PART 3 - DETAILING THE VISION

DETAILING THE VISION

THE OVERALL STRATEGY......................

The Regional Picture

Coffs Harbour's development will be influenced by regional factors, such as State government funding strategies and regional transport networks, and the City's relative attractiveness to business and commercial ventures compared to other centres on the North Coast.

Centrally located between Sydney and Brisbane, Coffs Harbour is strategically placed to serve as a major regional centre on the North Coast. The Department of Planning's (DoP) recently released draft Mid North Coast (MNC) Regional Strategy lists Coffs Harbour, along with Grafton, Port Macquarie and Taree, as a major regional centre. Woolgoolga is listed as one of six major towns in the Mid North Coast region.

The Coffs Coast sub-region of the Mid North Coast incorporates the local government areas (LGA) of Coffs Harbour, Bellingen and Nambucca. Coffs Harbour is recognised as the sub-region's major regional centre.

Settlement will be focused on the four major regional centres. It is expected that these centres will manage housing demand with higher dwelling densities. These centres are also expected to take the majority of commercial development as they have the greatest potential for redevelopment.

Coffs Harbour Regional Airport provides the primary service for the entire Mid North Coast Region, with 5,000 domestic flights, carrying approximately 300,000 domestic passengers annually, with an additional 25,000 freight and charter flights.

The Local Picture

The Great Dividing Range runs roughly parallel to the coast, coming to within a few kilometres of the coastline in places, resulting in a narrow coastal plain with a backdrop of steep, forested slopes. The average elevation is 600 metres and the eastern escarpment of this plateau region is deeply cut by gullies with slopes in excess of 30%.

The topographic and other physical features of the Coffs Harbour LGA have resulted in a linear form of development along the coast, with a number of small rural villages in the hinterland. In the coastal strip there are three main urban areas including Coffs Harbour, Toormina (including Sawtell, Boambee East and Bayldon) and Woolgoolga.

The Our Living City (OLC) Settlement Strategy aims to achieve sustainable development. Appendix A sets out the benefits to be achieved from sustainable development. Definitions adopted for these various development styles are included in the Glossary contained in Appendix B.

The Strategy encourages the consolidation of the Coffs Urban area as a Coastal City. It will be the main focus of development in order to attract higher order services and maximise efficiency of transport networks. Woolgoolga, Moonee and Toormina will be developed as Coastal Towns (refer Map 1). Other urban areas will be developed as either Coastal or Hinterland Villages or Hamlets. Definitions adopted for these various development styles are included in the Glossary, contained in Appendix B.

The Strategy includes the investigation of areas for urban purposes and strategies for employment/ commercial development, environmental management, transport and economic development.

The OLC Settlement Strategy envisages that by 2031 the population in the Coffs Harbour LGA will be in the order of 99,000 people made-up of 94,000 people accommodated in existing zoned urban areas and 6,000 in areas for potential urban expansion. Projected population growth indicates that, at existing rates of consumption, additional land will be required for residential purposes by the period 2016-2021 in proximity to the Coffs Harbour Township. Additional lands to the north will be needed by the year 2021, and to the south around 2010, to secure land supplies to meet expected demands in these locations.

Map 2 gives estimated 2031 population projection for each of the villages, towns and the City that makes up the Coffs Harbour LGA, along with estimates for rural areas.

A sieve mapping exercise of land in the Coffs Harbour LGA was undertaken to identify those lands which are relatively free of limiting factors. These limiting factors include both land capability and land suitability factors. This comprehensive analysis was undertaken in the Coffs Harbour City Revised Land Capacity Assessment 2005.

The full methodology for calculations in the Revised Land Capacity Assessment 2005 are set out in that document. However, in summary, the following methods have been applied:

- The Coffs Harbour LGA was broken into 14 localities which correspond to the Australian Bureau of Statistics (ABS) collection districts.
- Dwelling densities of 10 dwellings per hectare are the realistic density achieved in recent years (due to recent bushfire and vegetation regulations). This is the figure used to project supply in new release areas.
- Calculations for rural residential development have been based on densities of 0.5 dwellings per hectare except where a Council document adopts a different rate.
- Calculations for infill development have assumed land allocated for high-density housing will only be developed for 50% of its potential capacity between now and 2031.

Final land supply calculations prepared to inform the DoP's draft MNC Regional Strategy have been used to update the calculations contained within Council's Revised Land Capacity Assessment 2005. These new calculations are identified in Appendix C of this OLC Settlement Strategy.

These calculations identify a total of 15,499 additional dwellings in the entire Coffs Harbour LGA by 2031 (calculated forward from 2004 figures). This number is composed of:

- 3,726 additional dwellings in new residential zones;
- 2,707 dwellings infilled into existing residential zones;
- 639 additional rural residential dwellings in possible future rural residential areas (once the 1999 Rural Residential Strategy is updated and any additional areas confirmed);
- 1,509 vacant lots;
- 6,336 dwellings on existing zoned, but unsubdivided residential land;
- 382 dwellings on existing zoned, but unsubdivided rural residential land;
- 2,957 dwellings in Bonville and Bark Hut Road areas (beige areas of the draft Settlement Strategy) but most of these are longer term than the 2031 Regional Strategy timeframe. An allowance of 200 dwellings at Bonville before 2031 is included.

Urban development in all investigation areas will be subject to detailed environmental assessment. Urban investigation areas of the Strategy are shown in Map 1. These are broken into priority programs of Priority 1 – Short Term Investigation (2006-2011), Priority 2 – Medium Term Investigation (2011-2016) and Priority 3 – Long Term Investigation (2016-2031).

Council has nominated the South Woolgoolga and North Boambee Valley areas for "Special Investigation". Additional studies are to be completed prior to the investigation of these lands to determine whether there is any need to supply additional employment generating (industrial) land uses in these locations.

Additional lands have been shown north of Woolgoolga and at Bonville as “Possible Future Urban Expansion” investigation areas, should our population targets be achieved sooner than projections predict. A total of 200 dwellings are added into projections for development at Bonville by 2031.

It is also proposed that Council revise and update the existing Rural Residential Strategy 1999. This will allow a detailed analysis of recent rural residential take-up rates, to determine the extent and timing of future releases in more detail than outlined in the Settlement Strategy.

The Strategy also includes actions relating to residential development, water and sewerage infrastructure, economic development, transport, community services, coastal agriculture and the environment. These strategic actions are outlined in Section 2 of the Strategy.

While individual plans for each place are to be developed, these plans need to be considered in the context of an overall strategic plan for the development of urban lands.

DETAILED STRATEGY............................

Key strategies and detailed maps have been provided for each urban area (Maps 3-9) of the Coffs Harbour LGA. These identify future development areas, expected limits to growth and key strategic actions for each area.

It should be noted that until the Mid North Coast Regional Strategy is finalised, the DoP has issued only interim approval of parts of this OLC Settlement Strategy. Matters covered by this interim endorsement are listed on Page 4 of this OLC Settlement Strategy.

Map series A, B and C are also provided for each urban investigation area. These maps identify expected lot yields, development areas and constraints for these areas. Map 8D also provides a Structure Plan for future land uses at Bonville.

The next stage of development is the preparation of individual Place Management Plans for each of these localities.

DWELLING SUPPLY AND DEMAND ANALYSIS..

Overview

It is difficult to forecast with accuracy the likely population growth of Coffs Harbour up until 2031, given the myriad of factors locally, regionally, nationally and internationally that might influence this growth. As a result, the following estimates of likely population growth have been made based on the historical demand for land and population growth. From this, comparisons have been made against the amount of land presently zoned for residential purposes.

In addition to ensuring that sufficient land is made available to accommodate future growth, a strategy to release land at the appropriate time is also necessary. Such a strategy allows for areas to be properly serviced, ensuring that future residents have their, social, economic and environmental needs met, while also ensuring that such infrastructure is cost effective.

Historic Population Growth

Coffs Harbour experienced a very high population growth from the 1970s through to the early 1990s. While this growth slowed somewhat during the mid to late 1990s, Coffs Harbour has nonetheless experienced the second highest growth rate for LGAs along the Mid North Coast. Recent figures from the ABS show that the growth of the Coffs Harbour LGA is currently occurring at 1.8% annually (Coffs Harbour City Population Profile 2004), similar to the Hastings LGA.

Projected Population Growth - Department of Planning

Recent published population projections by the DoP estimate the need to accommodate 91,800 people in the Coffs Harbour LGA by 2031. This total relies on a slower growth rate being experienced than that predicted in the previous Urban Development Strategy (UDS) and reflects an annual growth rate of approximately 1.2 – 1.3%.

Projected Population Growth - Council Projections

Table 1 shows the various historical growth rates experienced by LGAs along the Mid North Coast since 1981. As is apparent, the LGAs of both Coffs Harbour and the Hastings have continued to grow strongly, notably both are similar in terms of population size and location.

Up until July 2003 the Northern Beaches of the Coffs Harbour LGA had not been able to be developed due to a lack of water and sewer infrastructure. This lack of infrastructure has therefore affected the areas from Moonee in the south, north to the Coffs Harbour LGA boundary. Restrictions were such that no subdivision and not more than one dwelling was permitted on an existing parcel of land. Consequently, the growth of this area (and the Coffs Harbour LGA as a whole) has been less than what might otherwise have been expected. This has been made more apparent by the fact that much of the land along the Northern Beaches represented land close to the coastline, which in recent years has been particularly sought after.

While restrictions on development along the Northern Beaches were removed in July 2003 by the provision of water and sewer infrastructure, much of this land is only now becoming ready for further development as adequate planning controls (Development Control Plans (DCPs)) are put in place (i.e. Moonee DCP and West Woolgoolga DCP).

It is anticipated that land close to the coast will continue to be sought after over the short to medium term, particularly by 'sea changers'. Accordingly, the Northern Beaches is expected to grow strongly over this period.

The Korora and Sapphire/Moonee[1] localities contain land close to the coast, which is representative of the land available along the Northern Beaches, which remains to be developed. Both the Korora and Sapphire/Moonee localities have over recent years experienced growth rates well above the rest of the Coffs Harbour LGA (with the exclusion of Coffs Rural in 1996-2001), as shown in Table 2.

This supports the notion that the development of land along the coast has been driving the population growth of the Coffs Harbour LGA. It is further evidence that growth of the population of the Coffs Harbour LGA as a whole has been retarded, and would have been markedly higher had the Northern Beaches been able to be developed.

To further support the notion that land along the coast has been sought after, it is worth looking at the growth of localities such as Lighthouse Beach/ Greenmeadows and Lake Cathie/Bonny Hills within the Hastings LGA, which are not dissimilar to the Northern Beaches of the Coffs Harbour LGA. Table 3 shows the growth rate for the Hastings LGA as a whole, as well as for the Lighthouse Beach/ Greenmeadows and Lake Cathie/Bonny Hills localities. As is apparent, these localities have experienced growth rates far exceeding that of the Hastings LGA.

It is likely therefore that the Northern Beaches will provide for a growth rate, above that of the Coffs Harbour LGA as a whole, on the basis that it offers significant areas of coastal land for future residential growth. This in part will also be due to the previous restriction on the supply of land in this area. Accordingly, the DoP estimate of a population of 91 800 is considered very conservative, essentially as a result of underestimating growth along the Northern Beaches.

It is considered likely that localities along the Northern Beaches will, for the short to medium term, grow at a faster rate than the remainder of the Coffs Harbour LGA. For the purposes of predicting the population growth of this area, Council has opted to use a conservative rate of 1.8% for the period 2001-2006 (in part due to restrictions along the Northern Beaches only being lifted late in this period, and the lead time needed for land to be developed). This rate is the same rate predicted for the Coffs Harbour (A) Statistical Local Area (SLA)[2].

[1] Containing the southern part of the Moonee settlement.

[2] Department of Infrastructure, Planning and Natural Resources – Transport and Population Data Centre.

Table 1 - Population Estimates 1981-2001 (Selected LGAs Northern Rivers and Mid North Coast)

Local Government Area	Population 1981	Population 1986	Annual Growth July 81-June 86 (% p.a.)	Population 1991	Annual Growth July 86-June 91 (% p.a.)	Population 1996	Annual Growth July 91-June 96 (% p.a.)	Population 2001	Annual Growth July 96-June 01 (% p.a.)
Coffs Harbour	34,000	42,113	4.37	50,877	3.85	57,283	2.40	62,902	1.89
Grafton	17,200	16,793	-0.48	17,512	0.84	17,507	-0.01	16,704	-0.93
Kempsey	19,550	22,829	3.15	25,375	2.14	26,468	0.85	26,934	0.35
Nambucca	11,550	14,344	4.43	16,730	3.13	17,639	1.06	17,718	0.09
Hastings	34,300	41,152	3.71	49,448	3.74	57,228	2.97	64,483	2.42
Bellingen	9,050	10,278	2.58	11,785	2.77	12,485	1.16	12,208	-0.45

Table 2 - Population growth Coffs Harbour LGA localities

Locality	Population 1991	Annual Growth July 91-June 96 (% p.a.)	Population 1996	Annual Growth July 96-June 01 (% p.a.)	Population 2001
Red Rock/Corindi Beach/Corindi Plateau			1,213	0.7	1,258
Arrawarra/Mullaway/Safety Beach	2,033	2.8	2,333	0.8	2,430
Woolgoolga	4,165	1.5	4,493	0.1	4,526
Sandy Beach/Emerald Beach	2,637	5.0	3,373	1.6	3,651
Moonee/Sapphire	2,187	5.9	2,910	3.5	3,456
Korora	861	22.4	2,367	2.7	2,701
Coffs Urban	22,141	0.5	22,728	0.7	23,547
Sawtell/Toormina/East Boambee	9,866	6.1	13,240	0.9	13,831
West Boambee			1,547	1.8	1,689
Bonville	1,541	2.8	1,768	1.1	1,872
Coramba	346	-1.0	329	-2.0	297
Ulong	116	3.7	139	-2.6	122
Nana Glen/Bucca	1,296	1.2	1,377	1.3	1,469
Coffs Rural	4,034	-15.5	1,733	3.4	2,044
Coffs Harbour LGA	51,593	2.4	58,021	1.6	62,902

Table 3 – Lighthouse Beach/Greenmeadows and Lake Cathie/Bonny Hills population growth

Locality	Population 1996	Annual Growth July 96 – June 01 (% p.a.)	Population 2001
Lighthouse Beach/ Greenmeadows	6,633	7.0	9,709
Lake Cathie/Bonny Hills	3,573	4.3	4,400
Hastings LGA	57,771	2.1	64,146

Following this a conservative rate of 2.5% for growth has been adopted for the period 2006-2011 and 2.1% for the period 2011-2016. These rates have been arrived at having regard to the growth rates of the Korora and Moonee/Sapphire localities, as well as those of Lighthouse Beach/Greenmeadows and Lake Cathie/Bonny Hills.

Given that growth rates are also set to decline over time, Council has for the remaining periods opted to use the declining rates predicted for the Hastings (A) SLA, in order to provide what is considered a more realistic rate. Again, this is considered conservative given the demand that has built over time as a result of the inability to develop land along the Northern Beaches.

Table 4 provides estimates of the population of the localities of the Northern Beaches until 2031 and the growth rates applied over each given period. It should be noted that the rate 2016 onward matches that of the Hastings (A) SLA. It is also acknowledged that not all localities are likely to grow at the rate provided and, in this regard, it is anticipated that localities such as Red Rock/Corindi Beach/Corindi Plateau and Arrawarra/Mullaway/ Safety Beach will in fact grow at a reduced rate, while areas such as Woolgoolga, Sandy Beach/Emerald Beach and Moonee/Sapphire will grow at a faster rate.

In relation to the remainder of the localities comprising the Coffs Harbour LGA, the rates provided for both Coffs Harbour (A) and (B) SLAs have been used. It should however be noted that the use of these rates over a locality by locality basis can lead to misleading figures and instead it is the total population achieved that should be noted.

Table 5 shows the number of dwellings which can be expected up until 2031 based on the population growth shown in Table 4. In this regard an average of 2.5 persons per dwelling has been applied to the figures in Table 4, and this figure has been adopted from the Coffs Harbour Revised Land Capacity Assessment 2005 after consideration of the density of development over the past few years and the constraints present over remaining land to be developed.

Table 6 provides an estimate of the land available (expressed in dwelling numbers) for further development as at 2001. These figures have been calculated from the amount of vacant lots and unsubdivided residential land calculated in the Coffs Harbour Revised Land Capacity Assessment 2005, and has involved calculating backward from these amounts to achieve figures for 2001. They have also been calculated based on an annual growth rate of 1.8% for the Northern Beaches, Coffs Urban, Sawtell/Toormina/East Boambee, West Boambee and Bonville localities, and a rate of 1% for the remaining localities.

Table 7 shows the amount of dwellings that remain to be accommodated over each period and within each locality, having regard to the figures in Tables 4 and 5. Negative figures represent a shortfall (in dwelling numbers) within a locality.

Based on the figures in Table 7, the following is apparent:

- The Northern Beaches will experience a shortfall in land in the period 2021-2026;
- Coffs Urban will experience a shortfall in land in the period 2016-2021; and
- Sawtell/Toormina/East Boambee will experience a shortfall in land in the latter part of the period 2006-2011.

Another factor, which should be noted in appreciating these figures, is that localities such as Sawtell/Toormina/East Boambee and Coffs Urban contain large amounts of land zoned for higher density purposes, which are under-developed. As such, if densification occurs over these time periods, it will have the effect of pushing back the stated timeframes.

Table 4 – 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

Table 5 - Growth in dwelling numbers

Locality	2001 - 2006	2006 - 2011	2011 - 2016	2016 - 2021	2021 - 2026	2026 - 2031	Total
Northern Beaches comprising the following localities: • Red Rock/Corindi Beach/Corindi Plateau • Arrawarra/Mullaway/Safety Beach • Woolgoolga • Sandy Beach/Emerald Beach • Moonee/Sapphire • Korora	672	1036	976	817	771	766	5,038
Coffs Urban	879	850	862	864	859	844	5,158
Sawtell/Toormina/East Boambee	516	500	471	468	500	491	2,946
West Boambee	63	61	62	62	62	60	370
Bonville	70	63	68	68	68	67	404
Coramba	6	5	5	6	6	5	33
Ulong	2	2	2	2	2	2	12
Nana Glen/Bucca	30	25	26	27	28	26	162
Coffs Rural	42	35	36	38	39	36	226
Total LGA	2,280	2,577	2,508	2,352	2,335	2,297	14,349

Table 6 – Dwelling Supply (2001)

Locality	2001
Northern Beaches comprising the following localities: • Red Rock/Corindi Beach/Corindi Plateau • Arrawarra/Mullaway/Safety Beach • Woolgoolga • Sandy Beach/Emerald Beach • Moonee/Sapphire • Korora	3,934
Coffs Urban	3,076
Sawtell/Toormina/East Boambee	874
West Boambee	0
Bonville	261
Coramba	6
Ulong	10
Nana Glen/Bucca	10
Coffs Rural	37
Total LGA	8,208

Table 7 – Dwelling Supply

Locality	2001 - 2006	2006 - 2011	2011 - 2016	2016 - 2021	2021 - 2026	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	3,262	2,226	1,250	433	-338	-1,104	
Coffs Urban	2,197	1,347	485	-379	-1,238	-2,082	
Sawtell/Toormina/East Boambee	358	-142	-613	-1,081	-1,581	-2,072	
West Boambee	-63	-61	-62	-62	-62	-60	
Bonville	190	127	59	-9	-77	-144	
Coramba	0	-5	-10	-16	-22	-27	
Ulong	8	6	4	2	0	-2	
Nana Glen/Bucca	-20	-45	-71	-98	-126	-152	
Coffs Rural-5	-5	-40	-76	-114	-153	-189	
Total LGA							5,832

RURAL RESIDENTIAL DEVELOPMENT.....

The only rural residential lands shown in the OLC Settlement Strategy are those already included in the 1999 Rural Residential Strategy. Council undertook some preliminary rural residential land supply and demand analysis during the preparation of this OLC Settlement Strategy. Findings reveal that forecast demand in the 1999 Rural Residential Strategy of 45-50 rural residential lots is adequate. However, there may be some locational demand, particularly noticeable at Bonville and in the Northern Beaches area.

It is proposed that the 1999 Rural Residential Strategy will be reviewed on completion of the Settlement Strategy. This will allow additional land stock analysis to be undertaken for rural residential development. It will also allow Council to commence the formal process with the DoP that is necessary for such a review. Consequently, no additional rural residential areas have been proposed for inclusion in the final Strategy.

AGRICULTURAL LANDS ....

The DoP's Farmland Mapping Project is to be exhibited from 9 July 2007. Both Bonville and North Boambee Valley are considered good land resources for primary industries as identified by the draft Farmland Mapping Project. However, both of these areas were originally identified in Council's 1996 UDS and 1999 Rural Residential Strategy. These are both approved Strategies by the DoP. It is expected that while lands in Bonville and North Boambee Valley contain small pockets of Regionally Significant Farmland, Council can continue to plan for the future uses of these lands for urban and rural residential purposes because approved planning strategies exist for these lands.

BUSINESS AND EMPLOYMENT LANDSTOCKS..

The expected population growth for Coffs Harbour City will require that not only land for the development of homes is provided, but that the associated need for employment, retail, industrial, governance, infrastructure and associated service lands are also available with all of the appropriate characteristics:

- quantity
- size
- infrastructure support
- location

In short, the business and employment lands will be required to:

- support the employment of an additional 9,000 full time and 7,000 part time people (at current employment rates);
- cater for 32,000 more people expected to be living in the region by 2031 and the associated construction of up to 14,000 additional homes;
- protect precious coastal areas facing increasing pressure from development;
- support regional strategies for locating future settlement around existing centres and towns;
- enhance and consolidate retail floorspace in existing centres;
- match and enhance the local character;
- provide appropriate support for rural living, employment and service opportunities;
- support sustainable growth throughout the City, including the hinterland areas, and redevelopment and reinvestment opportunities in existing areas;
- enhancing the regional primacy of Coffs Harbour with respect to transport, communication and lifestyle linkages with regional neighbours;
- locate industrial sites to ensure attractiveness to industries by ensuring maximum access by road, rail and air.

Retail Floorspace

The AEC Group during 2006 completed a Retail Strategy for Coffs Harbour which identifies the following characteristics for retail growth opportunities over the short to medium horizon:

- Despite the significant population growth projected for Coffs Harbour, which is well above State averages, there is limited demand for additional retail floorspace for the next five years. It is currently estimated that there is more than 25,000sqm of oversupply in the retail market. This became 36,000sqm when the Moonee Shopping Centre and Aldi Supermarket began trading.
- Based on an assessment that average trading levels are not sustainable in key retail areas, the path forward is one of consolidation before expansion. For the purposes of projecting future retail floorspace demand, the higher end of the Coffs Harbour average or the low end of industry benchmarks is applied as the basis for future floorspace demand assessment. Not until these benchmarks are reached is new retail development considered appropriate.
- Based on this Strategy, total retail floorspace demand is projected at 312,400sqm by 2030-31, equating to an increase of 111,400sqm from the current estimated level of 201,000sqm. To place this demand projection into perspective, there was an addition of 52,000sqm of retail floorspace in Coffs Harbour over the 14-year period between 1991/92 and 2003/04. By comparison, this analysis projects demand for an additional 53,600sqm over the next 15 years. If market share declines due to developments in the regional catchment such as the expansion of Grafton Shoppingworld, then the demand projections would be even lower and the current market oversupply even greater.
- Over the next five years, the analysis projects demand for additional retail development in the areas of groceries and specialty food, food and liquor catering, clothing and accessories, motor vehicles and parts, other goods and personal services. There is no potential for additional bulky goods floorspace over the next 10 years as the market consolidates. The implication of this is that showroom developments adjacent to "The Good Guys" will further exacerbate the oversupply situation. The Strategy makes clear there is no demand for any new supermarkets in the next five years given the recent approval of the Moonee Beach Shopping Centre and Aldi developments.

Industrial Zoned Lands

While an Industrial Lands Strategy has not yet been completed, preliminary analysis has revealed that a small percentage of existing industrial zoned land is relatively unconstrained and available for development. Further areas of zoned but undeveloped land that remain are largely affected by environmental restrictions such as drainage lines, State Environmental Planning Policy (SEPP) 14 wetlands and acid sulfate soil potential.

There are also existing industrial sites, particularly in Woolgoolga, Coffs Harbour and Toormina that could deliver more intensive employment opportunities through redevelopment and more intensive land uses (e.g. conversion of transport storage and warehousing to manufacturing, primary product processing and shipping, or more labour intensive small business clustering).

Council has resolved to undertake additional studies and strategies to determine needs for employment zoned land stocks in the Coffs Harbour LGA. Two "Special Investigation" areas identified at South Woolgoolga and North Boambee Valley are shown in Maps 4 and 7 of this Strategy.

Because of the size of the "Special Investigation" areas at both North Boambee Valley and also at South Woolgoolga, the DoP has requested that additional work be undertaken to fine-tune available area and to work out anticipated lot yields and land supply calculations for the agreed growth area mapping. Maps 4B and 7B of the final Strategy include the preliminary identified parts of these sites. At both the Woolgoolga and North Boambee Valley locations, lands in the northern part of the yellow "Special Investigation" area are shown as possible future residential, and lands in the southern part are shown as possible industrial. These classifications are only preliminary at this point in time and are subject to further studies and agreement by the DoP.

SERVICING ANALYSIS ....

Full details of water and sewer servicing issues are set out in Part 2 of this document. Key matters that will dictate release of lands include:

- **Sewer:** Services are currently being planned for sewer that will result in some limits to development, as follows:
  - Corindi Water Reclamation Plant (WRP) – Only has capacity for the addition of 150 dwellings (say 400 Equivalent Persons [EPs]) without further augmentation. This will limit the extent of long-term development, essentially capping the population of Red Rock, Corindi Beach and Corindi Plateau at 2,950 persons.
  - Woolgoolga WRP– Capacity to service 18,000 (EPs) without further augmentation. This plant services from Corindi Beach to Sandy Beach.
  - Moonee WRP – Capacity to service 7,000 EPs, or can be augmented to 10,000 EPs. This plant services settlements of Emerald Beach south to Split Solitary Road.
  - Coffs Harbour WRP (new plant) – Capacity to service 72,000 EPs without further augmentation. This plant services all remaining residential land in the Coffs Harbour LGA, south of Split Solitary Road.
  - Bonville – any development at Bonville would require augmentation of the Coffs Harbour plant (with the exception of works at the Bonville International Golf Resort).
- **Water:** Infrastructure has only been planned to service the old projected 2021 population of 94,500 EP. The 55 metre Australian Height Datum (AHD) contour provides significant constraints for any development of land in proximity to Coffs Harbour Central Business District (CBD). Lands higher than this will not be able to be serviced. However, the introduction of Building and Sustainability Index (BASIX) requirements for new dwellings is likely to further extend the life expectancy of the current water supply system but to what extent it is difficult to gauge within the scope of this Strategy.

Strategies for water and sewer servicing are as shown on Maps 10 and 11.

PACIFIC HIGHWAY UPGRADE ....

A total of 656 (84%) out of the 785 community submissions to the draft OLC Settlement Strategy raised the RTA preferred route for the Pacific Highway upgrade as a significant issue. The majority of these submissions requested that Council continue to lobby the State and Federal governments to construct a "far western bypass". Many also requested that the community-preferred route (far western bypass) be shown on the final OLC Settlement Strategy maps.

Council at its ordinary meeting of 17 May 2007 resolved "*to make provision for the Pacific Highway Upgrade at Coffs Harbour to be included for consideration in the OLC Settlement Strategy*". It further resolved that Council and the community request both the State and Federal members to continue to lobby on the City's behalf for an acceptable highway west of Coffs Harbour.

A number of community submissions requested that the Settlement Strategy process be halted until the final Pacific Highway upgrade route is selected and all environmental studies are completed. However, this is not considered appropriate. The DoP has instructed Council to update the 1996 UDS and Council is acting upon that instruction. The Department further issued Council with a letter dated 11 October 2006 that stated "*it is appropriate that the preferred route be shown in the Strategy as this major infrastructure corridor needs to be considered in the future planning of the Coffs Harbour local government area*".

Many community submissions also made the comment that the aims and objectives of the OLC Settlement Strategy cannot be achieved by construction of the RTA preferred inner bypass routes. It is agreed that the goals and objectives contained within the Strategy would be more readily achieved with a highway located to the west of Coffs Harbour. This is another reason for Council to continue to lobby on the City's behalf for an acceptable highway west of Coffs Harbour.

NORTH COAST REGIONAL ENVIRONMENTAL PLAN 1988 CLAUSE 38 REQUIREMENTS ....

The North Coast Regional Environmental Plan (REP) 1988 stipulates that councils shall not prepare local environmental plans (LEP) which permit significant urban growth unless they have prepared an urban land release strategy for the whole of their LGAs.

Whilst the North Coast REP has since been repealed as a regional environmental plan and designated as a SEPP, this Strategy was prepared whilst the provisions of this plan were still in force, as such, it is necessary to demonstrate that satisfactory action in relation to the plan has been taken.

Clause 38(3) of the REP states:

(3) The Strategy referred to in subclause (1) shall –

- *(a) be based on a land release program and population projections agreed between the council and the Director;*
- *(b) give preference to urban growth occurring on land that both adjoins other land which is already being used for urban purposes and is the most economic to service;*
- *(c) not include for development land that is unsuitable due to any environmental hazard unless the council has made an assessment of the risk and considered it to be minor or alternatively has made provision for the control or reduction of the hazard;*
- *(d) not include for development land which has conservation value or which has heritage, environmental or cultural significance;*
- *(e) have regard to the rural character and heritage significance of villages and small coastal settlements and the need to maintain that character and significance;*
- *(f) provide substantial buffer areas between coastal urban centres to avoid uninterrupted coastal development.*

The OLC Settlement Strategy satisfies the requirements of the North Coast REP in relation to the coastal area of the City, as detailed in the following.

Land Release Program and Population Projections

Council's adopted population projections for Coffs Harbour to the year 2031 are shown in Table 1 of this document. Council has lobbied with the DoP, believing that recently published projections of 91,800 persons by 2031 are too low. A revised figure of 99,000 persons by 2031 has been adopted as a basis for estimating land requirements and rates of urban land depletion.

Infrastructure and land supply requirements have been identified by assessing the total population capacity of existing and proposed urban areas, assuming existing densities and household sizes and a growth rate equivalent to the Department's projections. These assumptions are outlined in Council's Revised Land Capacity Assessment 2005.

The overall Strategy shows three levels of priority for investigation and release of urban lands. These include Priority 1 – Short Term Investigation (2006-2011), Priority 2 – Medium Term Investigation (2011-2016) and Priority 3 – Long Term Investigation (2016-2021).

Council has nominated the South Woolgoolga and North Boambee Valley areas for "Special Investigation". An Industrial Land Strategy is to be completed prior to the investigation of these lands to determine whether there is any need to supply additional employment generating (industrial) land uses in these locations. These areas have been included as part of the land capacity calculations.

Additional lands have been shown north of Woolgoolga and at Bonville as “Possible Future Urban Expansion” investigation areas, should our population targets be achieved sooner than predicted.

The proposed land release program will be subject to detailed land investigations. These investigations will take the form of Local Environmental Studies, prepared prior to any rezoning of lands for urban purposes.

Criteria for Identifying Future Urban Areas

1. Extent of physical limitations.
2. Proximity to existing urban areas.
3. Existing land supplies and rate of depletion.
4. Servicing requirements.
5. The settlement hierarchy depicted in the NSW Coastal Design Guidelines Discussion Paper 2001.

Environmental Hazard, Conservation Value, Cultural and Heritage Significance

A sieve mapping technique was used to exclude land that was subject to the full range of planning constraints identified in the North Coast REP 1988 and the 1995 North Coast Urban Planning Strategy.

Rural Character and Heritage Significance of Villages and Small Coastal Settlements

This Strategy has adopted the principle that the existing rural character of Coffs Harbour’s inland villages and small coastal settlements will be recognised and preserved. Future urban growth will be directed towards consolidation of the Coffs Harbour City as a regional centre, with Woolgoolga, Moonee and Toormina as Coastal Towns.

It is proposed that the next stage in development of this Strategy is the preparation of Place Management Plans for each urban area, which will incorporate principles and strategic actions outlined in Part 2 of this Strategy.

Buffer Areas Between Coastal Urban Centres

The proposed settlement hierarchy will facilitate the definition of buffer areas between centres. These buffer areas will be identified on the basis of conservation and visual significance. Some areas of coastal land which are already zoned for urban purposes, but which have significant constraints, may never be able to be developed. It is proposed that environmental studies be completed on these lands to determine the appropriate zones for these lands.

MID NORTH COAST REGIONAL STRATEGY..

On 26 February 2007 the Minister for Planning issued a new Direction (Ministerial Direction No 30 “implementation of regional strategies”) under section 117 of the Environmental Planning and Assessment Act 1979 requiring that all draft comprehensive and amending LEPs be in accordance with the relevant regional, or draft regional, strategy. The regional strategy will also provide the context for the preparation of land use planning strategies that support LEPs. Land use planning strategies prepared by councils are to generally provide a local perspective on the vision, land use strategy and relevant outcomes for the council area as set out in the regional strategy. The OLC Settlement Strategy takes the form of a land use planning strategy. As such, this Ministerial Direction is relevant to this Strategy.

The DoP’s MNC Regional Strategy aims to guide sustainable development of the Mid North Coast Region to 2031. It requires local councils to prepare local growth management strategies to guide development. This OLC Settlement Strategy takes the form of a local growth management strategy.

During the preparation of this Settlement Strategy, Council has worked with the DoP to set its “agreed growth areas” as defined by the MNC Regional Strategy. These agreed growth areas incorporate the urban investigation areas of the OLC Settlement Strategy and are areas identified in the A and B series maps contained within this document.

On 12 November 2007, the DoP endorsed an interim agreement to allow some short term matters contained within the document to be progressed prior to the release of the MNC Regional Strategy. The Strategy document was changed in February 2008 to identify these matters as separately endorsed under the interim agreement.

On 6 March 2009, the DoP released the finalised MNC Regional Strategy, incorporating the published agreed growth areas. Following the release of the Regional Strategy the DoP further assessed Council's Settlement Strategy and on 11 November 2009 advised of their substantial endorsement of the Strategy.

In November 2010 Council annotated the Settlement Strategy to reflect the findings of the final MNC Regional Strategy and the advice of the Director General.

The following settlement planning principles have been used when identifying agreed growth areas and urban investigation areas in this OLC Settlement Strategy.

- **Growth Opportunities**: Coffs Harbour City, including the Sawtell/Toormina/East Boambee area, is defined in the MNC Regional Strategy as a major regional centre. The OLC Settlement Strategy promotes Coffs Harbour City as the focus of settlement, employment and regional services to 2031. Woolgoolga, the only major town in the Coffs Harbour LGA (as defined in the draft MNC Regional Strategy), is proposed to provide for some regional services including potential for additional employment lands. The OLC Settlement Strategy identifies potential opportunities for the growth in retail and commercial capacity of these centres.
- **Character Statements**: Maps 3-8 of this OLC Settlement Strategy identify potential for development in all centres, towns and villages of the Coffs Harbour LGA. It identifies the aspects of the character of each locality to be promoted and preserved, and provides for Place Management Plans to be provided for each locality as the final stage of this planning process.
- **Planning for Protection of Areas of Significant Value**: Part 2 of this OLC Settlement Strategy identifies Strategic Directions for social, economic and environmental sustainability. This aims to ensure that planning for new settlement will respect the environmental, coastal and heritage values of the landscape. The extension of coastal villages has been restricted to protect environmentally fragile areas and to preserve the scenic values of the coastal landscape. The Strategy status that the existing rural character of hinterland villages will be recognised and preserved.
- **Planning for Community Services**: New settlement areas have been planned adjacent to existing urban areas. The priority of settlement provision is proposed in proximity to Coffs Harbour City. Mixed-use zones are also to be promoted. This will facilitate the integration of transport services with the provision of community services and retail activity.
- **Housing Affordability**: It is recognised that the population of the Coffs Harbour LGA is likely to experience an influx of retirees within the next 10 years. This fact, combined with a reducing dwelling occupancy rate, will require some modification to the traditional dwelling mix seen in recent decades. This has been addressed in Part 2 of the Strategy, which aims to maximise the affordability of housing, as well as to provide the type of housing styles and dwelling mixes that are appropriate to the ageing of the population.
- **Infrastructure Capacities**: Servicing all areas of the Coffs Harbour LGA is addressed in Part 2 of the document. Servicing and environmental constraints were a key matter for consideration in identifying urban investigation areas in the Strategy.
- **Rural Residential Areas**: The only rural residential lands shown in the Strategy are those already included in the 1999 Rural Residential Strategy. It is proposed to review that Rural Residential Strategy on completion of the OLC Settlement Strategy. Settlement Planning Principles, in the draft MNC Regional Strategy, relating to rural residential development do not apply in this instance.