

Mid-Western Employment Lands Strategy (Industrial) 2024



Source: <https://www.midwestern.nsw.gov.au/Development>

15 August 2024





DOCUMENT CONTROL

Document: Project Name: Mid-Western Employment Lands Strategy (Industrial)
PSA Job Number: 1647
Report Name: Mid-Western Employment Lands Strategy (Industrial) 2024

This document has been prepared for:



Contact: Sarah Armstrong
Manager, Strategic Planning
Mid-Western Regional Council
86 Market Street, Mudgee 2850
02 6378 2863
sarah.armstrong@midwestern.nsw.gov.au

This document has been prepared by:



Contact: Kate Burke
PSA Consulting (Australia) Pty Ltd
PO Box 10824, Adelaide Street, Brisbane QLD 4000
Telephone: +61 7 3220 0288
kate@psaconsult.com.au
www.psaconsult.com.au

REVISION HISTORY

VERSION	DATE	DETAILS	AUTHOR	AUTHORISATION
V5 <i>'Changes made as per Council resolution no. 161/24 (17/7/2024)'</i>	15 August 2024		Danica McCarthy Shelley McCormack	<i>K. Burke.</i> Kate Burke

GENERAL DISCLAIMER

The information contained in this document produced by PSA Consulting (Australia) Pty Ltd is for the use of the Mid-Western Regional Council for the purpose for which it has been prepared and PSA Consulting (Australia) Pty Ltd undertakes no duty of care to or accepts responsibility to any third party who may rely upon this document.

All rights reserved. No section or element of this document may be removed from this document, reproduced, electronically stored or transmitted in any form without the written permission of PSA Consulting (Australia) Pty Ltd.



EXECUTIVE SUMMARY

Mid-Western Regional Council is committed to building a strong, resilient and sustainable industrial sector in the Mid-Western Regional local government area (the Region). Council has recognised the need to undertake further analysis to ensure appropriately zoned industrial land is available to meet demand and ensure Council's policy settings are supportive of new industrial opportunities. To enable this, the Mid-Western Regional Employment Lands Strategy (Industrial)(ELSI) has been developed, with a critical part of the study being the identification of additional sites which may potentially be suitable for future industrial development.

The Region is expected to be a key population and employment growth area of the Central West and Orana region in the short-term. Employment within the Region is projected to increase significantly between 2021 and 2026 from 11,068 workers to 19,480 workers. However, employment within the Region is anticipated to decrease significantly as construction is completed on a number of State Significant Development (SSD) projects. There is the potential for additional industrial employment opportunities to be generated in the Region to service these SSD projects.

There is also likely to be a significant decline in employment opportunities within the Region in the mining sector between 2021 and 2046, with the shift away from coal mining towards clean energy¹.

The analysis undertaken shows that the Region has sufficient industrial zoned land to meet its needs to 2046 and beyond, based on a direct comparison of supply against demand. However, further investigations highlight the composition of remaining supply does not meet the needs of prospective land users, is already committed or appropriately located to service the significant number of SSD projects coming online as part of the Central-West Orana Renewable Energy Zone (REZ).

The initial background economic analysis undertaken in support of the ELSI identified a need to identify ~40 hectares of raw land as a baseline figure to accommodate industrial land demand growth within the Region to 2046 (i.e. to service existing demand). However, it is recognised that the modelling undertaken to support this analysis was based on latest information available at the time and that industrial development may catalyse further investment in the medium term, which cannot be fully quantified at this point in time. Therefore, the ELSI suggests the need to identify at least ~60 hectares of raw land as a baseline figure to accommodate industrial land demand growth.

The ELSI identifies a range of sites as being potentially suitable for short (1-5 years), medium (5-10 years) and long term (10 years+) industrial supply, particularly in locations such as Mudgee and Gulgong, and allocates additional industrial land in the order of 141 hectares as follows:

	Land area (ha) Short Term (1-5 years)	Land area (ha) Medium Term (5-10 years)	Land area (ha) Long Term (10+ years)	Sub total
Mudgee	3.88 (South-East Mudgee) 36.69 (North-West Mudgee)			40.57
Gulgong	36.14		43.29	79.43
Rylstone	0.55		0.78	1.33
Ulan				0
Kandos			20.18	20.18
Sub total	40.57	36.69	64.25	141.51

The additional 141 hectares of land identified therefore provides over double the amount of raw land identified as being required.

With respect to the size of allotments needed to cater for anticipated demand, the growth in land demand is being driven mostly by service industry and warehouse and storage uses. The ELSI suggests that lots of up to 2 hectares in size and primarily within the E4 General Industry zone would be required and should be the main focus to

¹ Bull & Bear Economics (2024)



accommodate this demand profile. However, this Strategy encourages maximum flexibility in the delivery of future industrial lands and does not preclude industrial development on larger lot sizes, or for other purposes and in other industrial zones, where this can be supported through formal Planning Proposals for Council's consideration. Opportunities for additional E5 Heavy Industry zoned lands could be considered, where these can be suitably located and any impacts on adjoining properties (such as sensitive receptors), can be appropriately ameliorated.

It is critical to ensure that much of the additional short-term land identified is within proximity to the Central West Orana Renewable Energy Zone (to appropriately service this development) and within reasonable distance to the workforce (e.g. Gulgong and Mudgee).

The ELSI does not advocate for the land identified for future Industrial purposes to be rezoned, but recognises that developer-led Planning Proposals for rezoning would be needed, which must then be subject to ordinary application processes through Council. Should any land be subsequently rezoned, this would then contribute additional industrial zoned land at the start of the land supply pipeline.

As a consequence of the employment lands analysis undertaken, the sites located in Maps 15 to 18 of the ELSI should be recognised as providing future potential industrial employment lands in the short, medium and long term. The current zoning of these lands should be retained, recognising that there is technically significant land supply available to meet the baseline industrial needs of the Region beyond 2046, whilst acknowledging that much of this land may not be the most suitable for industrial development in the short term due to a range of factors. The ELSI provides the imprimatur for additional industrial lands within the Region to be identified and should be used as a guide for directing proponents as to where Council has earmarked future industrial lands in the Region over the Next 20 years. This will allow prospective businesses to secure sites, with flexibility in determining the most appropriate lot sizes and mix of industrial uses, which can then be addressed through formal Planning Proposals.



TABLE OF CONTENTS

EXECUTIVE SUMMARY	I
1. INTRODUCTION	1
1.1 VISION	1
1.2 MID-WESTERN REGION SNAPSHOT	2
1.3 MID-WESTERN REGIONAL EMPLOYMENT LANDS STRATEGY (INDUSTRIAL) STRUCTURE	3
1.4 POLICY CONTEXT	3
2. EMPLOYMENT LANDS WITHIN THE MID-WESTERN REGION	7
2.1 WHAT ARE EMPLOYMENT LANDS?	7
2.2 WHICH EMPLOYMENT LANDS ARE CONSIDERED IN THIS STRATEGY?	7
3. DEMOGRAPHIC AND KEY EMPLOYMENT ISSUES	9
3.1 SUMMARY OF KEY SOCIO-ECONOMIC CHARACTERISTICS	9
3.2 EMPLOYMENT TRENDS	9
3.2.1 Industries of Significance.....	9
3.2.2 Journey to Work.....	10
3.2.3 Major Projects.....	10
3.3 IMPLICATIONS FOR INDUSTRIAL LAND	12
4. INDUSTRIAL DEMAND AND SUPPLY ANALYSIS	13
4.1 INDUSTRIAL ACTIVITY	13
4.1.1 Mudgee	13
4.1.2 Gulgong.....	13
4.1.3 Ulan	14
4.1.4 Rylstone	14
4.1.5 Kandos	14
4.2 INDUSTRIAL DEMAND	15
4.3 INDUSTRIAL SUPPLY	16
4.3.1 E5 Heavy Industry Zoned Land	17
4.3.2 Summary of Analysis	17
5. STAKEHOLDER CONSULTATION	18
5.1 PUBLIC SURVEY.....	18
5.2 STAKEHOLDER INTERVIEWS.....	18
6. INDUSTRIAL EMPLOYMENT OPPORTUNITIES.....	19
6.1 OPPORTUNITIES	21
6.1.1 South-East Mudgee	21
6.1.2 North-West Mudgee	23
6.1.3 Gulgong.....	24
6.1.4 Ulan	27
6.1.5 Rylstone	27
6.1.6 Kandos	29
6.2 SUMMARY OF SITES	30
6.3 CENTRAL-WEST ORANA RENEWABLE ENERGY ZONE	36
6.4 TRANSITION FROM MINING	36
6.5 OPPORTUNITY FOR INTER-MODAL TERMINAL	37
7. SUMMARY AND RECOMMENDATIONS.....	38



LIST OF APPENDICES

APPENDIX 1 BACKGROUND ECONOMIC ANALYSIS REPORT

APPENDIX 2 BACKGROUND DOCUMENT ANALYSIS

LIST OF ACRONYMS

CLUS	Comprehensive Land Use Strategy
DCP	Development Control Plan
ELSI	Employment Lands Strategy (Industrial)
LEP	Local Environmental Plan
LGA	Local Government Area
LSPS	Local Strategic Planning Statement
MWRC	Mid-Western Regional Council
REZ	Renewable Energy Zone
SEPP	State Environmental Planning Policy
SSD	State Significant Development
URS	Urban Release Strategy



1. INTRODUCTION

Mid-Western Regional Council is committed to building a strong, resilient and sustainable industrial sector in the Mid-Western Regional local government area (the Region). Council has recognised the need to undertake further analysis to ensure appropriately zoned industrial land is available to meet demand and ensure Council's policy settings are supportive of new industrial opportunities. To enable this, the Mid-Western Employment Lands Strategy (Industrial) (ELSI) has been developed, with a critical part of the study being the identification of additional sites which may potentially be suitable for future industrial development.

The Region is expected to be a key population and employment growth area of the Central West and Orana region in the short-term future. The Region had a population of approximately 25,714 people² at 2021, which is expected to grow to approximately 33,956 by 2041³.

Employment within the Region is projected to increase significantly between 2021 and 2026, from 11,068 workers to 19,480 workers, due to the construction phase of several State Significant Developments (SSD) for clean energy projects, as part of the Central-West Orana Renewable Energy Zone. However, employment within the Region is anticipated to decrease significantly as construction is completed on these projects, fluctuating to a total workforce of between ~11,751 workers and 12,801 workers⁴.

Overall, the SSD projects alone are anticipated to generate a peak of 8,789 workers around 2026, recognising that construction may not be completed until closer to 2028. Total construction employment is anticipated to peak in 2026 with 8,515 workers, while total operational employment is anticipated to peak across 2037 to 2045 with 776 workers⁵. These SSD projects must be considered as part of Council's response to the provision of sufficient lands for industrial development.

There is also likely to be a significant decline in employment opportunities within the Region in the mining sector between 2021 and 2046, with the shift away from coal mining towards clean energy⁶.

The Mid-Western Regional Comprehensive Land Use Strategy (CLUS) 2010 is the overarching land use strategy guiding planning over the next 25 years for the Region. The CLUS identifies specific locations of future industrial land development, however with remaining supply not meeting the needs of prospective land users, the ELSI has been developed to address the need for industrial land over a 20+ year period, with a focus on land zoned E3 Productivity Support, E4 General Industrial and E5 Heavy Industrial.

The ELSI provides strategic recommendations based on a detailed industrial supply and demand analysis, to ensure that an adequate supply of industrial employment lands have been identified to meet both the identified current and future demand. The Strategy is supported by a comprehensive background economic analysis report (**Appendix 1**), which provides the evidence base for the supply and demand analysis based on economic trends, within the ELSI.

1.1 VISION

The *Our Place 2040 Mid-Western Regional Local Strategic Planning Statement (LSPS)*, outlines the following vision for the Mid-Western Region:

To provide for sustainable growth and development, having regard to the Region's unique heritage, environment and rural character, and to support agricultural enterprises and the Region's economic base (LSPS, 2020)

Building on from this, the Vision for the ELSI is as follows:

² Australian Bureau of Statistics Estimated Resident Population (2023)

³ Bull & Bear Economics (2024)

⁵ Bull & Bear Economics (2024)

⁶ Bull & Bear Economics (2024)



Mid-Western is the key gateway to the Central West and Far West regions and has a thriving and diverse industrial economy which complements its commercial and retail economy. The Mid-Western region provides a diverse range of industrial opportunities and a highly skilled workforce, leveraging off its historical mining and construction base and is dynamic and flexible. It supports the Region's role in the Central-West Orana Renewable Energy Zone, providing for maximum value add, flexibility and innovation, which evolves in response to changing needs.

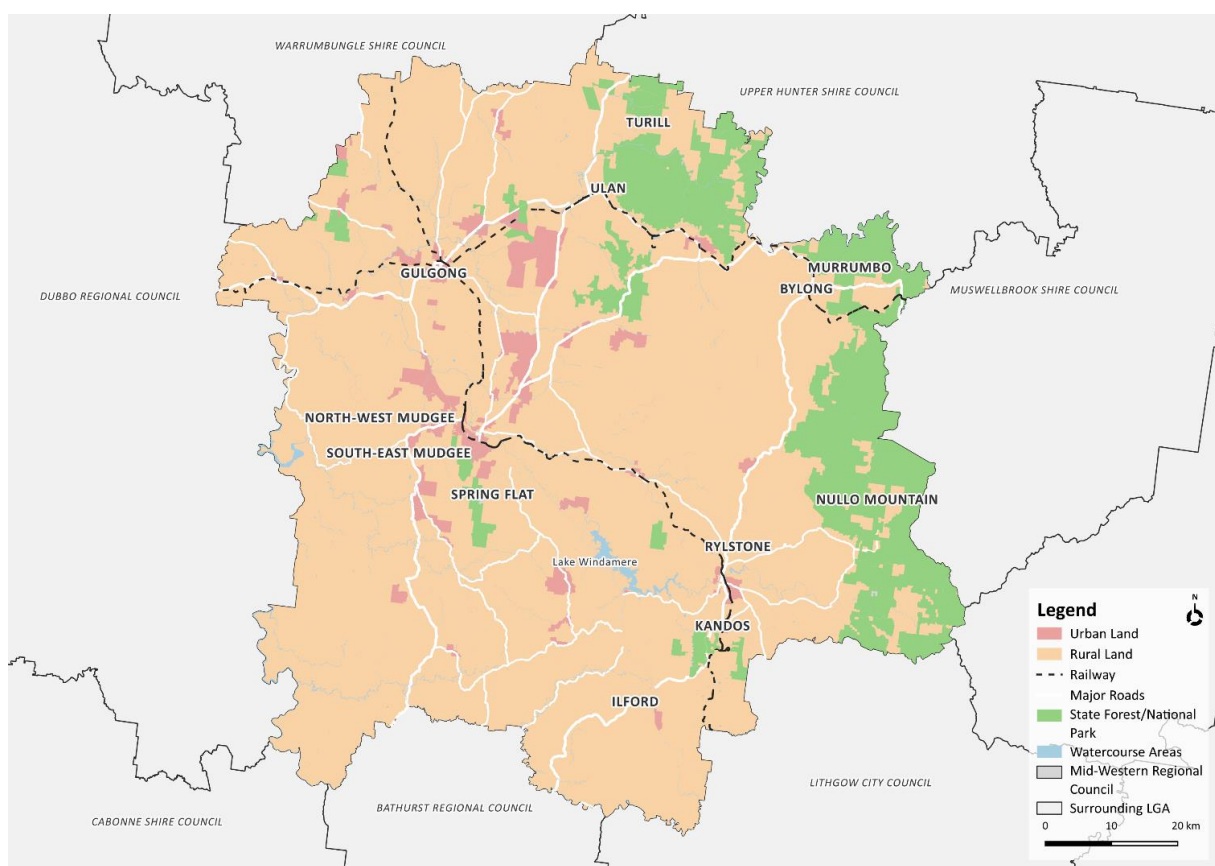
1.2 MID-WESTERN REGION SNAPSHOT

The Region is situated within the greater Central West Region of New South Wales (refer **Map 1**). With a population of approximately 25,714 and 11,068 workers at 2021⁷, the Region encompasses a diverse area that includes a range of rural, agricultural, and mining communities. The council was formed in 2004 through the amalgamation of several smaller councils, including the former Mudgee, Gulgong and Rylstone Shires.

The Region covers a significant portion of Central West New South Wales and has an area of approximately 8,737 km², with Mudgee serving as its main administrative centre. The Region features diverse landscapes, including fertile agricultural land, vineyards, and mining areas.

Agriculture, construction, property development, viticulture, mining, tourism and retail are significant contributors to the local economy. The Region is known for its wine production, particularly in the Mudgee area, which has a reputation for producing high-quality wines.

The Region's partial location within the Central-West Orana Renewable Energy Zone (REZ), provides significant opportunities for the ongoing viability of the Region, due to a number of proposed large scale projects in clean energy.



Map 1 – Mid-Western Regional LGA

⁷ Bull & Bear Economics, 2024



1.3 MID-WESTERN REGIONAL EMPLOYMENT LANDS STRATEGY (INDUSTRIAL) STRUCTURE

The ELSI has been structured as follows:

- 1. Section 1 – Introduction
- 2. Section 2 – Employment Lands Within Mid-Western
- 3. Section 3 – Demographics and Key Employment Issues
- 4. Section 4 – Employment Activity and Demand and Supply Analysis
- 5. Section 5 – Industrial Employment Opportunities
- 6. Section 6 – Summary and Recommendations

1.4 POLICY CONTEXT

A review of the relevant background documents and policies has been undertaken to inform the preparation of the ELSI (**Appendix 2**). These documents and policies provide important background context in terms of Council’s established policy framework for the management of employment lands and the desired future for employment and economic development for the Region. A summary of these documents is provided in Table 1.

Table 1 – Background Document Review

Document	Document summary
Mid-Western Regional Comprehensive Land Use Strategy 2010 (Part C)	<p>The Mid-Western Regional Comprehensive Land Use Strategy (CLUS) 2010 provides a basis for identifying options to meet long term urban and rural growth needs across the Region until 2031.</p> <p>The CLUS includes Town Structure Plans (TSPs) for Mudgee, Gulgong, Rylstone and Kandos. The TSPs visually represent the outcomes of the strategy, which identifies the location of the future supply of land, including future industrial development opportunities. The CLUS has been considered when identifying potential future industrial sites as part of the ELSI, to ensure that any areas identified are consistent with the CLUS and do not encroach on land already identified for other purposes, such as for residential development.</p>
Mudgee and Gulgong Urban Release Strategy 2014	<p>The Mudgee and Gulgong Urban Release Strategy 2014 is a 20-year strategic framework that has been created to inform the release of residential land within the townships of Mudgee and Gulgong to meet housing needs and facilitate projected future growth.</p> <p>This strategy has been considered to ensure that the identification of potential future industrial sites as part of the ELSI do not interfere with the proposed urban release areas.</p>



Document	Document summary
Mudgee and Gulgong Urban Release Strategy 2023 Update	<p>The Mudgee and Gulgong Urban Release Strategy 2023 Update provides an updated housing supply and demand analysis to the existing Mudgee and Gulgong Urban Release Strategy 2014.</p> <p>This Strategy has also been considered to ensure that the identification of potential future industrial sites as part of the ELSI do not interfere with the proposed urban release areas. Further, the updated projections have been utilised to feed into the background economic analysis which has been prepared in support of the ELSI (Appendix 1).</p>
Mid-Western Regional Council Retail Review Final Report 2005	<p>The Mid-Western Regional Council Retail Review Final Report 2005 provides a comprehensive review of retail and commercial needs in the Mid-Western region.</p> <p>The current direction of Council policy is the designation and facilitation of a bulky goods precinct to adjoin or as part of the Mudgee Industrial area focused on Sydney Road. However, an important issue for future policy development is the extent to which this area should be allowed or facilitated to develop as a major bulky goods precinct to meet the needs of the Shire and surrounding districts.</p> <p>The focus of the ELSI is on the provision of appropriate future industrial employment lands and it does not consider retail and commercial employment lands, as addressed by this Retail Review.</p>
Mid-Western Regional Economic Development Strategy –2023 Update	<p>The Mid-Western Regional Economic Development Strategy – 2023 Update provides an updated evidence base to guide governments in policy and investment decisions related to long term economic growth. The Strategy provides an overview of key changes and trends that have occurred since 2018, an economic snapshot of the Region, identifies opportunities and constraints for future growth, and provides updated economic strategies.</p> <p>The Strategy identifies future release of industrial land, and proactive planning for industrial land as a key enabler of future economic growth for the Region, specifically growing industry clusters around mining, manufacturing, agriculture and renewable energy.</p>
Draft Central West and Orana Transport Plan	<p>The Draft Central West and Orana Transport Plan is a supporting plan of Future Transport 2056 and provides a strategic framework outlining how transport within the Region will be informed by changes in land use, population and travel demand.</p> <p>The draft Transport Plan has been considered in the preparation of the ELSI, to ensure that any potential future industrial sites identified are well-located and accessible to key transport infrastructure.</p>
Central West and Orana Regional Plan 2041	<p>The Central West and Orana Regional Plan 2041 is a strategic framework that informs the growth of the Region through a 20-year land use plan, with a focus on the next 5 years. The document outlines objectives (high level goals) for the Region which is</p>



Document	Document summary
	<p>supported by strategies, actions and collaborative activities that are to be implemented by varying government departments and councils.</p> <p>The high level goals identified within the plan have been considered in the preparation of the ELSI in terms of providing context to future development and industrial uses within the Region.</p>
Our 2040 Mid-Western Regional Local Strategic Planning Statement 2020	<p>The Mid-Western Regional Local Strategic Planning Statement 2020 provides a 20-year vision for land use planning in the , by outlining planning priorities for the Region and providing short, medium and long term strategic actions that support the outlined priorities.</p> <p>The identified planning priorities outline land use actions, some of which are relevant to the ELSI, including undertaking an industrial land use survey. The Vision established by the LSPS has also informed the preparation of a vision statement for the ELSI.</p>
Mid-Western Local Environmental Plan 2012	<p>The Mid-Western Regional Local Environmental Plan 2012 (LEP) is a statutory document that outlines legislative provisions on zoning, development processes and development application requirements, development standards, prohibited development, and other provisions.</p> <p>The Mid-Western LEP has been consulted in the preparation of the ELSI to ensure identified current and future industrial land comply with the provisions set under the Mid-Western LEP, as relevant.</p>
Mid-Western Development Control Plan 2013	<p>The Mid-Western Development Control Plan 2013 (DCP) supports the objectives of the LEP and sets out the definitions, standards and other provisions related to local development within the Region.</p> <p>The DCP has been broadly considered in the preparation of the ELSI to ensure identified current and future industrial land comply with the provisions set under the DCP.</p>
Development Servicing Plan for Mid-Western Regional Council	<p>The Water Supply Development Servicing Plan 2008 outlines water supply developer charges, and requirements related to the provision of water supply to the Region.</p> <p>The Sewerage Development Servicing Plan outlines sewerage developer charges, and requirements related to the provision of sewerage services to the Region.</p> <p>Any additional lands identified for future industrial employment as part of the ELSI must be capable of being adequately serviced, in order for it to be viable.</p>
State Environmental Planning Policies	<p>The NSW State Government has developed a number of State Environmental Planning Policies (SEPPs) to address significant State issues. SEPPs contain individual chapters that apply to certain areas or specific circumstances. In some cases, they may override Council LEPs and DCPs, while in other cases they are applied in conjunction with them. Several SEPPs were consolidated on 1 March 2022 (State Environmental Planning Policies Planning (nsw.gov.au)).</p>



Document	Document summary
	<p>SEPPs which are of particular relevance to the consideration and preparation of the ELSI include:</p> <ul style="list-style-type: none">• Industry and Employment• Resilience and Hazards• Resources and Energy• Transport and Infrastructure



2. EMPLOYMENT LANDS WITHIN THE MID-WESTERN REGION

2.1 WHAT ARE EMPLOYMENT LANDS?

Employment lands refers to the following types of activities:

- **Industrial activities** refers to the manufacturing, production, assembling, altering, formulating, repairing, renovating, ornamenting, finishing, cleaning, washing, dismantling, transforming, processing, recycling, adapting or servicing of, or the research and development of, any goods, substances, food, products or articles for commercial purposes, and includes any storage or transportation associated with any such activity.
 - *Light industrial* refers to a building or place used to carry out an industrial activity that does not interfere with the amenity of the neighbourhood by reason of noise, vibration, smell, fumes, smoke, vapour, steam, soot, ash, dust, wastewater, waste products, grit or oil, or otherwise, and includes high technology industry, home industry, artisan food and drink industry and creative industry.
 - *Heavy industry* refers to a building or place used to carry out an industrial activity that requires separation from other development because of the nature of the processes involved, or the materials used, stored or produced, and includes hazardous industry, or offensive industry.
- **Commercial activities** refers to activities carried out on a commercial premises, which includes:
 - *Business premises*: means a building or place on which an occupation, profession or trade (other than an industry) is carried on for the provision of services directly to members of the public on a regular basis.
 - *Office premises*: means a building or place used for the purpose of administrative, clerical, technical, professional or similar activities that do not include dealing with members of the public at the building or place on a direct and regular basis, except where such dealing is a minor activity (by appointment) that is ancillary to the main purpose for which the building or place is used.
 - *Retail premises*: means a building or place used for the purpose of selling items by retail, or hiring or displaying items for the purpose of selling them or hiring them out, whether the items are goods or materials (or whether also sold by wholesale).

For the purposes of the ELSI, the focus is on industrial development land and activities, as defined above.

2.2 WHICH EMPLOYMENT LANDS ARE CONSIDERED IN THIS STRATEGY?

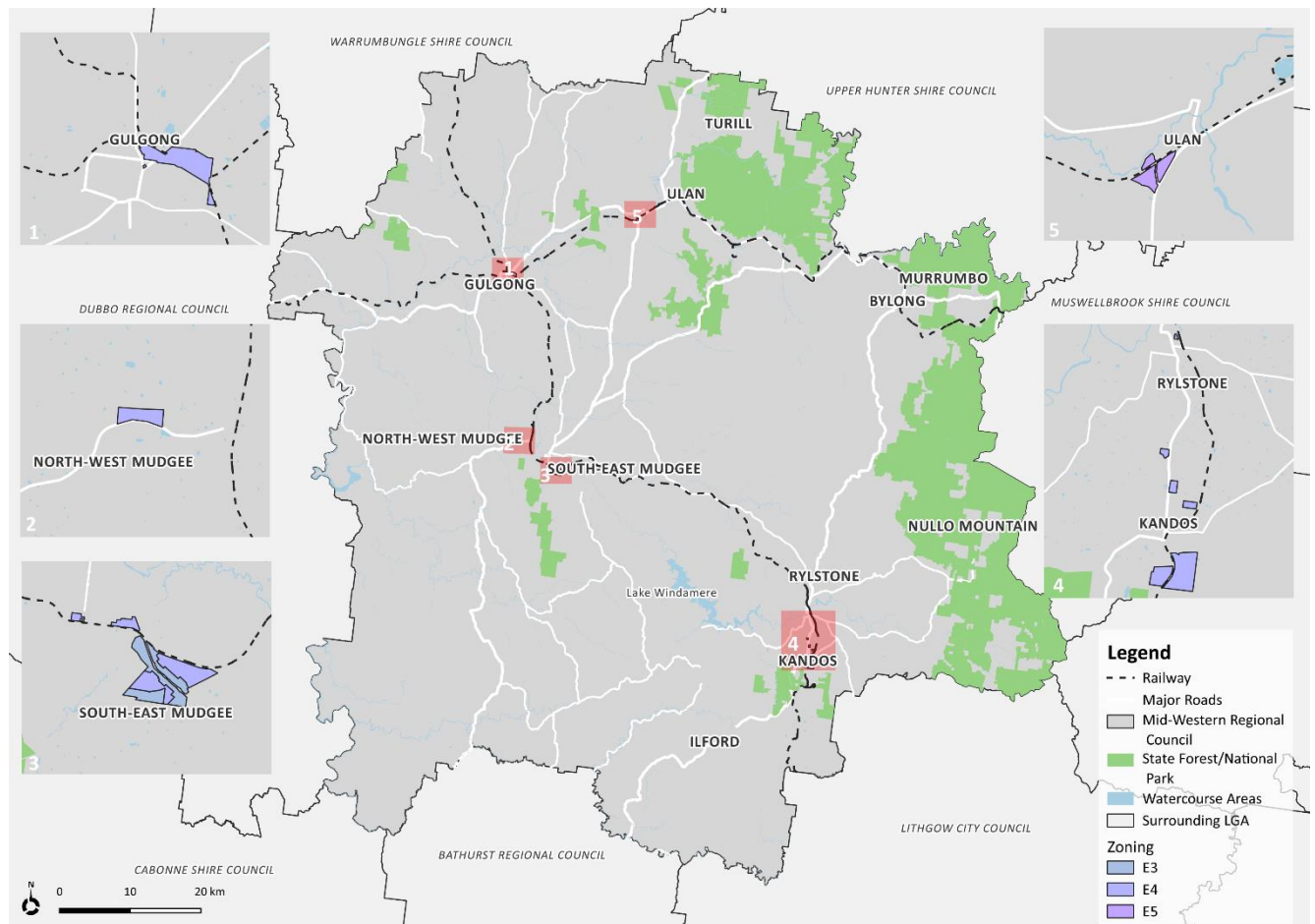
The Mid-Western Regional Comprehensive Land Use Strategy (CLUS) 2010 is the overarching land use strategy guiding planning over the next 25 years for the Mid-Western region. Town Structure Plans included as part of the CLUS visually represent the outcomes of the Strategy and specifically identify the location of the future supply of land, including for industrial development.

With the majority of remaining industrial land supply not meeting the needs of prospective land users, or is already committed or appropriately located to service the significant number of SSD projects coming online as part of the Central-West Orana Renewable Energy Zone (REZ), the ELSI specifically addresses the need for additional industrial land over a 20+ year period, and considers the following employment land zones (refer **Map 2**):

- E3 Productivity Support
- E4 General Industrial
- E5 Heavy Industrial



In addition, the ELSI also gives consideration to the Central-West Orana REZ and a number of SSDs for clean energy projects proposed in relation to the REZ. It considers the issues associated with planning for the significant (temporary) influx in the construction workforce to service these developments, as well as post-construction and what this means for industrial employment lands for the Region in the longer term.



Map 2 – Mid-Western Regional LGA Employment Zoned Lands



3. DEMOGRAPHIC AND KEY EMPLOYMENT ISSUES

The key demographics and employment issues relevant to the development of the ELSI are important as they assist in identifying the need (or otherwise) for additional employment lands for industrial development to service the Region.

3.1 SUMMARY OF KEY SOCIO-ECONOMIC CHARACTERISTICS

The Region's workforce is largely supported by the mining industry which employs 19.1% of the workforce. Mining has likely influenced demand for industrial land within the Region, alongside the agricultural sector.

Population growth across the Region has remained similar (albeit slightly lower) to the overall population growth across New South Wales.

The most significant industries in the Region are mining, retail trade, health care and social assistance, accommodation and food services, education and training, construction and agriculture. Of these industries, mining, construction and agriculture are of most relevance for industrial land provision.

More than 90% of the Mid-Western region's resident workers work and live within the Region. This indicates there are not large proportions of the resident population or the workforce who are travelling between LGAs to their place of work or residence. It is therefore critical to ensure that there is sufficient industrial land in the right areas to support industrial activity within the Region.

There are several major projects and SSDs which have recently commenced or are about to commence construction and operation. The construction and operations of these projects may have implications for industrial land demand which is investigated further throughout this Strategy.

3.2 EMPLOYMENT TRENDS

3.2.1 Industries of Significance

From 2016 to 2021, the most significant industries of employment within the Region shifted from mining and retail trade in 2016 to mining and health care and social assistance in 2021 (Refer Table 2-5 in Appendix 1).

This analysis identifies that the Region has relative strengths (in terms of employment outcomes in the following industry sectors):

- Agriculture, forestry and fishing (relative to NSW);
- Mining (relative to both Central West and Orana Regional Plan Area and NSW); and
- Accommodation and food services (relative to both Central West and Orana Regional Plan Area and NSW).

Between 2016 and 2021, employment shifts varied by industry sector, with employment in mining and health care and social assistance increasing; but a decline in the retail trade, agriculture, forestry and fishing.

The most dominant industries of employment across the Region are mining, health care and social assistance and retail trade. This analysis identifies mining, in particular coal mining, is the dominant industry supporting the Region's workforce.

3.2.1.1 Coal Mining

Coal mining was the most significant industry of employment in the Region as of the 2021 Census, employing an estimated 1,898 workers. There are three thermal coal mines in the Region (Wilpinjong, Ulan West and Underground and Moorlarben), all located around Ulan that produce a combined ~42 million tonnes (Mt) of coal per annum.



3.2.1.2 Agriculture

The agriculture sector provided employment for ~785 persons in the Region and generated a Gross Value Added (GVA) of approximately \$88 million in 2021, representing 0.5% of NSW GVA. The most significant agriculture product by GVA in 2021 was livestock production, followed by cereals production. Comparatively, the New South Wales agriculture sector reported a total GVA of approximately \$17.5 billion in 2021.

3.2.1.3 Tourism

The industries of retail trade, accommodation and food services employed approximately 1,974 persons in 2021 across the Region. Employment within these sectors is supported by tourism to the Region.

As of 2019, the Region welcomed a total of 691,000 tourists, whereby 410,000 tourists were domestic overnight travellers, 276,000 tourists were domestic day travellers, and 5,000 tourists were international visitors. The visitor market is dominated by domestic day trippers and domestic overnight visitors with very few international visitors, likely due to its distance from a major airport which can accommodate international flights. The Region's tourism industry generated an estimated \$199 million in total visitor expenditure.

3.2.2 Journey to Work

This section of the report provides an overview of the employment location of residents in the Region, as well as the residential location of employed persons, as of the 2016 and 2021 Censuses.

3.2.2.1 Employment Location of Residents

In 2016, there were 9,623 resident workers within the Region, which has since increased by 1,774 persons to 11,397 resident workers in 2021. The proportion of resident workers employed locally has declined marginally from 90.0% of resident workers in 2016 to 89.4% of resident workers in 2021. Notably, more than 4.0% of resident workers did not report a fixed place of work. This does not necessarily mean these persons do not work within the Region, rather it indicates that these workers do not have a permanent fixed office location. The most significant industry for these workers was construction, followed by fly in fly out (FIFO) workers.

Approximately 5.9% of resident workers travelled outside of the Region for work. The most significant LGAs Mid-Western resident workers travelled to were neighbouring LGAs such as Dubbo Regional Council, Lithgow City Council and Warrumbungle Shire Council.

3.2.2.2 Residential Location of Workers

Workers within region mostly lived within the Region. This is evident as the proportion of the working population who resided in the Region represented 92.1% of the working population in 2021, representing a slight increase from 2016.

The most significant places of usual residence for the working population remained relatively similar in 2016 and 2021 with the top LGAs being Warrumbungle Shire Council, Dubbo Regional Council, Lithgow City Council and Lake Macquarie City Council.

3.2.3 Major Projects

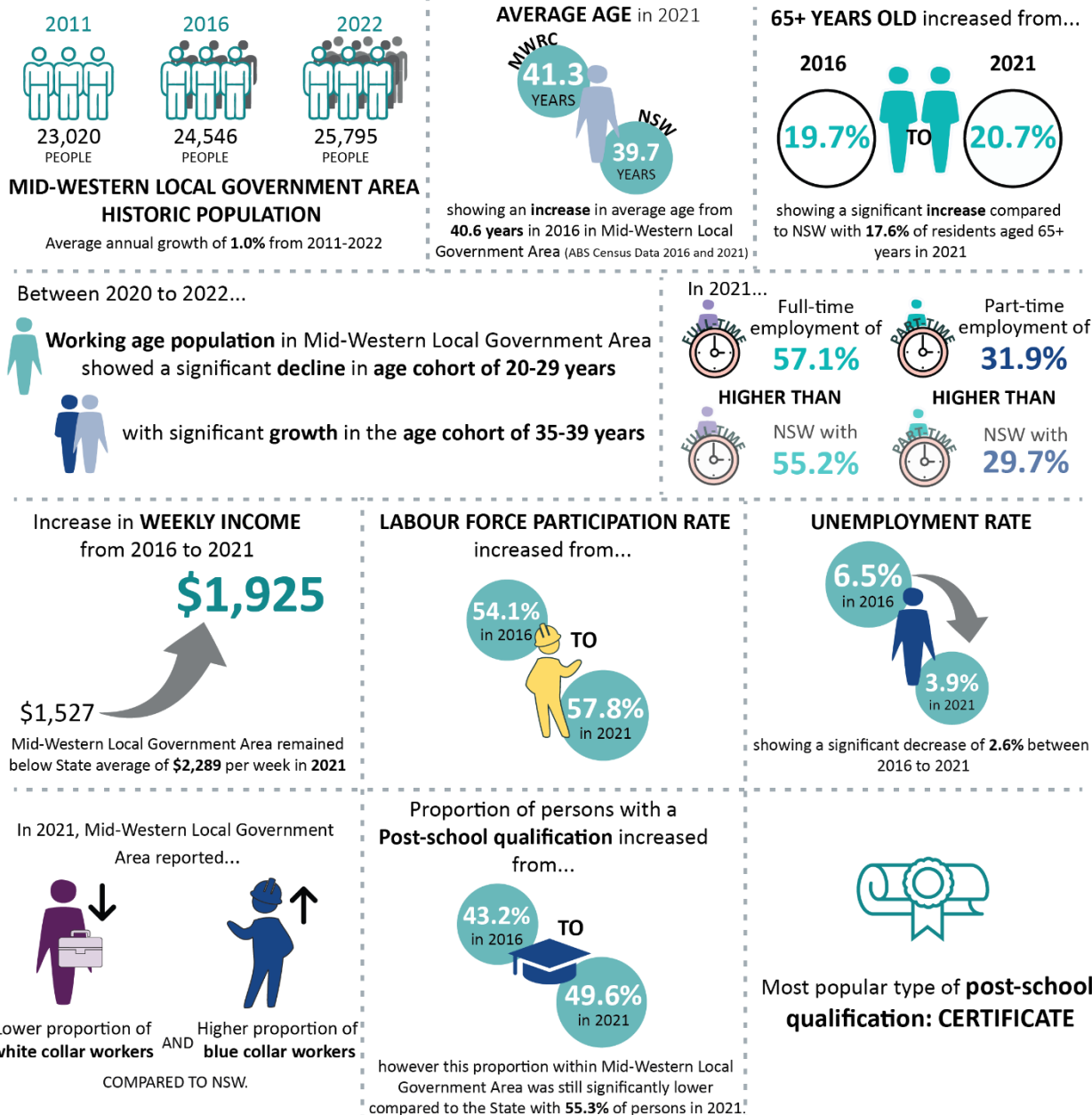
The Mid-Western Regional Economic Development Strategy – 2023 Update listed several private and public major projects which have occurred in the Region since 2018. These projects are relevant to the ELSI in that they create additional jobs, increase demand for supporting industrial uses and/or improve freight transport throughout the Region.

Council is considering the effects that a large number of SSDs will have on their economy. The majority of these projects are solar and wind farm constructions. The largest estimated construction workforce is expected for the Secure Now projects (combined total of 2,330 persons), while Ulan Coal reported the largest operational workforce (931 workers), followed by Bowdens Silver Mine (228 workers).

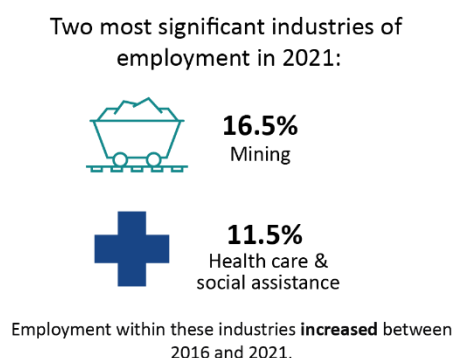
Figure 1 provides a summary of the key demographic information for the Region.



MID-WESTERN LOCAL GOVERNMENT AREA POPULATION & SOCIO ECONOMIC PROFILE



ECONOMIC AND MAJOR PROJECTS



Major Private Investments since 2018

Crudine Ridge Wind Farm
Moolarben and Ulan Coal Mine Expansions
Beryl Solar Farm
St Matthews School New Senior Campus
Stubbo Solar Farm
Bowdens Silver Project
Wollar Solar Farm
Mudgee Spring Estate

Major Public Investments since 2018

Mudgee Hospital redevelopment
Glen Willow Sporting Complex Upgrade
Mudgee Arts Precinct
Bylong Valley Way Upgrades
Putta Bucca Eco Trail Project
Goulburn River Bridge Replacement
Wollar Road Upgrade

Source: Based on information contained in MWRC Employment Lands Strategy (Industrial) – Background Report, Bull & Bear Economics, 2024

Figure 1 – Summary of Key Demographic Information for Mid-Western Regional LGA



3.3 IMPLICATIONS FOR INDUSTRIAL LAND

Based on the socio-demographic analysis and employment trends outlined above, the following implications have been identified when planning for the provision of future industrial employment lands within the Region:

- The Region's workforce is largely supported by the mining industry, which has likely influenced demand for industrial land within the Region, alongside the agricultural sector. There is also likely to be a significant decline in employment opportunities in the mining sector between 2021 and 2046, with the shift away from coal mining towards clean energy;
- Population growth across the Region has remained similar (albeit slightly lower), to the overall population growth across New South Wales;
- The most significant industries in the Region are mining, retail trade, health care and social assistance, accommodation and food services, education and training, construction and agriculture. Of these industries, mining, construction and agriculture are of most relevance for industrial land provision. It is also noted there has been an increase in the proportion of persons employed within the manufacturing sector;
- More than 90% of the Region's resident workers work and live within the Region. This indicates there are not large proportions of the resident population or the workforce who are travelling between LGAs to their place of work or residence. It is therefore critical to ensure there is sufficient industrial land in the right areas to support industrial activity within the Region; and
- There are several major projects and SSDs which have recently commenced or are about to commence construction and operation. The construction and operations of these projects will have implications for industrial land demand.



4. INDUSTRIAL DEMAND AND SUPPLY ANALYSIS

Below outlines the rate of industrial activity within the key townships and villages of the Region.

4.1 INDUSTRIAL ACTIVITY

4.1.1 Mudgee

4.1.1.1 *South-East Mudgee*

South-East Mudgee (refer Map 2) hosts the largest industrial precinct within the Region, which includes General Industrial (E4) and Productivity Support (E3) zoned land at Burrundulla. The industrial zoned land is separated into three main parcels, two small parcels of E4 zoned land above the rail line and a large industrial precinct below the rail line including both E4 and E3 zoned land. This rail line is not currently operational.

The E4 zone includes two vacant sites below the rail line, providing 0.96 hectares of vacant industrial land. There is also one vacant lot within the E3 zone on the corner of Lions Drive and Sydney Road, which is 5.38 hectares in size. It is understood that there is an approved development application for a Bunnings on this site. As such, this lot is expected to be developed in the short term. Lastly, there is a small site above the rail line that includes four residential sites totalling 0.3 hectares. While zoned E4, given the small scale of these allotments, they are considered unlikely to be redeveloped for industrial purposes despite the zoned intent.

These industrial areas are mostly built out with limited vacancies. The majority of industrial allotments within South-East Mudgee are small lots (less than half a hectare). The businesses within the E4 General Industrial zone include construction supplies (concrete, plumbing, electrical, windows, doors etc.), self-storage, truck repairs, towing, milling, agriculture supplies (pumps and irrigation, landscaping etc.), solar energy equipment suppliers and mechanics. The businesses within the E3 Productivity Support zone have a stronger focus towards bulky goods retailers such as Bunnings, Homemakers Furniture and Harvey Norman, with other uses including car dealers, rural supplies and gyms. Notably, the Mudgee BIG4 Holiday Park is located within the E3 Productivity Support zone.

4.1.1.2 *North-West Mudgee*

There is a new industrial precinct (titles were registered in 2022) located in North-West Mudgee on Hill End Road (refer Map 2). This estate is largely vacant, with several sites under construction and the supply already brought to market. The industrial subdivision is made up of 30 lots with a total of approximately 19.5 hectares. Developments are already present on several lots, and property sales records indicate the sale of numerous lots within this estate, suggesting a significant portion of this land could be developed over the next 12 months.

4.1.2 Gulgong

The Gulgong industrial precinct is the second largest industrial precinct in the Region (after South-East Mudgee). There is one small E3 zoned lot within the precinct, with the remainder zoned E4.

The E3 zoned land is a 0.2 hectare lot on the corner of Station Street and Herbert Street which accommodates a mechanic and petrol station.

The E4 zoned land surrounds the Gulgong train station and includes land to the north and south of the rail line. Although it is significantly smaller than the South-East Mudgee Industrial Precinct, it has much larger lot sizes with industrial businesses more spread out across these lots. The lots are mostly larger than one hectare in size with only a handful of smaller lots (less than half a hectare). Key industrial businesses in this precinct include Nepean Conveyors, R & J Andrew's Haulage, Hardware & Welding Supplies, Gulgong transport depot and two storage unit businesses.

There is one 0.45 hectare vacant industrial site identified in Gulgong on the corner of Industrial Avenue and Saleyards Lane. In addition, a 2.78 hectare vacant industrial site was identified between Rouse Street and the rail



line. However, upon further investigation this lot is on Crown land and as such cannot be used for industrial purposes.

4.1.3 Ulan

The only E5 Heavy Industrial zoned land in the Region is in Ulan which is proximate to the three coal mines in the Region. This land consists of two lots either side of Toole Road and is largely vacant with only one industrial business on the site, namely the Holcim Australia – Ulan Concrete Plant. The entire industrial zone and surrounding Environmental Management zone is owned by the same company. Excluding the land with the Holcim Australia – Ulan Concrete Plant, there is approximately 20 hectares of vacant E5 Heavy Industrial zoned land at this site.

It is understood there is an approved development application for subdivision of the land along the Toole Road side of the rail line which is not yet registered. For the purposes of this assessment this land is still considered to be underutilised.

4.1.4 Rylstone

The industrial land at Rylstone consists of six lots within the E4 zone. The lots are between one and two hectares in size. All lots have been developed, leaving no vacant land within Rylstone.

4.1.5 Kandos

The industrial land in and around Kandos consists of four sites of E4 zoned land.

The site along Bylong Valley Way has three lots, one of which hosts the Kandos Sewage Treatment Plant, one lot has another industrial business and the large site hosts CBG Engineering Services. Surrounding the CBG Engineering Services building (on the same lot) there is approximately five hectares of vacant land.

The site north of Kandos closest to the rail line is approximately eight hectares and vacant. However, this lot is isolated and is not connected to the road network, which would likely act as a barrier to its uptake.

The lot to the south of the town hosts the old Kandos Cement Works and Quarry which is currently under care and maintenance. To the south of the Cement Works buildings there is approximately 30 hectares of vacant land within the industrial zone. There is also 30 hectares of industrial land to the west of the rail line which is also vacant.



4.2 INDUSTRIAL DEMAND

Based on the Mid-Western Regional Council industrial employment estimates (detailed in Section 6.2 of the background report in Appendix 1) and estimated demand generated by the State Significant Development (detailed in Section 6.3 of the background report in Appendix 1), total industrial employment is anticipated to increase from 1,979 workers in 2023 to 2,592 workers in 2041, before declining slightly to 2,490 workers in 2046.

Figure 2 summarises projected industrial employment in the Region between 2021 and 2046.

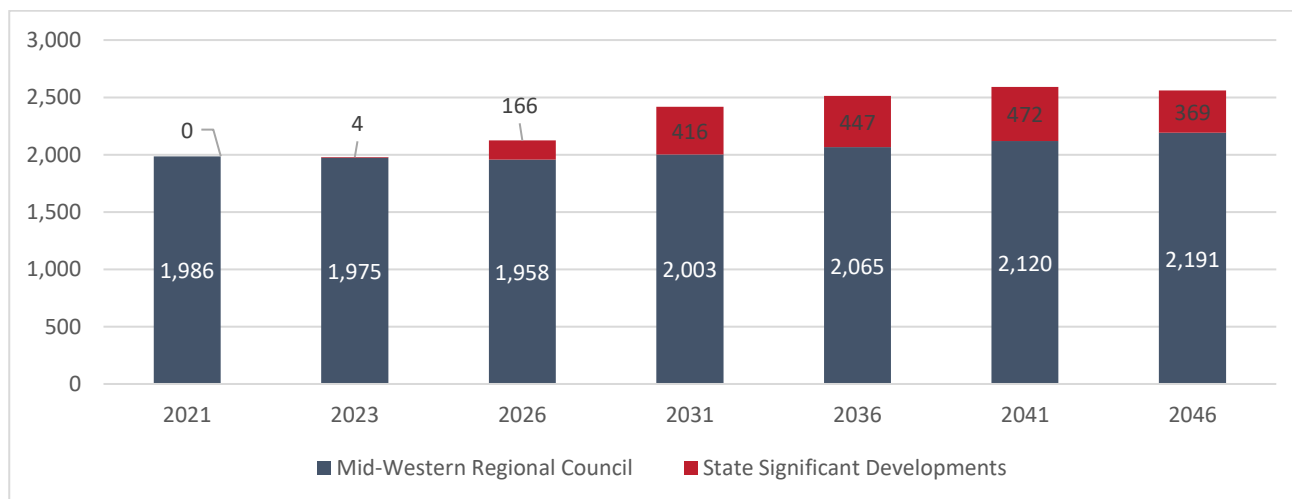


Figure 2 – Total Industrial Employment – Mid-Western Regional LGA, 2021 to 2046 (Source: Bull & Bear Economics, 2024)

This translates to demand for an additional 20.9 hectares of industrial allotments over and above current provision in 2041, with industrial land demand predominantly for service industry uses driven by the establishment of several SSDs within the Region. This demand decreases slightly to 2046 at ~19.7 hectares (refer Figure 3).

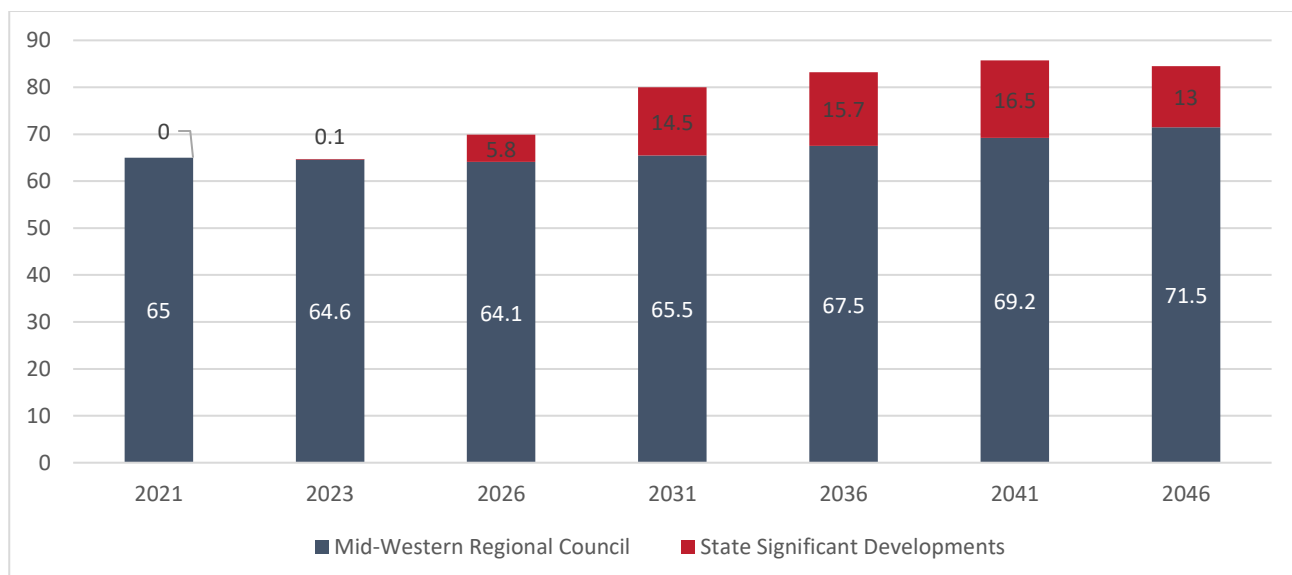


Figure 3 - Demand for Industrial Land Allotments (hectares) – Mid-Western Regional LGA, 2021 to 2046 (Source: Bull & Bear Economics, 2024)

It is critical to ensure that vacant industrial land is available within proximity to service the SSD projects, on allotments of a suitable size. The concentration of land demand within the service industry sector is suggestive of a need to ensure small allotments (up to two hectares in size, within the E4 General Industrial zone) are available



within proximity to the Central West-Orana Renewable Energy Zone (REZ), with Gulgong and Mudgee considered the most suitable locations to service this need.

However, this does not preclude the ELSI from identifying sites in other locations as also being potentially suitable for future industrial development, over the short to longer term.

4.3 INDUSTRIAL SUPPLY

Based on the analysis undertaken, in total there are 37 vacant lots constituting 94.37 hectares of vacant industrial land (36 lots on E4 zoned land (87.99 hectares) and one lot on E3 zoned land (5.38 hectares)) across the Region.

The majority of vacant industrial land is located in Kandos (68 hectares) and North-West Mudgee(16.80 hectares). Figure 4 summarises vacant industrial land and Table 3 summarises vacant industrial land by zone and locality across the Region as of November 2023.

The majority of remaining industrial land supply is on large allotments within Kandos and small allotments in North-West Mudgee. However, it is recognised that the vacant land in North-West Mudgee does not truly represent remaining industrial land supply, as these lots are already zoned for industrial purposes and have been registered.

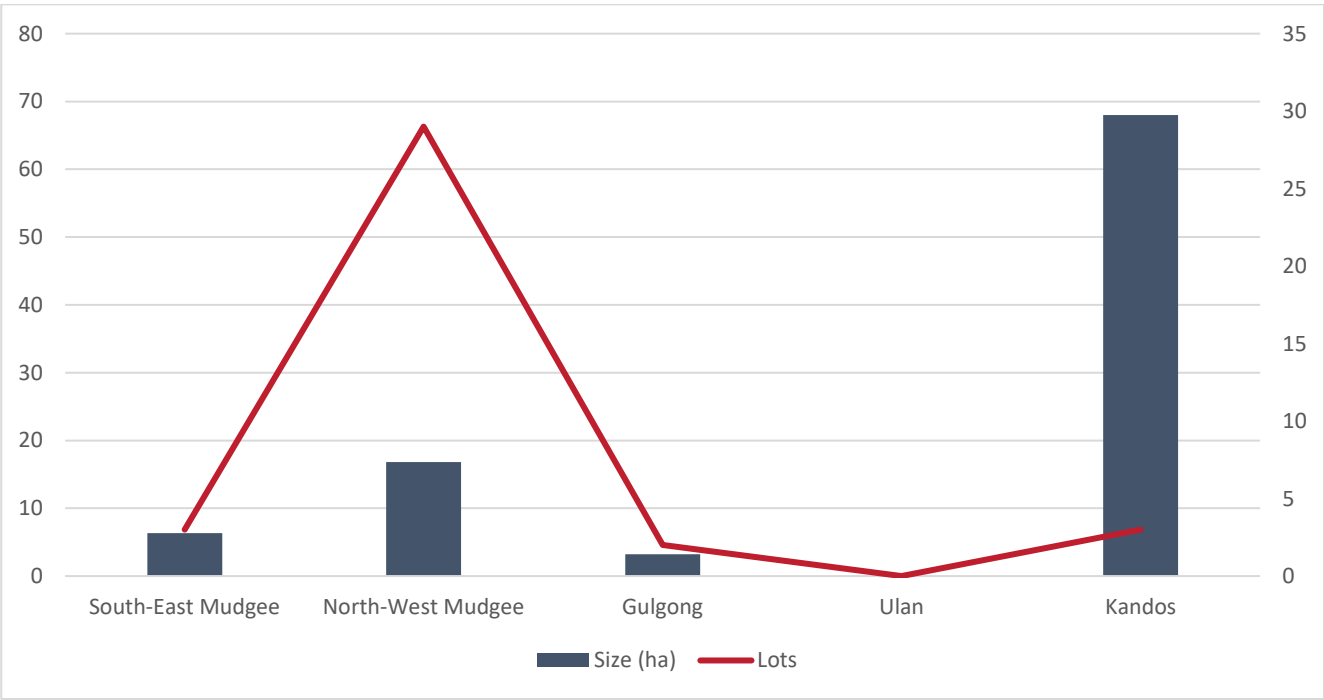


Figure 4 – Vacant Industrial Land (Source: Bull and Bear Economic, 2024)

Table 2: Vacant Industrial Land by Zone and Locality (Source: Bull and Bear Economics, 2024)

	Productivity Support (E3)	General Industrial (E4)	Heavy Industrial (E5)	Total
South-East Mudgee	5.38	0.96	0.00	6.34
North-West Mudgee	0.00	16.80	0.00	16.80
Gulgong	0.00	3.23	0.00	3.23
Ulan	0.00	0.00	0.00	0.00
Kandos	0.00	68.00	0.00	68.00
Total	5.38	88.99	0.00	94.37



4.3.1 E5 Heavy Industry Zoned Land

The Strategy recognises that the only E5 Heavy Industry zoned land is currently within Ulan, with approximately 20 hectares of vacant E5 Heavy Industry zoned land remaining in this locality. Further, it is recognised that there may be opportunities for some additional E5 Heavy Industry zoned land to be located within North-West Mudgee, however the proximity to sensitive land uses would need to be considered. A Planning Proposal would need to be brought forward and considered by Council, with sufficient justification provided.

Despite this, the ELSI encourages maximum flexibility in the development of future heavy industrial land. Should a suitable proposal be submitted which involves heavy industrial uses, then this could potentially be located on any future industrial site nominated within the Strategy, subject to verification of constraints and demonstrating that the site is suitable to accommodate these types of uses, being cognisant of adjoining land uses and necessary buffers and amelioration measures.

4.3.2 Summary of Analysis

The analysis identifies a significant amount of vacant industrial land within the Region, comprising 94.37 hectares of land, mostly contained within Kandos and North-West Mudgee. However, it has already been acknowledged that E4 zoned land within North-West Mudgee is not truly representative of remaining industrial land supply.

Vacant E4 zoned land within Kandos is on lots at least five hectares in size, pointing to a potential need to subdivide this land into smaller allotments to facilitate its development. However, its relative isolation from other population centres in the Region is likely to limit its appeal relative to other offerings within the Region.

There was no vacant E5 zoned land identified, pointing to a potential opportunity to zone additional land for these uses if required. An opportunity may exist to zone some land as E5 within North-West Mudgee, recognising the limitations of the existing E5 zoned land within Ulan. However, any policy decision made in this regard by Council would need to be cognisant of nearby adjoining sensitive land uses.

There was one vacant E3 zoned allotment identified in South-East Mudgee, which is just over five hectares in size, which already has an approved development application for a Bunnings, so this will also likely be developed in the short term. Opportunities for further land to be identified for future industrial purposes in South-East Mudgee should be explored, considering the limited vacancies which exist on current industrial zoned land in this area.

These factors all suggest that whilst significant opportunity appears available to accommodate industrial activity in the Region, it may not align with the expectations of industrial users, pointing to a potential need to identify additional land to facilitate future industrial land development.



5. STAKEHOLDER CONSULTATION

As part of the development of the ELSI, targeted stakeholder consultation was conducted with business and land owners and a public survey was also conducted. Below outlines the results of that consultation.

5.1 PUBLIC SURVEY

The public survey was made available on Council's website, between 12 January to 15 February 2024, with 170 responses received during this period.

A summary of the survey results are as follows:

- 88 per cent of those surveyed were supportive of more industrial activity / lands within the Region and were mainly supportive of light industrial activity, followed by heavy industrial activity;
- Suggested locations for more industrial activity /lands included Kandos, South-West Mudgee (Caerleon) and Gulgong;
- To incentivise more industrial activity, the community would like to see:
 - Appropriate separation / buffers from any functional tourist areas and residential areas;
 - Sufficient and appropriate road access (i.e. B-double routes) to support industrial uses, and heavy vehicle detours to avoid schools; and
 - Sufficient housing will be needed to support industrial employment lands, in providing a place for workers to live.
- Only 24 per cent of respondents would utilise or move their business if more industrial lands were available – ideal locations included South-East Mudgee, North-East Mudgee (Caerleon), Gulgong, Kandos or Rylstone;
- 62 per cent of respondents did not have any issues with any new or existing industrial activities within the area, however, some key concerns were raised around managing the amenity and other impacts of new or existing industrial activities on surrounding uses. Feedback received from the survey responses generally indicated broad support for the development of the ELSI.

5.2 STAKEHOLDER INTERVIEWS

Targeted interviews were conducted with real estate agents, business owners and members from the Chamber of Commerce. Nine interviews were completed with those willing to participate, consisting of five real estate agents, two business owners and two members from the Chamber of Commerce.

Key issues raised included:

- The need for more industrial land in Mudgee as this is the primary centre for the Region and there is already a shortage of land available which would likely be taken up if additional industrial land was brought to market;
- Business owners find that there are a need for larger sized blocks to support growing businesses, however, the demand for lot size varies across the industry;
- Land supply is apparent, but is still not readily available. There will be a lot of work needed by Council to incentivise the take up of earmarked industrial lands;
- Housing is critical to support the growth of the industrial sector, this is evident in seeing how renewables projects have had to manage this;
- Freight efficiencies to improve transit to Sydney and other major hubs will help boost industrial development.



The results of this stakeholder consultation was considered as part of the development of the ELSI and particularly in identifying potential sites for future industrial employment opportunities.

6. INDUSTRIAL EMPLOYMENT OPPORTUNITIES

There is anticipated demand for an additional 19.7 hectares of industrial allotments between 2023-2046. Given that there is currently approximately 91.6 hectares of vacant industrial land across the Region, this would suggest that there is theoretically remaining capacity to accommodate future industrial land demand to 2046, with significant remaining capacity beyond 2046.

Table 4 provides a comparison of the incremental industrial land demand against remaining vacant industrial land in the Region.

Table 3 - Supply Demand Balance Industrial Land – Mid-Western Regional LGA, 2023 to 2046 (Source: Bull & Bear Economics, 2024)

	2023	2026	2031	2036	2041	2046
Incremental Land Demand (on 2023 levels)	-	5.1	15.3	18.4	20.9	19.7
Vacant Land Supply (November 2023)	91.6	91.6	91.6	91.6	91.6	91.6
Supply Demand Balance	91.6	86.5	76.3	73.2	70.7	71.9

The analysis undertaken shows that the Region has sufficient industrial zoned land to meet its needs to 2046 and beyond, based on a direct comparison of supply against demand. However, further investigations highlight the composition of remaining supply does not meet the needs of prospective land users, is already committed or appropriately located to service the significant number of SSD projects coming online as part of the Central-West Orana Renewable Energy Zone (REZ).

The demand profile developed as part of the ELSI indicates industrial land demand to 2046 is predominantly for service industry uses, which are best accommodated on either E3 Productivity Support or E4 General Industrial zoned land. Advice from Council has also indicated a desire to relocate their depot, which is currently on a 2.4 hectare site in Mudgee. It is understood Council requires a site of approximately 9-10 hectares to accommodate this.

The following vacant land has been identified in the Region within the E3 Productivity Support and E4 General Industrial zones:

- E3 Productivity Support:
 - 5.38 hectares in Mudgee on a single lot;
- E4 General Industrial:
 - 16.8 hectares in North-West Mudgee;
 - 0.96 hectares in South-East Mudgee;
 - 0.45 hectares in Gulgong; and
 - 68 hectares in Kandos.

The vacant industrial land supply across the Region includes 68 hectares of vacant E4 General Industrial land in Kandos, which would need to be subdivided and serviced to facilitate industrial land take up of this land. Even with servicing and subdivision, this land is well removed from the major activity centres of Mudgee and Gulgong, making it a less desirable location for industrial businesses who rely on strong connectivity to population centres and transport routes. It is also noted this land is in single ownership and is removed from the Central West Orana REZ, which is a key driver of industrial land demand within the Region to 2046. However, this industrial zoned land is based around the old cement works and an historic land use approval, therefore it is recognised that this existing E4 zoned land does represent a constrained supply.



The remaining 23.59 hectares of vacant industrial land is situated across South-East Mudgee, North-West Mudgee and Gulgong. The majority of this land (16.80 hectares) is in the new industrial estate in North-West Mudgee, which was recently brought to market. Most of the lots within this estate are already sold, indicating that whilst this land is technically vacant, it is likely to be taken-up in the short term. The vacant industrial land in South-East Mudgee is largely on one lot in the E3 Productivity Support zone, which already has an approved development application for a Bunnings, so this will also likely be developed in the short term. Vacant industrial land in Gulgong consists of a single 0.45 hectare lot.

Council could consider the opportunity to expand industrial land provision particularly within Mudgee or Gulgong, for a range of potential uses. This includes:

- 9-10 hectare site to accommodate the relocated depot. This should be located in close proximity to the established population centre of Mudgee and within proximity to Gulgong, which is also identified for urban expansion;
- Opportunities for a range of E4 General Industrial zoned land in both Mudgee and Gulgong, which offer relative proximity to the Central West Orana REZ.

The initial background economic analysis undertaken in support of the ELSI identified a need to identify ~40 hectares of raw land as a baseline figure to accommodate industrial land demand growth within the Region to 2046 (i.e. to service existing demand). However, it is recognised that the modelling undertaken to support this analysis was based on latest information available at the time and that industrial development may catalyse further investment in the medium term, which cannot be fully quantified at this point in time. Therefore, the ELSI suggests the need to identify at least ~60 hectares of raw land as a baseline figure to accommodate industrial land demand growth.

In light of the above, an analysis of potential future industrial sites has been undertaken as part of the ELSI to assist Council in identifying areas that may have future potential for future industrial purposes. This analysis has considered a range of factors, including:

1. Site location in proximity to existing industrial zoned lands;
2. Site access and accessibility to major transport networks;
3. Proximity to existing or future sensitive land uses;
4. Constraints and limitations to potential development;
5. Ability to be serviced;
6. Timeframes for delivery (i.e. short, medium or long term, based on the above factors); and
7. Feedback from stakeholder consultation conducted.

Below outlines the additional land identified for potential industrial purposes by location, in informing the recommendations outlined in section 7, for Council to take forward.



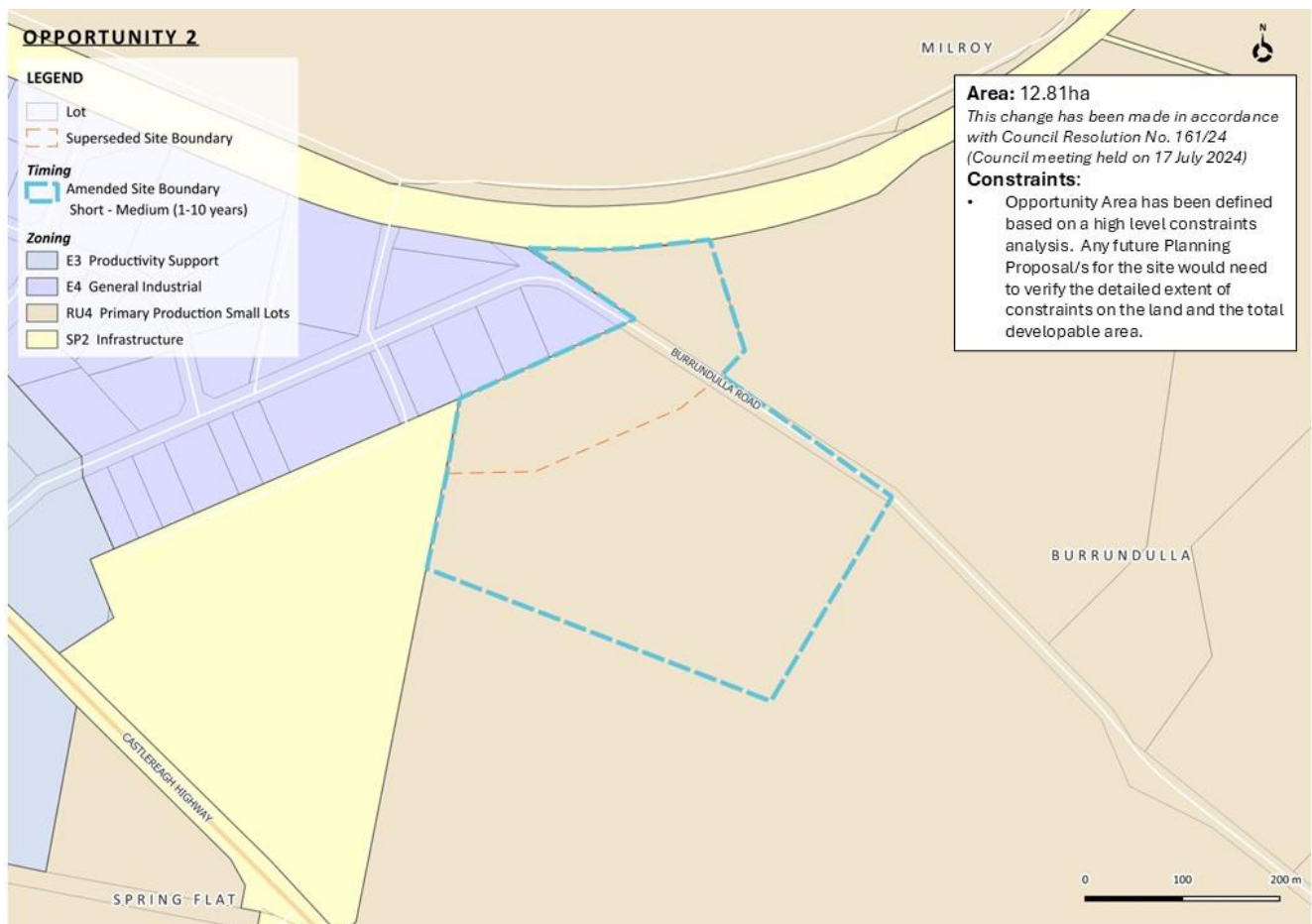
6.1 OPPORTUNITIES

6.1.1 South-East Mudgee

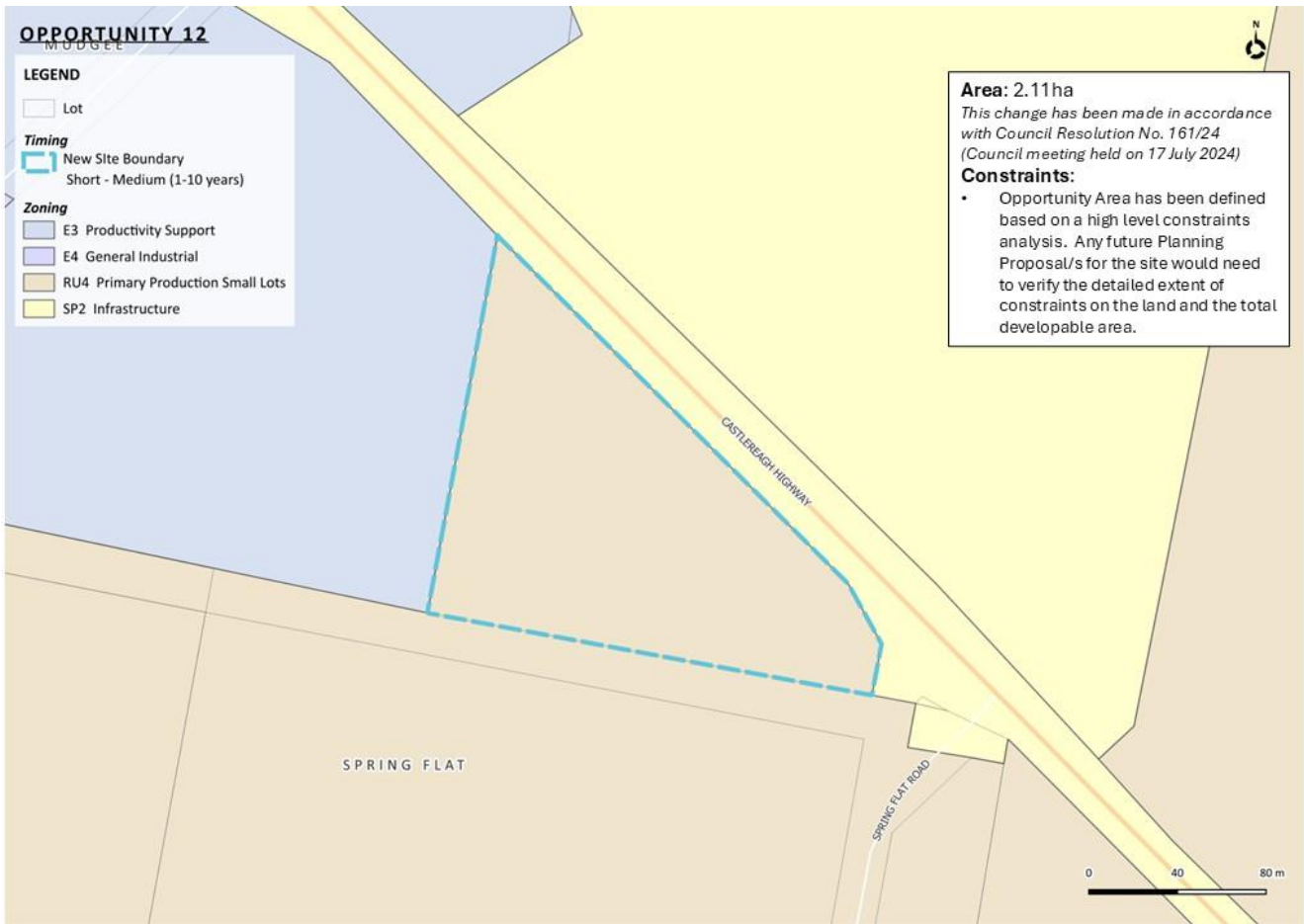
Map 3 indicates a site within South-East Mudgee on Burrundulla Road, which is suggested as a potential short-medium term industrial expansion opportunity. The site is located to the immediate east of the existing industrial estate in South-East Mudgee, which is serviced and well located. It represents a logical extension opportunity of the existing industrial area and is relatively flat land, which is suited to industrial development.

Whilst it is understood that part of the greater site may potentially be subject to flooding (as indicated in the 2021 Flood Study), an area that may be suitable for development has been nominated. This site builds upon the well-established industrial area already located within the main township of the Region, recognising that there are limited industrial land vacancies within Mudgee and any further opportunities provided will likely be capitalised upon.

Map 4 also indicates an additional site which has been included to reflect Council resolution no. 161/24, based on the Council meeting held on 17 July 2024.



Map 3 – South-East Mudgee Industrial Expansion Opportunity (Burrundulla Road)



Map 4 - South-East Mudgee Industrial Expansion Opportunity (Castlereagh Highway)



6.1.2 North-West Mudgee

North-West Mudgee is ideally located to provide additional industrial land supply for E4 zoned land in the short-medium term, in close proximity to the main township of Mudgee. There may also be potential for some additional E5 Heavy Industrial zoned land to be provided for within North-West Mudgee in the longer term, noting that the only available E5 land in the Region is currently located in Ulan and is held in single ownership. However, proximity to nearby sensitive land uses including the emerging residential estate to the south means that this would warrant very careful consideration by Council moving forward.

Map 5 indicates the potential short-medium term expansion opportunities for the existing North-West Mudgee industrial precinct off Hill End Road, with consideration being given to a number of factors such as adjacent sensitive land uses, the emerging new residential estate to the south (and the potential for industrial traffic to mix with residential traffic on Hill End Road) and proximity to the Castlereagh Highway, servicing and constraints (including topography).



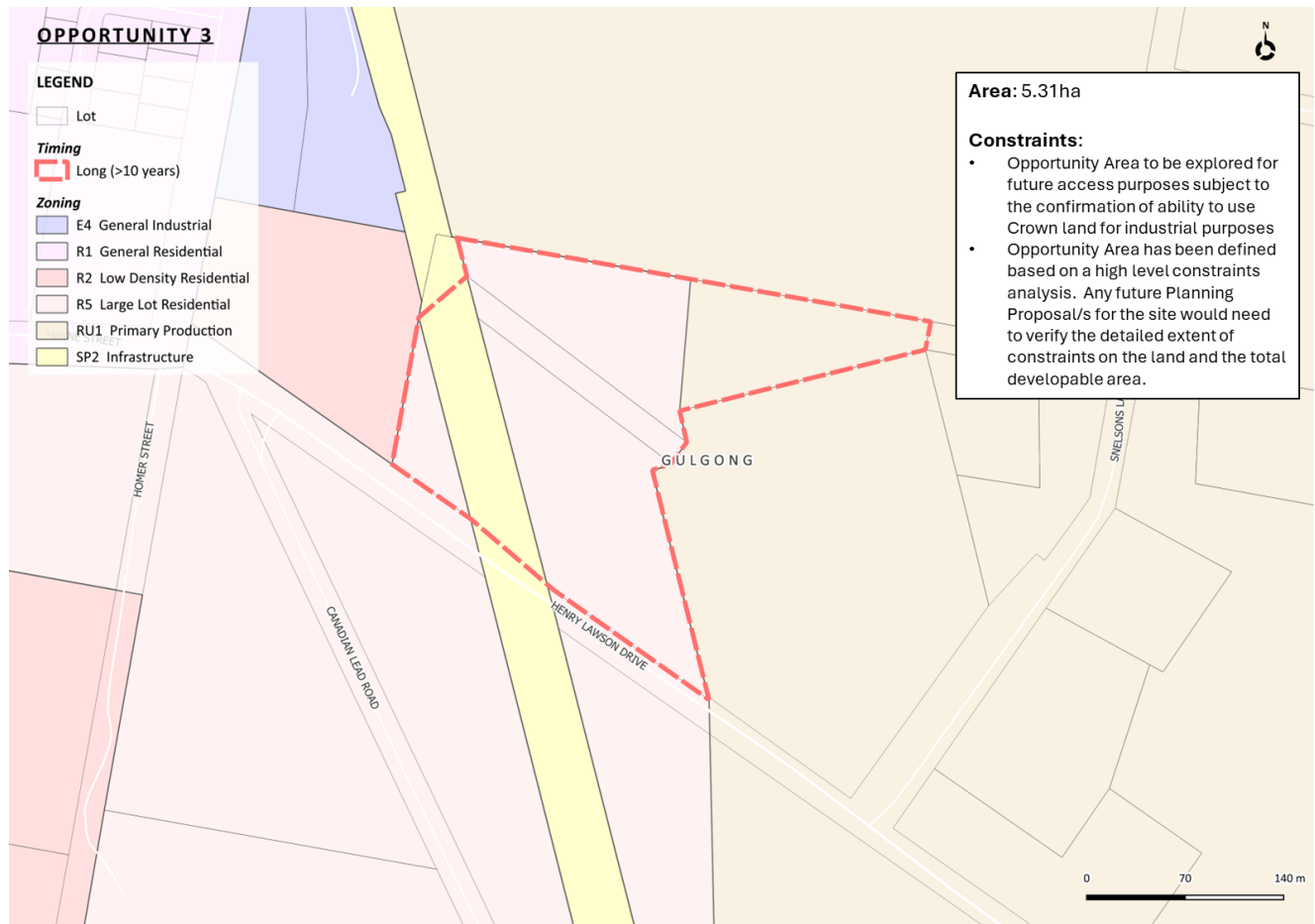
Map 5 – North-West Mudgee Industrial Expansion Opportunity (Hill End Road)



6.1.3 Gulgong

Vacant industrial land in Gulgong currently consists of a single 0.45 hectare lot. Given Gulgong's location within the Central West Orana REZ and the potential opportunities afforded by this, additional sites for further industrial employment lands have been considered.

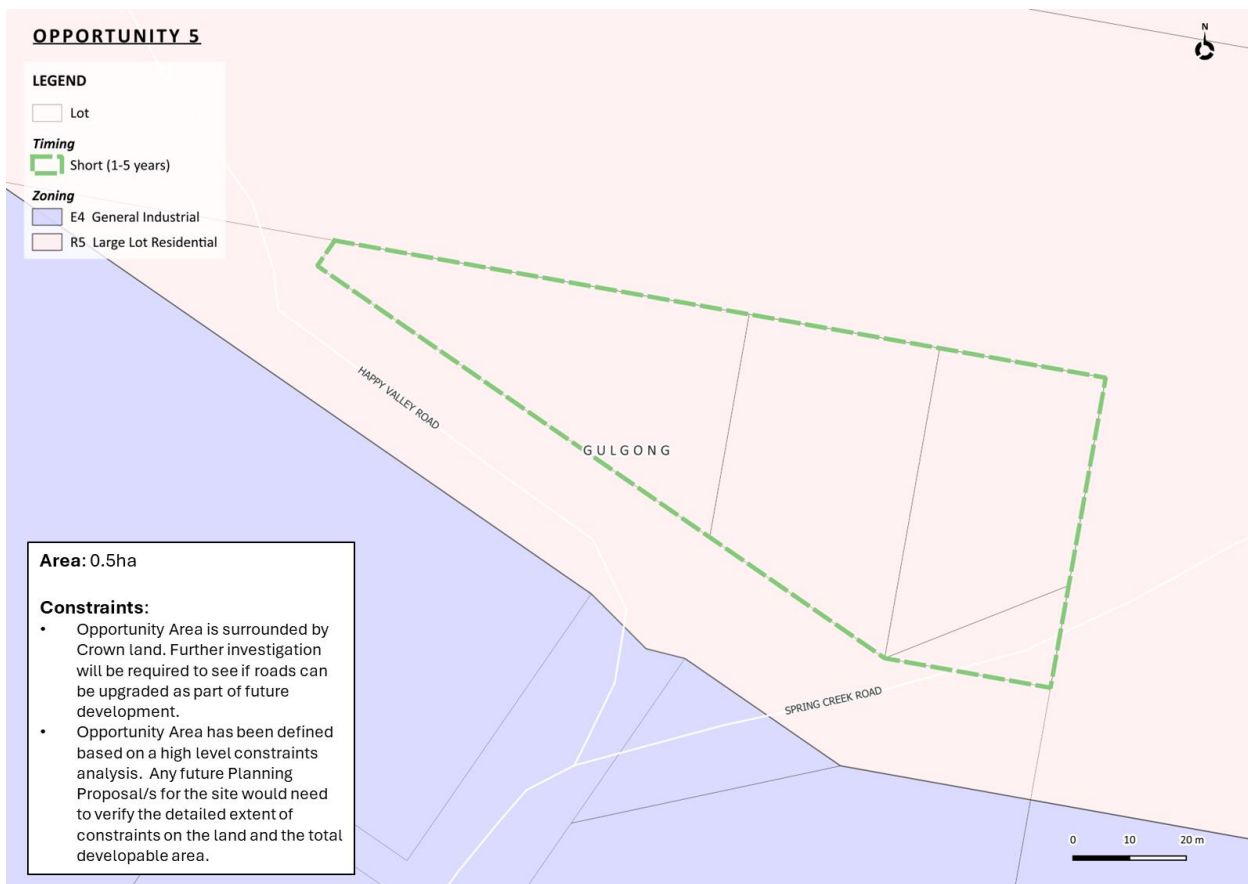
Whilst many of the sites analysed were found to be unsuitable due to access constraints or being improved by newer housing stock which is unlikely to be demolished in the short-medium term, there are a number of sites within Gulgong which have been identified as potentially suitable for short and longer-term industrial development opportunities. These sites are shown in Maps 6-10 and seek to leverage off their proximity to existing industrial lands and the proximity to the railway line.



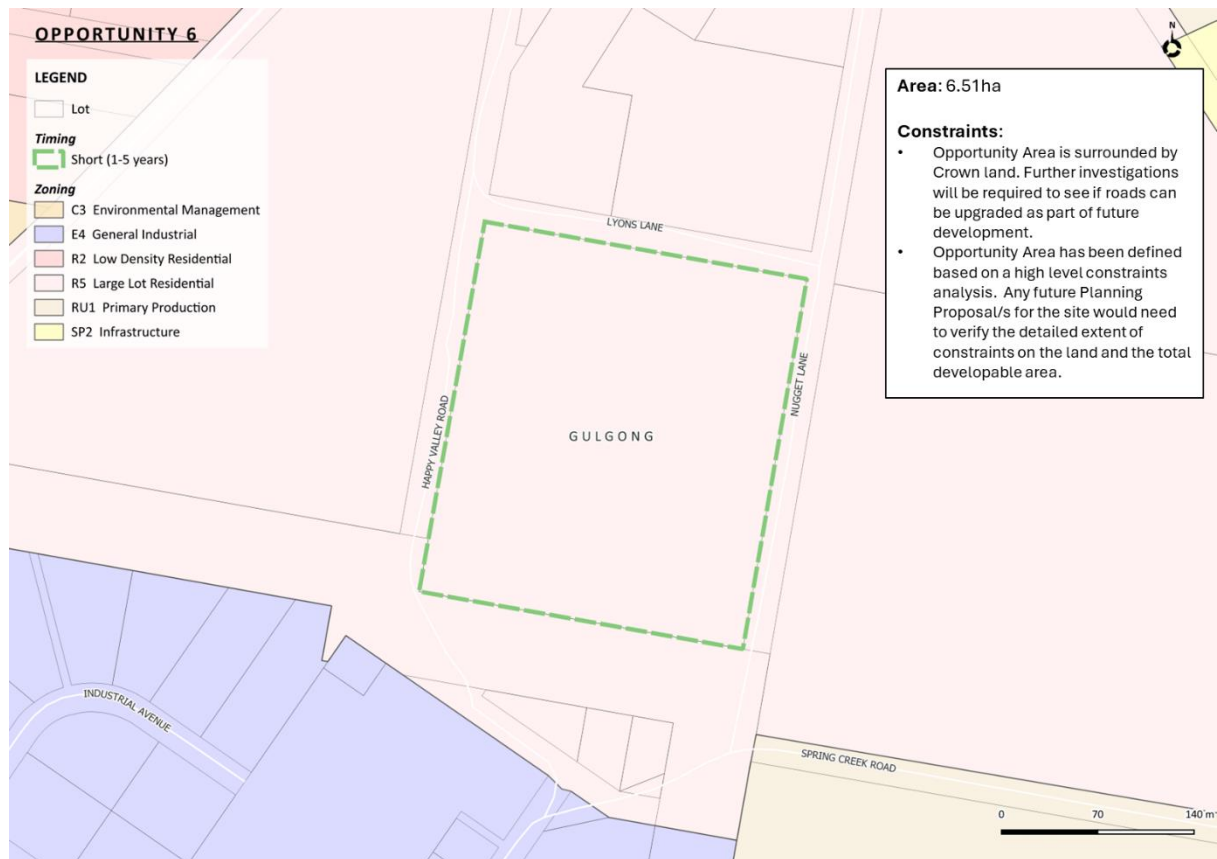
Map 6 – Gulgong Industrial Expansion Opportunity (Henry Lawson Drive)



Map 7 – Gulgong Industrial Expansion Opportunity (Spring Creek Road)



Map 8 – Gulgong Industrial Expansion Opportunity (Hapy Valley Road)



Map 9 – Gulgong Industrial Expansion Opportunity (Nugget lane)



Map 10 – Gulgong Industrial Expansion Opportunity (Spring Creek Road and Snelsons Lane)



6.1.4 Ulan

Ulan currently contains the only E5 Heavy Industrial zoned land within the Region. This land is comprised of two lots and is largely vacant, with only the Holcim Australia – Ulan Concrete Batching Plant operating on the site. There is approximately 20 hectares of vacant E5 Heavy Industrial zoned land at this site. In light of this, there have been no further industrial employment lands opportunities identified for Ulan as part of the ELSI.

6.1.5 Rylstone

The industrial estate at Rylstone is relatively small and contained, comprising of a series of smaller lots. As there is currently no vacant land within Rylstone, some opportunities for potential industrial land have been identified in Map 11 and Map 12. Map 11 represents the short term priority site despite being located across the road from the existing industrial estate. The site on Piper Street as shown in Map 12 is currently constrained by significant vegetation, despite being located to the immediate south of the industrial area and representing a more logical expansion opportunity. This has been identified as a long term opportunity.



Map 11 – Rylstone Industrial Expansion Opportunity (Tongbong Street)



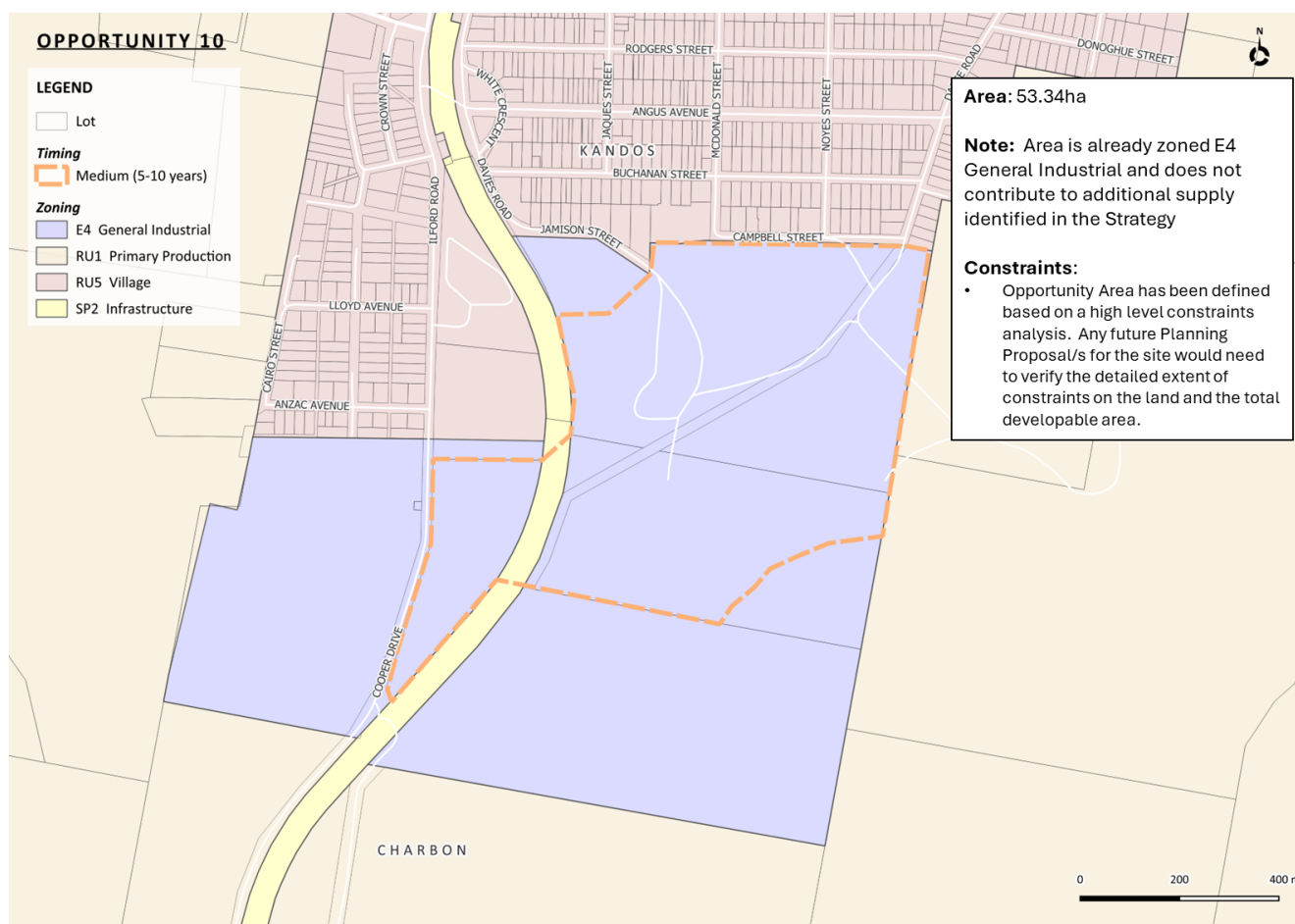
Map 12 – Rylstone Industrial Expansion Opportunity (Piper Street)



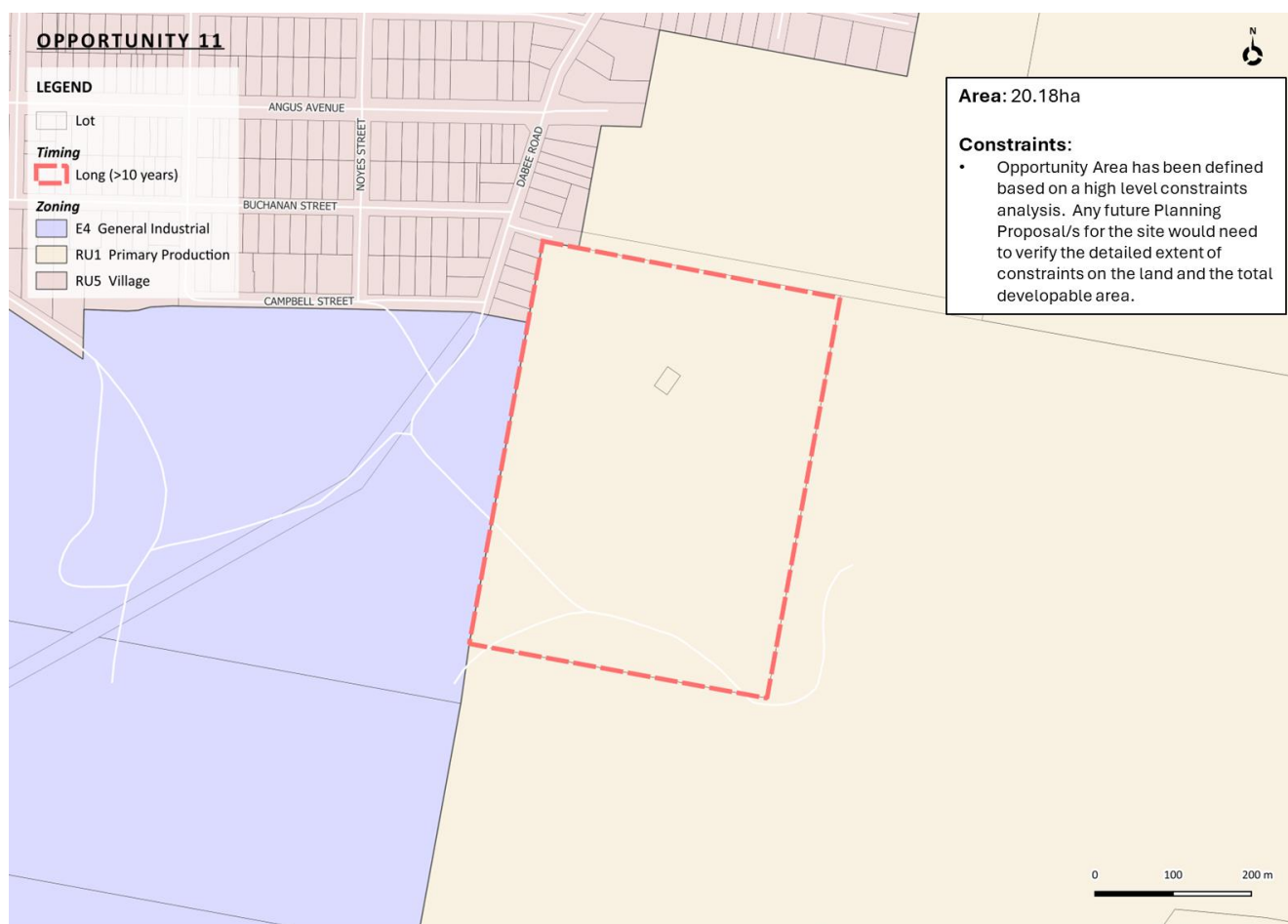
6.1.6 Kandos

The existing land zoned for industrial purposes in Kandos is currently largely vacant, representing approximately 68 hectares of vacant land. Much of the vacant land within Kandos is on lots at least five hectares in size, which could indicate a need to subdivide this land into smaller allotments to facilitate their uptake. However, despite its relative isolation from other population centres in the Region which could limit its appeal relative to other offerings within the Region, Council should still consider encouraging the development of the existing industrial zoned land in Kandos, provided that impacts on adjoining sensitive land uses can be appropriately managed. However, this industrial zoned land is based around the old cement works and an historic land use approval, therefore it is recognised that this existing E4 zoned land does represent a constrained supply.

Map 13 reiterates existing industrial zoned land in Kandos as being a medium term opportunity for future industrial land, with the extent of the potentially developable area being rationalised due to the site analysis undertaken. Map 14 represents a new site to the immediate east of the area shown on Map 13, which although not zoned for industrial purposes, may represent a potential long-term industrial land opportunity, although this is seen as a lower priority.



Map 13 – Kandos Industrial Opportunity (Cooper Drive)



Map 14 – Kandos Industrial Opportunity (Dabee Road)

6.2 SUMMARY OF SITES

The ELSI identifies a number of sites that could potentially be suitable for a range of short, medium and long term industrial employment needs. Some of these sites represent short term opportunities, while others represent a longer term opportunity.

The analysis undertaken shows that the Region has sufficient industrial zoned land to meet its needs to 2046 and beyond based on a direct comparison of supply against demand. However, further investigations highlight the composition of remaining supply does not meet the needs of prospective land users, is already committed or appropriately located to service the significant number of SSD projects coming online as part of the Central-West Orana Renewable Energy Zone (REZ).

The initial background economic analysis undertaken in support of the ELSI identified a need to identify ~40 hectares of raw land as a baseline figure to accommodate industrial land demand growth within the Region to 2046 (i.e. to service existing demand). However, it is recognised that the modelling undertaken to support this analysis was based on latest information available at the time and that industrial development may catalyse further investment in the medium term, which cannot be fully quantified at this point in time. Therefore, the ELSI suggests the need to identify at least ~60 hectares of raw land as a baseline figure to accommodate industrial land demand growth.

The ELSI identifies a range of sites as being potentially suitable for short (1-5 years), medium (5-10 years) and long term (15 years+) industrial supply, particularly in locations such as Mudgee and Gulgong, which allocates additional industrial land in the order of 141 hectares as follows:



	Land area (ha) Short Term (1-5 years)	Land area (ha) Medium Term (5-10 years)	Land area (ha) Long Term (10+ years)	Sub total
Mudgee	3.88 (South-East Mudgee) 36.69 (North-West Mudgee)			40.57
Gulgong	36.14		43.29	79.43
Rylstone	0.55		0.78	1.33
Ulan				0
Kandos			20.18	20.18
Sub total	40.57	36.69	64.25	141.51

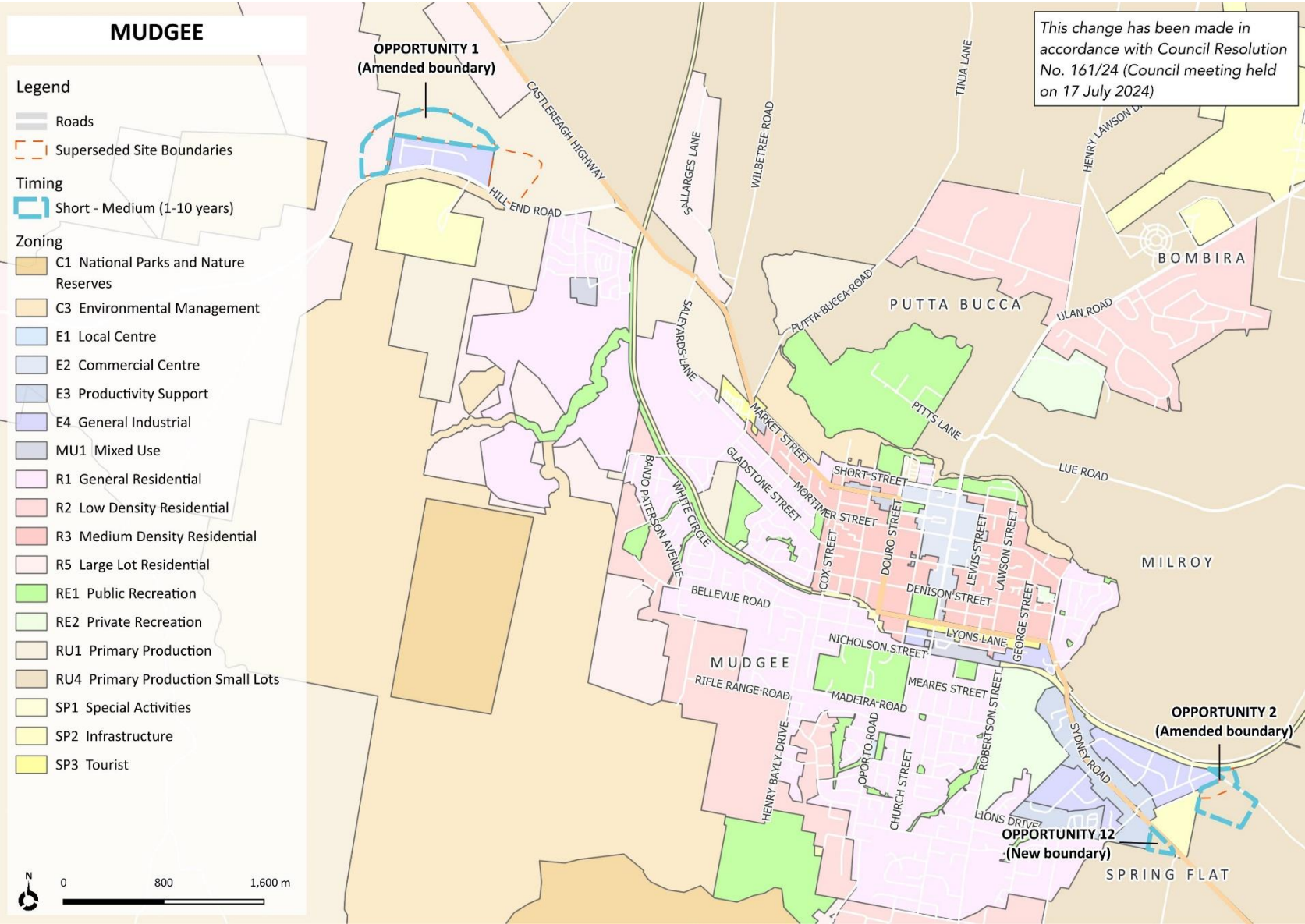
The additional 141 hectares identified therefore provides over double the amount of raw land required.

With respect to the size of allotments needed to cater for anticipated demand, the growth in land demand is being driven mostly by service industry and warehouse and storage uses. The ELSI suggests that lots of up to 2 hectares in size and primarily within the E4 General Industry zone would be required and should be the main focus to accommodate this demand profile. However, this Strategy encourages maximum flexibility in the delivery of future industrial lands and does not preclude industrial development on larger lot sizes, or for other purposes and in other industrial zones, where this can be supported through formal Planning Proposals for Council's consideration. Opportunities for additional E5 Heavy Industry zoned lands could be considered, where these can be suitably located and any impacts on adjoining properties (such as sensitive receptors), can be appropriately ameliorated.

It is critical to ensure that much of the additional short term land identified is within proximity to the Central West Orana Renewable Energy Zone (to appropriately service this development) and within reasonable distance to the workforce (e.g. Gulgong and Mudgee).

The ELSI does not advocate for the land identified for future Industrial purposes to be rezoned, but recognises that developer-led Planning Proposals for rezoning would be needed, which must then be subject to ordinary application processes through Council. Should any land be subsequently rezoned, this would then contribute additional industrial zoned land at the start of the land supply pipeline.

As a consequence of the employment lands analysis undertaken, the sites located in Maps 15 to 18 of the ELSI should be recognised as providing future potential industrial employment lands in the short, medium and long term. The current zoning of these lands should be retained, recognising that there is technically significant land supply available to meet the baseline industrial needs of the Region beyond 2046, whilst acknowledging that much of this land may not be the most suitable for industrial development in the short term due to a range of factors. The ELSI provides the imprimatur for additional industrial lands within the Region to be identified and should be used as a guide for directing proponents as to where Council has earmarked future industrial lands in the Region over the Next 20 years. This will allow prospective businesses to secure sites, with flexibility in determining the most appropriate lot sizes and mix of industrial uses, which can then be addressed through formal Planning Proposals.



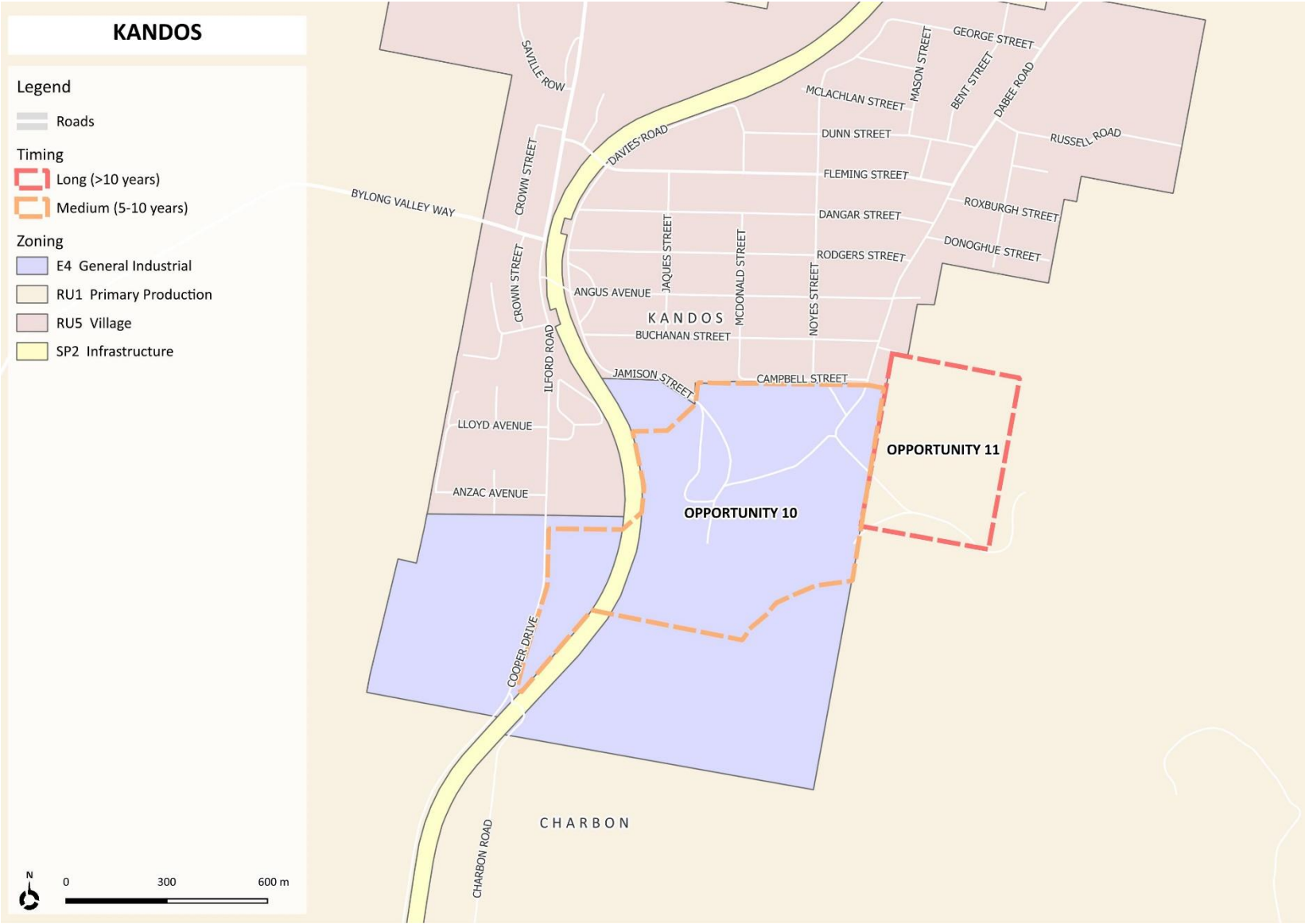
Map 15 – Summary of Industrial Opportunity Sites (Mudgee)



Map 16– Summary of Industrial Opportunity Sites (Gulgong)



Map 17- Summary of Industrial Opportunity Sites (Rylstone)



Map 18 – Summary of Industrial Opportunity Sites (Kandos)



6.3 CENTRAL-WEST ORANA RENEWABLE ENERGY ZONE

The background analysis conducted to inform the preparation of the ELSI, identifies that the NSW Government has announced several Renewable Energy Zones (REZ) including the Central-West Orana REZ which covers part of the Region, including Mudgee and Gulgong. REZs combine renewable energy infrastructure (solar and wind farms), storage (batteries and pumped hydro) and high-voltage transmission infrastructure. Connecting these allows REZs to capitalise on economies of scale to deliver cheap, reliable and clean energy (Energy Co, 2023). The Central-West Orana REZ covers 20,000 km² covering towns such as Mudgee, Gulgong, Dubbo and Mendooran. It is expected to generate six gigawatts of power. Some of the key projects (existing and planned) within this REZ in the Region include:

- Beryl Solar Farm;
- Merotherie Energy Hub;
- Wollar Switching Station;
- Barneys Reef Wind Farm;
- Bellambi Heights Battery Energy Storage System;
- Tallawang Solar Farm;
- Birriwa Solar Farm and Battery Energy Storage System;
- Narrangamba Solar;
- Stubbo Solar Farm; and
- Ulan Solar Farm.

ACEN Australia has proposed an 800MW 12-hour pumped hydro project (Phoenix Pumped Hydro) 35km west of Mudgee. This project is intended to provide long-duration storage for the above mentioned solar and wind generated energy (ACEN Australia, 2023).

Whilst these projects are not being built on industrial land, they do contribute to demand for industrial land through their reliance on supporting industrial businesses (e.g. solar farm manufacturers, construction etc.). The large clustering of solar farms, wind farms and battery energy storage systems, may provide sufficient economies of scale for industrial businesses supporting these projects to locate within the Region.

As such, it is important that Council identify additional industrial employment lands to accommodate such opportunities, should the need arise in the future as a result of the SSD projects being developed as part of the REZ.

6.4 TRANSITION FROM MINING

In the move to a low carbon economy, coal production will decline in the Region, which will reduce employment opportunities within the sector. However, there appears to be limited supply chain businesses on industrial land servicing the mining sector relative to other economies highly reliant on coal mining for employment opportunity. The closure of mines can represent economic opportunity. Rehabilitation of mining land can create possible land opportunities in the form of crop production; grazing for livestock; nature conservation and eco-tourism; and forestry.

Opportunity exists for viticulture and other agricultural operations in the Region to adopt innovative technologies and processes. However, it is anticipated supply chain businesses who provide these services will predominately be located beyond the Region, in recognition of the relatively small size of the Region's economy relative to other agricultural regions in New South Wales.

As a key part of the broader Central West Orana REZ, the Region is positioned to benefit significantly from the establishment of several clean energy projects.



6.5 OPPORTUNITY FOR INTER-MODAL TERMINAL

There are two rail lines which pass through and stop within the Region. One rail line passes through Gulgong and Ulan which on a broader level connects Dubbo with Newcastle. Within the Region, this line is largely used by the coal mines around Ulan to transport coal intrastate and to the Port of Newcastle for exports. The second rail line is a branch off the Main West line coming out of Sydney which passes through Kandos and ends at Rylstone. These two lines were previously connected as part of the Gwabegar railway line; however, in 2007 the line between Kandos and Gulgong was closed due to lack of demand. In 2018 the line between Rylstone and Kandos was reinstated to operate heritage trains between the two towns.

Figure 5 displays the railway lines across New South Wales including the lines through Gulgong/Ulan, the line to Kandos/Rylstone and the closed line between Rylstone and Gulgong.



Figure 5 – Railway Lines in New South Wales (Source: Wikipedia (2024) in Bull & Bear Economics, 2024)

The rail line passing through Gulgong and Ulan is the most direct route between Dubbo, Mid-Western Regional Council and Newcastle including the Port of Newcastle. The Port of Newcastle is the largest bulk shipping port on Australia's east coast and Australia's largest terminal for coal exports as such strong connections to this port are beneficial to Mid-Western Regional Council's economy (Transport for NSW, 2023). Gulgong's train station is not operational with freight only trains passing through the station. The only place in the Region where trains on this line stops is at the three coal mines in Ulan. Currently the rail line is not at full capacity and the most significant use of this line is the Ulan coal mines meaning the potential closure of these mines (given the trend towards renewable energy) would significantly impact utilisation of this rail line. The Inland Rail project (currently under construction) offers significant opportunity for this rail line.

However, the opportunity for an intermodal terminal within the Region in the medium to long term is likely limited due to associated cost, competitive offerings within the broader region and absence of critical mass to support the terminal in the foreseeable future.



7. SUMMARY AND RECOMMENDATIONS

As discussed throughout this report, the Region technically has sufficient zoned industrial zoned land to meet its needs to 2046 and beyond based on a direct comparison of supply against demand. However, further investigations highlight the composition of remaining supply does not meet the needs of prospective land users, is already committed or appropriately located to service the significant number of SSD projects coming online as part of the Central-West Orana REZ.

The initial background economic analysis undertaken in support of the ELSI identified a need to identify ~40 hectares of raw land as a baseline figure to accommodate industrial land demand growth within the Region to 2046 (i.e. to service existing demand). However, it is recognised that the modelling undertaken to support this analysis was based on latest information available at the time and that industrial development may catalyse further investment in the medium term, which cannot be fully quantified at this point in time. Therefore, the ELSI suggests the need to identify at least ~60 hectares of raw land as a baseline figure to accommodate industrial land demand growth.

In light of the above, an analysis of potential future industrial sites has been undertaken as part of the ELSI to assist Council in identifying areas that may have future potential for future industrial purposes in the longer term. This analysis has considered a range of factors, including:

- Site location in proximity to existing industrial zoned lands;
- Site access and accessibility to major transport network;
- Proximity to existing or future sensitive land uses;
- Constraints and limitations to potential development;
- Ability to be serviced;
- Level of priority (i.e. short, medium or long term opportunity, based on the above factors); and
- Feedback from stakeholder consultation conducted.

The ELSI identifies a range of sites as being potentially suitable for short (1-5 years), medium (5-10 years) and long term (15 years+) industrial supply, particularly in locations such as Mudgee and Gulgong, which allocates additional industrial land in the order of 141 hectares.

The ELSI encourages maximum flexibility in the delivery of future industrial lands in terms of a mix of lot sizes, industrial use types and industrial zones, where this can be supported through formal Planning Proposals for Council's consideration. Opportunities for additional E5 Heavy Industry zoned lands could be considered, where these can be suitably located and any impacts on adjoining properties (such as sensitive receptors), can be appropriately ameliorated.

In addition to identifying additional lands for future long-term industrial employment, it is also noted that as coal production declines in the Region, that this will reduce employment opportunities within the sector, which currently contributes a significant portion of jobs for the Region. The closure of mines can represent economic opportunity, with the rehabilitation of mining land creating possible land opportunities in the form of crop production, grazing for livestock, nature conservation and eco-tourism and forestry.

Opportunity exists for viticulture and other agricultural operations in the Region to adopt innovative technologies and processes. However, it is anticipated supply chain businesses who provide these services will predominantly be located beyond the Region, in recognition of the relatively small size of the Region, relative to other agricultural regions in New South Wales.

The Region is well-positioned to benefit significantly from the establishment of several major clean energy projects as part of the broader Central West Orana REZ, with short-term employment estimates contributing to significant jobs in the Region. The challenge will be in capturing some of the flow-on effects of those projects in terms of their potential to generate ongoing demand for associated industrial employment lands and businesses.



As a consequence of the employment lands analysis undertaken, the sites located in Maps 15 to 18 of the ELSI should be recognised as providing future potential industrial employment lands in the short, medium and long term. The current zoning of these lands should be retained, recognising that there is technically significant land supply available to meet the baseline industrial needs of the Region beyond 2046, whilst acknowledging that much of this land may not be the most suitable for industrial development in the short term due to a range of factors. The ELSI provides the imprimatur for additional industrial lands within the Region to be identified and should be used as a guide for directing proponents as to where Council has earmarked future industrial lands in the Region over the next 20 years. This will allow prospective businesses to secure sites, with flexibility in determining the most appropriate lot sizes and mix of industrial uses, which can then be addressed through formal Planning Proposals.



**APPENDIX 1 BACKGROUND ECONOMIC ANALYSIS
REPORT**

AP01

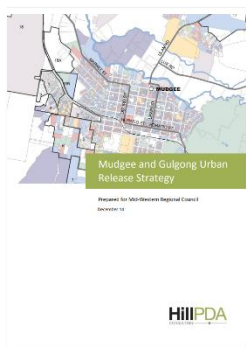


APPENDIX 2 BACKGROUND DOCUMENT ANALYSIS

AP02

STRATEGIC DOCUMENTS

Mudgee and Gulgong Urban Release Strategy 2014

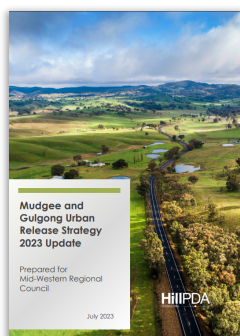


The Mudgee and Gulgong Urban Release Strategy 2014 is a 20-year strategic framework that has been created to inform the release of residential land within the townships of Mudgee and Gulgong to meet housing needs and facilitate projected future growth. The analysis is based on demographic trends, housing markets and land use constraints.

Key recommendations include increasing housing density in town centres, providing a range of housing typologies, protecting employment lands and high value agricultural land, and concentrating development in existing residential zones and around existing and planned infrastructure to maximise use.

This strategy has been used to ensure that the identification of industrial sites as part of the Employment Lands Strategy (Industrial) do not interfere with the proposed urban release areas.

Mudgee and Gulgong Urban Release Strategy 2023 Update

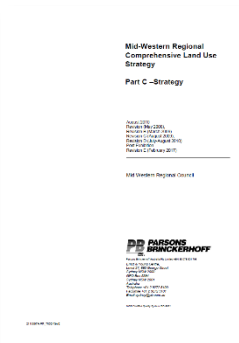


The Mudgee and Gulgong Urban Release Strategy 2023 provides an updated housing supply and demand analysis to the existing Mudgee and Gulgong Urban Release Strategy 2014 (as outlined above). The updated strategy will:

- Assess the supply and demand of residential land and the status of previously identified urban release areas;
- Recommend any required changes to facilitate anticipated demand shortfalls;
- Inform Council's strategic planning works and servicing; and
- Provide a framework for the systemic release of residential land to manage the balance of supply and demand.

This strategy has been used to ensure that the identification of industrial sites as part of the Employment Lands Strategy (Industrial) do not interfere with the proposed urban release areas.

Mid-Western Regional Comprehensive Land Use Strategy 2010 (part c)



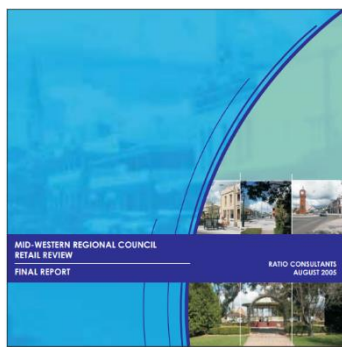
The Mid-Western Regional Comprehensive Land Use Strategy (CLUS) 2010 provides a basis for identifying options to meet long term urban and rural growth needs across the Region until 2031.

The purpose of the strategy is to identify environmental, social and economic opportunities and constraints and weigh these against land supply and demand pressures to inform strategic planning direction for future infrastructure and service needs in the Region.

The CLUS includes Town Structure Plans (TSPs) for Mudgee, Gulgong, Rylstone and Kandos. The TSPs visually represent the outcomes of the strategy, which identifies the location of the future supply of land, including future industrial development opportunities.



Mid-Western Regional Council Retail Review Final Report 2005



The Mid-Western Regional Council Retail Review Final Report 2005 provides a comprehensive review of retail and commercial needs in the Mid-western region.

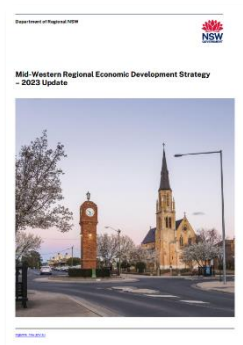
Analysis of shopping behaviour, tenancy surveys, forecasted population growth trends and stakeholder/community workshops within the areas of Mudgee, Gulgong, Rylstone and Kandos were undertaken to provide policy development recommendations.

Recommendations provided facilitate the long term planning and management of the Region's activity centres that best meet the needs of existing and future communities. The proposed policies are accompanied by actions and programs focused on ensuring activity centres will be maintained and viable central places

for the foreseeable future.

The current direction of Council policy is the designation and facilitation of a bulky goods precinct to adjoin or as part of the Mudgee Industrial area focused on Sydney Road. However, an important issue for future policy development is the extent to which this area should be allowed or facilitated to develop as a major bulky goods precinct to meet the needs of the Shire and surrounding districts.

Mid-Western Regional Economic Development Strategy –2023 Update



The Mid-Western Regional Economic Development Strategy – 2023 Update provides an updated evidence base to guide governments in policy and investment decisions related to long term economic growth. the strategy provides an overview of key changes and trends that have occurred since 2018, an economic snapshot of the Region, identifies opportunities and constraints for future growth, and provides updated economic strategies.

the key industries in the Region are mining, agriculture and tourism, which continue to drive economic and population growth. Drought, bushfires, floods, and the mouse plague have significantly impacted the Region environmentally and economically in previous years.

Trends impacting the Region's industries, employment and economy includes digital transformation including remote working arrangements, changing migration patterns, shift towards renewable resources, and increasing climate uncertainty.

The strategy identifies future release of industrial land, and proactive planning for industrial land as a key enabler of future economic growth for the Region, specifically growing industry clusters around mining, manufacturing, agriculture and renewable energy.

Draft Central West and Orana Transport Plan



The Draft Central West and Orana Transport Plan is a supporting plan of Future Transport 2056 and is a strategic framework outlining how NSW transport will be informed by changes in land use, population and travel demand across the Region.

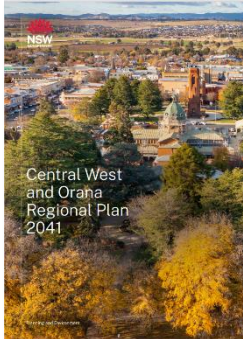
The draft plan provides an overview of current trends and uses within the central west and Orana region, and outlines necessary transport infrastructure, services and policies needed to make active and public transport a viable alternative to private vehicle use, to support the 2041 regional transport vision.

The draft plan supports industry growth by outlining a number of objectives and corresponding initiatives that aim to improve freight network connectivity, improve connectivity and transport options for commuters, as well as reduce transport emissions.



The draft plan has been used to support the development of the Employment Lands Strategy (Industrial) by taking into consideration the planned development for the Central West and Orana region impacting the Region and general objectives that impact upon the provision and use of current and future industrial land.

Central West and Orana Regional Plan 2041



The Central West and Orana Regional Plan 2041 is a strategic framework that informs the growth of the Region through a 20-year land use plan, with a focus on the next 5 years. The document outlines objectives (high level goals) for the Region which is supported by strategies, actions and collaborative activities that are to be implemented by varying government departments and councils.

The Regional plan identified the Region as having strong economic and industry growth with continued mine expansions, continued growth of construction and manufacturing industries supported by mining, State Significant Developments and expected expansion of tourism industries. The plan also identified the Region as having naturally occurring asbestos that could present a health hazard if affected by ground disturbing activities,

which should be considered in planning future industry uses.

The plan identifies objectives and strategies related to future industrial land uses of the Central West and Orana Region which apply to the Region. Key objectives include:

- Leverage existing industries and employment areas and support new and innovative economic enterprises
- Improve economic diversification of existing mining economies
- Sustainably manage extractive resource land and grow the critical minerals sector
- Support the State's transition to Net Zero by 2050 and deliver the Central-West Orana Renewable Energy Zone
- Leverage inter-regional transport connections

The high level goals identified within the plan have been considered in the preparation of the Employment Lands Strategy (Industrial) in terms of providing context to future development and industrial uses within the Region.

CURRENT PLANNING INSTRUMENTS

The current relevant planning instruments demonstrates land use regulations for industrial zoned land and planning guidelines for industrial uses, and does not address strategic industrial lands. A summary of the Mid-Western Local Environmental Plan, relevant Development Control Plans and relevant State Environmental Planning Policies have been completed below.

MID-WESTERN LOCAL STRATEGIC PLANNING STATEMENT 2020



The Mid-Western Local Strategic Planning Statement 2020 provides a 20-year vision for land use planning in the Region, by outlining planning priorities for the Region and providing short, medium and long term strategic actions that support the outlined priorities.

The mid-western local strategic planning statement 2020 has been used to identify key planning priorities related to industrial development within the Mid-Western Region, which should be considered in the preparation of the Employment Lands Strategy (Industrial).

This includes:

- Planning priority 6: Minimise the impact of mining and other development on the natural environment,



- Planning priority 7: support the attraction and retention of a diverse range of businesses and industries
- Planning priority 8: provide leadership on economic development initiatives and identify resources and infrastructure required to drive investment and economic growth in the Region
- Planning priority 9: support the expansion of essential infrastructure and services to match business and industry development in the Region
- Planning Priority 10: Develop a regional transport network in partnership with government agencies, that grows with the needs of residents and businesses.

The identified planning priorities outline land use actions relevant to the Employment Lands Strategy (Industrial), including actions such as undertaking an industrial land use survey, mapping freight and logistic routes, mapping heavy vehicle bypasses, as well as outlining council actions.

MID-WESTERN LOCAL ENVIRONMENTAL PLAN 2012

The Mid-Western Regional Local Environmental Plan 2012 is a statutory document that outlines legislative provisions on zoning, development processes and development application requirements, development standards, prohibited development, and other provisions.

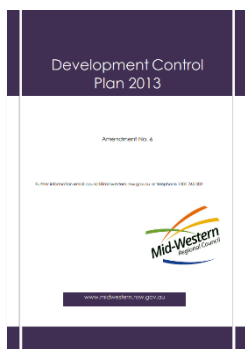
The Mid-Western Local Environmental Plan 2012 outlines the provisions, objectives and planning parameters related to:

- Productivity Support (E3)
- General Industrial (E4)
- Heavy Industrial (E5)

The plan also identifies other provisions related to industry development including provisions related to light industry, home industry as well as provisions related to boundaries and buffers between industrial zones and other zones.

The Mid-Western Local Environmental Plan 2012 has been consulted in the preparation of the Employment Lands Strategy (Industrial) to ensure identified current and future industrial land comply with the provisions set under the Mid-Western Local Environmental Plan 2012.

MID-WESTERN DEVELOPMENT CONTROL PLAN 2013



The Mid-Western Development Control Plan 2013 supports the objectives of the Local Environmental Plan and sets out the definitions, standards and other provisions related to local development within the Region.

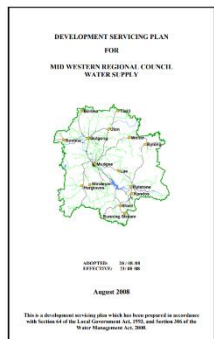
The DCP outlines local standards for industrial development, including provisions relating to lot sizes, design, signage, car parking requirements, subdivision, performance targets, exemptions and other general provisions.

The DCP has been broadly considered in the preparation of the Employment Lands Strategy (Industrial) to ensure identified current and future industrial land comply with the provisions set under the DCP



DEVELOPMENT SERVICING PLAN FOR MID-WESTERN REGIONAL COUNCIL

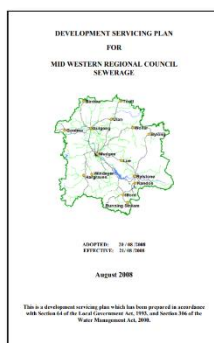
Water Supply 2008



The Water Supply Development Servicing Plan outlines water supply developer charges, and requirements related to the provision of water supply to the Region (relating to flow, pressure, quantity and frequency of restrictions), as well as identifying existing infrastructure and scheduling proposed works to meet increasing water supply demand caused by development. The plan maps the existing town water supply service areas of Mudgee, Gulgong, Rylstone, Kandos and Charbon and Clandulla, and outlines applicable charges for varying developments, including industrial developments. The plan includes methods of calculation, cost estimates and levels of service.

Identification of existing infrastructure has been broadly considered in the preparation of the Employment Lands Strategy (Industrial) in considering future industrial land supply.

Sewerage 2008



The Sewerage Development Servicing Plan outlines sewerage developer charges, and requirements related to the provision of sewerage services to the Region (relating to pump station capacity, collector main capacity and treated effluent quality), as well as identifying existing infrastructure and scheduling proposed works to meet increasing sewerage service demand caused by development. The plan maps the existing sewerage service areas of Mudgee, Gulgong, Rylstone, and Kandos, and outlines applicable charges for varying developments, including industrial developments. The plan includes methods of calculation, cost estimates and levels of service.

Identification of existing infrastructure has been broadly considered in the preparation of the Employment Land Strategy (Industrial) in considering future industrial land supply.

STATE ENVIRONMENTAL PLANNING POLICIES

State Environmental Planning Policy (industry and Employment)

State Environmental Planning Policy (industry and employment) is NSW state legislation outlining development controls, development application processes and general provisions related to development of industry and employment lands, with the aim of protecting and enhancing land with employment purposes.

The State Environmental Planning Policy (industry and employment) outlines the objectives, and provisions related to development permitted without consent, development permitted with consent, and prohibited development within the light industrial and general industrial zones. The State Environmental Planning Policy (industry and employment) also outlines general provisions related to industrial zones and usages such as signage and advertising, and controls relating to industrial retail outlets.

The State Environmental Planning Policy (industry and employment) has been broadly considered in the preparation of the Employment Lands Strategy (Industrial) to ensure identified current and future industrial land comply with the provisions set under the State Environmental Planning Policy (Industry and Employment)

State Environmental Planning Policy (Resilience and Hazards)

State Environmental Planning policy (Resilience and Hazards) is NSW state legislation outlining development controls, development application processes, and general provisions related to development within the coastal zone, development of hazardous and offensive development and the remediation of land.

The State Environmental Planning policy (Resilience and Hazards) outlines provisions related to hazardous and offensive development including definitions, considerations of departmental guidelines, storage facilities and



provisions on where development consent is required. Provisions are also outlined in terms of the development process for potentially hazardous and potentially offensive development including the preparation of preliminary hazard analysis, matters for consideration by consent authorities and advertising of applications.

Provisions related to the remediation of land include definitions, considerations in determining a development application, provisions relating to remediation work permissible, remediation work needing consent, remediation work not needing consent as well as other general provisions.

The State Environmental Planning policy (Resilience and Hazards) has been broadly considered in the preparation of the Employment Lands Strategy (Industrial) to ensure identified current and future industrial land comply with the provisions set under the State Environmental Planning policy (Resilience and Hazards).

State Environmental Planning Policy (Resources and Energy)

State Environmental Planning policy (Resources and Energy) is NSW state legislation outlining development controls, development application processes and general provisions related to mining, petroleum production and extractive industries.

The State Environmental Planning policy (Resources and Energy) outlines provisions related to mining, petroleum production and extractive industries in terms of development permissible without consent, development permissible with consent, determination of permissible development under local environmental plans, prohibited development, exempt development as well as matters for consideration within development applications. The State Environmental Planning policy (Resources and Energy) also outlines provisions relating to mining and petroleum development on strategic agricultural land, which includes development application provisions and provisions relating to site verification certificates, gateway certificates, and gateway panels.

The State Environmental Planning policy (Resources and Energy) has been broadly considered in the preparation of the Employment Lands Strategy (Industrial) to ensure identified current and future industrial land comply with the provisions set under the State Environmental Planning policy (Resources and Energy).

State Environmental Planning Policy (Transport and Infrastructure)

State Environmental Planning policy (transport and infrastructure) is NSW state legislation outlining provisions related to the delivery of infrastructure across the state. Development controls, development application processes and general provisions are outlined for infrastructure, educational establishments and childcare facilities, major infrastructure corridors, specific ports, and Moorebank Freight Intermodal Precinct.

A wide range of provisions related to infrastructure development are provided some of which include consultation processes, use of state land, complying development and development controls for a variety of land use zones. Objectives, and development controls provisions such as permitted without consent, permitted with consent, and prohibited development are outlined for general industrial, light industrial, and heavy industrial zones.

The State Environmental Planning policy (transport and infrastructure) has been broadly considered in the preparation of the Employment Lands Strategy (Industrial) to ensure identified current and future industrial land comply with the provisions set under the State Environmental Planning policy (transport and infrastructure).



psaconsult.com.au

PSA Consulting Pty Ltd ABN 83 109 836 197

T + 61 7 3220 0288 F +61 7 3220 0388

Brisbane (Head Office) L11 / 270 Adelaide Street, Brisbane / Meeanjin Qld 4000

PO Box 10824 Adelaide Street Brisbane Qld 4000