sections 7,9 and 10 Section 9 Section 10
A servicing and infrastructure program summary for the supply of utilities and social facilities needed over the life of the strategy.	Section 9.7
A commitment to a nominated review period.	Sections 8.3, 9.2.3 and 10.3.7

4.1.5 North Coast Regional Environmental Plan

The North Coast Regional Environmental Plan (NCREP) was prepared by the Department of Planning to establish a regional planning framework for the North Coast region of New South Wales. The aims of this plan are:

- to develop regional policies that protect the natural environment, encourage an efficient and attractive built environment and guide development into a productive yet environmentally sound future;
- to consolidate and amend various existing policies applying to the region, make them more appropriate to regional needs and place them in an overall context of regional policy;
- to provide a basis for the co-ordination of activities related to growth in the region and encourage optimum economic and social benefit to the local community and visitors to the region; and
- to initiate a regional planning process that will serve as a framework for identifying priorities for further investigation to be carried out by the department and other agencies.

These aims will be implemented through NCREP by:

- specifying objectives for the future planning and development of land within the region;
- specifying regional policies to guide the preparation of local environmental plans within the region; and
- specifying regional policies for the control of development in the region.

Any proposed rezoning within a LGA to which NCREP applies must be consistent with these aims and objectives. The recommendations of this Industrial Lands Strategy must also be consistent with the aims and objectives of NCREP. It should be noted that once the Coffs Harbour Standard Local Environmental Plan is adopted, NCREP will no longer apply to the Coffs Harbour LGA.

Relevant clauses of NCREP are outlined and addressed below;

Clause 47 Plan preparation and development control—principles for commercial and industrial development.

This clause requires Council, when preparing a draft local environmental plan relating to commercial or industrial development, to take into consideration the following principles:

- strong multi-functional town centres should be maintained to focus the drawing power of individual businesses and maintain the integrity of the main business area by only zoning land for further commercial or retail development where that development adjoins or is adjacent to the existing town centre;
- provisions contained in local environmental plans relating to retail, commercial, business and industrial zones should be flexible, especially to enable the development of light service industry near the central business district; and
- there should be an adequate supply of zoned industrial land located where it is physically capable of development for industrial purposes, is not environmentally fragile and can be serviced at a reasonable cost.

This Industrial Lands Strategy will provide a framework for future industrial development within the Coffs Harbour LGA which will be consistent with the objectives of the NCREP and the principles outlined in Clause 47.

Clause 48 Plan preparation—maintenance of industrial development zonings

NCREP requires that a draft local environmental plan applying to an urban area should not substantially reduce existing zonings of land for industrial development.

Although the aim of this Industrial Lands Strategy is to provide for the future demand for industrial lands within the LGA, it also looks at existing vacant industrial lands with the goal of determining suitability for future industrial development. Any vacant lands that are determined to be unsuitable for future urban development because of environmental constraints will be identified for rezoning for more appropriate land uses.

4.1.6 Mid North Coast Regional Economic Profile

The Mid North Coast Regional Economic Profile was commissioned by the Mid North Coast Regional Development Board (MNCRDB) with funding support from the NSW Department of Planning and the NSW Department of State and Regional Development. The aim of the Profile is to initiate and provide a framework for collaborative action to advance industry and employment growth on the NSW Mid North Coast over the next five years. It should be noted that the Mid North Coast as identified by the Regional Economic Profile includes the nine Local Government Areas (LGA's) of Clarence Valley, Coffs Harbour, Bellingen, Nambucca, Kempsey, Port Macquarie-Hastings, Greater Taree, Gloucester and Great Lakes.

The Mid North Coast Regional Economic Profile aims to inform and address the economic development needs of the NSW Mid North Coast region. It identifies and discusses the key advantages and challenges to be overcome in the context of its economic structure, available infrastructure, existing and potential industry activity and overarching influencing factors. The Profile also aims to provide:

- valuable economic and business input to the Mid North Coast Regional Strategy being developed by the Department of Planning;
- the foundation for a series of Mid North Coast Regional Innovation Strategies by identifying future industry growth opportunities in the region; and
- essential contemporary economic data on current economic conditions and development opportunities that should be of use to both Governments and prospective investors.

The preparation of the profile also involved consultation with the relevant stakeholders for each industry to ascertain the challenges and opportunities for development (refer Appendix A – consultation results). Many of the industry sectors conveyed that industry clustering and co-location to increase economies of scale and collaboration is an important direction for future development in the region.

The Profile identifies that the Mid North Coast is growing in population at a rate faster than the State average. The Coffs Harbour LGA has a comparable population growth rate (1.6%) to key growth areas in the Mid North Coast region (Great Lakes and Port Macquarie Hastings each with 1.7%). These growth trends are projected to continue until at least 2031.

Like the State Plan, the Mid North Coast Regional Economic Profile has the potential to increase economic investment in the Region and consequently the Coffs Harbour LGA. This Industrial Lands Strategy recognises the importance of the findings of the Mid North Coast Regional Economic Profile and considers the recommendations for the future development of industrial land within the region and within the Coffs Harbour LGA.

4.1.7 Integrating Land Use and Transport - The Right Place for Business and Services Planning Policy

The Integrating Land Use and Transport Planning Policy - The Right Place for Business and Services explains why businesses and services that generate transport demand, should be in locations that offer a choice of transport and encourage people to make fewer and shorter trips. The objectives of the policy are to:

- locate trip-generating development which provides important services in places that:
  - help reduce reliance on cars and moderate the demand for car travel;
  - encourage multi-purpose trips;

- encourage people to travel on public transport, walk or cycle; and
- provide people with equitable and efficient access.

- minimise dispersed trip-generating development that can only be accessed by cars;
- ensure that a network of viable, mixed use centres closely aligned with the public transport system accommodates and creates opportunities for business growth and service delivery;
- protect and maximise community investment in centres, and in transport infrastructure and facilities;
- encourage continuing private and public investment in centres, and ensure that they are well designed, managed and maintained; and
- foster growth, competition, innovation and investment confidence in centres, especially in the retail and entertainment sectors, through consistent and responsive decision making.

The planning policy applies to developments that:

- generate many trips from employees, customers or visitors; and
- provide important services, and generally have a gross floor space of 1,000 square metres or more.

Such developments include:

- retail;
- bulky goods outlets;
- leisure and entertainment;
- offices;
- community, health and education facilities; and
- existing isolated commercial developments.

The guidelines, therefore, do not specifically relate to traditional industrial type development, as such development is often appropriately located away from residential, commercial and other uses to avoid potential conflicts. However, the policy does relate to uses such as bulky goods and other retail and commercial development some of which are permitted within the current Industrial 4A Zone of CHLEP 2000.

4.2 Local

4.2.1 Our Living City Settlement Strategy (OLCSS) Interim Document 2008

The OLCSS Interim Document 2008 was prepared by Council in accordance with the requirements of the North Coast Regional Environmental Plan which requires the preparation of an urban land release strategy prior to any significant rezoning of land for urban purposes within the North Coast Region. The OLCSS Interim Document 2008 supersedes the Coffs Harbour Urban Development Strategy 1996 and will guide future development within the Coffs Harbour LGA to 2031. The overarching goal of the strategy is to provide a framework for economically, environmentally and socially sustainable growth and expansion of the LGA until 2031. The OLCSS Interim Document 2008 also addresses the requirement of the Mid North Coast Regional Strategy that Councils must prepare local Growth Management Strategies prior to rezoning land for urban purposes.

The OLCSS Interim Document 2008 identifies that the LGA will experience considerable population growth by 2031. This population growth will in turn create demand for business and employment opportunities, which will create demand for additional industrial land. The OLCSS Interim Document 2008 provides a preliminary analysis of demand for future industrial lands and identifies broad areas for potential industrial land within the LGA. These areas are replicated by the previously mentioned Mid-North Coast Regional Strategy Growth Areas Map and are located at South Woolgoolga, on the western side of the Pacific Highway directly adjacent to the existing Woolgoolga industrial estate (24.2 ha) and within North Boambee Valley adjoining the existing Isles Drive Industrial Estate (73.5 ha).

Strategic actions were created within the OLCSS Interim Document 2008, which define the direction in which the Council will provide for future growth within the LGA. The actions relevant to this Industrial Lands Strategy include undertaking a review of permissible uses within industrial zones, and identifying and consolidating areas to be set aside for industrial development. The Strategy also acknowledges that although a preliminary industrial land assessment was undertaken as part of OLCSS Interim Document 2008, further investigation will be required to ascertain the future demand, what land is already available/under utilised, and potential areas for additional industrial lands.

This Industrial Lands Strategy implements these strategic actions by providing a detailed investigation into the current and projected supply of and demand for industrial land and by providing strategic direction for the future industrial lands within the Coffs Harbour LGA.

4.2.2 Draft Coffs Harbour Retail Strategy

The draft Coffs Harbour Retail Strategy was prepared for Council by the AEC Group with the final draft being presented to Council in February 2006. The Retail Strategy provides Coffs Harbour City Council with a framework for the future direction of retail development in the Coffs Harbour LGA for a 25 year period to ensure the continued growth and development of the city's retail sector. The draft Strategy identifies the nature of the retail challenges that exist in Coffs Harbour and provide strategies to address these challenges in order to sustain Coffs Harbour's position as a strong regional retail hub. The draft Strategy is used by Council as a draft background document.

Of particular relevance to the Industrial Lands Strategy is the finding of the draft strategy relating to the oversupply situation in large format retail (bulky goods). These findings indicate there is no need for development in the bulky goods area for the next 10 years. However there are already retail showrooms currently under construction which will further impact on the sustainability of retail stock in these areas. Further development of showroom floor space is identified within the strategy for the period 2015 – 2030 concentrated in the Coffs south area at Isles Drive and expansions to Homebase in the Coffs north area. The strategy recommends discouraging retail development in industrial zones and reviewing the permitted uses within industrial zones as part of the preparation of the new LEP.

4.2.3 Draft North Boambee (West) Structure Plan

This draft Structure Plan has been recently prepared by GHD on behalf of Coffs Harbour City Council and is a strategic framework for the future development of the North Boambee Valley area. The draft Structure Plan sets out a long term direction and provides a framework and guidelines for more detailed land use planning of the locality. The draft Structure Plan is particularly relevant to this industrial lands strategy as it identifies significant areas of land for potential future industrial land use.

The draft Structure Plan has identified two areas that have potential to be developed for industrial land. These can be identified as Precincts 3 and 4 within the draft Structure Plan for the North Boambee Valley area. Of the 67 ha identified in Precinct 3, a total of 13.1 ha (not including internal roads) have been identified as suitable for industrial land. A total of 21 ha contained within Precinct 4, has been identified as being potentially suitable for industrial land subject to further investigations. This figure includes potential internal roads and buffers from wetlands and other sensitive areas.

The Structure Plan and the various opportunities and constraints that exist within the North Boambee Valley are discussed in Section 9.

4.2.4 Coffs Harbour Regional Airport Master Plan

The Coffs Harbour Regional Airport Master Plan (currently under review) establishes a framework for the potential future development of the lands surrounding the airport.

The Coffs Harbour Regional Airport is currently zoned Special Uses 5A Aerodrome, pursuant to CHLEP 2000. Any development of the airport is required to comply with Clause 19A Land Zoned Special Uses 5A Community Purposes, which requires any development within the Special Uses 5A Zone to be consistent with the aims and objectives of the zone and any relevant management plan for the site. Furthermore the consent authority has to take into consideration any master plan for the subject land.

The Master Plan proposes specific areas at the airport to be developed for a defined development focus to ensure like uses are situated in proximity and are compatible and appropriate to the existing use of the site. Council has prepared a land use plan for the location which identifies a number of controls for the subject site. These are:

- Zone A: Industrial Focus

  Permitted uses: industries, light industries, warehouse or distribution centres, depot, vehicle repair station, vehicle body repair shop, subdivision of land.
- Zone B: Industrial/Aviation Focus

  Permitted uses: industries, light industries, warehouse or distribution centres, depot, vehicle repair station, vehicle body repair shop, aviation related, subdivision of land.
- Zone C: Airport Terminal Focus

  Permitted uses: aviation related, shops (with a floor area less than 80 square metres) business premises (with a floor area less than 80 square metres), office premises (with a floor area less than 80 square metres), motel, service station, subdivision of land.
- Zone D: Community Focus

  Permitted uses: community facility, place of worship, child care centres, advertisement, car park, communications facility, subdivision of land.
- Zone E: Employment Focus

  Permitted uses: business premises (only permitted if associated with aviation uses), office premises (only permitted if associated with aviation uses), motel (only permitted if associated with aviation uses), shops (restricted to a gross floor area of no greater than 200 square metres), retail plant nursery, community facility, tourism facility, education facility, veterinary hospital, place of worship, child care centres, depot, light industry, advertisement, restaurant, car park, communications facility, dwelling or dwelling-houses (only permitted if associated with aviation uses), home industry, home occupation, subdivision of land.
- Zone F: Residential Focus

  Permitted uses: dwelling or dwelling-houses (only permitted if associated with aviation uses), multi unit housing (only permitted if associated with aviation uses), motel (only permitted if associated with aviation uses), subdivision of land.
- Zone G: Aviation Focus

  Permitted uses: associated with aviation uses, subdivision of land.
- Zone H: Not used
- Zone I: Vegetation

A large section of the site is proposed for general industry and general aviation industry. The site is discussed in more detail in **Section 7**.

4.2.5 Coffs Harbour Local Environmental Plan 2000

Coffs Harbour City Local Environmental Plan 2000 (CHLEP 2000) is the principal Local Environmental Planning Instrument applying to all land within the Coffs Harbour Local Government Area. The aims of this Plan are:

- to provide a single local environmental plan for the City of Coffs Harbour;
- to encourage sustainable economic growth and development within the City;
- to recognise the need to provide for, and to provide for, development within the City in an ecologically sustainable manner; and
- to provide a quality lifestyle within the City.

CHLEP 2000 contains only one Industrial Zone which is Industrial 4A Zone (Zone 4A)

The objectives of Zone 4A are to:

- enable development for industrial or warehousing or other land uses compatible with an industrial environment.
- enable development that is within the environmental capacity of the land and can be adequately serviced.

The fact that the CHLEP 2000 has only one industrial zone has created problems in the development of industrial areas within the LGA. The main problem is that a number of commercial uses including bulky goods are permissible with development consent within the Industrial 4A Zone. This has seen a proliferation of some commercial uses in certain industrial areas. This issue is discussed further in Section 9.

4.2.6 Economic Development Plan

The Coffs Harbour Economic Development Plan was prepared in 2005 by the Economic Development Unit and sets out a foundation for achieving the Council's vision for economic development within Coffs Harbour. The Economic Development Plan is structured around a number of themes, these themes are:

- leadership;
- investment traction;
- business development;
- industry development;
- infrastructure facilitation; and
- liveability.

Under each of these themes are a number of priorities. Of particular relevance to this strategy are the following:

Infrastructure facilitation

- take a leadership role in facilitation of major projects that will attract and/or stimulate new investment in the economy;
- coordinate the provision of infrastructure that supports economic growth;
- support and provide business leadership in the development of an integrated transport strategy for the city;
- investigate opportunities to fund priority infrastructure projects including private investment and public/private partnerships; and
- support the growth of the Coffs Harbour Regional Airport.

Industry development

- undertake sector based initiatives aimed at accelerating growth and targeted industries;
- promote the benefits of corporation and networks at industry level to firms;
- facilitate and support the establishment of active industry clusters, focused on improving the competitive performance of the sectors; and
- encourage and facilitate a broad range of cooperative industry activities including marketing, research, technology development and knowledge exchange.

Business development

- provide all local businesses with access to current and up to date relevant information that encourages confidence; and
- facilitate local business expansion and development of supporting businesses with training, recruitment and marketing access.

Investment attraction

- develop and implement a Coffs Harbour Investment Attraction Strategy; and
- undertake marketing focused on building recognition of Coffs Harbour as a serious place to do business and promote the capability of local firms.

Those priorities that are particularly relevant to this Industrial Lands Strategy have been incorporated into the recommendations of this strategy.

4.2.7 Coffs Harbour Jetty Foreshores Plan of Management - June 2008

The Coffs Harbour Jetty Foreshores Plan of Management (PoM) provides direction and develops a strategic framework to guide the future use and development of the subject land as a working harbour, recreational facility and tourist destination. The planning emphasis of the PoM is towards optimising of the existing assets of the harbour and achievement of its full potential as a significant place for tourism and recreation within the city of Coffs Harbour and New South Wales.

The PoM serves to define and guide commercial development opportunities to support a working harbour while affirming a commitment to preserve and improve the public domain including a commitment to respect aboriginal values and the wider public use and enjoyment of the area.

Of relevance to the Industrial Lands Strategy is the South Coffs Island / Corrambirra Point precinct. This precinct is planned to be developed as a high quality maritime, recreational and tourist orientated precinct in a rehabilitated natural coastal setting. The PoM proposes that this precinct contain port facilities and services and uses that support a working waterfront, e.g. facilities associated with a maritime developments in the harbour waters including boat maintenance, travel lift and hard stand and dry stack boat storage as well as docking / berthing facilities for many cruise ships and other vessels.

The precinct has also other opportunities which include

- Public recreation including public entertainment, tourist activities and attractions;
- Tourist and visitor accommodation;
- Restaurant;
- Indigenous cultural centre;
- Public boat launching and parking;
- Retail and commercial space to support tourism and marine activities;
- Office space for agencies (where location is critical to service delivery) and small business (connected to maritime activity);
- Open space, car parking and public walkways / scenic viewing;

- Landscaping and bush regeneration to maintain and improve ecological value; and
- Fergusons Cottage to be maintained and developed into a museum including caretaker's cottage.

From the PoM it is difficult to determine the area of actual working waterfront that will be proposed. Accordingly no calculations for this area have been included into the industrial land calculations as part of this strategy.

5

Industrial Land Uses

5.1 Types of Industrial Land Uses

5.1.1 Broad Classification

There is no adopted uniform classification for types of industrial development within NSW. For the purpose of this Industrial Land Strategy the following three general classifications have been adopted:

- heavy industry – these are industries that require separation from other land uses because of the nature of the types of uses. They are usually on larger sites and have large buildings associated with them. They often are likely to generate waste requiring treatment and can also involve hazardous or offensive processes or the storage of hazardous materials.
- general industry – these types of industries are generally smaller but still involve some manufacturing and processing however are not generally considered hazardous or noxious and are generally located in traditional industrial estates.
- light or service industry – these are smaller types of uses and are generally low impact and do not interfere with the amenity of a locality.

The Standard Instrument – Principal Local Environmental Plan contains a number of definitions that would fall under these broad classifications. These are listed in **Table 5.1** with the corresponding definition.

Table 5.1 Definitions of types of industry

Definitions of types of industrial uses
agricultural produce industry means an industry involving the handling, treating, processing or packing of produce from agriculture (including dairy products, seeds, fruit, vegetables or other plant material), and includes flour mills, cotton seed oil plants, cotton gins, feed mills, cheese and butter factories, and juicing or canning plants, but does not include a livestock processing industry.
air transport facility means an airport or a heliport that is not part of an airport, and includes associated communication and air traffic control facilities or structures.
boat repair facility means any facility (including a building or other structure) used primarily for the construction, maintenance or repair of boats, whether or not including the storage, sale or hire of boats, but does not include a marina or boat shed.
boat shed means a building or other structure used for the storage and routine maintenance of a boat or boats and that is associated with a private dwelling or non-profit organisation, and includes any skid used in connection with the building or other structure.
depot means a building or place used for the storage (but not sale or hire) of plant, machinery or other goods (that support the operations of an existing undertaking) when not required for use.
electricity generating works means a building or place used for the purpose of making or generating electricity.
extractive industry means the winning or removal of extractive materials (otherwise than from a mine) by methods such as excavating, dredging, tunnelling or quarrying, including the storing, stockpiling or processing of extractive materials by methods such as recycling, washing, crushing, sawing or separating, but does not include turf farming.

Definitions of types of industrial uses
freight transport facility means a facility used principally for the bulk handling of goods for transport by road, rail, air or sea, including any facility for the loading and unloading of vehicles, aircraft, vessels or containers used to transport those goods and for the parking, holding, servicing or repair of those vehicles, aircraft or vessels or for the engines or carriages involved.
hazardous industry means development for the purpose of an industry that, when the development is in operation and when all measures proposed to reduce or minimise its impact on the locality have been employed (including, for example, measures to isolate the development from existing or likely future development on other land in the locality), would pose a significant risk in the locality: (a) to human health, life or property, or (b) to the biophysical environment.
hazardous storage establishment means any establishment where goods, materials or products are stored that, when in operation and when all measures proposed to reduce or minimise its impact on the locality have been employed (including, for example, measures to isolate the establishment from existing or likely future development on other land in the locality), would pose a significant risk in the locality: (a) to human health, life or property, or (b) to the biophysical environment.
heavy industry means an industry that requires separation from other land uses because of the nature of the processes involved, or the materials used, stored or produced. It may consist of or include a hazardous or offensive industry or involve the use of a hazardous or offensive storage establishment.
home industry means a light industry carried on in a dwelling, or in a building ancillary to a dwelling, by one or more permanent residents of the dwelling that does not involve: (a) the employment of more than 2 persons other than those residents, or (b) interference with the amenity of the neighbourhood by reason of the emission of noise, vibration, smell, fumes, smoke, vapour, steam, soot, ash, dust, waste water, waste products, grit or oil, traffic generation or otherwise, or (c) the exposure to view, from any adjacent premises or from any public place, of any unsightly matter, or (d) the exhibition of any notice, advertisement or sign (other than a notice, advertisement or sign exhibited on that dwelling to indicate the name of the resident and the light industry carried on in the dwelling), or (e) the sale of items (whether goods or materials), or the exposure or offer for sale of items, by retail, except for goods produced at the dwelling or building, but does not include bed and breakfast accommodation or sex services premises. Note. See clause 5.4 for controls relating to the floor area used to carry on the light industry.
industrial retail outlet means a building or place that: (a) is used in conjunction with an industry (including a light industry) but not in conjunction with a warehouse or distribution centre, and (b) is situated on the land on which the industry is carried out, and (c) is used for the display or sale (whether by retail or wholesale) of only those goods that have been manufactured on the land on which the industry is carried out. Note. See clause 5.4 for controls relating to the retail floor area.
industry means the manufacturing, production, assembling, altering, formulating, repairing, renovating, ornamenting, finishing, cleaning, washing, dismantling, transforming, processing or adapting, or the research and development of any goods, chemical substances, food, agricultural or beverage products, or articles for commercial purposes, but does not include extractive industry or a mine.
light industry means an industry, not being a hazardous or offensive industry or involving use of a

Definitions of types of industrial uses
hazardous or offensive storage establishment, in which the processes carried on, the transportation involved or the machinery or materials used do not interfere with the amenity of the neighbourhood by reason of noise, vibration, smell, fumes, smoke, vapour, steam, soot, ash, dust, waste water, waste products, grit or oil, or otherwise.
liquid fuel depot means storage premises that are used for the bulk storage for wholesale distribution of petrol, oil, petroleum or other inflammable liquid and at which no retail trade is conducted.
livestock processing industry means an industry that involves the commercial production of products derived from the slaughter of animals (including poultry) or the processing of skins or wool of animals, derived principally from surrounding districts, and includes such activities as abattoirs, knackeries, tanneries, woolscours and rendering plants.
offensive industry means any development for the purpose of an industry that would, when the development is in operation and when all measures proposed to reduce or minimise its impact on the locality have been employed (including, for example, measures to isolate the development from existing or likely future development on other land in the locality), emit a polluting discharge (including, for example, noise) in a manner that would have a significant adverse impact in the locality or on the existing or likely future development on other land in the locality.
offensive storage establishment means any establishment where goods, materials or products are stored and that would, when all measures proposed to reduce or minimise its impact on the locality have been employed (including, for example, measures to isolate the establishment from existing or likely future development on other land in the locality), emit a polluting discharge (including, for example, noise) in a manner that would have a significant adverse impact in the locality or on the existing or likely future development on other land in the locality.
port facilities means any of the following facilities at or in the vicinity of a designated port within the meaning of section 47 of the *Ports and Maritime Administration Act 1995*: (a) facilities for the embarkation or disembarkation of passengers onto or from any vessels, including public ferry wharves, (b) facilities for the loading or unloading of freight onto or from vessels and associated receival, land transport and storage facilities, (c) wharves for commercial fishing operations, (d) refuelling, launching, berthing, mooring, storage or maintenance facilities for any vessel, (e) sea walls or training walls, (f) administration buildings, communication, security and power supply facilities, roads, rail lines, pipelines, fencing, lighting or car parks.
resource recovery facility means a building or place used for the recovery of resources from waste, including works or activities such as separating and sorting, processing or treating the waste, temporary storage, transfer or sale of recovered resources, energy generation from gases and water treatment, but not including re-manufacture or disposal of the material by landfill or incineration.

Definitions of types of industrial uses
rural industry means an industry that involves the handling, treating, production, processing or packing of animal or plant agricultural products, and includes: (a) agricultural produce industry, or (b) livestock processing industry, or (c) use of composting facilities and works (including to produce mushroom substrate), or (d) use of sawmill or log processing works, or (e) use of stock and sale yards, or (f) the regular servicing or repairing of plant or equipment used for the purposes of a rural enterprise, undertaken for commercial purposes.
sawmill or log processing works means a building or place used for handling, cutting, chipping, pulping or otherwise processing logs, baulks, branches or stumps, principally derived from surrounding districts, into timber or other products derived from wood.
service station means a building or place used for the sale by retail of fuels and lubricants for motor vehicles, whether or not the building or place is also used for any one or more of the following: (a) the ancillary sale by retail of spare parts and accessories for motor vehicles, (b) the cleaning of motor vehicles, (c) installation of accessories, (d) inspecting, repairing and servicing of motor vehicles (other than body building, panel beating, spray painting, or chassis restoration), (e) the ancillary retail selling or hiring of general merchandise or services or both.
storage premises means a building or place used for the storage of goods, materials, plant or machinery for commercial purposes and where the storage is not ancillary to any business premises or retail premises on the same parcel of land.
transport depot means a building or place used for the parking or servicing of motor powered or motor drawn vehicles used in connection with a passenger transport undertaking, business, industry or shop.
truck depot means a building or place used for the servicing and parking of trucks, earthmoving machinery and the like.
vehicle body repair workshop means a building or place used for the repair of vehicles or agricultural machinery, involving body building, panel building, panel beating, spray painting or chassis restoration.
vehicle repair station means a building or place used for the purpose of carrying out repairs or the selling of, and fitting of accessories to, vehicles or agricultural machinery, but does not include a vehicle body repair workshop.
warehouse or distribution centre means a building or place used mainly or exclusively for storing or handling items (whether goods or materials) pending their sale, but from which no retail sales are made.
waste disposal facility means a building or place used for the disposal of waste by landfill, incineration or other means, including such works or activities as recycling, resource recovery and other resource management activities, energy generation from gases, leachate management, odour control and the winning of extractive material to generate a void for disposal of waste or to cover waste after its disposal.
waste management facility means a facility used for the storage, treatment, purifying or disposal of waste, whether or not it is also used for the sorting, processing, recycling, recovering, use or reuse of material from that waste, and whether or not any such operations are carried out on a commercial basis. It may include but is not limited to: (a) an extractive industry ancillary to, required for or associated with the preparation or remediation of the site for such storage, treatment, purifying or disposal, and

Definitions of types of industrial uses
(b) eco-generating works ancillary to or associated with such storage, treatment, purifying or disposal.
waste or resource management facility means a waste or resource transfer station, a resource recovery facility or a waste disposal facility.
waste or resource transfer station means a building or place used for the collection and transfer of waste material or resources, including the receipt, sorting, compacting, temporary storage and distribution of waste or resources and the loading or unloading of waste or resources onto or from road or rail transport.

Source: Standard Instrument—Principal Local Environmental Plan

This page intentionally left blank.

6 Consultation

6.1 Preliminary Consultation

GeoLINK and SGS Economics and Planning undertook targeted stakeholder consultation to inform this Strategy. This targeted consultation involved face to face meetings with groups and individuals identified by Council and GeoLINK as having an interest in this Strategy as well as being able to provide insight and information essential for completion of this Industrial Lands Strategy. The stakeholders who were interviewed included:

- Coffs Harbour City Council staff – this involved a workshop with a number of Council officers from a broad range of positions including planning, engineering, economic development, biodiversity and community services;
- Urban Development Institute of Australia;
- Coffs Harbour Local Aboriginal Land Council;
- Woolgoolga Chamber of Commerce;
- Sawtell Chamber of Commerce;
- Coffs Harbour Chamber of Commerce;
- Coffs Harbour Economic Development Unit/ Coffs Future Development Board;
- Coffs Coast Manufacture – a sample of large industrial firms within Coffs Harbour including W. E Smith, Faircloth & Reynolds, Thermal Electric Elements;
- a number of real estate agents within Coffs Harbour local government area;
- Department of State and Regional Development; and
- Department of Planning.

As mentioned previously, consultation with these groups and individuals was conducted either in person or over the telephone. Some of the stakeholders opted to provide additional comment on the strategy in writing. A summary of the consultation findings is attached as Appendix A.

During the preliminary consultation process, several broad issues were raised. These include:

- leakage of workers: youth retention in Coffs Harbour is a major problem, as many young people tend to leave the area in favour of larger cities for work. Creating industries and supporting educational tools for this demographic group is vital for Coffs Harbour's growth;
- dominance of the Pacific Highway: an issue for Coffs Harbour is the Pacific Highway as it has created a linear pattern of development. Council is working towards dedicating industrial land in Woolgoolga which would provide jobs for those workers living 40 minutes away from Coffs Harbour. The goal of this is to minimise pollution and car travel time, as well as curbing the need for commuters travelling on a dangerous stretch of highway;
- difficulty in accommodating manufacturing operations: manufacturing and related industries usually require larger lots, but limited supply of larger lots and resulting higher land prices mean that accommodating manufacturing industries can be difficult;
- impact of seasonal economy: many key industry sectors in the LGA are seasonal in nature such as accommodation, cafés and restaurants and some retail sectors. Retail trade in particular has grown very strongly in the 2001-2006 period (1008 jobs). The attraction of industries that are less prone to

seasonal fluctuation will assist in tackling unemployment in the LGA. Industry attraction must build from the LGA's competitive strengths;

- education-related industry potential: the education sector has grown in the 2001-2006 period (579 jobs). The current education strategy seeks to expand on the Coffs Harbour Education Campus (CHEC). A technology park is proposed for CHEC as part of the technology incubator. This area has the potential to focus on the commercialisation of research from the TAFE and university in support of local entrepreneurs;
- longer term potential for aged care services: health and community services sector has shown very high jobs growth in the 2001-2006 period (1407 jobs). Within this sector, aged care industries have high growth potential, given the ageing population trend;
- nature of industry enquiries: many enquiries for industrial land in Coffs Harbour originate from Sydney-based businesses.
- Coffs Harbour has a number of constraints that makes provision of industrial land challenging. These constraints include topography, environment, flooding, traffic, and competition with other land uses such as residential development, commercial development and agricultural uses;
- existing industrial estates throughout the local government area need their particular role and function to be made more clear to the general public;
- Coffs Harbour needs to secure a number of large employers to assist in future growth of the area. There is a need to provide a variety of lot sizes, not just smaller lots; and
- there is a need to consolidate future industrial areas into one specific large area if possible.

A number of potential sites were suggested during the consultation process. These include:

- Bonville east and west of the highway;
- Corindi/Red Rock;
- airport lands (Christmas Bells Road);
- Moonee - Bucca Road and around the shopping centre;
- North Woolgoolga west of the highway;
- South Woolgoolga west of the highway;
- North Boambee Valley; and
- expansion of existing areas.

Further discussion on these sites as well as an analysis of their potential for future industrial lands is discussed in **Section 9**.

GeoLINK also undertook preliminary consultation with the Department of Planning. The Department of Planning advised that the Strategy needs to be consistent with the Mid North Coast Regional Strategy. As part of the Mid North Coast Regional Strategy, Department of Planning has identified areas that will be available for future urban development. These areas are contained in the Mid North Coast Growth Areas Map.

The areas identified within the Growth Areas Map aim to reinforce the region's settlement hierarchy and provide for a range of housing types and employment lands to meet the needs of the region's growing population. At the same time, they support scenic green breaks between coastal communities and the protection of important assets such as farm land, estuaries and wetlands. The mapped areas have been identified for their ability to deliver a desirable future growth pattern, in keeping with the settlement planning principles outlined in the Regional Strategy.

Local councils will only be able to identify additional land for urban uses if:

a. it falls within one of the growth areas shown on the Growth Areas Map;
b. it is within the existing identified urban footprint; or

c. if it meets the Strategy's sustainability criteria.

Further discussions indicated that it is highly unlikely that the department will support the rezoning of land for development in the short to medium term if that land is outside of the Growth Areas Map or not within the existing identified urban footprint. This has significant implications for the release of industrial land within the Coffs Harbour Local Government Area and has had a significant influence on the recommendations contained within this Strategy.

The Growth Areas Map for Coffs Harbour is attached as Appendix B. As can be identified from the map, the lands designated for future proposed employment lands are limited to south of Woolgoolga west of the existing industrial estate and within the North Boambee Valley area. Areas within the existing urban footprint such as the Airport Lands can also be considered.

6.2 Community Forum

A Community forum was held as during the public exhibition phase. The community forum was an informal 'shop front' process that allowed interested residents to come in and discuss any aspect of the Strategy with the Council staff and its consultant.

6.3 Public Exhibition Process

The Strategy was placed on public exhibition from 13 November 2008 to 30 January 2009. Council also forwarded the Strategy to relevant Government Agencies to obtain comment. A total of twelve submissions were received from Government Agencies and a further nineteen submissions were received from individuals and community groups. One submission included a petition signed by 64 individuals. Community groups included the Ulitarra Conservation Society, The Coffs Harbour Bellingen Branch of the National Parks Association (two submissions) and the Coffs Harbour Chamber of Commerce. A summary of the issues raised within the submissions is included as Appendix C.

This page intentionally left blank.