

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

#1 Urban Areas Employment Lands Investigation - Final Report

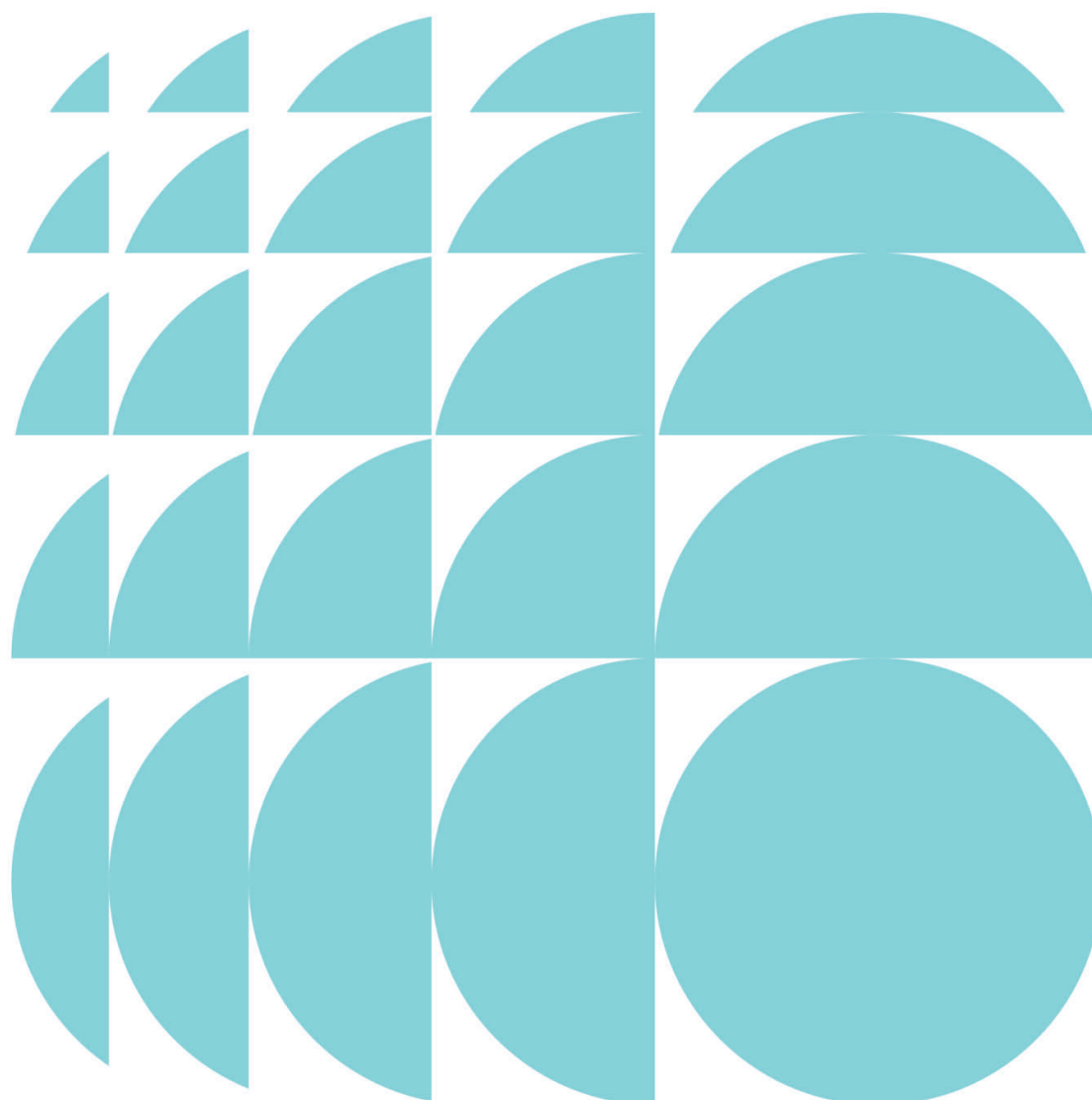
**ETHOS
URBAN**

**Urban Area Employment
Land Investigation (UAELI)**

FINAL REPORT

Prepared for **Moreton Bay Regional Council**

March 2022 | [7200270](#)



(Background study - Not Council Policy)

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

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ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Contents

PART 1 – Executive Summary and Report Summary	7
Executive Summary	8
Report Summary	12
PART 2 – UAELI Report	21
Introduction	22
PART 2A – Locational, Policy and Economic Context	24
1 Locational Context and Subject Employment Land	25
1.1 Regional Location	25
1.2 Key Economic Infrastructure	25
1.3 Industrial Precincts	28
1.4 Summary	31
2 Policy Context	32
2.1 ShapingSEQ (2017)	32
2.2 State Planning Policy (SPP)	33
2.3 MBRC Planning Scheme V4	34
2.4 Regional Growth Management Strategy 2041 – Summary Document (October 2019)	37
2.5 Regional Economic Development Strategy (REDS) 2020-2041	37
2.6 MBRC Industrial Land Supply and Demand (AEC 2017)	39
2.7 Summary	40
3 Economic Context	41
3.1 Study Region	41
3.2 Recent & Forecast Population Growth	42
3.3 Employment by Industry	43
3.4 Place of Work Data	48
3.5 Industrial Building Approvals	50
3.6 Development Pipeline	51
3.7 Wider Region Industrial Market	53
3.8 Summary	55

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

4	Advanced Manufacturing Innovation & Start-ups	57
4.1	Moreton Bay's Future Economic Pathway	57
4.2	Unlocking Innovation	57
4.3	Transitioning to Advanced Manufacturing	59
4.4	Entrepreneurship & Enabling Infrastructure	63
4.5	Place Based Innovation	65
4.6	Summary	68
	PART 2B – Land Supply and Demand Analysis	69
5	Urban Employment Land	70
5.1	Industrial Land within Study Scope	70
5.2	Industrial Land Zone Precincts	70
6	Current Supply	72
6.1	Modelling Industrial Land Supply	72
6.2	Key Data Sources	72
6.3	Land Supply Assessment Methodology	73
6.4	Supply at 2021	77
6.5	Comparison with LSDM 2020	81
6.6	Summary	81
7	Historical Take-Up Patterns	83
7.1	Definition of Take-Up	83
7.2	Take-Up Analysis Methodology	83
7.3	Recent Take Up Patterns	84
7.4	Longer Term Take-Up Trends at Brendale and Boundary Road Narangba	87
7.5	Comparison with LSDM 2020	88
7.6	Summary	88
8	Drivers of Future Demand	89
8.1	Population Growth & New Business Demand	89
8.2	Warehousing & Logistics	90
8.3	Technology Advancement, Big Data	92
8.4	Local Industry Demand	94
8.5	Demand Transfer from Neighbouring Council Areas	98

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

8.6	Infrastructure Induced Demand	99
8.7	Changing Nature of Industrial Precincts	100
8.8	Intermodal Freight Hub at Elimbah	101
8.9	COVID-19 Implications	104
8.10	Summary	106
9	Demand Scenarios	107
9.1	Demand Model Methodology	108
9.2	Adjusted Population Projections	109
9.3	Base Case Scenario	109
9.4	High Demand Scenario	111
9.5	Low Demand Scenario	112
9.6	Comparison of Scenarios	114
9.7	Limitations of Modelling Approach	115
9.8	Summary	115
10	Adequacy of Industrial Land Supply	116
10.1	Modelling Approach to Assessing Supply Adequacy	116
10.2	Model Limitations	117
10.3	Adequacy of Industrial Land Supply	118
10.4	Effective Supply	118
10.5	Individual Precinct Implications for the Base Case Scenario	121
10.6	Importance of New Greenfield Supply Areas	126
10.7	Infrastructure Implications	126
10.8	Implications of High & Low Demand Scenario	127
10.9	Comparison of Employment Outcomes with Other Sources	130
10.10	Economic Value of Industrial Precincts	132
10.11	Comparison with MBRC Industrial Land Supply and Demand (2017)	135
11	Demand & Supply Considerations for Innovation/Health/Aviation Precincts	141
11.1	Mill Innovation, Transit Demand & Supply Context	141
11.2	Health/Hospital Uses Demand & Supply Context	148
11.3	Aviation	154

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

11.4	Summary	155
	Part 2C – Recommendations	156
12	Land Use Planning Issues and Considerations	157
12.1	The Ongoing Role, Function and Need for the MIBA, Light Industry and General Industry Zone Precincts	157
12.2	Allowance for Future High Impact Industry Opportunities	159
12.3	Clear Planning Intent for Important Areas of Future Employment Land Supply	161
12.4	Diversify Industrial Growth Fronts	164
12.5	The MBRC Place Model and ShapingSEQ	164
12.6	Other Relevant MBRC Planning Scheme Considerations	166
13	Industrial Land Monitoring	168
13.1	Enhance and Update VUT Databases	168
13.2	Conduct Major Industrial Land Study in the Next One to Two Years and Subsequently at Least Every Five Years	168
14	Specific Precincts	170
14.1	Secure Future Supply of Industrial Land at Elimbah East and North East Business Park	170
14.2	Investigate Redevelopment Opportunities at Brendale and Boundary Road Narangba	170
15	Economic Development	172
15.1	Continue to Build Local Industrial Property Market Intelligence Capabilities	172
15.2	Monitor Competing Industrial Land Markets	172
15.3	Take a Leading Role in the Delivery of Innovation Infrastructure at The Mill at Moreton Bay	173
15.4	Actively Advocate for Transport Infrastructure Initiatives with Government Authorities	174
	Appendix 1: Employment Precinct Overview:	175
	Appendix 2: Detailed Demand Projections Tables	206
	Appendix 3: Council Assessment of 'Able to be Serviced'	221
	Appendix 4 Glossary of Terms	222

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

PART 1 – Executive Summary and Report Summary

Part 1 of the UAELI Report provides a concise stand-alone overview of the key findings, implications and recommendations of the UAELI report, and includes:

- **Executive Summary:** A brief overview of project, key findings and recommendations.
- **Report Summary:** An overview of findings in each section of the report.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Executive Summary

- 1 Moreton Bay Regional Council (MBRC) engaged Ethos Urban to undertake the Urban Areas Employment Land Investigation (UAELI). The project has the following objectives:
 - Assess the demand and supply situation for industrial land in MBRC's urban areas both now and into the future to determine the adequacy of supply (i.e. for land in the Industry Zone and land identified for industrial use in the Emerging Community Zone).
 - Advise on the supply and demand situation for site-specific uses focused on knowledge, health, innovation or technology, and aviation.
 - Advise on the employment land needs in greenfield locations including Elimbah East and North East Business Park.
- 2 The UAELI does not consider:
 - Land reserved or used for retail, commercial or residential purposes
 - Non-urban land
 - Tourism and events land.
- 3 The existing planning scheme uses zoning to set aside certain areas for specific land uses. For example, some areas are to build houses (ie. residential zones) and others are for economic development (ie. employment land in industrial or centre zones).
- 4 There are five types of industrial development areas or *precincts* within the Industry Zone. Each precinct has slightly different intentions, as described below:
 - Light Industry - accommodates low impact industrial uses such as repairing or servicing motor vehicles.
 - Mixed Industry and Business Area (MIBA) - accommodates low impact industrial uses and associated commercial uses, such as assembling or fabricating products from wood and an associated office or showroom.
 - General Industry (GI) - accommodates medium and high impact industrial uses such as transport depot, sawmilling or waste disposal facility (in appropriate locations, separated from incompatible uses)
 - Restricted Industry - accommodates high impact and hard to locate industrial uses - such as a crematoria – that are well separated from incompatible uses, to avoid health and safety impacts.
 - Marine Industry - accommodates waterfront-based industrial uses and associated commercial activities which require direct access to a waterway.

Adequacy of Industrial Land Supply

- 5 The Queensland Government's South East Queensland Regional Plan (*ShapingSEQ*) states that at all times local governments should have at least 15-years supply of land that is appropriately zoned and able to be serviced.
- 6 This is consistent with the first objective of the UAELI which is to determine whether MBRC has an adequate Effective Supply of industrial land for future planning and development, ie. at least 15 years of Effective Supply of industrial land.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- 7 For the purposes of this assessment, the industrial land supply that is appropriately zoned and able to be serviced is referred to as 'Effective Supply.'
- 8 Under Base Case demand projections, there is adequate Effective Supply in the GI, MIBA, Light Industry and Restricted Industry precincts to satisfy the minimum threshold of 15-years supply.
- 9 Maintaining a minimum of 15-years supply of industrial land at all times is a way of ensuring the industrial land market remains competitive, efficient and affordable. This is particularly important for the GI and MIBA precincts which collectively support the majority of new industrial development.
- 10 To maintain the supply over the longer term, Council should soon start to look for possible additional GI and MIBA supply options.
- 11 Within the existing Effective Supply framework, Elimbah East (GI) and North East Business Park (MIBA) are the only greenfield locations that could support new large scale industrial estates. These areas are yet to commence development. This means MBRC currently has an 'eggs in one basket' industrial land supply problem for GI and MIBA zone precincts which is a risk for industrial land planning and development in the municipality.
- 12 If Elimbah East and North East Business Park were not developed for industrial use, there would no longer be an adequate supply of GI and MIBA land as the Effective Supply would be less than the 15-year minimum threshold under the Base Case projections (at 9-years and 12-years supply respectively).

Differences between the UAELI and MBRC Industrial Land Supply and Demand (2017)

- 13 The previous overarching assessment of industrial land supply and demand in MBRC was the report titled 'MBRC Industrial Land Supply and Demand (2017)' by AEC Group (i.e. the AEC report). The UAELI report will replace the AEC report.
- 14 The UAELI and AEC were compiled in different ways. In particular, the number of industrial precincts, the base year for land supply estimates, base data underpinning land supply estimates, supply calculation methodology, and demand modelling methodology, all differ between the two reports. MBRC's industrial land context has also evolved since the AEC report was undertaken in 2017. The unprecedented level of industrial land take-up from 2019-2021 is one significant change that highlights the need for a fresh assessment of supply and demand.

Recommendations

- 15 Flowing from the analysis, a range of recommendations are outlined for Council, which can be broadly categorised into – land use planning matters, location specific matters, land use monitoring matters and economic development and advocacy matters.
- 16 Land use planning related matters include:
 - The distinction between some of Council's industrial precincts is not clear as some industrial uses can be developed in more than one industrial precinct. This can be confusing for residents and industrial developers. Council should investigate the ongoing role, function and need for separate Light Industry, MIBA and GI zone precincts.
 - High impact industrial land areas play a key role in accommodating important but difficult to locate industries. To do that, development of these areas and 500m around them, must be monitored to make sure that sensitive uses or zones remain 500m away.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- Within the Effective Supply, Elimbah East and North East Business Park are the only greenfield locations that could support new large scale industrial estates for GI and MIBA respectively. The current reliance on these two areas of supply leads to the recommendation to commence a process to identify potential additional GI and MIBA supply options.
- ShapingSEQ was finalised after the commencement of the MBRC planning scheme. Therefore, there is an opportunity to further refine the strategic framework to better reflect the strategies within ShapingSEQ, particularly in relation to the Major Enterprise and Industrial Areas for the region.
- The nature of employment areas and industrial uses are changing which has the potential to impact on the built form needed to support industrial innovation. To ensure the planning scheme does not unnecessarily limit opportunities for contemporary industrial uses and innovations within employment areas a review of the industrial zone codes and the associated assessment benchmarks is recommended.
- Critical to the delivery of employment land supply is the timely and efficient delivery of supporting urban civil infrastructure. To support the delivery of industrial land Council should investigate ways to service future employment land so that it is easier to develop.

17 Location specific matters include:

- Within the Effective Supply, Elimbah East and North East Business Park are the only greenfield locations that could support new large scale industrial estates for GI and MIBA respectively. Further, should these locations not proceed to develop as industrial estates there would no longer be adequate effective supply of either GI or MIBA land. Therefore, it is recommended that Council refine the strategic framework to incorporate clear outcomes on the intent for these critical locations, as well as resolve the current complex considerations around both sites regarding land use mix.
- The long-standing industrial estates at Brendale and Boundary Road, Narangba are of strategic importance to the region's industrial economy. However, both locations have limited remaining supply. Given their importance to the region it is recommended an assessment of renewal and redevelopment opportunities be undertaken for these existing industrial estates.
- Hospitals can act as catalysts for the development of health clusters. An investigation of planning controls applicable to land proximate hospitals would assist in facilitating and encouraging clustering of allied health and medical uses.

18 Land use monitoring related matters include:

- Council's industrial land database was critical to the development of this study, however further improvements could be made to improve accuracy and the level of detail available. It is recommended that Council continue to monitor and also expand their information about all industrial land parcels in the municipality.
- The industrial land market will continue to evolve. Thus, it is recommended Council conduct a significant industrial land study every five years keeping the methodology and scope consistent and prioritising local industrial property market intelligence to complement information in industrial land databases. Further, it is recommended a revised demand assessment be undertaken in the short term given the unprecedented level of industrial land take-up between 2019-21.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

19 Economic development and advocacy related matters include:

- Local intelligence on the Moreton Bay industrial property market, as well those of competing markets, would complement the more statistical focus of the land use database. Council should expand their industrial property market intelligence gathering.
- Significant transport infrastructure initiatives can generate positive and material economic benefits for industrial markets. It is recommended Council closely engage with government authorities to advocate for commitments to infrastructure of this nature.
- The Mill at Moreton Bay will likely provide an opportunity for innovation infrastructure to be delivered that can support innovation and entrepreneurship. Council should take a leading role in delivering innovation infrastructure at the Mill at Moreton Bay and the establishment of governance structures capable of delivering an innovation agenda with strong linkages to local industry.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Report Summary

Locational, Policy and Economic Context

Locational Context

- 1 MBRC is Australia's third largest municipality by population and is strategically positioned between central Brisbane and the Sunshine Coast. The municipality's urban footprint is mainly proximate the Bruce Highway and North Coast Line alignment, and functions as a linear economic corridor linking the balance of South-East Queensland (SEQ) to the Sunshine Coast, Wide Bay Burnett Region, and areas further north. Caboolture West is an important future development front and is identified as a Major Expansion Area in ShapingSEQ.
- 2 MBRC's economic context is shaped by its provision of major infrastructure, including the Bruce Highway, Sunshine Coast Railway Line, Redcliffe Peninsula Line and Regional Employment Clusters (RECs) at Strathpine/Brendale/Petrie and Mango Hill/North Lakes.

Policy Context

- 3 Policy priorities of relevance are outlined in documents including the MBRC Planning Scheme V4, Regional Growth Management Strategy 2041 and the Regional Economic Development Strategy 2020-2041. These priorities include planning to accommodate significant projected population growth, leveraging existing competitive advantages, and facilitating the development of high-value economic activities focused on knowledge and innovation.
- 4 A previous report titled MBRC Industrial Land Supply and Demand Assessment (2017) undertaken by AEC had concluded that the municipality's long-term stock of industrial land was sufficient (from a whole of municipality perspective).

Economic Context

- 5 Projected population growth in MBRC is significant. The municipality expects to accommodate +280,020 additional persons between 2021 and 2051, representing an increase of +58%. These figures have been adjusted to reflect COVID-19 impacts such as lower net overseas migration.
- 6 MBRC's workforce increased substantially between 2011 and 2016. Some +18,860 new jobs were created over the period, representing an annual increase of an annual increase +3,780 jobs (+3.9% p.a.). The consumer services sector was the focus for new job creation in addition to construction activities.
- 7 The 2016 Queensland Treasury projections note that MBRC would add some +59,680 jobs were between 2016 and 2041, representing annual growth of +2,390 jobs (or +1.8% p.a.). In contrast, the Moreton Bay Employment Model (2019) envisages +87,600 jobs would be added over this period, representing +3,500 jobs (or +2.4%) p.a.
- 8 MBRC had an employment self-containment rate of 48.5% in 2016, meaning 48.5% of employed residents in MBRC worked in the municipality. The employment self-containment target for MBRC is 70%, as stated in the MBRC Planning Scheme V4 (section 3.7). A total of 90,500 residents were employed in MBRC in 2016, of which 69% resided in the southern region and the balance (31%) in the northern region.
- 9 The southern region is the primary focus for industrial investment, supporting 92% of the total capital value for industrial approvals in MBRC from 2012 to 2020. Warehouses were the primary industrial building type delivered across the 8-year period comprising 77% of the total building value.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- 10 MBRC has a strong development pipeline underscored by the Caboolture Hospital Redevelopment and delivery of The Mill at Moreton Bay PDA. The industrial development pipeline is estimated at \$407.3 million and is primarily attributed to new warehouse construction in the municipality's southern region.
- 11 The Land Supply and Development Monitoring (LSDM) Report 2020 notes that the SEQ municipality with the largest industrial land supply was Ipswich (3,830ha) followed Scenic Rim (1,350ha), Moreton Bay (1,000ha) and Toowoomba (890ha).
- 12 Industrial land consumption from 2011 to 2019 was highest in Toowoomba according to the LSDM (2020). Toowoomba is well located to service supply chains extending to western Queensland and south to Sydney and Melbourne. Industrial land in Moreton Bay, Brisbane, and Sunshine Coast, is positioned to service that north-south coastal supply chains within Queensland; while Ipswich, Toowoomba and Gold Coast are positioned to service those supply chains extending to the west and south.

Advanced Manufacturing Innovation & Start-ups

- 13 Though innovation has always been an important component of business practice, its importance has been heightened by globalisation and the disruption associated with digital technology. Innovation precincts have emerged to support innovation and harness the benefits associated with knowledge and technology clustering.
- 14 Advanced manufacturing refers to the technologies and processes that are a natural fit for first-world economies in view of the mega-trends of globalisation, digitalisation and increased demand for sustainable, bespoke and high-margin solutions. Entrepreneurship in the modern economic development context is focused mainly on start-up culture.
- 15 The Mill at Moreton Bay PDA will likely provide opportunities for delivery of innovation infrastructure that supports entrepreneurship in sectors such as advanced manufacturing or health. Cross sectoral partnerships, support in the start-up phase, access to training and education, are among an array of key factors for success drawing from case studies.
- 16 It will be important that any new innovation infrastructure geared to advanced manufacturing, or the health/medical sectors has direct links to the local businesses community. One suggestion is to ensure an industry and advisory committee with local business representation forms part of the overarching government structure.

Land Supply and Demand Analysis

Industrial Land

- 17 A key requirement of the UAELI is to analyse the supply and demand situation for urban industrial land by zone precinct. The category 'industrial land' comprises enterprise and employment areas in MBRC and additional industrial areas. The Industry Zone and associated zone precincts – General Industry (GI), Mixed Industry and Business Area (MIBA), Light Industry, Marine Industry – applies to the vast majority of industrial land considered.
- 18 Approximately 2,037.2ha of zoned industrial land was in MBRC urban areas in 2021, of which 757.4ha (or 37%) is estimated to be Net Vacant Land (NVL) – allowing for occupied, underutilised or constrained land, and civil infrastructure. The majority of total NVL (552.9ha or 73%) is located in the northern region, with the balance (204.5ha, 27%) provided in the southern region. Note, NVL is not the baseline for testing the municipality's industrial land supply against the ShapingSEQ benchmark, as it includes land that is not appropriately zoned and/or able to be serviced (refer following paragraph 35).

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- 19 The NVL supply in the GI zone precinct is calculated at 408.3ha – with Elimbah East (55%), Brendale (15%), Caboolture West (14%) and Bribie Island Road Caboolture (11%) being the main locations of supply. Future employment land at Caboolture West is considered to be a longer-term proposition due to civil infrastructure and staging considerations.
- 20 The NVL supply for MIBA totals around 201.2ha, with North East Business Park (60%) and Boundary Road Narangba (12%) being the major areas of supply.
- 21 Provision of NVL for Restricted Industry is limited, with all available supply (only 11.5ha) situated at Boundary Road Narangba. The provision of land for Marine Services is also limited (less than 1,000m²), but additional supply may be delivered at North Harbour PDA.
- 22 The estimate of 757.4ha of NVL in the municipality is 15% lower than that reported in LSDM 2020. However, given coverage and methodological differences between LSDM and NVL calculations¹, the 15% variation is considered to be within an acceptable margin of difference.
- 23 Recent take-up (from 2016-2021) was calculated using Council's VUT data, which was generally assembled and classified as per Queensland State Government guidelines (2020). The State Development, Infrastructure, Local Government, and Planning Department defines take-up as land that contains an active land use and built form for the purposes of industrial or other use; or, land that contains construction of an improvement/building that commenced but may not be completed.
- 24 For Boundary Road Narangba and Brendale precincts – which between them accounted for 78% of industrial land take-up between 2016 and 2021 – take-up prior from 2009 to 2021 was also measured.
- 25 From 2016 to 2021, average annual take-up of employment land across all zone precincts was 22.0ha. Around half of the land consumed across this time period (annualised) was in the GI zone precinct (11.5ha or 52%).
- 26 In contrast, MIBA land accounted for 5.3ha of take-up on an annual basis, or 23% (of total annual take-up), with the balance (5.1ha or 24%) attributed to other zone precincts. Recent take-up of land at Brendale and Boundary Road Narangba increased relative to the long-term (10-year) average.
- 27 Population growth will play a prominent role in shaping the demand context for employment land in the municipality. For modelling purposes, demand was divided into:
 - Population Growth Demand (PGD) – demand generated in-line with population growth; and
 - New Business Demand (NBD) – demand generated by new businesses that would not otherwise develop in MBRC due to local population growth.

¹ For example, the Warner precinct was excluded from the UAELI upon direction from Council but included in the LSDM 2020 estimates.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- 28 A host of other potential demand drivers exist, including warehousing and logistics; technology and big data; demand from local industries (manufacturing, construction, food and forestry etc); demand transfers from neighbouring municipalities; infrastructure induced demand; and industrial precincts accommodating an increasingly diverse mix of uses.
- 29 Though some of these demand drivers are relatively static, others will continue to evolve into the future. Likewise, some demand drivers function separately, but many – to varying degrees – are interrelated. If an intermodal freight hub was established at Elimbah East, it would likely anchor a very active industrial area, encourage related uses and generate significant demand for industrial land.
- 30 The impacts of COVID-19 on the MBRC industrial land market are highly uncertain due to intermittent outbreaks, international border closures. However, e-commerce has increased markedly during the pandemic, and this trend will continue to support new investment in supply chains and warehousing.
- 31 Three future projections of demand for industrial land have been constructed by separating demand supported by population growth and demand generated by new or expanding businesses with markets extending beyond MBRC and/or companies choosing MBRC in preference to other locations.
- 32 Based on revised population growth projections, and assumptions about New Business demand, the three scenarios provide a:
 - **Base Case Scenario** – demand ranging from 22 to 26ha per year, generating a requirement for 720ha over the period 2021-2051.
 - **High Growth Scenario** – demand ranging from 25 to 30ha per year, generating a requirement for 830ha over the period 2021-2051.
 - **Low Growth Scenario** – demand ranging from 17 to 24ha per year, generating a requirement for 610ha over the period 2021-2051.
- 33 Assuming a distribution of demand among zone precincts, the Base Case Scenario projects demand over the period 2021-2051 for:
 - 407.8ha of GI zoned land
 - 205.0ha for MIBA zoned land
 - 84.6ha for Light Industry zoned land
 - 16.5ha for Restricted Industry; and
 - 6.1ha for Marine Industry.
- 34 A model to assess the adequacy of supply of industrial land in MBRC, relative to projected demand, has been constructed to address planning requirements.
- 35 Two barometers for assessing the adequacy of industrial land supply in MBRC were considered: the ShapingSEQ minimum threshold of 15-years of land supply that is appropriately zoned and able to be serviced; and a direct comparison of supply against demand to understand implications for individual precincts.
- 36 For the purposes of this report, land that is appropriately zone and able to be serviced is defined as 'Effective Supply'. Effective Supply is estimated at 653.5ha in 2021 (and is equivalent to total NVL (757.4ha) less Caboolture West (84.2ha) and parts of Bribie Island Road Caboolture (19.8ha)) – and is based on an assessment by Council of land that is able to

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

be serviced based on State Government criteria. The assessment identified all of Caboolture West and parts of Bribie Island Road Caboolture as not currently able to be serviced (refer Appendix 3).

- 37 MBRC's supply of industrial land in years is calculated by dividing the quantum of Effective Supply by the average annual demand forecasted for each zone precinct. Focusing on the Base Case Scenario, the ShapingSEQ minimum threshold of 15-years supply that is appropriately zoned and able to be serviced would be reached as follows:
 - GI – approximately 2032
 - MIBA – approximately 2035
 - Light Industry – approximately 2038
 - Restricted Industry – approximately 2027
 - Marine Industry – current supply is already below the 15-year threshold.
- 38 But having regard for the timing of when the Effective Supply of GI and MIBA land would be equivalent to 15-years under the Base Case and High Case projections (refer Table 10.1), Council should commence investigating potential GI and MIBA supply options, considering:
 - That a planning process has not yet been undertaken to identify additional industrial supply options; and
 - The timeframe for the planning and servicing of new industry land (subsequent the identification of genuine supply options) is generally in the order of 5-7 years.
- 39 It is advised that, where possible, Council should avoid a situation whereby development approvals result in a reduction in the current quantum of GI and MIBA supply.
- 40 The Base Case demand modelling envisages that as a result of constrained supply:
 - Development of GI land at Elimbah East would theoretically occur by around 2028 at the latest.
 - Development of MIBA land at North East Business Park would theoretically occur by approximately 2026 at the latest.
- 41 Elimbah East and North East Business Park represent MBRC's two future reservoirs of new greenfield Effective Supply (i.e. land that is appropriately zoned and able to be serviced). If the capacity to deliver industry (as currently zoned) at these precincts was forgone, the Effective Supply of GI and MIBA land would be 9 and 12 years respectively at 2021 which is lower than the ShapingSEQ minimum 15-year threshold.
- 42 MBRC's existing limited options for new greenfield Effective Supply of GI and MIBA is considered a significant risk to industrial land planning and development in the municipality.
- 43 And in view of the general 5-7 year lead time to provide civil infrastructure to greenfield industrial estates prior to these areas being occupied, both North East Business Park and Elimbah East are considered infrastructure pressure points.
- 44 Projected land development under the Base Case Scenario would result in MBRC's urban industrial areas supporting an estimated 36,970 jobs by 2051, representing an increase of +17,440 jobs on the current level. The northern region would capture 65% of total additional jobs over the time period (+11,400 jobs).

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- 45 Direct comparison of the employment projections derived in this report with other results are difficult because of differences in timing, scope, geographical coverage, and methodology. Notwithstanding, MBRC's REDS (2021) envisages annual employment growth over the period 2021-41 of +2.4% which broadly reflects employment growth under the Base Case Scenario.
- 46 An estimate of the economic contribution of industrial precincts under the Effective Supply framework shows that new development projected to occur after 2021 would contribute cumulative value added of \$9,566 million by 2051 (or \$9.6 billion) in real \$2021 dollars.
- 47 Comparison of demand and supply of industrial land between UEALI and the report for MBRC by AEC titled 'MBRC Industrial Land Supply and Demand' (2017) is problematic. The two reports differ significantly in coverage, scope and the methodology employed. For example, while detailed analysis of recent industrial land uptake based on the VUT dataset and State Government criteria (for categorising vacant, underutilised or taken up land) was a key aspect that informed the UAELI projections, the analysis of uptake by AEC was comparatively limited and not based on the VUT dataset. Moreover, the UAELI's calculations of land supply was informed by a more detailed analysis of constraints, relative to the AEC report. A key difference in findings was that the average annual increase in land demand and employment across 20 years to 2041 under the Base Case UAELI projections (both +2.3%) was higher than AEC projections (at +2.0% p.a. and +2.1% p.a. respectively).

Site-Specific Precincts Focused on Innovation Health & Knowledge

- 48 Analysis of site-specific uses focused on knowledge, health, innovation or technology, and aviation, related to the Perrie Mill Innovation Precinct (Mill Innovation), Petrie Mill Transit Precinct (Mill Transit), Redcliffe Health Precinct, Caboolture Health Precinct, the proposed Bribie Island Hospital, Aerodrome Caboolture, and Redcliffe Aerodrome.
- 49 Mill Innovation is to be developed as an employment precinct accommodating high-profile businesses with an innovation focus and potential links to the university campus (USC Moreton Bay). In keeping with the current Development Scheme, Mill Innovation would support office and 'research and technology industry' as the primary land uses, complemented by medium and high-density residential development. In contrast, Mill Transit is envisaged as a transit oriented residential community with a neighbourhood hub that supports medium and high-density residential; convenience retail including shops and food and beverage uses; and minor employment-generating uses such as small-scale offices.
- 50 The take up of commercial floorspace at Mill Innovation will be shaped by broader demand conditions for office floorspace and the markets for co-worker and potentially flex-space and serviced offices. Securing high profile anchor tenants is considered critical in establishing the Mill Innovation precinct as an office destination.
- 51 Demand for apartments within the Mill Innovation and Mill Transit areas will be influenced by the broader apartment market. Establishing a high-quality urban environment will be important if residents are to be attracted to the area. Emerging residential typologies such as Built to Rent may be viable based on the proximity of the nearby university campus.
- 52 Hospital precincts at Caboolture and Redcliffe, and a new hospital at Bribie Island are likely to generate additional development in health and allied health services within, or adjacent to the health precincts. Based on the locations of the health precincts, it is considered less likely that significant investment in commercial accommodation or higher-density housing will occur in the short to medium term.
- 53 Both Aerodrome Caboolture and Redcliffe Aerodrome represent small-scale airports with operations focussing on recreational services and flight training. Limited passenger services are also offered at Redcliffe Aerodrome. These precincts are not expected to attract any

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

substantive demand from industrial tenants and aviation related activities and businesses will continue to be the main users of the airports.

Recommendations

- 54 Flowing from the analysis, recommendations are provided regarding land use planning issues, monitoring of industrial land trends, issues specific to precincts and economic development.

Land Use Planning Issues & Considerations

- 55 Council to investigate the ongoing role, function and need for the Light Industry, MIBA and GI zone precincts, in view of recent take-up and projected demand for each zone precinct and the significant crossover in uses envisaged for each of these zone precincts.
- 56 To facilitate potential future High Impact industry opportunities in MBRC. It is recommended that Council:
- Identify and monitor GI land with a 500m separation distance to sensitive uses or zones, in particular at Elimbah East and potentially Caboolture West in the longer term.
 - Review the strategic framework, with a particular focus on the strategic and specific outcomes within themes 3.3.5 Employment Location, 3.3.11 Planning Area Structuring and 3.3.12 Moreton Bay Regional Council Place Model, to incorporate clear outcomes on the intent and appropriate potential locations for High impact industry uses within the enterprise and employment area at Elimbah East and potentially Caboolture West. This review should also extend to the GI zone precinct, which does not currently include any location specific provisions to consider incorporating an intent for High impact industry uses at Elimbah East.
- 57 Based on the above, we recommend the strategic framework would benefit from refinements that:
- Emphasise the importance of the employment and enterprise areas at Elimbah East, North-East Business Park and Caboolture West in delivering adequate supply of employment land to meet the future needs of industry and related businesses.
 - Improve the clarity around the intended high-level land use outcomes for these important areas of future supply, with a focus on clarifying appropriate areas for where High Impact industry uses may be located within Elimbah East.
 - Strengthen the intended role and function of the employment and enterprise areas at Elimbah East, North-East Business Park and Caboolture West, with a particular focus on protection from incompatible land uses.
- 58 Council should also commence a process to identify potential additional GI and MIBA supply options to mitigate risks associated with an 'eggs in one basket' situation.
- 59 In considering the precinct specific findings of Part 2 of this investigation, and the major enterprise and industrial areas identified in ShapingSEQ, an opportunity has been identified to refine the outcomes associated with the enterprise and employment areas place type and zoning, with a focus on:
- Providing greater clarity around the intent, role and intended land uses of the major enterprise and industrial areas identified in ShapingSEQ
 - Distinguishing the major enterprise and industrial areas identified in ShapingSEQ from other Enterprise and employment areas within the MBRC place model

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- Reviewing and identifying opportunities to implement the relevant elements, strategies and sub-regional directions within ShapingSEQ, including the strategies within Goal 2, Element 5: Major enterprise and industrial areas.
- 60 Informed by the land supply and demand findings of this investigation, Council should investigate opportunities to improve the alignment between development of future employment land and assumptions made around the provision of supporting civil infrastructure within the Local Government Infrastructure Plan (LGIP) of the MBRC planning scheme. Note, the scope of investigations regarding the provision and timing of civil infrastructure is a separate consideration to the scope of this investigation.

Industrial Land Monitoring

- 61 Council to prepare a field survey instrument to capture information about all industrial land parcels in the municipality covering, but not limited to:
- A clear classification of each parcel into Vacant, Underutilised or Taken-up.
 - On occupied sites:
 - Type of industry operating classified using ABS ANZSIC codes.
 - Whether industrial activities are classified as high, medium or low impact.
 - Built form (e.g., single/multiple storeys, age and condition).
 - GFA of buildings; and
 - Whether buildings are occupied or vacant.
- 62 Council to consider undertaking a census of all industrial land supply in the municipality, either once every five years or on a five-year rolling basis. The information from the census of industrial land be integrated into the VUT databases.
- 63 Council to consider undertaken a significant industrial land study every five years. The brief for these studies should specify that significant definitions, methodological approach and coverage enable the results of successive studies to be readily compared.
- 64 Council to consider prioritising local industrial property market intelligence gathering to complement information formally maintained in VUT databases.
- 65 Council to consider extending industrial property market intelligence gathering to include monitoring trends in competing locations, particularly in Brisbane, Logan, the Sunshine Coast and Ipswich.

Precincts & Economic Development

- 66 Council to resolve the land use mix at both Elimbah East and North-East Business Park as an immediate priority, in view of their significance to future industrial land supply and the likelihood that both precincts will be needed to accommodate industrial businesses before the end of the decade. In resolving the land use mix at both Elimbah East and North-East Business Park, Council should have regard for the implications for Caboolture West.
- 67 Council to consider initiating an assessment of renewal and redevelopment opportunities in existing industrial estates, in particular, at Brendale and Boundary Road Narangba, to evaluate the potential that redevelopment could contribute to future industrial land supply.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- 68 Council to take a leading role in delivering innovation infrastructure at the Mill at Moreton Bay and the establishment of governance structures capable of delivering an innovation agenda with linkages to local industry.
- 69 Investigate refinement of planning controls applicable to land proximate hospitals to assist in facilitating and encouraging clustering of allied health and medical uses.
- 70 Council to closely engage with government authorities regarding significant transport infrastructure initiatives – such as an alternative arterial to the west of the Bruce Highway and a potential intermodal freight hub at Elimbah East – with a view to actively advocating for initiatives that will generate positive and material economic benefits.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

PART 2 – UAELI Report

Part 2 of the UAELI Report outlines the research and analysis undertaken which forms the basis of the Part 1 summary. Part 2:

- Describes locational attributes of MBRC, key economic infrastructure, and employment precincts in the scope of the study.
- Reviews key policy documents and studies relevant to employment land in the Council area.
- Discusses significant demographic and economic characteristics of the MBRC area.
- Considers key definitional and contextual considerations relevant to advanced manufacturing, innovation and entrepreneurship, and approaches that could potentially support these sectors.
- Quantifies the NVL supply of industrial land.
- Analyses historical take-up of industrial land.
- Discusses drivers of future demand for industrial land.
- Details three future demand scenarios for industrial land - Low Demand, Base Case and High Demand.
- Assesses the adequacy of the supply of industrial land against the three demand scenarios.
- Separately considers site-specific uses focused on knowledge, health, innovation or technology, and aviation.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Introduction

Moreton Bay Regional Council (MBRC) engaged Ethos Urban to undertake the Urban Area Employment Land Investigation (UAELI), focusing on precincts within the urban footprint of the municipality.

Strategically positioned between central Brisbane and the Sunshine Coast, MBRC's population is forecast to increase by +250,200 persons from 2016 to 2041, based on the latest Queensland Government Population projections (2018). This forecast growth trajectory is substantial and, in conjunction with a priority to diversify the economy, significantly influences the municipality's planning and development context.

Shaped by MBRC's location within an economic corridor linking the balance of South East Queensland (SEQ) to the Sunshine Coast and areas further north, the municipality accommodates a variety of employment areas. Local job opportunities are historically recognised as a key strength.

Like many regions across Australia, MBRC's economy is restructuring with jobs growth now primarily in services sectors. However, the Council's recently completed Regional Economic Development Strategy (REDS) identified the need for a new economic direction, focused on industries that provide high value to the economy, generate exports and embrace innovation and technology.

Against this backdrop, MBRC is seeking to update its economic information base covering urban employment land. Two specific issues are at hand:

- Council currently lacks easily understood data regarding the availability and appropriateness of employment land supply for the assessment of development applications, as well as for strategic planning for future growth areas; and
- The preferred economic pathway outlined by the REDS positions '*advanced manufacturing*' and '*knowledge, innovation and entrepreneurship*' as key growth areas, among others.

In summary, up-to-date economic information is required to inform MBRC's planning processes and confirm appropriate policy settings to give effect to the REDS.

The scope of the 'employment land' in this study covers:

- Land in the enterprise and employment area place type and other industrial precincts; and
- Analysis of site-specific uses focused on knowledge, health, innovation or technology, and aviation (Mill Innovation, Mill Transit Precinct, Redcliffe Health Precinct, Caboolture Health Precinct, the proposed Bribie Island Hospital, Aerodrome Caboolture, and Redcliffe Aerodrome).

The scope of the project excludes consideration of:

- Land reserved or used specifically for retail purposes
- Non-urban land (which will be addressed in a separate investigation); and
- Tourism and events land.

Objectives

The key objectives of this investigation are to:

- Assess the demand and supply situation for industry land in MBRC's urban areas both now and into the future.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- Advise on the supply and demand situation for site-specific uses focused on knowledge, health, innovation or technology, and aviation.
- Provide advice to support the development of advanced manufacturing, innovation and start-ups in MBRC.
- Advise on the employment land needs of future growth areas including Caboolture West, Elimbah East and North East Business Park.

Project Outputs

The primary output of this project is a final MBRC UAELI report.

Prior to this final report, three internal reports were undertaken. The three internal reports were reviewed by Council and CDM Smith (an external peer reviewer) and comprised:

- Two internal working documents:
 - Phase 1 (Background Analysis) - issued October 2020; and
 - Phase 2 (Employment Land Analysis) – issued December 2020
- A draft UAELI report – issued June 2021.

This Report

A full table of contents appears at the beginning of this document.

This report comprises three main parts:

Part 1: Executive Summary and Report Summary – precedes this chapter and provides a high-level summary of key findings, and a more detailed overview of the whole report.

Part 2A: Locational, Policy and Economic Context – reviews important contextual factors relevant to employment land in MBRC.

Part 2B: Land Supply and Demand Analysis – a thorough quantitative investigation of employment land, including an assessment of adequacy of supply based on ShapingSEQ policy.

Part 2C: Recommendations highlights key conclusions from Parts 1 and 2 and recommends future actions.

In addition, appendices contain precinct profiles, detailed supply and demand tables, a glossary of terms, and Council's assessment of land that is 'able to be serviced'.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

PART 2A – Locational, Policy and Economic Context

Part 2A:

- Describes locational attributes of MBRC, key economic infrastructure, and industrial precincts in the scope of the study.
- Reviews key policy documents and studies relevant to employment land in the Council area.
- Discusses significant demographic and economic characteristics of the MBRC area.
- Considers key definitional and contextual considerations relevant to advanced manufacturing, innovation and entrepreneurship, and approaches that could potentially support these sectors.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

1 Locational Context and Subject Employment Land

This chapter considers Moreton Bay Regional Council's (MBRC's) location and key economic infrastructure, as well as employment land in the scope of this study.

1.1 Regional Location

MBRC comprises 2,040 square kilometres in the northern portion of Brisbane's metropolitan area and contained a population of around 469,440 persons in 2019 (source: ABS Cat: 3218.0). Established in 2008, MBRC replaced the former local government areas of Redcliffe, Pine Rivers and Caboolture, and is the third-largest local government area in Australia by population.

MBRC's urban form includes a mix of traditional suburbs, established urban centres, developing greenfield areas and industrial precincts in the municipality's eastern reaches. Rural townships, and areas of agricultural production, natural beauty and environmental significance are in the western part of the municipality. Overall, MBRC has a diverse land use mix with urban, peri-urban and rural landscapes.

For the most part, the municipality's urban areas follow a linear pattern consistent with the alignment of the Bruce Highway, Sunshine Coast Railway Line (part of the North Coast Line) and Redcliffe Peninsula Line. Key activity centres include Petrie, Mango Hill/North Lakes, Burpengary, Strathpine, Morayfield, Caboolture and Redcliffe.

This urban region is the gateway to both metropolitan Brisbane and the Sunshine Coast, and functions as an economic corridor linking the balance of South East Queensland (SEQ) to the Sunshine Coast, Wide Bay Burnett Region, and areas further north.

Moreton Bay borders the northern extent of Brisbane. Key industrial areas in the municipality (e.g., Brendale) are a 30-minute drive (approximately 40km) from the Australia Trade Coast (ATC). ATC is an economic development area containing the Port of Brisbane and Brisbane Airport, and is Queensland's major import-export facility handling general cargo and international visitors.

Caboolture West, in the municipality's north, is identified in ShapingSEQ as a major expansion area and will be an important growth front for greenfield development in MBRC across the next 30+ years (noting that the timing of industrial land at Caboolture West is uncertain and would likely be delivered toward the end of the expansion area's development phase). Other development fronts are situated at Narangba, Mango Hill/Griffith, Warner, Joyner and throughout the Morayfield South area more generally, while the Mill at Moreton Bay (at Petrie) is the municipality's premier urban renewal precinct.

Although Council are endeavouring to reduce MBRC's reliance on economic activities directly supported by population growth, population growth supported by ongoing and planned residential development is, and will remain, a major driver of economic activity in MBRC.

1.2 Key Economic Infrastructure

MBRC's economic context is framed by provision of major infrastructure. In many respects this infrastructure forms the spine of the economic corridor which broadly extends from Strathpine (in the municipality's south) to Caboolture and Elimbah (in the north) and includes:

- **Bruce Highway** – part of the north-south M1 highway/freeway system that connects the majority of Australia's eastern seaboard.
- **North Coast Line** – connects metropolitan Brisbane with the Sunshine Coast and Queensland's north.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- **Redcliffe Peninsula Line** – completed in 2016 and provides a passenger rail spur connecting the suburb of Petrie with Kippa-Ring and the Redcliffe peninsula.
- **Regional Economic Clusters (RECs)** – at Strathpine/Brendale/Petrie and Mango Hill/North Lakes, as identified in ShapingSEQ.
- **Hospitals/health precincts** – at Redcliffe, Caboolture and a future hospital at Bribie Island which has been approved for construction.
- **The Mill at Moreton Bay** – classified as a Priority Development Area (PDA), this 460-hectare urban renewal precinct is planned to support a full-scale University of Sunshine Coast Campus, as well as employment and residential components. Stage 1 of the University Campus opened in March 2020.

Potential exists for the following major infrastructure to be delivered in the next 20+ years which could also influence MBRC's economic trajectory:

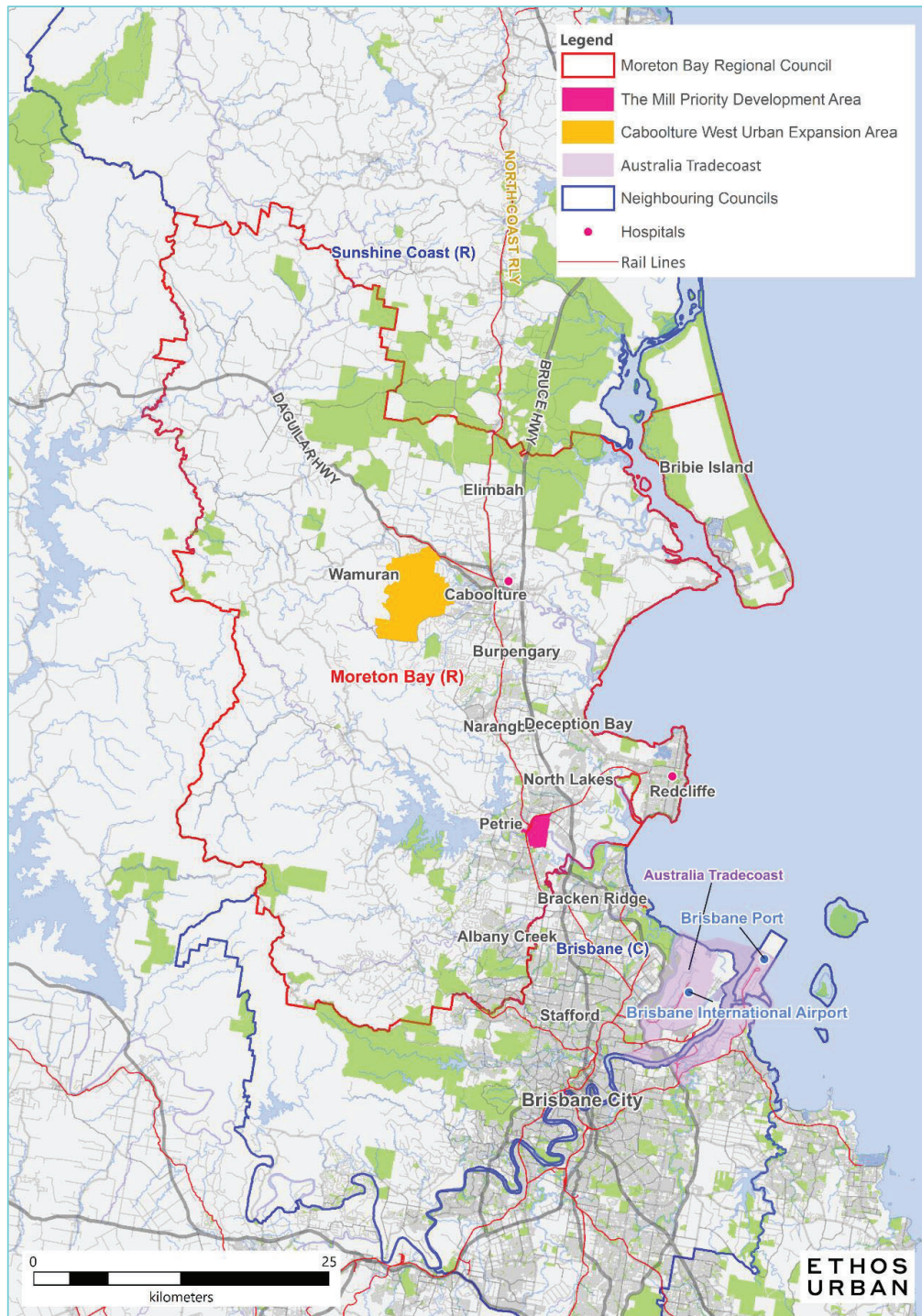
- **The Maroochy Rail Line, or CAMCOS** (Caloundra and Maroochy Corridor Options Study) – a passenger rail spur branching off the North Coast Railway Line at Beerwah and extending to Caloundra and Maroochy.
- **North Coast Connect** – private consortium comprising Stockland, SMEC, Urbis and KPMG submitted a business case to Infrastructure Australia (in August 2020) for a faster connection between Brisbane and the Sunshine Coast. The proposal includes a new duplicated track on the North Coast Line between Brisbane and Beerwah, and a new rail corridor connecting Maroochy and Caloundra to the North Coast Line.
- **Cross River Rail**, which removes network bottlenecks in central Brisbane. Without Cross River Rail, the ability for increased train service services to regions such as Caboolture would be constrained, as noted in the business case. The project is expected to be finished by 2024 based on current timelines.
- **Elimbah Intermodal Freight Hub** – at land north of Caboolture and to the West of the Bruce Highway. This future freight hub has been identified for further investigation by SEQ Transport Plan (2018) with potential delivery before 2041.
- **North South Arterials** – the SEQ Regional Transport Plan (2021) states that planning be undertaken for north-south arterial links parallel to the Bruce Highway to provide alternative arterial roads for shorter trips and preserve the Bruce Highway's role as a strategic route.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure 1.1: MBRC Key Features and Economic Infrastructure



Source: Ethos Urban

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

1.3 Industrial Precincts

This report focuses on industrial land inside the urban footprint of MBRC and separately considers other precincts relevant to innovation, health, education and knowledge, and aviation.²

The geographic focus of this report includes:

- Land in the 'enterprise and employment area' place type and additional industrial precincts identified through discussions with Council officers and Ethos Urban; and
- Site-specific uses focused on innovation, health, education and knowledge, and aviation related uses (Mill Innovation, Mill Transit, Redcliffe Health Precinct, Caboolture Health Precinct and Bribie Island Hospital, Aerodrome Caboolture, Redcliffe Aerodrome).

For the purposes of this assessment, land in the enterprise and employment area' place type and additional industrial land are referred to as **industrial** precincts. While **innovation/health/aviation** precincts encompass the site-specific uses focused on knowledge, health and innovation, and aviation related uses.

Petrie Mill (19) includes land identified in both categories. The existing employment land at Petrie Town is captured within 'industrial' and is included in the supply and demand assessment; while the Petrie Mill Innovation and Mill Transit precincts are captured within the 'innovation/health/aviation' category given the uses envisaged for these areas are of limited relevance to the industrial land market.

Individual precincts are also categorised as belonging to either the northern region or the southern region of the MBRC.

It is important to note that both industrial precincts and innovation/health/aviation precincts assessed for the purposes of this study are not to be confused with 'zone precincts' that relate to zoning controls regulating the types of uses permitted in an area.

The precincts included in the study are shown in Table 1.1 and Figure 1.1 and 1.2.

² The reason for separately considering industrial land and non-industrial land is that the underlying demand and supply factors influencing non-industrial land are significantly different from factors relevant to industrial land.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 1.1. Industrial and Innovation/Health/Aviation Precincts

Precincts
Industrial
<u>Northern Region</u>
(01) Elimbah East
(02) Caboolture West - Enterprise and employment - EC
(03) Sandstone Point
(04) Bribie Island Road Caboolture
(05) Henzell Road Caboolture
(06) First Avenue Bribie Island
(07) PAC Morayfield
(08) North East Business Park
(09) Bruce Highway Burpengary
<u>Southern Region</u>
(10) Old Gympie Road Narangba
(11) Deception Bay
(12) Deception Bay Road
(13) Boundary Road Narangba
(14) Scarborough Marina
(15) Newport
(16) Rothwell
(17) Kippa Ring
(18) Clontarf
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town
(20) Paisley Drive Lawnton
(21) Brendale
(22) The Hills District
Innovation/Health/Aviation
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town
(A) Bribie Island Hospital (proposed)
(B) Aerodrome Caboolture
(C) Caboolture Hospital
(D) Redcliffe Aerodrome
(E) Redcliffe Hospital

Source: Ethos Urban

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure 1.2 Urban Employment Land Areas – Included in the Scope (Northern Region)

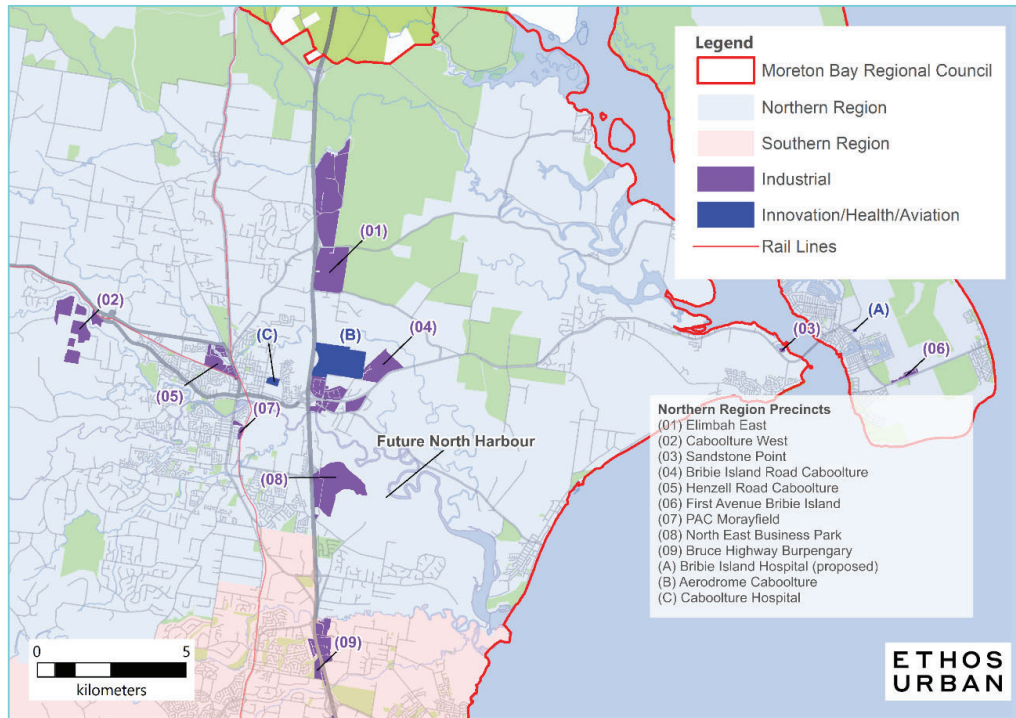
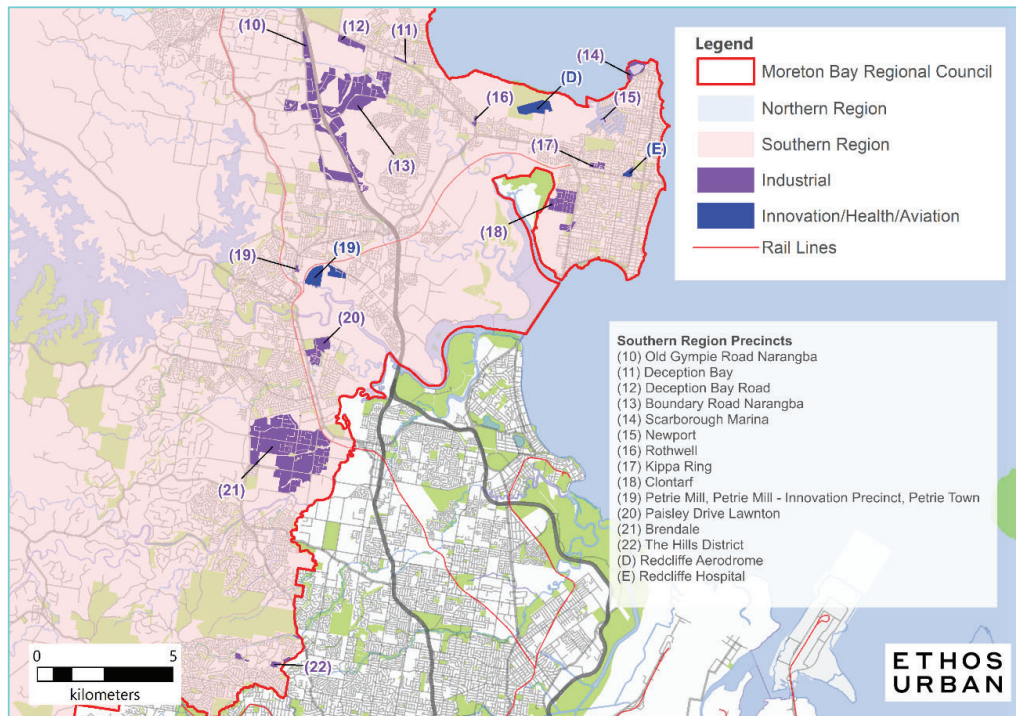


Figure 1.3 Urban Employment Land Areas – Included in the Scope (Southern Region)



Source: Moreton Bay Regional Council, Ethos Urban

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

1.4 Summary

MBRC is Australia's third largest municipality (by population) and is strategically positioned between central Brisbane and the Sunshine Coast. The municipality's urban footprint is largely proximate to the Bruce Highway and North Coast Line, and functions as a linear economic corridor linking the balance of South East Queensland (SEQ) to the Sunshine Coast, Wide Bay Burnett Region, and areas further north. Caboolture West will be an important development front and is identified as a Major Expansion Area in ShapingSEQ.

MBRC's economic context is shaped by provision of major infrastructure including the Bruce Highway, Sunshine Coast Railway Line, Redcliffe Peninsula Line and RECs at Strathpine/Brendale/Petrie and Mango Hill/North Lakes.

Individual precincts to be analysed as part of this project's scope include existing and future industrial land in MBRC's urban area (i.e. industrial precincts), as well as Mill Innovation, Mill Transit, Caboolture Health Precinct, Redcliffe Health Precinct, future Bribie Island Hospital, Aerodrome Caboolture, and Redcliffe Aerodrome.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

2 Policy Context

This chapter considers relevant strategic and statutory policy documents, namely: ShapingSEQ (2017); State Planning Policy; MBRC Strategic Framework; the Regional Growth Management Strategy 2041; Regional Economic Development Strategy (2016); and the MBRC Industrial Land Supply and Demand Report (2017).

2.1 ShapingSEQ (2017)

ShapingSEQ is the statutory regional plan for the SEQ region and replaces the former SEQ Regional Plan 2009-2031. Prepared by the Queensland Government in collaboration with the region's 12 local governments, this document guides planning and development in the SEQ region.

The document sets a 50-year vision responding to the region's significant projected growth and the opportunities associated with global mega-trends. It also outlines directions and strategies to move towards this vision across the next 25-years. Key initiatives include:

- Identifying a long-term sustainable pattern of development, with approximately 60% of new housing development to occur through consolidation in the existing urban area.
- Identifying Regional Economic Clusters (RECs) to support a globally competitive economy and establishing baselines for employment planning across the region.
- Ensuring land-use and infrastructure planning and delivery is integrated.
- Locating people and jobs closer together, and moving people and goods more reliably.
- Maximising the use of existing infrastructure and planning smarter solutions for new infrastructure.

Of particular relevance to the UAELI is Theme 2: Prosper, which states that:

"In 50 years, SEQ will be a globally competitive region, an innovative economic powerhouse and a region of opportunity for all, with close to a million new jobs by 2041 and many more beyond" (p29)

It notes that SEQ's competitive advantages will be built on, among other aspects:

- Economic areas including RECs and the continuing role of SEQ's centres, knowledge and technology precincts, and other major industry and enterprise areas.
- Advantages in key export orientated industries including knowledge, education, and creative industries; food production and agri-business; energy and resources; tourism and high-value manufacturing.
- SEQ's position as Australia's eastern gateway to Asia.
- Investment and reputation in health, science, education and training.

In MBRC, ShapingSEQ identifies RECs at Strathpine/Brendale/Petrie and North Lakes/Mango Hill. The document notes that RECs demonstrate synergies across important economic areas and contain a concentration of significant economic activity.

Strathpine/Brendale/Petrie REC accommodates the University of Sunshine Coast Future Moreton Bay Campus (a future knowledge and technology precinct), a major enterprise and industrial area at Brendale, and regional activity centre at Strathpine. ShapingSEQ notes that facilitating synergies between the University and industrial areas to support economic growth will be important.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

The North Lakes/Mango Hill REC contains the major enterprise and industrial area of Narangba, the North Lakes Industrial Park, and North Lakes (regional activity centre). It is noted that improving synergies between the industrial park and activity centre, and leveraging the existing rail network for better connectivity, will improve the function of this REC.

ShapingSEQ also identifies individual knowledge and technology precincts at Redcliffe and Caboolture to contain major public and private health facilities. The document also identifies Elimbah East and Morayfield as individual major enterprise and industrial areas.

Other aspects of relevance to this study include:

- Caboolture West's identification as major expansion area.
- Strong population growth projected for MBRC for the period 2016-2041, underscored by the projected delivery +88,300 dwellings, and
- A projected increase to MBRC's Employment baseline for the period 2016-2041 of approximately +66,230 employees.

The population and employment growth baselines identified for MBRC by ShapingSEQ reflect the official Queensland Government Projections that are discussed further in Chapter 3.

ShapingSEQ notes as a strategy that sufficient land and local infrastructure be planned for and delivered to accommodate, at a minimum, the employment baselines (refer Strategy 7 for Element 1 on p52).

2.2 State Planning Policy (SPP)

The State Planning Policy July 2017 (SPP) expresses the Queensland State Government's interests in land use planning and development. The SPP sets out a total of 17 State interests that apply to plan making, and that should be given effect through each local government planning scheme. The SPP also includes assessment benchmarks for certain State interests, that apply to certain development, if a planning scheme identifies that it does not appropriately integrate the relevant State interest. At present, MBRC integrates all aspects of the SPP (July 2014 version), with the exception of the Natural hazards, risk and resilience – Coastal hazards (Erosion Prone Areas) State interest. The July 2017 version of the SPP has not yet been integrated in the MBRC planning scheme.

Relevant to the MBRC Employment Land Investigation, the SPP (development and construction State interest) includes a State interest policy that a sufficient supply of suitable land for residential, retail, commercial, industrial and mixed-use development is identified that considers:

- Existing and anticipated demand
- The physical constraints of the land
- Surrounding land uses; and
- The availability of, and proximity to, essential infrastructure required to service and support such development.

This State interest also includes a policy that appropriate infrastructure required to support all land uses are planned for and provided. The infrastructure integration of State interest also requires that development occurs:

- In areas currently serviced by state and/or local infrastructure and associated services; or

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- In a logical and orderly location, form and sequence to enable the cost-effective delivery of state and local infrastructure to service development.

As demonstrated by the above-referenced State interest policies, the SPP provides clear direction regarding requirements for infrastructure provision that secures a range of land uses and the avoidance of incompatible uses. Both of these aspects are relevant to land use planning for employment land in MBRC.

2.3 MBRC Planning Scheme V4

MBRC Strategic Framework of MBRC Planning Scheme V4, outlines local strategic policy directions to guide planning and development in the municipality.

Of most relevance to this assessment is the content of Section 3.7 – Employment Location, which outlines the local policy for employment areas, and is based around the theme of:

“A strong, resilient and diversified economy that grows prosperity in the region by using its competitive advantages to deliver exports, investments and sustainable accessible jobs.”

It is noted that the creation of new employment and business opportunities and the growth of existing activities are among the greatest challenges to be addressed in the future development of the region, and that MBRC has an employment self-sufficiency target of 70%.

A range of Strategic Outcomes are provided to guide employment land planning, including:

- **Diversification of the local economy (3.7.1)** – *“develop a diversified local economy that retains local jobs and builds on regional and sub-regional competitive advantages.”* Specific outcomes include expansion of the business sector to support population growth and leverage into state, national and international markets; and balanced and more self-contained economic and employment growth that builds on competitive advantages.
- **Maximise the opportunities for development of existing places of employment and business activity (3.7.2)** – *“encourage increased activity and greater intensity of activity within existing places of employment and business activity.”* In particular, it is stated that major locations for enterprise and employment (Brendale, North Lakes, Clontarf, Narangba, Burpengary, Morayfield, Caboolture and Caboolture West) will continue to be developed with an appropriate mix of compatible uses ranging from low, medium and high impact industry and related activities.
- **Location of new economic activities (3.7.3)** – *“provide sufficient additional land for industry and related businesses to enable diversified, broad-based, future economic and employment growth across the region.”* Outcomes of note include that:
 - The local economy will be strengthened by encouraging growth in knowledge-based, high value adding industry and related businesses activities; and by promoting specialised industry clusters/groupings.
 - Council will seek to provide an adequate supply of additional land appropriately located to meet the needs of industry and business.
 - Inappropriate industrial activities that have potential for environmental harm and that generate adverse impacts on the local community will not be encouraged.
 - Providing more robust innovation and knowledge infrastructure is important to the economic future of the region with linkages to industry a key requirement.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- Council will seek to protect enterprise and employment areas and associated existing and future infrastructure and sites from incompatible development.

Also relevant to the Strategic Framework is Section 3.6 (Settlement Pattern & Built Form) and section 3.14 (MBRC Place Model), which inform the planning for a compact urban structure. The future settlement pattern outlined in Section 3.6 is shown by Figure 2.1.

The MBRC Place Model identifies and describes a series of broad place types, including the 'enterprise and employment area' place type. Each place type has a distinguishing mix and intensity of uses, development forms, character, function, and other qualities to guide the planning and development of places across the municipality.

Of specific importance to this investigation is Chapter 6 (of MBRC's Planning Scheme) regarding the zone precincts within the Industry Zone, which allow for different industrial activities based on their level of impact. The five zone precincts in the Industry Zone are described in Table 2.1.

A key outcome of this study is to provide an understanding of the supply and demand situation for industrial land in MBRC by zone precinct type.

Table 2.1: Industry Zone – zone precincts

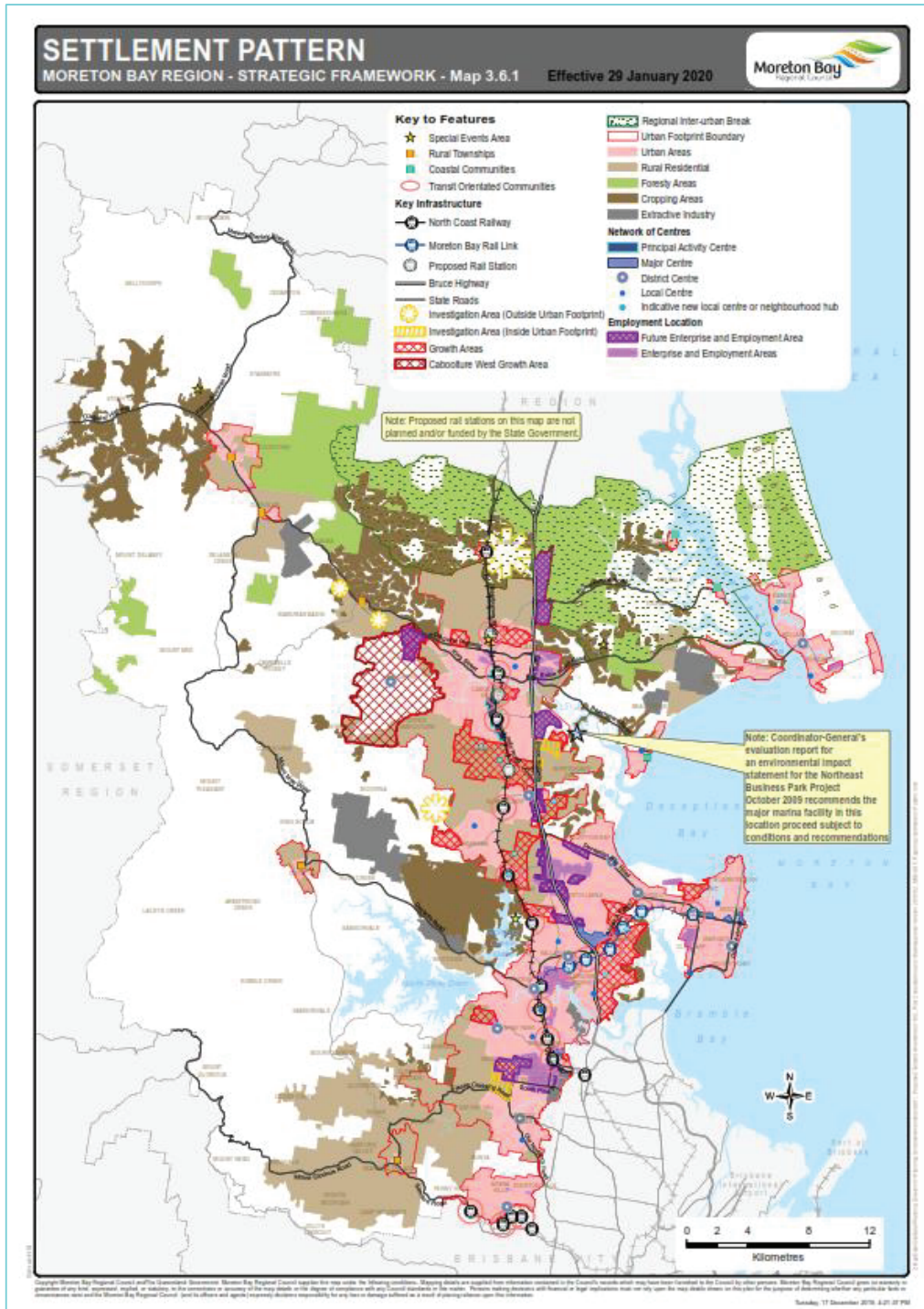
Zone Precinct	Purpose
Mixed industry and business precinct	facilitate a range of low impact industry and associated commercial uses which have a nexus with other industrial activities occurring in the precinct
Light industry precinct	facilitate and maintain the long-term viability of a range of low impact and low intensity industrial and business activities which are compatible with adjacent commercial and residential areas
General industry precinct	facilitate and maintain the long-term viability of a broad range of industrial uses which provide significant employment opportunities and require locations which are well separated from incompatible uses.
Restricted industry precinct	support the continued viability of a range of high impact and hard to locate industrial uses which contribute significantly to the regional economy and require locations which are well separated from incompatible uses.
Marine industry precinct	facilitate and maintain the long-term viability of waterfront-based industry and associated commercial activities which require direct access to a waterway.

Source: MBRC Planning Scheme V4

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)
Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure 2.1: MBRC Settlement Pattern



ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

2.4 Regional Growth Management Strategy 2041 – Summary Document (October 2019)

MBRC has resolved to prepare the Regional Growth Management Strategy 2041 (RGMS2041) to provide strategic guidance in relation to:

- Planning and development outcomes for the region's future expansion areas
- The sequence of planning and development for these future expansion areas
- Specific infrastructure outcomes and networks; and
- Responses to specific key issues.

The Strategy will be developed in four phases. So far only a Summary Document outlining the Strategy's intent and work program has been released.

MBRC's expansion areas are the key focus of the Strategy and include:

- **Emerging Community Areas** – areas included in the Emerging Community Zone under the current MBRC Planning Scheme (Caboolture West, Morayfield South, Narangba East, Burpengary East and Joyner (South))
- **Investigation Areas** – areas identified as investigation areas in the Strategic Framework of MBRC Planning Scheme (Warner, Wamuran, Pine Valley); and
- **Other/Conversion Areas** – areas identified for non-residential purposes in the current MBRC Planning Scheme where this is landowner interest to change the primary land use to residential.

The UAELI will inform the preparation of Phase 1 (confirming trends and assumptions) of the RGMS2041, which includes understanding economic and employment opportunities.

2.5 Regional Economic Development Strategy (REDS) 2020-2041

MBRC's REDS provides a direction, strategies and actions to guide economic development in the municipality.

The REDS is underpinned by the notion that a new direction is required for economic development in MBRC and notes *"it will be important for the next twenty years to reduce the reliance on population driven industries and focus on high value-adding industries, exports and innovation"* (P.V).

The Strategy sets out the following economic goals for MBRC to achieve by 2041:

- **Bigger** – to double the size of the economy to more than \$40 billion.
- **Bolder** – to create 16,000 new business and 100,000 new jobs to underpin a better future for local residents.
- **Brighter** – to become a national leader in innovation and entrepreneurship and be considered a top 10 regional innovation hub in Australia.

To inform the Strategy's preparation, stakeholder holder consultations were undertaken that identified MBRC's key economic strengths, including its:

- Size and scale, particularly in view of forecast population growth
- Diversity of areas and land use contexts

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- Lifestyle and housing affordability
- Strategic location with proximity to Brisbane's CBD, airport and port, as well as the Sunshine Coast
- Access to transport infrastructure and the Sunshine Coast Broadband Cable; and
- Workforce and access to skills.

Challenges identified included a lack of clear vision and bold aspirations for the economy, lack of identity and regional reputation as a business or investment destination, and lack of collaboration between stakeholders.

The Strategy put forward four key growth areas that would drive MBRC's transition to a more sophisticated economy:

- Advanced manufacturing
- Food and agri-business
- Tourism, sport and major events; and
- Knowledge, innovation and entrepreneurship.

The identified growth areas of advanced manufacturing and knowledge, innovation and entrepreneurship are of relevance to the UAELI.

The document notes that advanced manufacturing is already an important industry for the Moreton Bay region and that industrial precincts are well located to transport and utility infrastructure and draw from a substantial workforce catchment. Key areas identified for advanced manufacturing include industrial engineering, fabrication, marine product manufacturing/repair/maintenance, building materials and bespoke products.

For knowledge, innovation and entrepreneurship, the document states that additional innovation infrastructure in the form of innovation spaces/hubs is required to expand the existing culture of innovation entrepreneurship. It is noted that The Mill at Moreton Bay – including the new University of Sunshine Coast campus – will support the growth of innovation and entrepreneurship in the municipality.

In addition to the four key growth areas, a number of region-building projects are outlined that individually (and combined) have potential to increase high-value jobs, exports and investment in MBRC, including:

- North Harbour
- The Mill at Moreton Bay
- Scarborough Harbour Masterplan
- SEQ Northern Freight Terminal; and
- Wamuran Irrigation Scheme.

Initiatives outlined in the Strategy are based around the following four pillars:

- **Leadership and Identify** - encompassing strong leadership and collaboration, coordination of an advocacy program, development of a responsive business culture and a recognised regional identity.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- **Industry Advancement** - including supporting business retention and expansion, encouraging B2B connections and creating pathways to employment.
- **Trade and Investment** - to aggressively pursue region building projects, marketing and promotion as a business destination and facilitating investment into the region.
- **Knowledge, Innovation and Entrepreneurship** - including establishing an entrepreneurial hub, developing entrepreneurial capabilities of 18-30-year-old residents, and developing a reputation for entrepreneurship and innovation.

2.6 MBRC Industrial Land Supply and Demand (AEC 2017)

Undertaken by AEC group in 2017, MBRC Industrial Land Supply and Demand (report) was the previous overarching assessment of industrial land supply and demand in MBRC. This report is superseded by the UAELI.

This report's purpose was to:

- Understand the future demands of business and industry for land in MBRC.
- Provide advice on the suitability or otherwise of existing and planned industrial land to accommodate growth.
- Ensure that MBRC continues to provide sufficient land to support job creation, business expansion and attraction that is appropriate for the region.
- Identify land requirements to ensure suitable provision of industrial land to support industry growth.

A range of national and global influences that have a bearing on local demand conditions were identified, including:

- Globalisation and manufacturing
- Robotics technology
- Changing configuration and fit out of industrial facilities
- Changing production trends
- Increased global food demand due to population growth
- Home-based work via improved internet connectivity; and
- Fluctuations in the global economy.

According to the AEC study, MBRC would have sufficient land zoned for industrial uses to accommodate projected growth until around 2041, with the industrial land supply in the south anticipated to be extinguished by around 2050.

The report stated that in 2041, over 950 hectares of industrial supply would still be available for development, with this land primarily located in the municipality's the northern reaches; and that Council would need to consider whether this land should be preserved to accommodate industry beyond 2041, or whether it should be opened to other forms of development.

It noted there is potential that residents in the northern parts of MBRC may need to commute to work, having regard for significant demand for industrial land (and jobs) projected for the southern precincts. The report also stated that industries and land uses consistent with mixed industry and

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

business precincts are considered to generate higher value and lower impact jobs and align with findings relating to workforce and production trends in the future. In this context, the report stated that flexibility that should be built into planning scheme to accommodate different types of uses within precincts currently zoned for industry.

2.7 Summary

ShapingSEQ's identification of Regional Economic Clusters at Strathpine/Brendale/Petrie and North Lakes/Mango Hill reflects MBRC's locational and economic attributes and provides a broad conversation starter for how different uses in these locations could better interface and generate synergies.

The State Planning Policy July 2017 (SPP) expresses the Queensland State Government's interests in land use planning and development. At present, MBRC integrates all aspects of the SPP July 2014 version, except for the Natural hazards, risk and resilience – Coastal hazards (Erosion Prone Areas) State interest. The July 2017 version of the SPP has not yet been integrated in the MBRC planning scheme.

Policy priorities for Council are articulated in MBRC Planning Scheme V4, Regional Growth Management Strategy 2041 and the Regional Economic Development Strategy 2020-2041. These priorities include planning to accommodate significant projected population growth, leveraging existing competitive advantages, and facilitating the development of high-value economic activities focused on knowledge and innovation.

The strategic merit of The Mill at Moreton Bay development is apparent, having regard for local policy directions around diversifying the economy.

AEC's conclusion was that the municipality's long-term stock of industrial land was sufficient (from a whole of municipality perspective). AEC also flagged a potential disconnect between the location of industrial jobs and residential growth and recommended that flexibility should be built into planning scheme to accommodate different types of uses within precincts currently zoned for industry.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

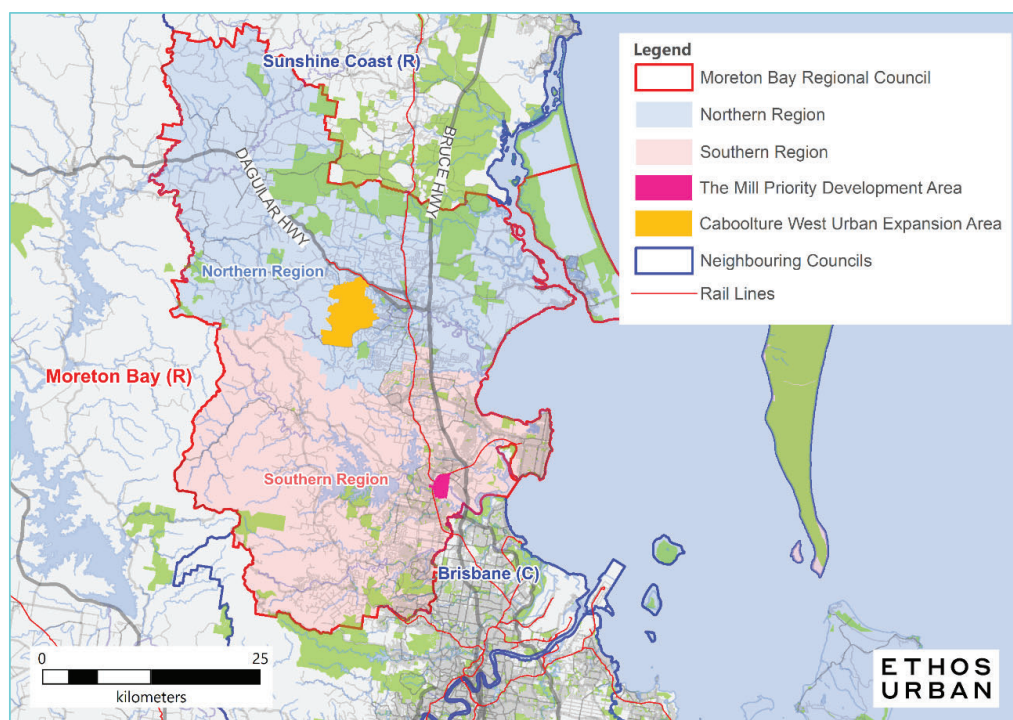
3 Economic Context

This chapter reviews a range of economic indicators relevant to employment land in MBRC.

3.1 Study Region

For the purpose of analysing economic data and trends, MBRC has been divided into a northern region, and southern region. The extent of these regions is illustrated by Figure 3.1.

Figure 3.1: Study Regions



Source: Ethos Urban

Note, for alignment with ABS ASGS Statistical Areas the following statistical geographies are included in the analysis:

- **Scarborough – Newport – Moreton Island SA2**, which includes Moreton Island (not within MBRC) as well as Scarborough and Newport. This SA2 forms part of the Southern Region.
- **Bribie Island SA2**, which includes the northern portion of Bribie Island – an area in Sunshine Coast Regional Council. This SA2 is included in the Northern Region.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

3.2 Recent & Forecast Population Growth

Substantial population growth is projected to occur in MBRC over the next 30+ years. This growth will be a key driver of MBRC's economy. The associated need to support residential development and additional local jobs is a key consideration for planning.

The resident population of MBRC is projected to increase by +315,630 persons between 2020 and 2051, representing annual growth of +10,180 persons or +1.7% per year. Originally released by the Queensland Government Statisticians Office (2018), these projections have been rebased to account for the 2019 ABS Regional Population Growth release (Cat:3218.0) and extended to 2051.

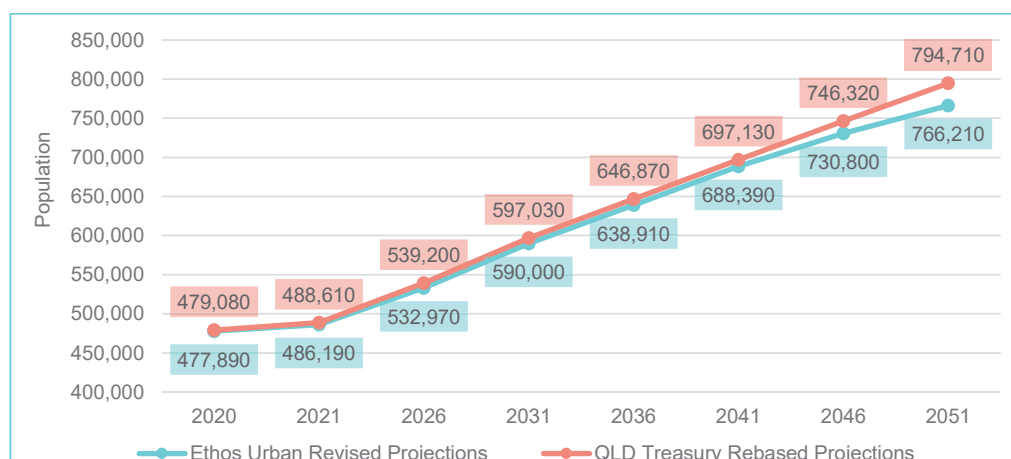
Around 47% of this total projected residential growth (or +148,790 persons) is expected to occur in the southern region, while the northern region is expected to accommodate 53% (representing an increase of +166,840 persons). In particular, the share of residential growth expected in the northern region (53%) would represent a significant increase relative to the share of growth experienced by this area from 2009 to 2019 (28%).

Caboolture West will be the focal point for residential growth in the northern region and is identified as a Major Expansion Area by ShapingSEQ. At full development, Caboolture West is expected to accommodate approximately 26,900 dwellings and 68,700 residents, according to the Caboolture West Local Plan (refer MBRC Planning Scheme V4 Section 7.2.3).

To account for the COVID-19 pandemic, the rebased projections noted above have also been revised to align with forecast changes in net overseas migration (due to COVID-19) reflected in the Queensland Budget 2020-2021. The Queensland Budget 2020-2021 assumes international borders will remain closed until the latter half of 2021. Post 2021, net overseas migration is forecast to be around 40% of what was originally projected from 2021 to 2026, after which it will return to pre-pandemic levels. (Figure 3.2 and Table 3.1)

Under these revised projections, MBRC's population would increase by +280,020 residents from 2021 to 2051, with a similar distribution of growth to occur across the northern and southern regions. Refer Figure 3.2. These revised projections envisage that MBRC's 2051 resident population of 766,210 would be 28,500 lower than projections unadjusted for the pandemic.

Figure 3.2: Forecast Population Growth, Moreton Bay, 2020 to 2051



Source: ABS (Cat:3218.0); Queensland Treasury, Ethos Urban

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 3.1: Ethos Urban Revised Population Projections, MBRC, 2019-2051

Region	2019	2021	2031	2041	2051
Population (no.)					
Northern Region	128,340	133,330	169,840	223,420	267,160
Southern Region	341,390	352,860	420,160	464,960	499,050
MBRC Total	469,730	486,190	590,000	688,390	766,210
Annual Growth (no.)					
Northern Region		2,500	3,650	5,360	4,370
Southern Region		5,740	6,730	4,480	3,410
MBRC Total		8,230	10,380	9,840	7,780
Annual Growth (%)					
Northern Region		1.9%	2.4%	2.8%	1.8%
Southern Region		1.7%	1.8%	1.0%	0.7%
MBRC Total		1.7%	2.0%	1.6%	1.1%
QLD Treasury Medium Series		2.0%	2.0%	1.5%	n.a.
Share of Growth (%)					
Northern Region		30%	35%	54%	56%
Southern Region		70%	65%	46%	44%
MBRC Total		100%	100%	100%	100%

Source: ABS, Regional Population Growth (Cat: 3218.0), Queensland Treasury Medium Series Population Projections, Ethos Urban

Sunshine Coast Regional Council and Brisbane City Council are also positioned to experience substantial projected population growth over the next 20+ years. An additional +214,620 persons are expected in Sunshine Coast, while Brisbane expects resident population growth of +366,930. These figures have not been rebased or adjusted to reflect the possible impacts of the COVID-19 pandemic.

The strong growth projected for Sunshine Coast Regional Council is relevant to MBRC and has potential to result in spill-over demand for residential dwellings, employment land and jobs in the northern reaches of the municipality.

In addition to underpinning residential land and activity centre development, population growth is a major driver of local service industrial uses including construction depots, automotive servicing and parts, trade supplies retailing, vehicle sales yards and small engineering firms.

Population growth is also the primary driver of retail expenditure growth that, in-turn, informs demand for retail uses, as well as warehousing and logistics activities that provide crucial linkages in retail supply chains.

3.3 Employment by Industry

ABS Census (place of work) data is an underlying basis for understanding employment trends at the local level.

Analysis of the 2011 and 2016 Census data for MBRC shows that +18,860 new jobs were created in MBRC across the 5-year period (refer Table 3.2, note this excludes responses 'not stated' and 'inadequately described'). This trend represents a substantial increase in job numbers of +21.3% over the period, or an average annual increase +3,780 jobs (+3.9% p.a.).

Consistent with broad structural trends at the national level, the vast majority of new jobs (84%) were accommodated in the tertiary services sector. Jobs growth in the balance of the economy is primarily attributed to construction activity.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Construction was the largest sub-sector for job creation with +4,000 new jobs, followed by health care and social assistance (+3,860 jobs), education and training (+3,110 jobs) and accommodation and food services (+1,860 jobs). In contrast, employment supported by the manufacturing sector declined by 1,800 jobs.

While the basis for the decline in manufacturing jobs at the individual firm level is unknown (in view of the high-level nature of this review), it is noted that manufacturing has been in structural decline in Australia for at least 30 years. Referred to as 'offshoring', this phenomenon is due Australia and other first-world countries being at a comparative disadvantage to developing economies for conventional manufacturing activities from a per-unit labour cost perspective. Moreover, from 2011 to 2016, manufacturers and other export focused industries were challenged by Australia's comparatively high exchange rate, however these currency pressures have since eased.

The employment growth observed in the transport, postal and warehousing sector (+800 jobs or +4.7%) is also of relevance to this study, noting that activities in this sector are typically land hungry and have a low intensity of employment. Across Australia, recent growth in e-commerce has supercharged investment in the warehousing and logistics.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 3.2: Employment by Industry, Moreton Bay Regional Council, 2011 to 2016

Category	2011		2016		Change 2011 to 2016		
	No.	% Share	No.	% Share	No.	% Share	Growth p.a.
<u>Primary Sector</u>							
Agriculture, Forestry & Fishing	1,420	1.6%	2,400	2.2%	980	5.2%	11.1%
Mining	300	0.3%	450	0.4%	150	0.8%	8.4%
Sub-Total	1,720	1.9%	2,850	2.7%	1,130	6.0%	10.6%
<u>Secondary Sector</u>							
Construction	7,280	8.2%	11,280	10.5%	4,000	21.2%	9.2%
Manufacturing	9,140	10.3%	7,340	6.8%	-1,800	-9.5%	-4.3%
Sub-Total	16,420	18.5%	18,620	17.3%	2,200	11.7%	2.5%
<u>Tertiary Sector</u>							
<u>Producer Services</u>							
Electricity, Gas, Water & Waste Services	920	1.0%	1,020	0.9%	100	0.5%	2.1%
Financial & Insurance Services	1,840	2.1%	2,110	2.0%	270	1.4%	2.8%
Information Media & Telecommunications	550	0.6%	800	0.7%	250	1.3%	7.8%
Rental, Hiring & Real Estate Services	1,870	2.1%	2,220	2.1%	350	1.9%	3.5%
Transport, Postal & Warehousing	3,110	3.5%	3,910	3.6%	800	4.2%	4.7%
Wholesale Trade	3,310	3.7%	2,680	2.5%	-630	-3.3%	-4.1%
Sub-Total	11,600	13.1%	12,740	11.9%	1,140	6.0%	1.9%
<u>Consumer Services</u>							
Accommodation & Food Services	6,950	7.8%	8,810	8.2%	1,860	9.9%	4.9%
Administrative & Support Services	2,270	2.6%	3,280	3.1%	1,010	5.4%	7.6%
Arts & Recreation Services	1,040	1.2%	1,420	1.3%	380	2.0%	6.4%
Education & Training	9,180	10.4%	12,290	11.4%	3,110	16.5%	6.0%
Health Care & Social Assistance	12,960	14.6%	16,820	15.7%	3,860	20.5%	5.4%
Other Services	4,170	4.7%	5,230	4.9%	1,060	5.6%	4.6%
Professional, Scientific & Technical Services	4,300	4.9%	4,960	4.6%	660	3.5%	2.9%
Public Administration & Safety	3,930	4.4%	4,530	4.2%	600	3.2%	2.9%
Retail Trade	14,050	15.9%	15,900	14.8%	1,850	9.8%	2.5%
Sub-Total	58,850	66.4%	73,240	68.2%	14,390	76.3%	4.5%
Sub-Total Tertiary Sector	70,450	79.5%	85,980	80.0%	15,530	82.3%	4.1%
Total	88,590	100%	107,450	100%	18,860	100%	3.9%

Sourced: ABS, Census of Population and Housing, 2011 and 2016

Note: Figures rounded; Data refers to workforce

Excludes 'Not Stated' and 'Inadequately Described'

Employment projections by industry and place of work for MBRC, prepared by the Queensland Statisticians Office in 2016, are shown by Table 3.3. These original projections are cited in ShapingSEQ as employment planning baselines and have been rebased using the 2016 Census employment data, which had not been released at the time ShapingSEQ was prepared.

The ShapingSEQ projections flow from a general equilibrium model developed by Queensland Treasury and were based on the 2015 Queensland Treasury population projections (medium series). These projections are now considered conservative in view of the 2018 population projections that envisaged an additional +40,000 additional residents by 2041 compared to the 2015 QGSO projections.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

It was envisaged that MBRC's workforce would increase +59,680 jobs from 2016 to 2041 (or +1.8% p.a.) based on the ShapingSEQ projections (refer Table 3.3). As noted previously, the REDS has a goal for +100,000 additional jobs to be created in MBRC by 2041.

Across the 25 years to 2041, health care and social assistance would observe the largest increase of any subsector with growth of +13,410 jobs or +2.4% p.a., followed by construction (+6,170 jobs or +1.8%), education and training (+8,690 jobs or +2.2%), manufacturing (+4,880 jobs or +2.1%) and professional, scientific and technical services (+5,040 jobs or +2.8%).

Broadly speaking, projected annual employment growth is significantly more conservative in percentage (%) terms than the growth observed over the period 2011 to 2016.

Council's Moreton Bay Employment Model 2019 envisages that 195,050 jobs would be supported in the municipality by 2041, representing annual growth of +2.4% over the period, which is substantially higher than the ShapingSEQ projections (refer Table 3.5).

Both projections series were developed pre-COVID-19 and are likely to overestimate employment creation in the short-term, notwithstanding Queensland's relative success so far in containing the virus. For reference, the Queensland Government has revised its unemployment rate forecasts in the Mid-Year Economic and Fiscal Outlook for 2020/21 from 6.0% to 8.5%.³

³ Unite & Recover – COVID-19 Fiscal & Economic Review

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 3.3: Shaping SEQ Employment Projections (rebased), Moreton Bay Regional Council, 2016 to 2041

Category	2016		2041		Change 2016-2041		
	No.	% Share	No.	% Share	No.	% Share	Growth p.a.
<u>Primary Sector</u>							
Agriculture, Forestry and Fishing	2,400	1.4%	2,860	1.0%	460	0.8%	0.7%
Mining	450	0.2%	1,350	0.4%	900	1.5%	4.5%
Sub-Total	2,850	1.6%	4,210	1.5%	1,360	2.3%	1.6%
<u>Secondary Sector</u>							
Construction	11,280	12.7%	17,450	12.7%	6,170	10.3%	1.8%
Manufacturing	7,340	9.0%	12,220	9.7%	4,880	8.2%	2.1%
Sub-Total	18,620	21.7%	29,670	22.4%	11,050	18.5%	1.9%
<u>Tertiary Sector</u>							
<u>Producer Services</u>							
Transport, Postal and Warehousing	3,910	3.4%	5,240	3.0%	1,330	2.2%	1.2%
Wholesale Trade	2,680	0.8%	3,180	2.5%	500	0.8%	0.7%
Rental, Hiring and Real Estate Services	2,220	3.0%	4,900	2.3%	2,680	4.5%	3.2%
Financial and Insurance Services	2,110	1.5%	2,210	2.2%	100	0.2%	0.2%
Electricity, Gas, Water and Waste Services	1,020	2.1%	4,760	1.4%	3,740	6.3%	6.4%
Information Media and Telecommunications	800	0.6%	1,000	0.4%	200	0.3%	0.9%
Sub-Total	12,740	11.5%	21,290	11.9%	8,550	14.3%	2.1%
<u>Consumer Services</u>							
Health Care and Social Assistance	16,820	15.2%	30,230	17.7%	13,410	22.5%	2.4%
Retail Trade	15,900	9.6%	16,590	10.7%	690	1.2%	0.2%
Education and Training	12,290	14.9%	20,980	10.1%	8,690	14.6%	2.2%
Accommodation and Food Services	8,810	8.2%	11,890	7.1%	3,080	5.2%	1.2%
Other Services	5,230	4.5%	6,960	5.9%	1,730	2.9%	1.1%
Professional, Scientific and Technical Services	4,960	4.4%	10,000	4.3%	5,040	8.4%	2.8%
Public Administration and Safety	4,530	4.7%	6,920	4.0%	2,390	4.0%	1.7%
Administrative and Support Services	3,280	2.7%	6,460	3.5%	3,180	5.3%	2.7%
Arts and Recreation Services	1,420	1.1%	1,930	1.0%	510	0.9%	1.2%
Sub-Total	73,240	65.3%	111,960	64.3%	38,720	64.9%	1.7%
Sub-Total Tertiary Sector	85,980	76.8%	133,250	76.1%	47,270	79.2%	1.8%
Total	107,450	100%	167,130	100%	59,680	100.0%	1.8%

Source: Department of Infrastructure, Local Government and Planning, ShapingSEQ Background Paper 2: Prosper, 2017, Ethos Urban

Note: Data refers to workforce.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 3.4: MBRC Employment Projections, Moreton Bay Regional Council, 2021 to 2041

Land Use	2021	2041	2021 - 2041
Community	30,630	42,660	12,030
Commercial	30,520	48,240	17,720
Retail	28,760	37,100	8,340
Industrial	20,680	27,430	6,750
Construction	16,690	22,140	5,450
WFH	8,700	14,260	5,560
Rural	3,300	3,220	-80
Total	139,280	195,050	55,770

Source: Moreton Bay Regional Council, Department of Infrastructure, Local Government and Planning, ShapingSEQ
Background Paper 2: Prosper, 2017

Notes: Data refers to workforce

Table 3.5: MBRC and Shaping SEQ Employment Projections, 2016 to 2041

	2016	2041	Total Growth	2016 - 2041 Annual Growth (no.)	Annual Growth (%)
Shaping SEQ	107,450	167,130	59,680	2,390	1.8%
Moreton Bay Projections	107,450	195,050	87,600	3,500	2.4%
<i>Difference</i>	<i>n.a.</i>	<i>-27,920</i>	<i>-27,920</i>	<i>-1,120</i>	<i>-0.6%</i>

Source: Moreton Bay Regional Council, Shaping SEQ

Notes: Data refers to workforce

3.4 Place of Work Data

The employment self-containment target for MBRC is 70%, as stated in the MBRC Planning Scheme V4 (Section 3.7).

Employment self-containment is the share of employed residents who work in local jobs. A total of 90,500 residents were employed in MBRC in 2016, of which 69% resided in the southern region with the balance (31%) in the northern region.

Overall, MBRC's self-containment rate in 2016 was 48.5% (refer Table 3.6) – meaning 48.5% of employed residents in MBRC work in the municipality. The employment self-containment of the southern and northern Regions was lower at 39.4% and 47.4% respectively, due to their smaller geographical size. The reduced self-containment of the southern region compared with the northern region, is attributable to this area's closer proximity to central Brisbane, evidenced by the high proportion of southern region residents working in Brisbane City (48.3%) compared with the northern region (21.3%).

In 2016, 80,290 jobs were located in the southern region, representing 72% of total jobs located in MBRC. The balance (30,900 jobs or 28%) was located in the northern region. Approximately 77% of jobs supported by activities typically associated with industrial land (construction; manufacturing; transport, postal and warehousing; wholesale trade; and electricity, gas, water and waste services) were located in the southern region.

Addressing this geographical employment imbalance will be important for employment land planning in MBRC having regard for the significant population growth projected for the northern region across the next 20 odd years. However, this imbalance can only be redressed if appropriate sites and market drivers exist for increased jobs opportunities to be unlocked in MBRC's northern reaches.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Of those non-resident workers who hold jobs within MBRC (around 19% of the total workforce), 13% commute from the City of Brisbane while a further 3% commute from the Sunshine Coast, based on 2016 Census data (refer Table 3.7).

Table 3.6: Employment Self-Containment, Moreton Bay Regional Council, 2016

Where they work	Where they live (employed participants in the MBRC labour force)		
	Southern Region	Northern Region	Moreton Bay Regional Council
Same Region	39.4%	47.4%	48.5%
Opposite Region (Northern – Southern)	5.4%	13.2%	n.a.
City of Brisbane	48.3%	21.3%	42.0%
Sunshine Coast Council	0.7%	3.7%	1.4%
Elsewhere in Queensland	5.6%	13.8%	7.5%
Interstate	0.6%	0.6%	0.6%
Total	100.0%	100.0%	100.0%

Source: ABS, Census of Population and Housing, 2016

Table 3.7: Workers' Place of Residence, Moreton Bay Regional Council, 2016

Where they live	Where they work		
	Southern Region	Northern Region	Moreton Bay Regional Council
Same Region	70.2%	66.8%	81.4%
Opposite Region (Northern- Southern)	9.6%	18.6%	n.a.
City of Brisbane	16.3%	5.5%	13.3%
Sunshine Coast Council	1.9%	7.5%	3.4%
Elsewhere in Queensland	1.8%	1.5%	1.7%
Interstate	0.2%	0.2%	0.2%
Total	100.0%	100.0%	100.0%

Source: ABS, Census of Population and Housing, 2016

Industries with a relatively high proportion of their workforce commuting from outside Moreton Bay Council include construction (26%), mining (25%), manufacturing (21%) and wholesale trade (20%), as shown in Table 3.8.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 3.8: Workforce Place of Residence by Industry, Moreton Bay Regional Council, 2016

Industry	Moreton Bay (R)	Sunshine Coast (R)	Brisbane (C)	Other	Outside Moreton Bay (R) Sub-Total
Electricity, Gas, Water and Waste Services	72%	11%	15%	2%	28%
Public Administration and Safety	74%	9%	14%	3%	26%
Construction	74%	6%	13%	7%	26%
Mining	75%	8%	10%	8%	25%
Education and Training	77%	5%	17%	1%	23%
Health Care and Social Assistance	78%	4%	17%	1%	22%
Manufacturing	79%	3%	15%	3%	21%
Wholesale Trade	80%	3%	15%	2%	20%
Total	81%	3%	13%	3%	19%
Information Media and Telecommunications	81%	2%	12%	4%	19%
Financial and Insurance Services	81%	2%	14%	2%	19%
Inadequately described	82%	3%	12%	3%	18%
Transport, Postal and Warehousing	83%	3%	10%	4%	17%
Professional, Scientific and Technical Services	84%	2%	13%	1%	16%
Retail Trade	84%	2%	11%	3%	16%
Administrative and Support Services	85%	3%	10%	1%	15%
Not stated	85%	2%	11%	1%	15%
Rental, Hiring and Real Estate Services	86%	2%	11%	1%	14%
Arts and Recreation Services	86%	2%	11%	1%	14%
Accommodation and Food Services	86%	1%	11%	2%	14%
Other Services	87%	2%	10%	2%	13%
Agriculture, Forestry and Fishing	87%	4%	4%	5%	13%

Source: ABS, Census of Population and Housing, 2016

3.5 Industrial Building Approvals

Across the eight years to 2020, \$602.3 million was invested in industrial property in MBRC, based on a review of ABS building approvals (refer Figure 3.3). For reference, the industrial investment in the LGAs of Sunshine Coast, Brisbane, Logan and Ipswich was \$475.6 million, \$4,852.1 million, \$648.0 million and \$1,055.1 million, respectively.

The southern region accounted for the majority of this investment (\$552.8 million or 92%) with balance (\$49.8 million or 8%) occurring in the northern region. The primacy of the southern region in terms of industrial investment and land uptake reflects its role in accommodating the vast majority of developing industrial supply.

The substantially higher investment in the southern region also reflects the area's current role as the focal point for industrial activity in MBRC, having regard for industrial precincts at Brendale/Strathpine, North Lakes and Narangba. The southern region also has a higher share of residents in the labour force.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

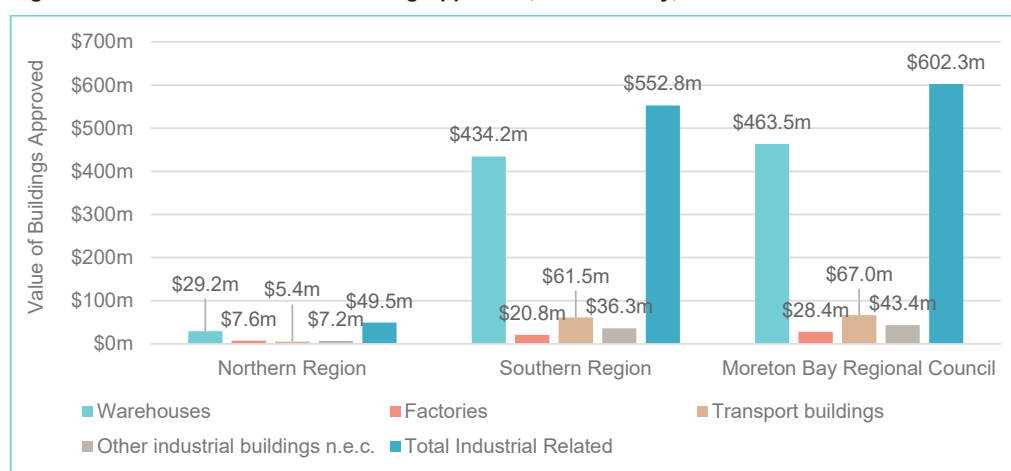
Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

In particular, the Brendale/Strathpine cluster is the primary location for larger-scale warehousing activity in the municipality, in view of its convenient access to central Brisbane and the wider transport network, and provision of larger developable sites. The value of building attributed to warehouses was \$463.5 million (or 77% of the total building value) from 2012 to 2020, of which \$434.2 million in investment occurred in the southern region.

The predominance of warehouse construction as a focus of investment in the industrial sector is a structural trend that will likely continue due to online retailing activity substantially increasing supply chain throughput (due to product returns etc.).

Figure 3.3: Industrial Related Building Approvals, Moreton Bay, 2012 to 2020



Source: ABS, Building Approvals

Note: Year ending June.

3.6 Development Pipeline

In October 2020, the development pipeline for MBRC was valued at \$2.3 billion, according to the Cordell Connect database (refer Figure 3.4).

Major projects include:

- **Caboolture Hospital Redevelopment, Caboolture (\$678 million)** - Redevelopment of the Caboolture Hospital, split across three stages. *Project Estimated Completion June 2024.*
- **The Mill at Moreton Bay PDA, Petrie (\$400 million)** – Construction of remaining stages of the Petrie Mill redevelopment, including educational facilities, recreation facilities and transport infrastructure. *Project Estimated Completion December 2036.*

Both the Mill at Moreton Bay PDA and Caboolture Hospital collectively comprise approximately \$1.1 billion in investment and would generate flow-on opportunities for the local construction sector in the construction phase, in addition to supporting local employment when operational.

Excluding these major projects, some \$1.3 billion in investment is attributed to the balance of the development pipeline comprising industrial, health, education/research, office and retail sector developments.

Residential and industrial projects represent the bulk of investment, at \$398.8 million and \$407.4 million, respectively. A total of 35% of total investment pipeline for industrial is in warehouse developments. Though not all of these projects will commence, this level of industrial investment indicates robust strong demand for industrial land in MBRC.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

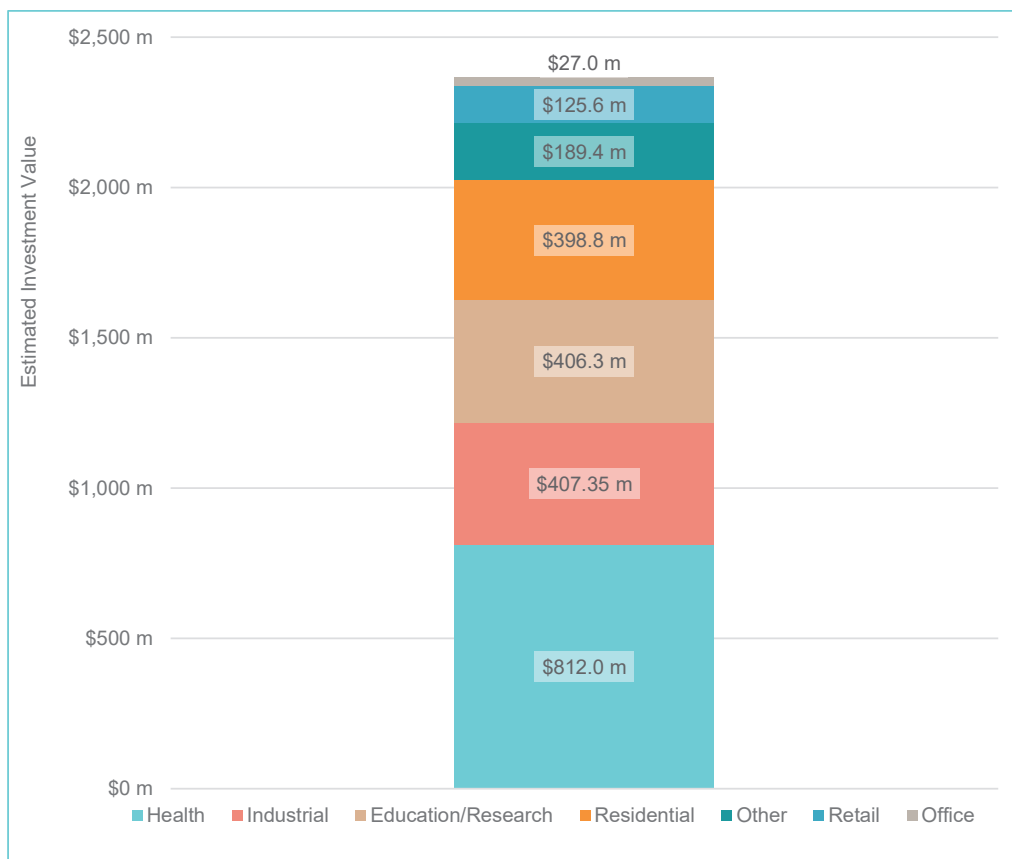
Final Report

Of the industrial investment, \$150.3 million or 36.9% is proposed for Strathpine/Brendale (representing 26 projects), followed by Narangba (\$78.2 million or 19.2%) and North Lakes (\$53.0 million or 13.0%), refer Table 3.8.

Proposed investment in stand-alone offices of \$27.0 million (excluding those within residential buildings) represent only a small portion of the development pipeline and reflects the limited role of the professional sector at present, comprising 4,980 jobs or 4.9% of total employment in MBRC at 2016 (refer Table 3.2.).

It is expected that stand-alone office development – and municipality's share of professional and knowledge sector workers – will increase across the next 20 years, as development of significant office components identified in the Mill at Moreton Bay PDA occurs.

Figure 3.4: MBRC Development Pipeline, 2020 to 2036, as at October 2020



Source: Cordell Connect, Ethos Urban

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 3.9: Industrial Development Pipeline by Location, 2020 to 2036, as at October 2020

Area	Estimated Value of Investment (million)	Share
Brendale/Strathpine	\$150.3	36.9%
Kallangur	\$78.2	19.2%
Northlakes	\$53.0	13.0%
Griffin	\$36.8	9.0%
Burpengary	\$9.7	2.4%
Other	\$79.4	19.5%
Total	\$407.4	100.0%

Source: Cordell Connect, Ethos Urban

3.7 Wider Region Industrial Market

3.7.1 Supply and Demand

Queensland's Government's Land Supply and Development Monitoring (LSDM) Report is the primary information source for understanding the supply and demand situation for industrial land at the municipal level in SEQ.

According to the latest iteration of the LSDM (released in 2020), SEQ's total industrial land supply is approximately 8,840ha, of which around 1,000ha (or 11.4%) is in MBRC.

The municipality with the most industrial land supply is Ipswich with around 3,830ha (or 43.4%), although this supply includes 2,520ha identified for 'industry investigation'. The next largest industrial land supply is in Scenic Rim (1,350ha or 15.3%), followed by Moreton Bay (1,000ha or 11.4%) and Toowoomba (890ha or 10.1%). Industrial supply for Moreton Bay was categorised as low, medium or high impact as well as industry investigation.

MBRC has a significantly larger supply of low and medium impact industrial land (840ha) than the neighbouring municipalities of Brisbane (260ha) and Sunshine Coast (180ha).

Toowoomba is the primary focus for industrial land consumption in SEQ with a land uptake of approximately 580ha from 2011 and 2019 (rounded), representing 28.2% of total industrial land consumed in SEQ over this period (2,060ha). New industrial supply coming online in Toowoomba (at Wellcamp) is competitively priced and well located to serve supply chains extending to western Queensland and south to Sydney and Melbourne.

Brisbane was the second largest municipality for industrial land take-up over this period (500ha or 24.2% of total SEQ take-up), followed by Ipswich (260ha or 12.5%), Gold Coast (240 hectares or 11.6%), Moreton Bay (170ha or 8.4%) and Scenic Rim (140ha or 6.7%).

Recent industrial land consumption at Ipswich has been largely focused in the areas of Bundamba and Redbank and due to the development of large warehousing/distribution centres on competitively priced supply. The neighbouring municipalities of Brisbane and Sunshine Coast are increasingly supply constrained which may result in demand transfers to MBRC in the future.

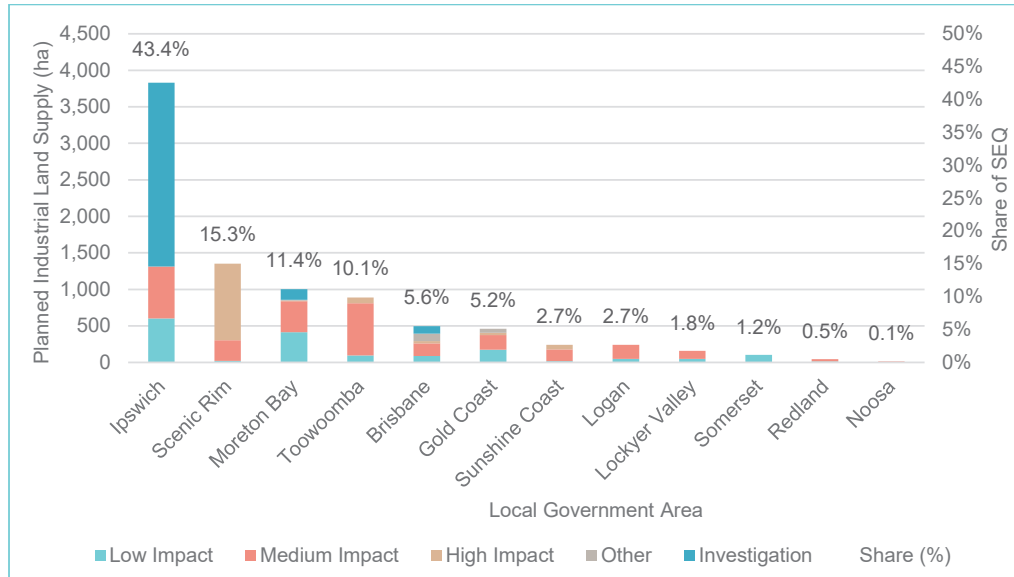
Broadly speaking, industrial land in Brisbane and Sunshine Coast, like Moreton Bay, is positioned to service that north-south coastal supply chain within Queensland, while Ipswich, Toowoomba and Gold Coast are positioned to service those supply chains extending to the west and south.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

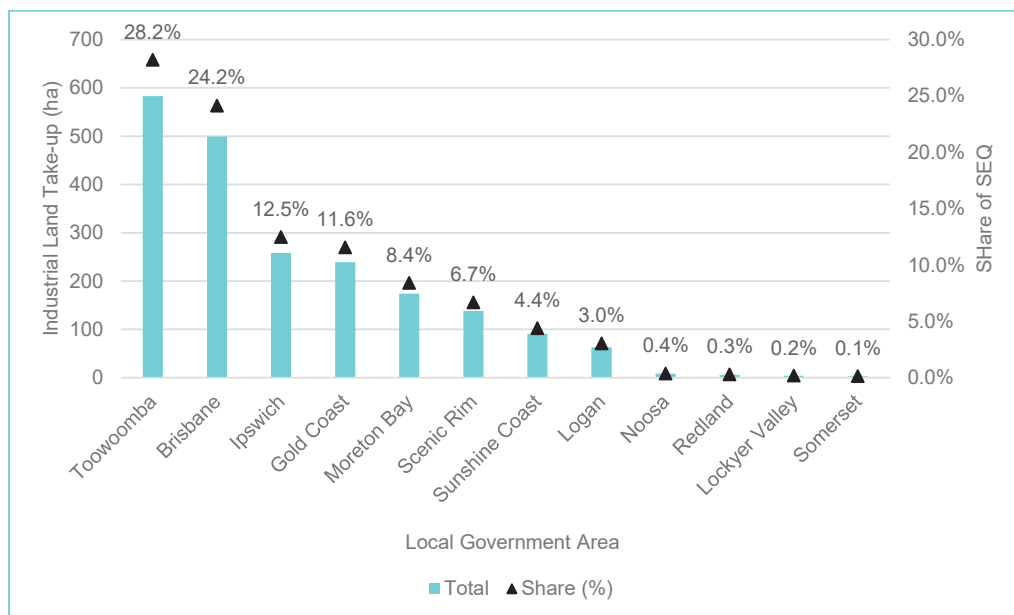
Final Report

Figure 3.8: SEQ Industrial Land Supply by LGA, 2019



Source: Queensland Government, LSDM 2020

Figure 3.9: SEQ Industrial Land Uptake by LGA, 2011- 2019



Source: Queensland Government, LSDM 2020

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

3.7.2 General Market Conditions

SEQ's industrial market is characterised by relatively low vacancies and strong demand. In particular the leasing market is highly competitive with vacancy rates down below 14% for 2018 (source: Charter Keck Cramer), noting that this figure pre-dates the COVID-19 pandemic.

According to Charter Keck Cramer, average rents for industrial assets in SEQ were \$133 per m² of leasable floorspace in 2018/19, having increased from \$106 per m² in 2016. This increase reflects a limited supply and increased competition for space in the market.

The breakdown of annual industrial rental prices per sqm for different regions in SEQ is provided in Table 3.9 and shows Brisbane East, Australia Trade Coast and Brisbane North areas command a price premium. For context, MBRC is situated in Brisbane North (area), while the Australia Trade Coast comprises land in the area of Brisbane Port and Airport.

Notwithstanding that the outlook for the industrial market is presently uncertain due to ongoing COVID-19 pandemic, underlying demand drivers are considered strong. This strength is underscored by significant long-term population growth and the continued expansion of e-commerce and third-party logistics.

An overview the demand drivers relevant to industrial market in MBRC is provided in Part 2.

Table 3.9: Leasing and Rental Returns for Industrial Floorspace in SEQ

	No. of leases	Annual Rental Price per m ² average	Percentage of Total Leases	No. of Leases Over \$1m
Australia Trade Coast	76	155	45.8%	2
Brisbane East	6	182	3.6%	0
Brisbane South	48	114	28.9%	3
Brisbane North	53	146	31.9%	1
Logan Motorway	13	89	7.8%	3
M1 Corridor	5	134	3.0%	1
Regional (incl. Sunshine Coast & Ipswich)	5	95	3.0%	0

Source: Charter Keck Cramer 2019

3.8 Summary

Key findings from this discussion of MBRC's economic context include:

- **Projected population growth is significant**, with the municipality expected to accommodate +280,020 (+58%) additional persons between 2021 and 2051 and reach a 2051 population level of 766,210. These figures have been adjusted to reflect COVID-19 impacts, particularly lower net overseas migration.
- **The workforce increased substantially between 2011 and 2016**, with +18,860 new jobs being created, representing an annual increase of an annual increase +3,780 jobs (+3.9% p.a.) over the period. The consumer services sector was the focus for new job creation in addition to construction activities.
- **The employment growth outlined in the 2016 Queensland Treasury projections is conservative** in view of recent trends and updated population projections. From 2016 to 2041 +59,680 addition jobs were projected for MBRC, representing annual growth of +2,390 jobs

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

(or +1.8% p.a.). In contrast, +87,600 jobs would be added based on the Moreton Bay Employment Model 2019 over this period, representing +3,500 jobs (or +2.4%) p.a.

- **MBRC had an employment self-containment rate of 48.5% in 2016.** A total of 90,500 residents were employed in MBRC in 2016, of which 69% resided in the southern region with the balance (31%) in the northern region. The employment self-containment rate in the southern region (39.4%) is substantially lower than the northern region (47.4%) due to its proximity to the Brisbane CBD.
- **The southern region is the primary focus for industrial investment,** containing 92% of the total capital value for industrial approvals in MBRC from 2012 to 2020. Warehouses were the primary industrial building type delivered across the 8-year period comprising 77% of the total building value.
- **MBRC has a strong development pipeline,** underscored by the Caboolture Hospital Redevelopment and delivery of education components at The Mill at Moreton Bay PDA. The industrial development pipeline is estimated at \$407.3 million with the construction of warehouses in the southern reaches of the municipality the focus and will drive uptake in this region. Although the pipeline for stand-alone offices is valued at just \$27 million, projects of this nature should increase over time as the Mill at Moreton Bay PDA is developed and the municipality's knowledge and professional sector becomes more prominent.
- **The Land Supply and Development Monitoring (LSDM) Report 2020** notes that the SEQ municipality with the largest industrial land supply was Ipswich (3,830ha) followed Scenic Rim (1,350ha), Moreton Bay (1,000ha) and Toowoomba (890ha).
- **Industrial land consumption between 2011 and 2019** was highest in Toowoomba according to LSDM 2020, which is well located to serve supply chains extending to western Queensland and south to Sydney and Melbourne. Industrial land in Moreton Bay, Brisbane, and Sunshine Coast, is positioned to service that north-south coastal supply chains within Queensland, while Ipswich, Toowoomba and Gold Coast are positioned to service those supply chains extending to the west and south.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

4 Advanced Manufacturing Innovation & Start-ups

Council's REDS 2041 identified advanced manufacturing and knowledge, innovation and entrepreneurship as important economic growth drivers.

This chapter outlines key definitional and contextual considerations relevant to advanced manufacturing, innovation and entrepreneurship. It also considers approaches that can support these sectors in MBRC.

4.1 Moreton Bay's Future Economic Pathway

The aspiration for MBRC's business sector to diversify and accommodate a larger share of high-value economic activities is made clear in local policy. Sentiments expressed in ShapingSEQ including the identification of The Mill at Moreton Bay site within the wider Strathpine/Brendale/Petrie REC also support this aspiration.

The Mill at Moreton Bay development, which includes a University of Sunshine Coast Campus, represents a platform from which MBRC's economy can be modernised and facilitate strengthened alignments between local industry, research and skills-training, and support for entrepreneurs/start-ups.

Potential also exists for knowledge-based innovation to be unlocked in the local health sector, having regard for existing and planned health infrastructure, including Redcliffe's Medical Precinct, Caboolture Medical Precinct and the future Bribie Island Hospital. The opportunity exists for these precincts to develop links with the new University of Sunshine Coast Campus.

Moreover, the MBRC plays a key role as a gateway to both metropolitan Brisbane and the Sunshine Coast, and functions as a linear economic corridor linking the balance of South East Queensland (SEQ) to areas further north. This gateway role positions the municipality as a natural location for industry, particularly logistics and warehousing.

Finally, when considering the future economy of MBRC, the role that substantial projected population growth will play as an economic driver in the municipality for years to come needs to be clearly acknowledged. Although opportunities for MBRC's economy to diversify are emphasised in future economic pathways, this emphasis should not cloud the reality that the municipality's population growth trajectory will have a significant bearing on the future local economic, and development and planning of employment land.

4.2 Unlocking Innovation

Economic progress has and will always be driven by innovation – be it the discovery of ground-breaking ideas and technologies, development of new products or services, or the establishment of new markets.

However, the role innovation plays in economic development has come into sharp focus in recent years due mainly to:

- **Globalisation:** increasing interconnections between businesses and consumers across the globe due to dramatic improvements in ICT (information communications technology) and the reduction of trade barriers. As a result, many businesses negotiate a global competitive context and are liable to disruption from new products, services and technology from far beyond the confines of national boundaries.
- **Rise of the digital economy**, which has supercharged the collection of data and its commodification – upending long-established market structures, business practices and hierarchies, and resulting in a new-normal whereby banking is undertaken on smartphones,

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

and anyone can with a driver's license can operate a taxi service. Flowing from the myriad of opportunities created by digital technologies is a modern culture of entrepreneurship based around 'start-ups'.

This new economic geography is conceptualised by authors Edward J Blakely and Richard Hu (in their recent book titled *Crafting Innovative Places for Australia's Knowledge Economy*) through the paradoxical observation that the world is both flat and uneven. Flat, in that a tribesman in Kenya can use a mobile phone to communicate the number of cattle in his or her herd; the same technology used by a hedge-fund manager in New York to undertake trades. Uneven, in that technology and knowledge have been observed to concentrate in certain places that observe competitive advantages.

The propensity of technology and knowledge to concentrate is of particular relevance to city planning and has resulted in what are commonly described as the modern 'innovation precinct'. The term 'innovation precinct' is liberally applied and can relate to health/science, services, creative/design, as well as manufacturing activity clusters. The Australian Government defines innovation precincts as:

"clusters of industry, research and education activity in a specific geographic area";

in which:

"precinct members build partnerships and tap into knowledge to launch new entrepreneurial activity and start-ups, and help establish businesses improve their competitiveness, productivity and innovative capacity".

(refer Innovation Precinct Insights – Guidance for Innovation Precincts, by the Department of Industry Science, 2019)

Global examples of innovation precincts include: Silicon Valley (California), Emeryville (California), Zhangjiang Science City (Shanghai), One-North (Singapore), Teheran Valley (Seoul), Bangalore Technology Parks (India), Soho (London) and 22 Barcelona (Spain), amongst an array of others.

Tonsley Innovation District, the redevelopment of Mitsubishi's former Tonsley Park Manufacturing Plant in Adelaide, is one of Australia's best examples of an innovation precinct. It comprises industry (focussing on cleantech and renewable energy, medical devices and assistive technologies, mining and energy services, and automation and software simulation), education (Flinders University's College of Science and Engineering and TAFE), retail and residential components.

Another different example of an innovation district in Australia is the Parkville National Employment and Innovation Cluster in Melbourne which contains University of Melbourne and the Melbourne Bio Medical Precinct – which includes prominent biotherapies manufacturer CSL Behring.

A plethora of enabling factors inform the development of innovation precincts – including the quality of the physical environment, shared and collaborative spaces, and provision of digital infrastructure – but most prominent in the consultant's view are:

- **Reputable anchor institutions** – universities, research centres, hospitals, large corporations providing the nucleus from which the wider land use mix can evolve. For example, Silicon Valley emerged from Stanford University developing surplus land in the 1950s for a business park (Stanford Business Park).
- **Critical mass of related enterprises** – fostering interfirm collaboration, and local networks and value chains.
- **Entrepreneurial and risk-taking culture** – facilitated by available talent pool, appropriate service support and access to venture capital (VC).

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- **An overarching vision and governance structure** – providing the bedrock for partnerships between industry universities/research and government to develop strategic plans, deliver enabling infrastructure and encourage investment.

4.3 Transitioning to Advanced Manufacturing

4.3.1 Manufacturing in Decline and Transition

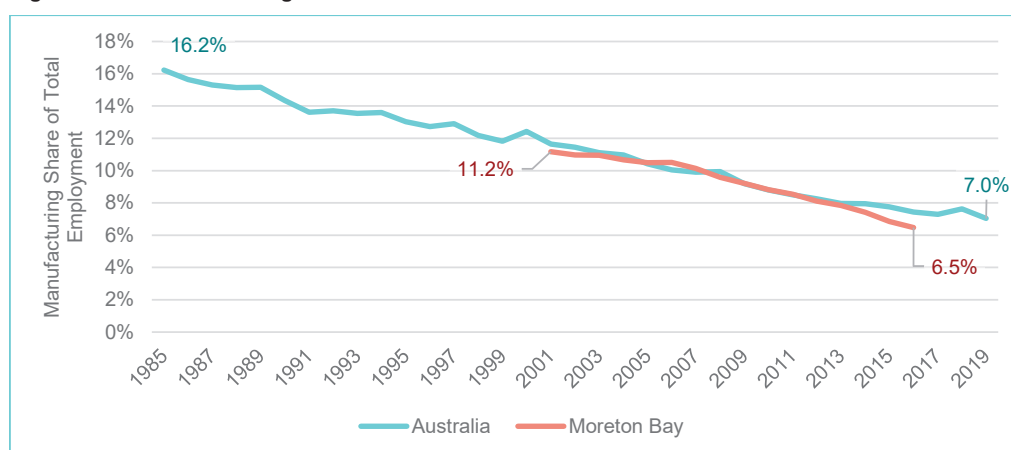
Across the last 30 or so years, conventional manufacturing activities in Australia have observed a long-term structural decline, refer Figure 4.1. The nation's comparatively high per-unit labour costs, increasingly high cost of energy, (at-times) strong exchange rate and the increased liberalisation of tariffs and other trade barriers, are all contributing factors.

The reduction in manufacturing activity is primarily attributed to Australia's function as a high-cost first-world economy, and the global megatrend of conventional manufacturing offshoring to developing economies (in Asia particularly) where input costs are lower. Similar to the USA, United Kingdom and many other 'developed' nations, the tertiary services sector has emerged as the focus for jobs growth in Australia.

Some may disagree with Alan Kohler's recent assertion (on ABC News) that manufacturing in Australia is a cottage industry subsequent the car industry's demise, but the size of the sector – both in terms of businesses and jobs – has significantly reduced. Moreover, Australia's manufacturing sector comprises a disproportionate number of small firms, with 47% employing between 1 and 19 staff (refer Table 4.1). In MBRC, the share of manufacturing businesses employing between 1 and 19 staff is 51%. Lack of scale is now commonly viewed as an impediment to Australian manufacturers in terms of cost competitiveness and supply chain development.

Unlike many legacy blue-collar areas in Australia, manufacturing remains a prominent industry in MBRC's economy, comprising 7,340 workers in 2016, or 7.2% of the total workforce. Indeed, manufacturing remains a strategic sector within the municipality that warrants attention from an economic development perspective, having regard for the quantum of employment manufacturing supports in MBRC and the high multipliers associated with manufacturing activity.

Figure 4.1: Manufacturing Jobs in Australia versus MBRC



Source: ABS Cat: 6291.0; id. Consulting

Note: MBRC share of manufacturing employment is sourced from id. Consulting. The share (%) for 2016 differs slightly from figure provided in Section 3.3 due to id. Consulting including the 'not stated' category etc.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 4.1: Size of Manufacturing Businesses in Australia

Category	2003	2019
Australia		
Non employing	56%	44%
1-19 Employees	35%	47%
20-199 Employees	9%	8%
200+ Employees	<u>1%</u>	<u>1%</u>
Total	100%	100%
Moreton Bay		
Non employing	-	43%
1-19 Employees	-	51%
20-199 Employees	-	7%
200+ Employees	-	<u>0%</u>
Total	-	100%

Source: ABS Cat: 8165.0

Note: Business count data not available for MBRC for 2003

4.3.2 What is Advanced Manufacturing?

Although MBRC's REDS identifies advanced manufacturing as a priority industry no definition outlined to clarify its meaning.

In the 2016 report by CSIRO titled: '*Advanced Manufacturing – A roadmap for unlocking future growth opportunities for Australia*', advanced manufacturing is defined as:

"the set of technology-based offerings, systems and processes that will be used to transition the current manufacturing sector into one that is centred on adding value across entire supply chains...Advanced manufacturers are companies that rapidly create and adopt these technologies" (p6).

In other words, advanced manufacturing refers to the technology dependent activities and processes that Australia, as a first-world country with high-input labour costs, has a comparative advantage in undertaking from a global perspective. Leveraging technology to produce products and services that the command a higher value is the overarching objective.

The Advanced Manufacturing Growth Centre Ltd (AMGC) provide a simpler definition that also draws from Australia's competitive context, defining advanced manufacturers as sharing characteristics of advanced knowledge, processes and business models (source: *Advanced Manufacturing – a new definition for a new era*).

Broadly speaking, Australia's comparative advantages for manufacturing include education and research skills, quality standards, political and economic stability, intellectual and property laws and access to Asia, as noted by CSIRO. While high labour costs, small and dispersed market, geographical remoteness and lack of digital infrastructure are viewed as comparative disadvantages.

Importantly, the global mega-trends of globalisation, digitalisation and increased demand for more sustainable, bespoke and/or high-margin solutions provides new-found opportunities for first world economies such as Australia's and render comparative disadvantages such as high unit labour costs less important.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Having regard for Australia's globally competitive position, the following (non-mutually exclusive) themes are put forward by CSIRO as strategic priorities for advanced manufacturing:

- **Customised high-margin solutions**, including:
 - The spectrum of design services from 'made to measure' to high-volume design.
 - Superior componentry; and
 - New and different products, from upgrades to existing products to new solution in the health, defence, aerospace, energy or mining sectors etc.
- **Sustainable manufacturing**, including:
 - Improvements to business models and processes such as reduced wastage to closed-loop material use; and
 - Improved and new products, from energy efficient products to those designed with recycling and recovery/re-use front of mind.
- **Selling services**, encompassing:
 - Maintenance and repair services – static monitoring, diagnostics and predictive services, intelligent sensors etc.
 - Workflow and management services, including tracking devices technology, performance-based contracts and interactive platforms for technology; and
 - Health and biosecurity services such as monitoring functions, integrated reporting and advanced warning systems.

The platform for realising the above growth opportunities is technical innovation. Specific technologies to underpin advanced manufacturing include:

- Sensors and data analytics
- Advanced materials offering biocompatibility, biodegradability, energy efficiency and self-repairing etc.
- Smart robotics and automation, whereby self-learning robots work collaboratively with humans and each other
- Additive manufacturing (3D printing), with reduced capital costs in time to allow for greater adoption of this technology and use on more complex products and at scale; and
- Augmented and virtual reality, with this technology set to jump from the gaming sector to application in wide variety of product design and training environments.

The report by the Federal Government titled: '*Make it Happen – The Australian Government's Modern Manufacturing Strategy*' provides a vision and objectives to support the broader manufacturing activities in Australia (not just advanced manufacturing). Priority sectors identified by this strategy are:

- Resources, technology & critical minerals processing
- Food & beverage
- Medical products

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- Recycling & clean energy
- Defence; and
- Space.

To support these sectors the Federal Government are preparing industry-led road maps to guide future investment. The Federal government is also investing \$1.3 billion through the 'Modern Manufacturing Initiative' to support large projects that will build scale and capabilities of local manufacturers.

4.3.3 Advanced Manufacturing Case Studies

Case Study 1: OCIUS

Originally known as Solar Sailor, a small start-up manufacturer from Sydney of solar and wind-powered ferries which emerged from the University of New South Wales, OCIUS has evolved into a company that builds solar, wind and wave powered robots that collect data in the ocean for long periods.

The company specialises in unmanned surface vehicles (USVs) – small drone like vessels undertake tasks such as checking offshore pipelines for leaks, measuring pollution levels and detecting hostile submarines or torpedoes.

The Australian Government recently contracted OCIUS to develop and build a new USV to bolster the nation's maritime surveillance and anti-submarine warfare capability.

Case Study 2: Carbon Revolution

Located in the Deakin University's Geelong Future Economy Precinct, Carbon Revolution have pioneered the commercial production of single-piece carbon composite car wheels used by both Ford and Ferrari and is now investigating opportunities in the aerospace and industrial markets.

Carbon Revolution is the highest profile private enterprise located in the Geelong Future Economy Precinct and is the product of partnerships with local research organisations including Deakin University's Institute for Frontier Materials. Other business located at the Precinct are LeMond, Composites, Quickstep and Carbon Nexus, as well as the research organisation CSIRO.

The Geelong Future Economy Precinct emerged from the ashes of the Ford Manufacturing Plant's closure in Geelong and is the product of funding committed by the Victoria and Federal Governments. The Precinct includes ManuFutures, a purpose-built incubator for advanced manufacturing.

Case Study 3: Detmold Group

Detmold Group is an example of a traditional manufacturer applying advanced manufacturing processes to leverage into new markets. Established in South Australia in 1948, the business is a manufacturer of packaging for the fast-moving consumer goods, grocery, retail and industrial markets and, with global footprint the includes South East Asia, the Middle East, Europe and the USA.

In response to clients seeking end-to-end packaging that could be designed and delivered in a short timeframe, the business R&D centre developed LaunchPad – a rapid prototyping and concept creation system – encompassing the services of design, prototyping, sample making, materials engineering, artwork and printing. As a result, LaunchPad compresses the product development process into around 24 hours, resulting in a fourfold increase in new clients (source: Food Innovation Limited).

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

4.4 Entrepreneurship & Enabling Infrastructure**4.4.4 What is a Modern Start-Up Culture?**

In recent years conversations regarding entrepreneurship in an economic development context focus mainly on start-up culture.

From the opportunities created by digital technology and an increasingly globalised economy start-ups have emerged: they are small, innovative growth-stage companies searching for repeatable and scalable business.

Lauded as entrepreneurs, start-ups create products or services that do not exist and/or enter markets with an offering that disrupts incumbents. Specifically, the business models of start-ups are geared to rapid growth, with the emphasis on moving fast (and failing fast) to leverage identified opportunities. In contrast, traditional small businesses operate in established markets with a conventional product or servicing offering and are far more risk adverse.

Innovation plays a pivotal role as an enabler for start-ups with innovation hubs acting as crucial locations for networking, building specialist knowledge and accessing funding. Rather than accessing funding from conventional retail banking services, start-ups rely on venture capital or angel investors (an entity using their own money to invest). Funders in the start-up space typically have a strong knowledge and connections in the sector and a high appetite for risk.

4.4.5 Key Infrastructure for Entrepreneurship and Innovation

For the purposes of this report, innovation infrastructure is broadly defined as those programs, technologies, and institutions that support innovation and entrepreneurship.

Start-ups are synonymous with modern innovation precincts or districts, with these locations providing the critical mass of infrastructure that enables start-up activity to flourish. Indeed, Silicon Valley, the world's well-known innovation district is also the birthplace of modern start-up culture. Anchor institutions, traditionally universities, also play an important role, with some of the world's most prominent locations for start-ups such as Silicon Valley, One-North (Singapore) or Tsukuba Science City (Japan) are within or proximate universities. Also of importance is the role of proactive government planning and investment in anchor institutions, infrastructure and marketing.

Within innovation precincts access to key innovation infrastructure, such as incubators and accelerators is typically required to enable start-up activities.

Incubators.

Incubators are typically physical spaces that accommodate companies or single entrepreneurs who are at the very beginning of building a business.

A typical incubator offers shared space in a co-working environment, on a month-to-month leasing program, with additional mentoring services. Some incubators are more generic in nature, but the most successful are themed: for example, YBF in Sydney focuses heavily on fintech (financial technology).

Within the incubator a company will refine its idea, build its business plan, work on product-market fit, and identify and establish networks. Coworking is an integral part of the incubator experience and provides the platform for collaboration.

Incubators can be independent, but they often sponsored by universities, government, major corporations. At Tonsley Innovation District in South Australia, eNVision, the primary incubator is sponsored by Flinders University and provides co-working space, in-house mentoring, as well as access to technology including prototyping facilities, 3D printers, laser cutters, vacuum formers and

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

CNC mills. Co-Hab, another incubator onsite, was developed by Innovyz (and accelerator program provider) and Renewal SA – the property development arm of the South Australian Government.

Incubators in proximity to MBRC include facilities at River City Labs and The Precinct (both located in Fortitude Valley) and the Sunshine Coast Innovation Centre (Sippy Downs).

Accelerators.

Accelerators function as programs with a set timeframe in which individual companies are provided with seed funding and mentoring to supercharge growth. Compressing three years of growth into three months is a typical goal.

Most accelerator programs have an application process. Successful applicants obtain seed investment and are provided exclusive access to mentoring in exchange for a share of equity (usually in the order of 7-10%).

The mentoring network is the most valued service provided by an accelerator and provides budding start-ups with access to persons with practical knowledge in marketing and branding and securing funding. Accelerator programs are typically run by people with deep experience in scaling start-ups and understanding of the wider start-up eco-system including relevant capital markets.

Sydney is currently Australia's focus for start-ups and the location for the nation's leading accelerators including Startmate, which services internet-based start-ups and is commonly cited as the best accelerator program in Australia.

Startmate provides a five-month programs (three months in Sydney and two in San Francisco) and seed funding of \$75,000 in exchange for a 7.5% equity stake.

Accelerator programs currently operating in Brisbane, include:

- **iLab Accelerator.** Located at University of Queensland's St Lucia campus, this accelerator offers a three-month program and \$10,000 in equity free funding.
- **Igniting Mets Accelerator.** Funded by the Queensland Government and delivered through Mets Ignited Industry Growth Centre, this program is targeted at mining industry, energy and resources sector start-ups specialising in robotics and automation, digital and data, and sustainability and responsible mining.
- **Hot desQ.** Another initiative of the Queensland Government, this accelerator program targets local entrepreneurs, as well as start-ups looking to return to Australia from overseas. The program provides from \$50,000 to \$80,000 in equity free funding in return for mentoring.
- **Suncorp Digital Incubator.** More akin to an accelerator than an incubator, this three-month program focusses on financial technology products.

To the north of MBRC on the Sunshine Coast, the Australian Health Accelerator (AHX) and the GrowCoastal Food Innovation Accelerator operate from the University of Sunshine Coast's Sippy Downs campus. In particular, the AHx program focuses on commercialising new health products and services and is open to up to 10 businesses from across Sunshine Coast, Moreton Bay and Brisbane municipalities.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

4.5 Place Based Innovation

Previous sections have broadly described innovation, advanced manufacturing and start-ups in the context of modern economies.

For MBRC, a prominent consideration is the approaches required to support innovation and entrepreneurship growth in the municipality, noting that the Mill at Moreton Bay development will provide full-service service university as well as a dedicated 'innovation precinct' referred to as Mill Innovation (refer Chapter 11).

Outlined below are three case studies – Western BACE, Canberra Innovation Centre and Hunter Research Centre – examples of existing infrastructures that are supporting entrepreneurship and innovation in their respective regions.

4.5.6 Western BACE

The Western Business Accelerator and Centre of Excellence (Western BACE) has the role of being the hub of enterprise, community activity and business development for Melbourne's West.⁴ The Centre was an initiative of City of Melton and received \$14.6 million in funding from The Australian Government, with Federation University, Victoria University, Kangan Institute, Burbank and Lend Lease, also providing support.

Through various programs and partnerships, Western BACE supports entrepreneurs and business owners to launch, build and scale their business. It also supports young people aged 3-15 participate in a STEM education programs.

The facility provides a range of different spaces including a co-working area, individual offices for small businesses, large flexible office space for anchor tenants, meeting rooms, warehouse areas, and a shared reception. The physical and spatial aspect of the facility is critical to the project's success as it provides a purpose-built place for the colocation of businesses and the associated benefits that flow from that.

This development of community is recognised as a major component of the success of the business accelerator component. Business owners are supported through access to business coaches, experts in residence, events, workshops, training and education.

The BACE offers tenants a 'pay as you grow' rent model, allowing fledgling businesses to access the facility and services at an affordable rate. This model ensures that as businesses grow, they eventually reach a threshold where rent becomes more expensive than commercial rates, thereby acting as an incentive for them to move on from the BACE and onto the next stage of their business development.

⁴ <https://westernbace.com/about/>

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

4.5.7 Canberra Innovation Centre

The Canberra Innovation Network (CBRIN) is a not-for-profit registered charity that was formed in 2014 as a collaboration between the ACT Government and its founding members – Australian National University, Canberra Institute of Technology, Data 61, CSIRO, University of Canberra and University of New South Wales. Its vision is “for Canberra to be recognised globally as a clever, connected and creative city fuelled by excellence in research, innovation and entrepreneurship, delivering diversified economy, social impact and generation of wealth”. A key focus is to assist in diversifying Canberra’s economy to reduce its reliance on public servants’ jobs.

The initial funding was provided by the Australian Capital Territory (ACT) Government.

The primary objectives of CBRIN are to:

- Provide a network linking businesses and entrepreneurs to services, facilities and stakeholders that accelerate their innovation and growth,
- Promote a culture of innovation and entrepreneurship in the ACT,
- Take a central role in growing the innovation ecosystem in the ACT and building individual and corporate capability and;
- Develop innovative approaches to provide services that support the growth and diversity of the ACT economy.

CBRIN has a staff ten and works for entrepreneurs, researchers, government and industry. It houses a range of programs and collaborative initiatives including a startup accelerator, incubator and collaborative innovation labs. More than 8,000 people visit CBRIN each year and it has helped over 1,000 budding entrepreneurs and SMEs through its lean innovation focused education.

CBRIN holds events including monthly networking nights where people have the opportunity to meet mentors, workshops for entrepreneurs and researchers and Hackathons. The Hackathons allow companies and organisations to present a problem to be workshopped by a diverse group. These businesses pay a fee for service.

The Foundation Members (the universities) contribute \$50,000 annually to support the operations of CBRIN. Gold partners provide in-kind support on a three-year contract. These partners are Optus, KWM (legal firm), PWC Accounting and Actew AG.

Additional revenue comes from:

- Participant fees for the Incubator,
- Renting out of workspaces,
- Fees for accessing mentors.
- Fees for participation in the Accelerator programs

Companies invest up to \$25,000 for start-ups in return for shares when the start-up has transitioned into full operations as a company. CBRIN also runs free workshops on topics such as branding, pitching and marketing.

4.5.8 Hunter Research Centre

The City of Newcastle and the Hunter region face the challenges of navigating the shift from traditional industries, such as resources and manufacturing, to globally positioned, knowledge-based economies. Both regions are in the process of economic and social transformation.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

The Hunter Research Foundation (HRF) Centre has been established as a partnership between the Hunter Research Foundation and the University of Newcastle. The HRF undertakes socio-economic research to inform the decision making of industry, government and the community in relation to transitioning the region's economy.

The partnership between the Hunter Research Foundation and the University of Newcastle provides the multi-disciplinary HRF Centre with the academic expertise to support analysis, decision-making, and innovation across sectors including health, engineering, energy and the environment.

In addition to its research, the Centre runs the Economic Breakfast Series for business intelligence and networking and publishes the Hunter Region Economic Indicators to capture the Hunter region's performance across key areas including labour, unemployment, house prices, housing and business performance. The Indicators are based on data collected from thousands of households and businesses through the quarterly Hunter Pulse surveys. It also publishes the Hunter Headline to provide timely business news and information specific to the Hunter region.

Partnerships and collaboration are important features of the HRF Centre's operations, including with the Hunter Innovation Festival since its inception and the Hunter Manufacturing Awards⁵.

4.5.9 Features in Common: Western BACE, CBRIN and HEF

Western BACE, CBRIN and the HEF each have some or all of the following features that MBRC may seek to replicate to deliver innovation infrastructure that supports advanced manufacturing, knowledge, and entrepreneurship etc:

- Physical and spatial aspect of the facility is critical to success – being at the heart of the community is important.
- Based on cross sectoral partnerships that include local government, universities, TAFE and other key stakeholders such as, in the case of Western BACE, a developer.
- Supported in the start-up phase by government through infrastructure as well as seed operational funds and arrangements.
- Established through legal arrangements to maximise flexibility and accountability to the customers e.g., not-for-profit social enterprises.
- Generate a sustainable environment for business development and educational based learning.
- Commitment to providing rigorous, independent research and analysis that is readily understood and clear in its implications.
- Valuing serendipitous opportunities that arise for collaboration and cross-fertilisation of ideas.

⁵ <http://www.hrf.com.au/>

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- Based on an ethos of radical inclusion, high levels of support and on creating cohesion.
- Provide access to business coaches, experts in residence, events, workshops, training and education.
- Provide business arrangements that support the cash flow of start-ups and micro business.
- Diversify revenue sources and arrangements rather than relying solely on government funding for ongoing operations.

It is logical that innovation infrastructure provided at the Mill at Moreton Bay or elsewhere would have a focus on advanced manufacturing, noting that this sector is one of the key four growth areas identified by the REDS.

Another sector that is a consideration in terms of future innovation infrastructure is health/medical, in view of existing hospitals at Caboolture and Redcliffe, and the development of a new public hospital at Bribie Island.

For both the advanced manufacturing and health/medical sectors, it will be important that existing innovation infrastructures have direct links to local business/stakeholders in these sectors.

The best way to ensure these linkages are in place in the first instance is via the governance structures sitting above innovation infrastructure/programs. One particular suggestion is that the governance structure of university or innovation hub components delivered at the Mill at Moreton Bay PDA include an 'industry and advisory committee' which includes local businesses representatives from target sectors.

4.6 Summary

This chapter considered the broad context and basis of innovation, advanced manufacturing and entrepreneurship that can inform recommendations in Part 3 of this report.

While innovation has always been an important component of business practice, its importance has been heightened by globalisation and the disruption associated with digital technology. Innovation precincts have emerged as one of the benefits associated with knowledge and technology clustering as the issues and challenges have become better understood and supported.

Advanced manufacturing refers to the technologies and processes with a natural fit for first-world economies in view of the mega-trends of globalisation, digitalisation and increased demand for sustainable, bespoke and high-margin solutions. While entrepreneurship in an economic development context is focused mainly on start-up culture.

The Mill at Moreton Bay PDA will likely provide an opportunity for the delivery of innovation infrastructure that supports entrepreneurship in sectors such as advanced manufacturing or health. Drawing from case studies, cross sectoral partnerships, support in the start-up phase, access to training and education, are among an array of key factors for success.

It will be important that any new innovation infrastructure geared to advanced manufacturing, or the health/medical sectors has direct links to local businesses/stakeholders. One suggestion to ensure an industry and advisory committee with local business representation forms part of the overarching government structure.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

PART 2B – Land Supply and Demand Analysis

Part 2B considers the demand and supply of industrial land in MBRC's urban areas. It:

- Further defines industrial land included in the project's scope
- Quantifies supply
- Analyses the historical take-up
- Discusses drivers of future demand
- Details three future demand scenarios - Low Demand, Base Case and High Demand
- Assesses the adequacy of the supply based on ShapingSEQ policy against the three demand scenarios; and
- Separately considers demand and supply of site-specific uses focused on knowledge, health, innovation or technology, and aviation.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

5 Urban Employment Land

This chapter provides more detail about industrial land included in the scope of this study.

5.1 Industrial Land within Study Scope

As previously noted, this project focusses on industrial land and separately considers other precincts relevant to innovation, health, education and knowledge, and aviation. The 27 individual precincts in the scope of this study were shown earlier in Table 1.1, Figure 1.2, and Figure 1.3.

Note, MBRC's Strategic Framework identifies an area west of Old Gympie Road at Narangba for investigation for future low impact enterprise and employment land, however investigating the potential for this area to provide additional industrial land supply is outside the scope of this study.

5.2 Industrial Land Zone Precincts

A key requirement of this report is to analyse the supply and demand situation for urban industrial land by zone precinct. The different zone precincts, which cover industrial land in this study are described in Table 5.1.

Industrial land in urban areas is identified as being subject to a specific zone precinct, providing that zone precinct (or zoning) currently applies to the land under the MBRC Planning Scheme. However, there are specific instances where industrial land has been categorised as being subject to a certain zone precinct when that zone precinct does not yet apply. These instances are outlined in Table 5.1.

A detailed description of the role of each zone precinct is in Section 6 of the MBRC Planning Scheme v4.

Table 5.1. Zone Precincts in the Scope of this Study

Zone Precinct	Purpose/Comment
Industry Zone – General Industry Precinct (GI)	<p>Purpose: Facilitate and maintain the long-term viability of a broad range of industrial uses which provide significant employment opportunities and require locations which are well separated from incompatible uses.</p> <p>Comment: All urban land areas within the GI precinct are included in the scope of this study. In addition, Caboolture West – Enterprise & Employment (02) is identified as accommodating GI land (in addition to Light Industry and Specialised Centre), based on guidance provided by the Caboolture West Local Plan (refer MBRC Planning Scheme v4 – section 7.2.3)</p> <p>Note, while the entire Caboolture West Growth Area is within the Emerging Community zone only the northern portion is within the Enterprise and Employment Place Type.</p>
Industry Zone – Mixed Industry & Business Area (MIBA) Precinct (MIBA)	<p>Purpose: Facilitate a range of low impact industry and associated commercial uses which have a nexus with other industrial activities occurring in the precinct</p>

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Zone Precinct	Purpose/Comment
	<p>Comment: All urban land areas within the MIBA zone precinct are included in the scope of this study. In addition, MIBA land within the Mango Hill infrastructure development control plan area has also been included.</p>
<p>Industry Zone – Light Industry Precinct (LI)</p>	<p>Purpose: Facilitate and maintain the long-term viability of a range of low impact and low intensity industrial and business activities which are compatible with adjacent commercial and residential areas</p> <p>Comment: All urban land areas within the LI precinct are included in the scope of this study. In addition, a portion of Caboolture West Growth Area – Enterprise & Employment Place Type area (02) is identified for LI, based on guidance provided by the Caboolture West Local Plan.</p>
<p>Industry Zone – Restricted Industry Precinct (Restricted Industry)</p>	<p>Purpose: Support the continued viability of a range of high impact and hard to locate industrial uses which contribute significantly to the regional economy and require locations which are well separated from incompatible uses.</p> <p>Comment: All urban land areas within Restricted Industry zone precinct are included in the scope of this study.</p>
<p>Industry Zone – Marine Industry (Marine Industry)</p>	<p>Purpose: Facilitate and maintain the long-term viability of waterfront-based industry and associated commercial activities which require direct access to a waterway.</p> <p>Comment: Urban areas within the Marine Industry zone precinct at Sandstone Point (03), Scarborough Marina (14) and Newport (15), are included in the scope of this study.</p>

Source: MBRC, Ethos Urban

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

6 Current Supply

This chapter estimates the supply of industrial land in June 2021. Supply and demand issues relevant to the knowledge/innovation/health/aviation precincts are considered separately in Chapter 11.

Additional detail at the individual industrial precincts regarding the tenant mix, strategic attributes, constraints and land supply/take-up are contained in Appendix 1.

6.1 Modelling Industrial Land Supply

Managing industrial land supply is a critical MBRC strategic planning responsibility. At any point in time, ShapingSEQ stipulates that Local Government planning schemes must support at least 15-years of land supply that is appropriately zoned and able to be serviced.

More than 47% of MBRC's zoned industry land is already occupied by businesses, the balance is in various stages of development – ranging from vacant lots in well-established industrial estates, to serviced or un-serviced greenfield sites.

The precise development yields in areas where little or no development has yet occurred are unknown and will remain so until detailed engineering surveys, other specialised studies and precinct masterplans are completed. In the meantime, it is necessary to model industrial land availability, based on available information.

Any modelling process inherently involves imperfect information and simplifying assumptions. Although every endeavour has been made to verify data and sense test assumptions, it needs to be acknowledged that the results of modelled land supply are likely to be different from development yields resulting from detailed on-the-ground masterplans.

6.2 Key Data Sources

6.2.1 VUT databases

As part of an agreement with State Development, Infrastructure, Local Government and Planning Department (SDILGP), Council assembles a 'Vacant, Underutilised, Taken-up' (VUT) database, which classifies each industrial land parcel in the municipality into one of these three categories. To assemble a VUT database, Council visually assessed aerial imagery and applied guidelines set out by the SDILGP in *SEQ Planned Industrial Land Supply: Process, Methodology and Visual Guide* (August 2020).

The digital GIS VUT databases for the years 2016, 2018, 2019 and 2021 were the core datasets on which the analysis of land supply and take-up were based. As well as the VUT status of each industrial land parcel, the databases contained fields showing:

- Area names
- Formal zoning status
- Primary land use
- Area (in hectares).

The QLD Treasury guidelines for developing VUT databases does not provide rules for identifying High, Medium or Low Impact industrial uses on occupied industrial land. Accordingly, it was out of this investigation's scope to generate detailed information about High/Medium/Low Impact uses at a precinct level.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

6.2.2 Limitations of VUT databases

While the VUT databases were an important source of core data for the supply analysis, they have some inherent weaknesses, including the need rely on aerial imagery to assess the VUT status of particular land parcels and the lack of detail about built form and the nature of businesses operating on industrial land.

These weaknesses could be addressed through detailed on-the-ground inspections of industrial land parcels, which would verify parcel status and add to the range of information available.

6.2.3 Constraints Layers

In addition, Council supplied digital GIS layers showing areas subject to physical conditions or planning classifications that may limit the extent of future development. For example, physical constraints include:

- Landslide hazards (>15% slope)
- High risk flood areas
- Overflow land path; and
- Erosion prone areas.

Planning constraints include:

- Matters of State environmental significance; and
- Landscape heritage areas.

Constraints were categorised as hard, high, moderate, limited and no (significant) constraint, initially consistent with the methodology outlined in the SDILGP Land Supply and Development Monitor (LSDM) for 2020.

6.3 Land Supply Assessment Methodology

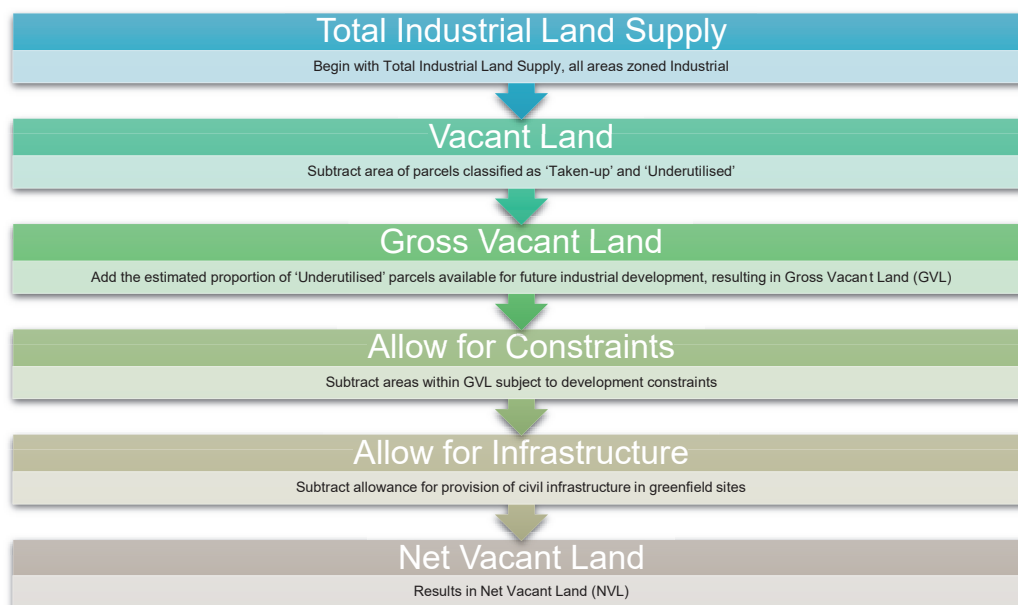
6.3.4 Methodology Overview

The methodology to estimate the future supply of developable industrial land in the municipality, at precinct level and overall, is summarised below:

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report



NVL measures of the volume of industrial land available for future industrial purposes.

Further details of the NVL assessment methodology are shown below.

Note, NVL represents the total volume of industrial land available for future industrial purposes and includes land that is currently not appropriately zoned and/or able to be serviced. Application of the ShapingSEQ 15-year threshold to NVL is therefore not appropriate. NVL less land that is not appropriately zoned and/or able to be serviced is referred to as Effective Supply for the purposes of this assessment and is the appropriate baseline for applying the ShapingSEQ threshold. Effective Supply and the ShapingSEQ threshold is discussed in Chapter 10.

6.3.5 Total Industrial Land Supply

Land identified for non-employment uses (or employment uses not included in the scope of this study) was identified and excluded from further calculations.

All urban employment land was then aggregated into **Total Industrial Land Supply**.

6.3.6 Taken-up Land

Parcels marked as 'taken-up' in the VUT database were completely excluded from future supply.

In practice, some of these taken-up land parcels may be able to absorb future demand for land or industrial floorspace through increases in building density or redevelopment. However, the potential for existing taken-up industrial sites to accommodate future demand was out of the scope for this study.

6.3.7 Underutilised Land

Land identified as underutilised was assessed through a visual assessment of aerial imagery. Land classified as underutilised was primarily:

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- **A Temporary storage yard** used for the temporary storage of materials, machinery, vehicles, etc that does not contain any permanent structures; or
- **Land not used to its full potential** – i.e. containing a significant proportion of open space associated with industrial built form or operation.

This is broadly consistent with SDILGP guidelines in the LSDM 2020. However, the UAELI applies a narrower definition of uses considered to present an underutilisation of sites compared to the SDILGP guidelines. For example, the uses listed below are considered to represent an underutilisation of a sites based on the SDILGP guidelines, but they are considered taken-up in this assessment:

- Automotive wreckers
- New and used vehicle storage
- Permanent storage yards and depots
- Heavy vehicle turning and queueing area; and
- On-site environmental management areas.

The UAELI applied this approach because the SDILGP guidelines were considered to categorise some uses as underutilised that are necessary for servicing the needs of local residents and businesses.

As noted above, GVL is calculated by adjusting Total Industrial Land Supply for Taken-up and Underutilised lots. GVL is a measure of the volume of industrial land that is vacant or underutilised before allowing for planning constraints or civil infrastructure requirements.

As per the SDILGP guidelines, sites categorised as vacant include:

- **Vacant land (for industrial purposes):** land that does not contain significant built-form or evidence of an industrial operation
- **Dwelling house:** dwelling on a small, medium to larger lot, with elements of vacant land and is zoned for and has the potential to be used for future industrial use; or
- **Rural, farming or land-based agricultural operations:** land that is being used for rural, farming or agricultural operations.

6.3.8 Constraints

As noted, Council provided detailed GIS constraints layers showing the extent to which physical characteristics and planning overlays may limit potential development on particular land parcels.

Based on the SDILGP LSDM 2020 methodology, the following allowances for the proportion of non-developable/developable land within a constrained area were applied:

- Hard Constraint – 100% undevelopable; 0% able to be developed,
- High Constraint – 75% undevelopable; 25% able to be developed,
- Moderate Constraint – 50% undevelopable; 50% able to be developed,
- Limited Constraint – 25% undevelopable; 75% able to be developed,
- No (significant) Constraint – 0% undevelopable; 100% able to be developed,

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

In the GIS layers analysed there were multiple instances where areas were subject to more than one constraint (e.g., Landslide Hazard Area (>15% Slope) - Hard Constraint *plus* Overland Flow Path - Limited Constraint).

In the instances where more than one constraint overlapped the same land segment, the 'hardest' constraint (i.e., with the greatest percentage of undevelopable land) was adopted.

Accordingly, this approach does not allow for overlapping constraints to accumulate limitations on developable land. In practice, this method has the potential to underestimate constraints on developability since the confluence of constraints may have cumulative consequences. However, without site specific details and informed engineering advice, it is considered difficult to estimate the cumulative consequences for every combination of overlapping constraints. From a modelling perspective, adopting the hardest constraint is, in our view, logical and the simplest method to assess constraint impacts.

Note, this approach does not align with the LSDM 2020 methodology which accounts for the cumulative impacts of multiple constraints. In our view the LSDM 2020 methodology has the potential to overestimate the volume of land unavailable for development by considering cumulative impacts.

6.3.9 Civil infrastructure Allowance

Greenfield sites, namely land zoned industrial but yet to be developed, will require civil infrastructure to service future tenants. Civil infrastructure includes internal and access road, paths, water, sewage and electricity supply easements.

Greenfield sites requiring civil infrastructure were identified via a review of aerial imagery. Sites requiring infrastructure are defined as those that:

- Are clearly greenfield sites based on a review of aerial imagery (i.e. areas where development is yet to occur); or
- Individual vacant sites (larger than 5ha) located in active industrial precincts.

For the purpose of this assessment, the share of greenfield land attributed to civil infrastructure was assumed to average 25%, noting that this requirement may be higher or lower depending on the topological characteristics of particular sites. Notwithstanding specific site characteristics, 25% is considered an appropriate allowance and is a widely used benchmark for greenfield development planning.

6.3.10 Net Vacant Land (NVL)

As noted, NVL is GVL adjusted for constraints and greenfield civil infrastructure.

This definition of NVL is intended to measure the volume of industrial land that is vacant and available to be developed to meet future demand.

Demand, as discussed in Chapter 9, is defined as the take-up of urban employment land - evidenced by the construction of premises or permanent facilities for the purpose of employment.

Note, NVL is not a measure of market availability; that is, land available for sale or lease at the time of assessment. Market availability will depend on whether owners choose to list properties for sale or lease, which in turn, will depend on any number of factors such as price trends, future development plans, or owner investment strategies.

In addition, NVL is a not the appropriate baseline for testing the adequacy of the municipality's industrial land supply. Refer to Chapter 10 for the appropriate assessment of adequacy of supply.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

6.3.11 Development Approvals

Development approvals were not taken into consideration when assessing land supply status (i.e. vacant lots subject to development approvals are included as NVL).

The one exception is the land currently within the LI and MIBA zone precincts at Warner, located immediately west of Old North Road and south of Kremzow Road. This land was excluded from the study as it is within a designated Investigation Area and is the subject of further investigations by Council to determine the future use of this area.

6.4 Supply at 2021

The current breakdown of industrial land by zone precinct, as per methodology described above, is summarized in Table 6.1, which shows:

- Total Zoned Land is calculated to be 2,037.2ha.
- 46% or 946.2ha of total zoned land is occupied, comprising taken-up land and underutilised land considered not able to be redeveloped.
- Total GVL is estimated as 1,229.6ha, comprising 138.6ha of underutilised land that is considered to have redevelopment potential, and 1,091.0ha of vacant land.
- It is estimated that 287.7ha of GVL is constrained, and a further 184.5ha would be required for greenfield civil infrastructure.
- Accordingly, NVL comes to **757.4ha**.

Table 6.1 Urban Employment Land Supply by Zone Precincts, at June 2021 (ha)**

Zone Precincts	Total Zoned Land	less	plus	gives	less	less	gives
		Occupied	Underutilised Available	Gross Vacant Land	Constrained GVL	Infrastructure	Net Vacant Land**
General industry	1,153.6	517.1	48.2	684.7	156.3	120.0	408.3
MIBA	403.6	127.1	32.7	309.2	58.9	49.1	201.2
Light industry	419.2	247.1	47.1	219.1	67.4	15.4	136.4
Restricted industry	42.4	36.5	10.6	16.6	5.1	0.0	11.5
Marine industry	18.4	18.4	0.00	0.05	0.00	0.00	0.04
Total	2,037.2	946.2	138.6	1,229.6	287.7	184.5	757.4

Source: MBRC; Ethos Urban

Notes: * Includes taken-up and underutilised parcels.

**NVL includes land that is not appropriately zoned and/or able to be serviced and is therefore not the appropriate baseline for application of the ShapingSEQ 15-year threshold, refer Chapter 10.

Figures have been rounded.

A detailed breakdown of NVL by precinct and zone precinct is shown in Tables 6.2 and 6.3.

The majority of NVL across all zone precincts (552.9ha or 73%) is located in the northern region, with the balance (204.5ha, 27%) in the southern region. The proportion of NVL identified for GI is 54% (408.3ha), while a further 27% is MIBA (201.2ha). The balance (around 20% or 147.9ha) dispersed across the other categories.

The northern region is the focus for NVL zoned for GI. In particular, Elimbah East supports approximately 55% of total NVL for GI. Caboolture West and Bribie Island Road Caboolture

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

contribute a further 14% and 11%, respectively. In addition, 15% of GI NVL is still available at Brendale in MBRC's southern region.

The 59.6ha of GI NVL identified at Brendale has been calculated by considering existing constraints, including high-voltage power line easements. Broadly speaking, the development of sites of 3ha to 5ha and larger is expected to become increasingly difficult in Brendale due to the power line easements and other site-specific factors.

In future assessments of industrial land supply, the issue of constraints on developable land due to existing infrastructure may need to be considered in more detail.

The industrial land identified at Caboolture West is currently in the Emerging Community Zone but has been identified for future designations within Industry Zone (GI and LI) and Centre Zone (Specialised Centre Precinct) in the Caboolture West Local Area Plan.

This future industrial land at Caboolture West is not currently serviced by civil infrastructure – with connection to be facilitated when adjacent land is developed for residential purposes. It is understood the timing of industrial development at Caboolture West is long-term and subject to significant uncertainty.

Provision of MIBA NVL is also concentrated in the northern region. The major existing areas of supply are North East Business Park (60%), followed by Boundary Road Narangba (12%), Old Gympie Road Narangba and Deception Bay Road (9% and 8% respectively).

The current supply of LI land is highly dispersed in view of its common application as a buffer zone to manage potential land use conflict with adjacent residential or commercial areas. Bruce Highway Burpengary (19%), Brendale (14%) and Bribe Island Road Caboolture (14%) are the major areas of supply. Around 18% of Light Industry NLV is also identified at Caboolture West, noting that development of this land is considered to be a longer-term prospect.

Provision of NVL for Restricted Industry is limited, with all available supply (only 11.5ha) situated at Boundary Road Narangba.

Of the existing Marine Industry precincts included in the study area, only Newport has a remaining supply (0.05ha).

Note, while there is potential for future marine services precinct at North Harbour PDA, the amount of land to be designated for Marine Industry uses at this location is still uncertain. Accordingly, it has been excluded from this analysis of industrial supply. This land is currently in the Recreation and Open Space zone and Rural zone but is expected to accommodate Marine Industry in the future as per the temporary planning intent under a future North Harbour PDA.

Note: NVL is not the baseline for testing the adequacy of the municipality's industrial land supply, as it includes land that is not appropriately zoned and/or able to be serviced. Refer to Chapter 10 for the appropriate assessment of adequate land supply.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 6.2 NVL Supply by Precincts and Zone Precinct, at June 2021 (ha)**

Precinct	General industry	MIBA	Light industry	Restricted industry	Marine industry	Total
Northern Region						
(01) Elimbah East	223.6	-	9.1	-	-	232.7
(02) Caboolture West – Enterprise and employment – EC	59.0	-	25.2	-	-	84.2
(03) Sandstone Point	-	-	-	-	-	0.0
(04) Bribie Island Road Caboolture	44.3	-	19.8	-	-	64.1
(05) Henzell Road Caboolture	0.5	1.2	9.1	-	-	10.7
(06) First Avenue Bribie Island	-	-	1.2	-	-	1.2
(07) PAC Morayfield	-	-	1.7	-	-	1.7
(08) North East Business Park	-	120.0	-	-	-	120.0
(09) Bruce Highway Burpengary	-	11.9	26.3	-	-	38.2
Sub total	327.4	133.1	92.3	-	-	552.9
Southern Region						
(10) Old Gympie Road Narangba	3.1	19.0	3.6	-	-	25.7
(11) Deception Bay	-	0.7	0.1	-	-	0.8
(12) Deception Bay Road	-	16.7	-	-	-	16.7
(13) Boundary Road Narangba	15.1	24.7	12.7	11.5	-	64.0
(14) Scarborough Marina	-	-	-	-	-	0.0
(15) Newport	-	-	-	-	0.0	0.0
(16) Rothwell	-	-	0.7	-	-	0.7
(17) Kippa Ring	-	-	0.0	-	-	0.0
(18) Clontarf	3.1	-	0.9	-	-	3.9
(19) Petrie Mill, Petrie Mill – Innovation Precinct, Petrie Town	-	0.6	-	-	-	0.6
(20) Paisley Drive Lawnton	-	0.0	5.5	-	-	5.5
(21) Brendale	59.6	6.3	18.9	-	-	84.8
(22) The Hills District	-	-	1.8	-	-	1.8
Sub total	80.9	68.1	44.1	11.5	0.0	204.5
Total	408.3	201.2	136.4	11.5	0.0	757.4

Source: MBRC; Ethos Urban

Note: **NVL includes land that is not appropriately zoned and/or able to be serviced and therefore not the appropriate baseline to inform the adequacy of supply of industrial land in the municipality, refer Chapter 10.

Value of 0.0 indicates less than 1,000m² of take-up.

Figures have been rounded

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 6.3 NVL Share by Precincts and Zone Precinct, as at June 2021

Precinct	General industry	MIBA	Light industry	Restricted industry	Marine industry	Total
Northern Region						
(01) Elimbah East	54.8%	-	6.7%	-	-	30.7%
(02) Caboolture West – Enterprise and employment – EC	14.4%	-	18.5%	-	-	11.1%
(03) Sandstone Point	-	-	-	-	0.0%	0.0%
(04) Bribie Island Road Caboolture	10.9%	-	14.5%	-	-	8.5%
(05) Henzell Road Caboolture	0.1%	0.6%	6.7%	-	-	1.4%
(06) First Avenue Bribie Island	-	-	0.9%	-	-	0.2%
(07) PAC Morayfield	-	-	1.3%	-	-	0.2%
(08) North East Business Park	-	59.7%	-	-	-	15.8%
(09) Bruce Highway Burpengary	-	5.9%	19.3%	-	-	5.0%
Sub total	80.2%	66.2%	67.7%	-	0.0%	73.0%
Southern Region						
(10) Old Gympie Road Narangba	0.8%	9.5%	2.6%	-	-	3.4%
(11) Deception Bay	-	0.3%	0.0%	-	-	0.1%
(12) Deception Bay Road	-	8.3%	-	-	-	2.2%
(13) Boundary Road Narangba	3.7%	12.3%	9.3%	100.0%	-	8.4%
(14) Scarborough Marina	-	-	-	-	0.0%	0.0%
(15) Newport	-	-	-	-	100.0%	0.0%
(16) Rothwell	-	-	0.5%	-	-	0.1%
(17) Kippa Ring	-	-	0.0%	-	-	0.0%
(18) Clontarf	0.8%	-	0.6%	-	-	0.5%
(19) Petrie Mill, Petrie Mill – Innovation Precinct, Petrie Town	-	0.3%	-	-	-	0.1%
(20) Paisley Drive Lawnton	-	0.0%	4.0%	-	-	0.7%
(21) Brendale	14.6%	3.1%	13.9%	-	-	11.2%
(22) The Hills District	-	-	1.3%	-	-	0.2%
Sub total	19.8%	33.8%	32.3%	100.0%	100.0%	27.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Moreton Bay Regional Council, Ethos Urban

Note: Figures have been rounded

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

6.5 Comparison with LSDM 2020

Analysis of MBRC's VUT databases yielded an estimated 757.4ha of NVL in urban area employment land. This estimate is 15% below the Queensland State Government's LSDM 2020 estimate of 1,004ha.

The LSDM 2020 description of 'planned industrial land' is as follows:

"Land that is vacant, has a zoning or intent for industrial purposes in a planning instrument (e.g., planning scheme, development scheme, port land use plan, etc.) and is not affected by identified constraints.

*This is effectively the gross developable area, i.e., it does not exclude any allowance for new roads, infrastructure corridors, open space and the like. It also does not exclude any allowance for some constraints which affect the economic feasibility of industrial development, e.g., geotechnical conditions, mining impacts, availability of infrastructure and the like."*⁶

While the LSDM 2020 and the estimates NVL in this report have similar objectives, it is inevitable that differences will arise through period (2019 vs 2021 data) coverage, methodology, interpretation of aerial imagery, and the level of detail considered.

For example, the Warner precinct was specifically excluded from the analysis in this report after discussions with Council but included in the LSDM 2020 findings. The constraints methodology in this report estimated NVL at Brendale accounting for powerline buffers, but these easements were not part of LSDM 2020 constraints. Finally, there will necessarily be some judgement differences in assessing the status of vacant, underutilised and taken-up land parcels through inspecting aerial imagery.

Ethos Urban considers NVL of 757.4ha to be a more precise measure than the estimate reported in LSDM 2020.

6.6 Summary

Key findings from this chapter include:

- Although the VUT databases were an important data source, their usefulness would be enhanced through detailed on-the-ground inspections of industrial land parcels to the verify parcel status amongst other information.
- NVL provides an overview of the total quantum of future industrial land supply, including land that is not currently appropriately zoned and/or able to be serviced. As a result, it is not the

⁶ <https://planning.dsdmip.qld.gov.au/planning/better-planning/state-planning/regional-plans/segpr/ladm?release=2020&area=moreton-bay&page=industrial>

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ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

appropriate baseline for testing the municipality's supply against the ShapingSEQ benchmark (refer to Chapter 10).

- Approximately 2,037.2ha of zoned urban industrial land currently exists in the MBRC, of which 757.4ha (or 37%) is estimated to be NVL – allowing for occupied, underutilised or constrained land, and civil infrastructure.
- The majority of total NVL (552.9ha or 73%) is located in the northern region, with the balance (204.5ha, 27%) provided in the southern region.
- The NVL supply of GI land is calculated at 408.3ha – with Elimbah East (55%), Brendale (15%), Caboolture West (14%) and Bribie Island Road Caboolture (11%) being the main locations of supply. Future employment land at Caboolture West is considered to be a longer-term proposition due to civil infrastructure and staging considerations.
- The provision NVL supply for MIBA totals around 201.2ha, with North East Business Park (60%) and Boundary Road Narangba (12%) being the major areas of supply.
- Provision of NVL for Restricted Industry is limited, with all available supply (only 11.5ha) situated at Boundary Narangba.
- The provision of land for Marine Services is also limited (0.05ha), however additional supply is expected to be delivered at North Harbour PDA.
- The estimate of 757.4ha of NVL in the municipality is 15% lower than the supply of 'planned industrial land' reported in LDSM 2020. However, given time period, coverage and methodological differences between LDSM and NVL calculations, the 15% variation is considered to be within an acceptable margin of variation.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

7 Historical Take-Up Patterns

This chapter discusses historic take-up patterns of industrial land in MBRC.

7.1 Definition of Take-Up

Consumption of industrial land can be measured in several ways. Although land sales (transactions) is a common method of measuring industrial take-up, there can be a significant lag between when a parcel of land is sold and when it is ultimately used for an industrial purpose.

Accordingly, when undertaking supply and demand analysis of industrial land for strategic, statutory and infrastructure planning processes, assessing take-up based on whether a site is physically occupied or is vacant (available for development) is considered more appropriate.

Take-up data provides valuable insights regarding actual, or realised, industrial market trends. Analysis of take-up is also a basis for understanding recent consumption trends (usually annualised) by MBRC Planning Scheme zone/zone precinct and study area precinct. And, if appropriate data is available, the analysis can reveal insights regarding the size of individual lots and specific uses being developed.

7.2 Take-Up Analysis Methodology

For this assessment, the main data source for recent take-up patterns was the Council supplied 2016, 2018, 2019, and 2021 VUT databases, as described in the previous chapter.

The VUT data was assembled through visual assessment of aerial imagery and followed the guidelines set out by SDILGP in *SEQ Planned Industrial Land Supply: Process, Methodology and Visual Guide* (August 2020).

These guidelines define a land parcel to be 'taken-up' as either:

- **Taken-up industrial land:** land that contains an active land use and built form for the purposes of industrial or other use, or
- **Under construction:** land that supports the construction of an improvement/building that commenced but may not be completed.

From the VUT databases, which also contain precinct and zoning information, it was possible to tabulate the volume of land classified as taken-up at each time point, then calculate the differences over the period 2016-2021.

While the VUT database were a rich source of information about recent take-up patterns, a limitation of the analysis was the relatively short time period covered by the datasets. Additional analysis of key industrial estates back to 2009 was undertaken using publicly available Nearmap aerial imagery.

Take-up patterns in Brendale and Boundary Road Narangba were analysed from 2009 onwards. As an indication of the importance of these precincts, they contributed around 78% of take-up in the period 2016-2021.

This additional analysis played a role in informing the understanding of land take-up for the purpose of developing projections.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

7.3 Recent Take Up Patterns**7.3.1 Recent Take-up by Zone Precinct, 2016 to 2021**

Based on the VUT datasets, average annual take-up of industrial land across all MBRC Planning Scheme zone precincts was 22.0ha from 2016 to 2021 (refer Table 7.1).

Around half of the land consumed across this time period (annualised) was in the GI zone precinct (11.5ha or 52% of total annual take-up). In contrast, MIBA precinct land accounted for 5.3ha of annual take-up (or 24% of total annual take-up).

The balance of take-up (5.1ha or 23%) was attributed to the other zones/zone precincts.

Table 7.1 Average Annual Employment Land Take Up by Zone Precinct (ha)

Zoned Precinct	Avg. Annual Take-Up (ha)			
	2016 to 2018	2018 to 2019	2019 to 2021	2016 to 2021
General Industry	8.2	12.6	14.4	11.5
MIBA	6.4	5.1	4.5	5.3
Light Industry	2.0	0.9	7.3	3.9
Restricted Industry	0.5	0.0	1.8	0.9
Marine Industry	0.1	1.1	0.0	0.3
Total	17.2	19.8	27.9	22.0

Source: MBRC, Ethos Urban

Note: Value of 0.0 indicates less than 1,000m² of take-up.

Figures have been rounded.

7.3.2 Recent Take-up by Precinct, 2016 to 2021

Average annual take-up by individual study area and zone precinct is shown in Table 7.2.

From 2016 to 2021, employment land take-up was largely focused on the southern region, which accounted for 19.1ha of annual take-up or 87% of total take-up across the three years. This pattern was a result of the two largest active employment precincts, Boundary Road Narangba and Brendale, being located in the southern region.

Across the five years to 2021, Boundary Road Narangba recorded annual take-up of 7.4ha (or 34% of total take-up), while 9.8ha of take-up was attributable to Brendale (45% of total take-up).

The northern region is expected to capture an increasing share of land take-up in the future and become the primary focus for industrial land development in Moreton Bay. Increased land consumption in the northern region will occur as available supply (NVL) reduces in the southern region and new industrial supply comes online in the north.

For example, at Bribie Island Road Caboolture, a new release of GI land to the east of the existing Aerodrome site (marketed as 'Corporate Park East') is now selling. Reports from local real estate agents suggest that demand for sites is strong.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

There is also potential for existing zoned supply (NVL) to be serviced and brought to market in the northern region at:

- North East Business Park (120.0ha)
- Elimbah East (232.7ha); and
- Caboolture West (84.2ha).

The demand and take-up scenarios discussed in Chapters 9 and 10 consider when these precincts are likely to be needed.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 7.2 Annual Employment Land Take Up by Precinct, 2016 – 2021 (ha)

Precinct	General industry	MIBA	Light industry	Restricted industry	Marine industry	Total
Northern Region						
(01) Elimbah East	-	-	0.8	-	-	0.8
(02) Caboolture West – Enterprise and employment – EC	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	0.2	0.2
(04) Bribie Island Road Caboolture	0.7	-	-	-	-	0.7
(05) Henzell Road Caboolture	0.0	0.2	0.2	-	-	0.4
(06) First Avenue Bribie Island	-	-	0.0	-	-	0.0
(07) PAC Morayfield	-	-	0.0	-	-	-
(08) North East Business Park	-	0.3	-	-	-	0.3
(09) Bruce Highway Burpengary	-	0.4	0.1	-	-	0.4
Sub total	0.7	0.8	1.1	-	0.2	2.9
Southern Region						
(10) Old Gympie Road Narangba	1.1	-	0.2	-	-	1.3
(11) Deception Bay	-	0.1	0.0	-	-	0.1
(12) Deception Bay Road	-	0.0	-	-	-	0.0
(13) Boundary Road Narangba	1.5	4.1	0.9	0.9	-	7.4
(14) Scarborough Marina	-	-	-	-	0.0	-
(15) Newport	-	-	-	-	0.1	0.1
(16) Rothwell	-	-	0.2	-	-	0.2
(17) Kippa Ring	-	-	0.0	-	-	0.0
(18) Clontarf	0.0	-	0.2	-	-	0.3
(19) Petrie Mill, Petrie Mill – Innovation Precinct, Petrie Town	-	0.0	-	-	-	-
(20) Paisley Drive Lawnton	-	-0.1	-0.1	-	-	-
(21) Brendale	8.1	0.4	1.2	-	-	9.8
(22) The Hills District	-	-	0.0	-	-	0.0
Sub total	10.8	4.5	2.7	0.9	0.1	19.1
Total	11.5	5.3	3.9	0.9	0.3	22.0

Source: MBRC, Ethos Urban

Note: Value of 0.0 indicates less than 1,000m² of take-up.

Figures have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

7.4 Longer Term Take-Up Trends at Brendale and Boundary Road Narangba

As noted earlier, Boundary Road Narangba and Brendale between them accounted for 78% of industrial land take-up between 2016 and 2021. Given the importance of these precincts, longer term take-up from 2009 to 2021 in these two precincts was examined separately using Nearmap aerial imagery.

As shown in Table 7.3 below, annual up-take of industrial land at Boundary Road Narangba in the period 2016 to 2021 (7.4ha per year) was higher than 6.8ha annual average over the longer 2009 to 2021 period, indicating faster take-up in recent years. This trend was due primarily to development of MIBA land at Boundary Road Narangba.

Brendale followed a similar trend, with recent take-up above the longer-term average. The main driver of take-up at Brendale was GI zoned land, averaging of 7.5ha per annum in the 10-year period, and averaging 8.1ha in the more recent 3-year period. GI comprises the majority of the employment land at Brendale.

In the future, annual take-up is expected to decline in Brendale as the availability of larger developable larger sites becomes more limited.

While distribution centres in excess of 40,000m² in floor area for anchor tenants Super Retail Group and Aldi were delivered on GI land at Brendale in 2014, it is uncertain if uses of this scale could now locate in the precinct, in view of the potential impacts of high-voltage power lines and other constraints on the remaining land supply.

Moreover, relatively new land supply in Ipswich and Logan (LGAs) is now the focus for larger scale (metropolitan) distribution facilities in SEQ.

Table 7.3 Average Annual Employment Land Take-Up at Brendale and Boundary Road – Narangba, 2009 – 2021 (ha)

	2016 to 2021	2009 to 2021
(13) Boundary Road Narangba		
General industry	1.5	2.0
Mixed industry and business	4.1	3.6
Light industry	0.9	0.7
Restricted industry	0.9	0.5
Total	7.4	6.8
(21) Brendale		
General industry	8.1	7.5
Mixed industry and business	0.4	0.9
Light industry	1.1	1.0
Total	9.7	9.4
Combined		
General industry	9.7	9.5
Mixed industry and business	4.5	4.6
Light industry	2.0	1.7
Restricted industry	0.9	0.5
Total	17.1	16.2

Source: MBRC, Ethos Urban

Note: Value of 0.0 indicates less than 1,000m² of take-up.

Figures have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

7.5 Comparison with LDSM 2020

A parcel is defined as 'taken-up' in LDSM 2020 if it contains an active use and has built form for the purpose of an industrial use. Over the period 2011 to 2019, the LDSM 2020 estimates 174ha of industrial land was developed, at an average annual rate of 21.8ha.

The LDSM take-up rate over 2011 to 2019 is broadly equivalent to the 22.0ha per annum estimated from MBRC's VUT dataset, which covered the period 2016 to 2021.

As noted in earlier discussions, differences in timing, precinct coverage, methodology and assessment of aerial imagery is likely to lead to differences in estimates derived from the two studies.

7.6 Summary

The key findings from the analysis of historic take-up patterns include:

- SDILGP defines take-up as land that contains an active land use and built form for the purposes of industrial or other use; or land that contains construction of an improvement/building that commenced but may not be completed.
- Recent take-up (from 2016-2021) was calculated using Council's VUT data, which was assembled and classified generally in-line with SDILGP guidelines (2020).
- For Boundary Road Narangba and Brendale precincts, which between them accounted for 78% of industrial land take-up between 2016 and 2021, take-up prior to 2016 was also measured.
- From 2016 to 2021, average annual take-up of employment land across all zone precincts was 22.0ha. Around half of the land consumed across this time period (annualised) was in the GI zone precinct (11.5ha or 52%).
- In contrast, MIBA land accounted for 5.3ha of take-up on an annual basis, or 24% (of total annual take-up), with the balance (5.1ha or 23%) attributed to the balance of zone precincts.
- Recent take-up of land at Brendale and Boundary Road Narangba strengthened relative to the long-term (10-year) average.
- The LDSM take-up rate over 2011 to 2019 is in-line with the 22.0ha estimated from MBRC's VUT dataset, which covered the period 2016 to 2021.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

8 Drivers of Future Demand

This chapter discusses demand drivers for future industrial land in MBRC.

For the purpose of this assessment 'demand drivers' are defined as broad trends or considerations, that will likely have a bearing on the future demand for, and development of, employment land in MBRC.

8.1 Population Growth & New Business Demand

As noted in Chapter 3, MBRC's long-term population growth trajectory is substantial. After adjusting for the expected impacts of COVID-19, MBRC's population is projected to reach 766,210 residents by 2051, an increase of more than +280,000 persons on the current level.

Population growth will likely influence the demand for employment land in MBRC in a number of ways, including as the:

- **Primary driver of land consumption by local service industrial uses**, such as construction depots, automotive servicing and parts, trade supplies retailing, vehicle sales yards etc. Put simply, as the local population increases, so does the market served by these uses and requirements for more space as existing operators expand or new businesses establish.
- **The key driver of local retail expenditure**, which in turn informs demand for some retail uses (some of which are located in MBRC's industrial precincts), as well as warehousing and logistics uses that play a crucial role in retail supply chains.

Although population growth will likely be the primary long-term driver of industrial land consumption in MBRC, Council has a priority to diversify the economic base, with a focus on 'value adding' and attracting industries that are not directly aligned to population growth (refer Regional Economic Development Strategy 2041).

In this regard, the modelling undertaken for this study in Chapter 9 considers both:

- Population Growth Demand (PGD) – demand generated in-line with population growth; and
- New Business Demand (NBD) – demand generated by new businesses that would not otherwise develop in MBRC due to local population growth, including:
 - New or expanding businesses with markets extending beyond MBRC; and/or
 - Companies choosing Moreton Bay in preference to other locations due to factors including site, locational, lifestyle and branding considerations etc.

The NBD component is contingent on future economic development initiatives from Commonwealth and State Governments, as well as from Council activities to proactively attract firms to the region.

How the demand drivers identified in the balance of this chapter relate to the PGD/NBD classification varies. Some demand drivers identified are related primarily to either PGD or NBD, while others are related to, in varying degrees, both.

An example of an identified demand driver potentially relating to both PGD and NBD is investment in warehousing and logistics: population growth in isolation is expected to continue influence demand for smaller scale distribution centres in MBRC; but there is also an opportunity for MBRC to attract facilities that service a wider regional catchment including the Sunshine Coast and beyond. This latter trend would result from operators potentially choosing MBRC above other competing locations.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

8.2 Warehousing & Logistics

In recent years, warehousing and logistics has emerged as a major sector in the Australian property market and a key focus for property funds seeking to diversify their portfolios.

As a result, prime yields for industrial assets in all mainland capitals have decreased dramatically to below 6.0%, a product of both the current low interest rate environment and the prospects for rental growth and yields⁷. CBRE estimated prime yields of 5.0% for Brisbane super prime warehouse assets in May 2021.

Underscoring the investment in warehousing and logistics is continued growth in e-commerce driven by online and omni-channel retail⁸. E-commerce requires more intensive supply chain investment than traditional 'bricks and mortar' due to products being sent to buyers' preferred postal address and the management of product returns. One result of increased e-commerce activity in Australia is the growing market share of third-party logistics operators (or 3PLs).

Higher order warehouse/distribution centre development has occurred at Brendale, notably the delivery of distribution centres in excess of 40,000m² of floor area for Super Retail Group and Aldi in around 2014. The focal point for large-scale, metropolitan or state focused warehouse/distribution centre development in the Greater Brisbane region, however, is Redbank and Bundamba in the Ipswich City Council LGA, Australia's Trade Coast (ATC) centred on Brisbane's port and airport, and to a lesser extent the Logan Motorway Corridor.

At Redbank, new state-of-the-art distribution centres for Coles and Australia Post are under construction at 66,000m² and 49,000m² in floorspace, respectively. For larger scale warehousing and logistics uses, Ipswich offers a generous supply of relatively cheap, flat, unencumbered which is:

- Highly accessible by road,
- Strategically located to service the SEQ region (via a hub and spoke distribution model); and
- Links into supply chains from Melbourne and Sydney.

Although Brendale's industrial precinct is considered to be highly-accessible and proximate to central Brisbane, available supply is increasingly constrained, precluding development of major metropolitan distribution centres (in the order of 20,000 – 50,000m² in floorspace). Moreover, alternative areas of supply in MBRC are considered by market sources to be less strategically located to service SEQ from a hub and spoke perspective or conveniently linked into major supply chains to the southern states.

MBRC, however, is an emerging location for the delivery of regionally focused warehousing facilities servicing MBRC, and potentially the Sunshine Coast and supply chains extending further north.

⁷ Declining yields indicate the price of an asset has become more expensive relative to returns generated.

⁸ Omni-channel refers to retailers using a cross channel approach to sell merchandise, complementing traditional bricks and mortar with online and click and collect services.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

These regionally focused facilities are broadly 3,000-10,000m² in floorspace, based on current market trends.

By way of example, The ISPT owned Interchange Industrial Estate, situated west of the Bruce Highway, includes: a distribution centre for Liquid Speciality Beverages (approx. 10,100m² in floorspace); a Bunnings Trade Centre (approx. 4,000m²); and a warehouse for Apex Building Products (approx. 10,800m²).

On the opposite side of the Bruce Highway, Boundary Road Industrial Estate is being developed by Pradella Group, and includes: a distribution centres for Nick Scali (approx. 4,800m²); Gyprock (approx. 4,000m²); and warehouses for Marinucci (approx. 3,000m²) and Australia Post (approx. 2,300m²).

Market contacts indicate there is existing interest from institutional investors (e.g., major property funds) in MBRC's industrial market to deliver design and construct (D&C) facilities for clients seeking warehousing/distribution space as well as other sectors including manufacturing.

Naturally, whenever warehouse/logistics activities increase, there will be associated traffic issues that will need to be considered by planning authorities.

Case study: Third Party Logistics

Third-party logistic (or 3PL) refers to businesses outsourcing elements of their supply chain management, logistics and warehousing requirements to organisations who specialise in these activities. Major 3PL providers in Australia include Invenco, StarTrack, Linfox, Pendulum Logistics, PikPak, NPF Fulfilment, amongst others.

3PL is a major growth sector with industry revenue forecast to increase by approximately +8% per annum for the 5 years to 2025.⁹ Population growth, coupled with the increasing e-commerce activity is the primary demand driver, as retailers turn to 3PL providers to manage their supply chain need— particularly online order fulfilment.

Increasing use of digital technology (including during the current COVID-19 pandemic) and the recent arrival of Amazon in Australia has placed significant pressure on traditional bricks and mortar retailers to shift to an omni-channel offering.

While overall provision of 3PL activities in MBRC is currently limited, new facilities are being developed such as the recent construction of a new 3,500m² warehouse by Main Freight at Narangba. It is conceivable that development of 3PL facilities will increase in MBRC in view of the municipality's projected population growth, along with that of neighbouring Sunshine Coast and Brisbane.

⁹ Mordor Intelligence, *Australian 3PL Market – Growth, Trends and Forecasts (2020-2025)*

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Case Study: Cold Storage

Traditionally regarded as a niche industrial typology, cold storage has emerged as a focus for major institutional investors with Goodman, Charterhall and Dexu having recently increased the allocation of cold storage in their portfolios.

The main demand drivers are food consumption and production, underpinned by an increase in pre-packaged meals, as well as food exports/imports volume. Demand for cold storage facilities is also generated by the pharmaceuticals sector. From a national perspective, SEQ is viewed as a growth market in view of the substantial population increase projected for the region.

Occupation of cold storage facilities has traditionally been dominated by major supermarket chains – Coles, Woolworths and Metcash. However, corporate outsourcing of distribution centres to 3PL providers is an emerging trend. Major 3PL providers including Emergent Cold (formally Swire Cold Storage), Rend Refrigerated Logistics (part of AHG) and Montague Cold Storage are expanding their footprints across Australia.

Historically, Australia Trade Coast has been the location for development of major cold storage facilities (comprising around 5,000m² to 10,000m² in floorspace), with this area providing access to the Port of Brisbane and Airport and a central location to service SEQ.

While cold storage development in MBRC has historically been limited to much smaller scale facilities, development of larger regionally focused facilities (from 3PL providers and the like) in the future is considered an opportunity, in view of regional population growth in MBRC and Sunshine Coast and ATC becoming increasingly supply constrained.

Implication

Development of warehousing/logistics uses that serve a regional role is considered an opportunity that will increase in prominence in view of projected population growth.

Although warehousing activity will generate demand for both General Industry and MIBA zone precincts, GI will be the focus for larger facilities.

8.3 Technology Advancement, Big Data

Technology has increasingly come into focus in the industrial sector as businesses have sought to invest in automated machinery and robotics to deliver superior products and/or services and reduce input costs, such as wages.

As a result, the labour intensity of industrial activities is generally in decline across most industry sectors. In the warehousing and logistics space, major operators are investing in technology which replaces picking and packing activities with robots, with fully automated (dark) warehouses now beginning to be delivered.

For example, Asahi (owner of Beverages Group and Schweppes) recently opened a \$72 million dollar facility in south-west Brisbane, capable of handling 28,000 pallets via an automated storage and retrieval system. As costs decline over time, it is expected that robotics technology will increasingly become a feature of smaller regional distribution centres, including in new facilities that may be established in MBRC.

A trend flowing from advancements in digital technology is the emergence of data centres as an employment land typology. For MBRC, the opportunities associated with data collection and storage are highlighted by the recent completion of a submarine data and telecommunications cable connecting nearby Maroochydore to the Japan Guam Australia South (JGA-S) cable. This cable is

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

set to provide MBRC and Sunshine Coast businesses with Australia's fastest data and telecommunications transmission speeds from the eastern seaboard to Asia¹⁰.

Case Study: Data Centres

Data centres provide electronic information storage for third parties, such as cloud services, and enable large sensitive files to be uploaded, downloaded, backed-up and accessed over the internet and secure private networks. Existing operators in Australia include Next DC, Equinix, Amazon Corporate, Digital Realty and iSeek.

The average size of a data centre is around 10,000m², although in the USA data centres of more than 300,000m² have been built.

Like cold storage, data centres have become a key sector for property funds. Migration to cloud services is the major prevailing demand driver, but big data, internet of things, and 5G technology and are positioned to increase the size of the market into the future. The COVID-19 pandemic is also increasing demand for cloud storage as businesses adapt by expanding their remote working capabilities. Total industry revenue is expected to increase by around +8.6% per annum over the 5-years to 2021-25 based on estimates by IBIS World in June 2020.¹¹

Currently, demand for data storage is primarily generated by government. The private sector is expected to drive the next phase of growth with 90% of small to medium enterprises (SMEs) in Australia expected to operate via the cloud by 2023.¹² While the Brisbane CBD and immediate surrounding suburbs represent the primary location for data centres in metropolitan Brisbane, development of the Mill at Moreton Bay development and the new submarine data cable are factors that could, conceivably, support data centre development in MBRC.

Implication

Technology and big data have potential to influence a range of industries. Advanced manufacturing and start-ups are a key focus of the REDS, with delivery of the Mill at Moreton Bay an opportunity to support local tech innovation.

Delivery of data centres is a potential future opportunity supported by recent connection of the submarine data cable on the Sunshine Coast.

¹⁰ Source: Queensland Government

¹¹ IBIS World report: Data Storage Services in Australia (55922)

¹² Source: ResearchandMarkets.com

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

8.4 Local Industry Demand

8.4.1 Manufacturing

Manufacturing is an important industry in MBRC and employed 7,340 workers or 6.8% of the municipality's workforce (persons who work in the municipality) at the 2016 Census (refer Table 3.2). Although in 2016, the jobs supported by the sector in MBRC was observed to be in long-term decline, the estimated value added¹³ generated by the sector has increased by around +\$49.7 million across the ten years to 2019/20, representing growth around +0.5% per annum¹⁴.

These figures indicate that although the industry supports less jobs than it once did, it is nonetheless expanding in terms of value added, and has remained resilient in view of broader structural trends impacting the sector at a national level, such as offshoring.

Local manufacturing firms seeking to expand their facilities remains a prominent driver of demand for larger GI sites, based on advice from local agents.¹⁵

MBRC's manufacturing sector encompasses a range of activities, including:

- Building supplies production,
- Fabrication,
- Timber products,
- Marine and leisure (such as boats and caravans),
- Food packaging; and
- Mining equipment.

For the most part, local manufacturers produce goods for regional, state or national markets, and are responsive to demand drivers including:

- Growth in the construction industry,
- Local forestry and agricultural activities,
- Growth in marine leisure and outdoor recreation; and

¹³ Value-added by industry is an indicator of business productivity and shows how productive each industry sector is at increasing the value of its inputs. It is a more refined measure of the productivity of an industry sector than output (total gross revenue), as some industries have high levels of output but require large amounts of input expenditure to achieve that output.

¹⁴ Source: <https://economy.id.com.au/moreton-bay/value-add-by-industry?sEndYear=2010>

¹⁵ The recent acquisition of a site Narangba (industrial precinct) by Bradco Joinery for cabinetry manufacturing and timber processing facility is a tangible example demand from local manufacturers to facilitate an expansion.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- Queensland's role as a mining state.

Opportunities will present for local manufacturers to transition through investment in technology to become 'advanced manufacturers', a focus area identified by the REDS. The establishment of a new Sunshine Coast University Campus (through development of the Mill at Moreton Bay) is expected to provide an opportunity for research/tertiary sector links that can stimulate this transition. Practical efforts by Council's economic development team to attract advanced manufacturers will be another factor.

At this point of time however the extent to which advanced manufacturing activities will be a major influence on future industrial land demand remains uncertain.

Implication

Manufacturing will generate ongoing demand driver for GI land, and to a limited extent, MIBA.

8.4.2 Construction

Construction is a key driver of MBRC's economy with employment supported by the sector increasing by +4,000 jobs between 2011 and 2016. Construction experienced the second largest employment increase for any subsector, ahead of the healthcare and social assistance.

The substantial population increase projected for MBRC (and neighbouring Sunshine Coast) will support growth in the local construction sector, resulting in ongoing demand for land to support construction depots and trade supplies operators.

In particular, demand for sites to accommodate construction sector aligned industry is expected to increase considerably in MBRC's northern region as the Caboolture West Major Expansion Area is delivered. Substantial residential development on the nearby Sunshine Coast at Caloundra South and Beerwah East Major Development Area will also drive industrial land demand in the longer-term.

Implication

Construction will generate ongoing demand driver for GI, MIBA and Light Industry land (depending on the nature of the use)

8.4.3 Other Industries

Other industries with a bearing on local industrial land demand include agriculture and forestry activities and marine servicing.

Food & Forestry

MBRC's rich soils and sub-tropical climate have long supported a strong local agriculture sector. Strawberries, pineapples, finger limes, macadamia nuts and avocados represent the current major commodities.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

MBRC is the largest strawberry growing area in Australia, producing around one-third of the national strawberry crop by weight.¹⁶ The municipality also produces over one-quarter of Australia's pineapple crop. Water security of food growers in MBRC will be future proofed by the Wamuran Irrigation Scheme – a venture by Unity Water that will supply recycled water to growers.

The municipality has a strong forestry sector focused on the harvesting of softwoods (pine). Significant forestry areas include the Beerburum State Forest (east and west) and in areas managed by HQPlantations on Bribie Island. As a result, forestry aligned industry is a feature of MBRC's employment areas for activities including timber processing and forestry transportation.

It is understood that MBRC's industrial land market has historically been supported by some demand from agriculture and forestry aligned industry, based on discussions with real estate agents. It is conceivable that this support will continue. For the food sector, development of value adding industries that are export focused is a key opportunity from an economic development perspective.

Implication

Food and forestry will be an ongoing demand driver for primarily GI land.

Marine Servicing

Marine servicing is a niche sector contingent on waterfront sites being available with capacity for dry-dock facilities. The capacity of existing marine servicing facilities at Scarborough Marine and Newport are understood to be effective fully occupied.

A preliminary land use vision for the North Harbour Priority Development Area (PDA), prepared by Urbis¹⁷, has identified land for a specialised marine employment area, which would accommodate marine servicing activities, export focused marine industry (such as boat building) and an education/training aspect. The opportunity would also exist for this precinct to develop synergies with the nearby North East Business Park, which is well located to also capture a share of marine industry.

MBRC's recreational boat fleet was estimated to contain 23,880 vessels in 2016, making it the third largest municipality for recreational boats behind Brisbane and the Gold Coast. The fleet is forecast to increase by +8,210 vessels (+34.4%) by 2036.¹⁸ Demand for local marine servicing is also

¹⁶ <https://www.moretonbay.qld.gov.au/Services/Building-Development/Make-Your-Move/Industry-Sectors/Food-and-Agribusiness>

¹⁷ MBRC General Meeting 515: Item 4.2 North Harbour Marina PDA Request A20359756 (#D Brochure prepared by Urbis)

¹⁸ Economic Associates, *Recreational Boating Demand Forecasting Study* (December 2017)

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

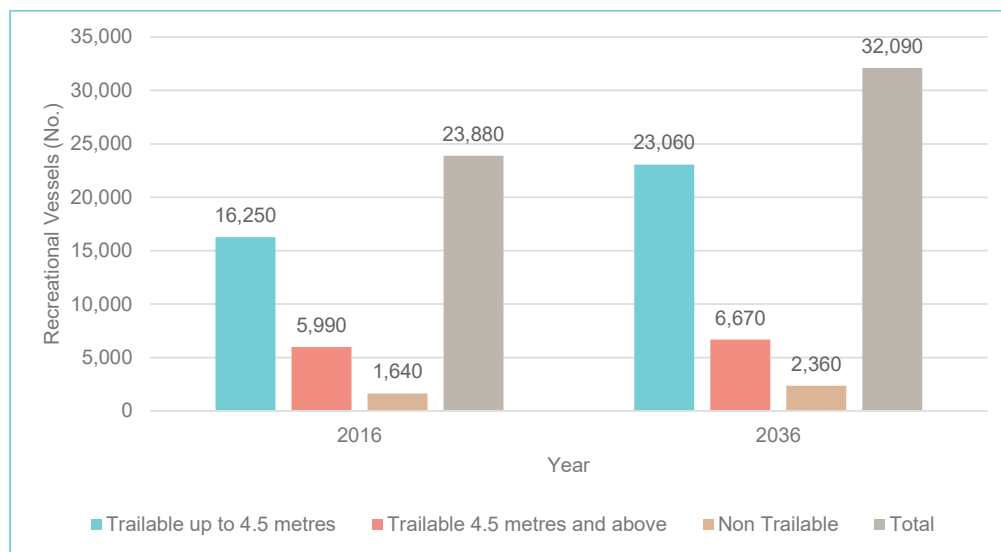
Final Report

expected to be generated by MBRC's commercial fishing fleet which targets prawns, squid and finfish (including mullet, bream and whiting). Refer Figure 8.1.

Implication

A niche opportunity exists for a Marine Servicing at North Harbour PDA that would have potential synergies with future industrial uses at the North East Business Park (MIBA)

Figure 8.1: Recreational Boating Fleet in Moreton Bay (LGA) – Projected Growth 2016-2036



Source: Economic Associates, Recreational Boating Facilities Demand Forecasting Study (Dec 2017)

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

8.5 Demand Transfer from Neighbouring Council Areas

Lack of appropriate land supply (especially large sites) in Sunshine Coast (LGA) has potential to result in a transfer of land demand to MBRC's Northern Region. This possibility is a separate consideration to the potential for industry in MBRC to expand due to demand drivers emanating from the Sunshine Coast.¹⁹

In 2020, Sunshine Coast (LGA) contained around 242ha in vacant industry land supply, of which 178ha (or 74%) was low or medium impact industry land, based on the latest estimates prepared by Queensland Government.²⁰ The average annual take-up between 2011-2019 of 11.3ha and primarily attributable to low/medium impact consumption, indicating a land supply of approximately 15-years.

New supply delivered in the Bells Creek/Caloundra South area the focus industrial land development on the Sunshine Coast, but other notable areas are Coolool and Yandina. In the longer-term (post 2030) there is potential for new employment land to be delivered at Beerwah East, noting that at this stage details are limited.

At a general level, Sunshine Coast has a significant number of smaller industrial areas that struggle to deliver larger sites for major uses due to environmental and other constraints. The opportunity exists for MBRC to accommodate major industrial uses that have either outgrown their existing sites on the Sunshine Coast or are seeking to move to the Sunshine Coast region but cannot secure an appropriate site. It is understood this consideration is firmly on the radar of Council's economic development team.

The opportunity also exists for demand transfer from Brisbane (LGA), particularly from the Australia Trade Coast (ATC). In 2020, Brisbane LGA's vacant industrial land totalled 497ha with 262ha (or 53%) attributed to low and medium impact industry, based on Queensland Government estimates. At the municipal level, the total industrial supply amounts to around 4.2 years, based on recent take-up between 2011-2019, indicating a significant supply shortage in the future. Moreover, Colliers have identified what they describe as a critical shortage of freehold land in ATC with only 151ha of supply remaining, due to 75% of land supply being located in Brisbane Airport or Brisbane Port and only being available on a leasehold basis²¹. Although 224ha of reclaimed land at Fisherman Island is the main location for industrial expansion within the ATC, this area is likely to be held on a leasehold basis by Brisbane Port.

¹⁹ Such as increased land demand from construction firms in the Caboolture area due to ongoing residential development at nearby Caloundra South (Aura) or future development at Beerwah East MDA).

²⁰ Queensland Government, *Land Supply & Demand Monitoring Report* (2020)

²¹ Colliers, *Australia Trade Coast Industrial Land Supply Report* (November 2019)

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

It is more likely, however, that MBRC would absorb spill-over demand from the Sunshine Coast due to MBRC's future industrial supply being located in the northern region:

- The northern region is less able to service southern supply chains (to Melbourne or Sydney); and
- Hub and spoke distribution networks to the wider SEQ region have already located in more attractive locations such as Ipswich (LGA) or the Logan Motorway Corridor where there is a significant supply of future industrial land.

Implication

Some future development of larger GI lots will be informed by spill-over demand from neighbouring municipalities.

8.6 Infrastructure Induced Demand

MBRC's economic context is framed by the provision of major infrastructure, as noted in Part 1 of this report.

Convenient access to major road networks is an important consideration for industrial developers and prospective tenants. Particularly those seeking to develop or operate higher-order warehousing and distribution facilities.

For larger industrial areas in MBRC – at Brendale, Narangba, Aerodrome Caboolture Aerodrome, or Elimbah East etc – convenient access to Bruce Highway or other major roads such as Gympie Road facilitate convenient access to the SEQ region and linkages to supply chains within MBRC and extending north to the Sunshine Coast and beyond.

However, MBRC is not the only location in SEQ with accessible employment land. Prospective developers and tenants will balance the transport attributes of employment land in MBRC with locations elsewhere in SEQ.

At a more localised level, the Redcliffe Peninsula Line is one factor that may, in the long-term, induce a gradual transition of the Redcliffe industrial precinct to accommodate some higher order uses, having regard for the low quality and intensity of the existing land use mix in this precinct.

As noted in Part 1, potential exists for the following major infrastructure to be delivered in the next 20+ years, which could also have a bearing on MBRC's economy and industrial land context. These initiatives include, but are not limited to:

- The Maroochydhore Rail Line (or Camcos)
- North Coast Connect
- Cross River Rail
- Elimbah Intermodal Freight Hub
- North South Arterial
- North Western Arterial Corridor

The three rail projects have the potential to shape MBRC's commuter context – particularly for white collar employment. The Cross River Rail will remove existing rail commuter bottlenecks in central Brisbane. Rail infrastructure is viewed as a key demand driver for development of the Mill Innovation

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

precinct at the Petrie Mill by reducing commute times from Brisbane and within MBRC (refer Chapter 11).

Conversely, provision of an Intermodal Freight Hub at Elimbah or Elimbah East and the potential for an additional North South Arterial Road, have the most potential to influence the demand context for conventional industrial land in MBRC.

The Elimbah Intermodal Freight Hub has been identified for future investigation in the SEQ Transport Plan (2018) with potential delivery before 2041. However, the project has not yet been commissioned. The Intermodal's potential location is yet to be finalised, although no future employment land is expected at this location (refer additional discussion regarding the Elimbah East Intermodal Freight Hub at Section 8.8).

Preliminary route planning is underway for a future north-south arterial road to the east of the existing Bruce Highway alignment, with the Department of Transport and Main Roads acting as the lead authority. Specific details regarding the route or timing of the future road are at this stage unknown.

A future north-south arterial to the east of MBRC's existing urban areas is a factor that could, conceivably, open-up opportunities for new employment precincts to be delivered in the longer term, if appropriate sites are considered suitable.

Implication

Accessibility afforded by the Bruce Highway and associated connectors (Gympie Road etc) will continue to be a demand driver for high-order industrial areas at Brendale, Narangba, Caboolture Aerodrome, Caboolture West as well as future development at Elimbah East.

Future infrastructure projects could shape the demand context in the longer-term.

8.7 Changing Nature of Industrial Precincts

Across Australia, the definition of 'industrial' is evolving as industrial precincts increasingly accommodate land uses not considered to be industrial in conventional terms.

Warehouse retail (i.e. Bunnings), dance studios, cafes, craft breweries or distilleries (with a cellar door or bar component), indoor sporting facilities, and commercial offices, are all examples of uses that do not fit the conventional definition of industry yet are frequently located in industrial areas.

The increasingly important role played by the services sector of the economy as the focus for jobs growth, coupled with innovation in the retail environment, are key drivers of this trend. In particular, the focus on omni-channel offerings in the retail sector is breaking down the distinction between retail shopfront, showroom and distribution centre.

Industrial precincts most likely to accommodate or transition to a wider mix of uses are typically well located to activity centres, walkable (as well as drivable), and provide a high-quality urban environment.

As the land use mix of industrial precincts becomes more diverse, the need to manage land use conflicts has also been brought into focus. In addition, other planning related issues such as built form, traffic management, noise mitigation and open space provision will need to evolve to meet these changes.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

For MBRC, MIBA provides the most appropriate zone precinct for accommodating a wider mix of uses beyond conventional industry and managing potential land use conflicts.

Implication

Current trends see industrial precincts accommodating an increasingly diverse mix of uses.

8.8 Intermodal Freight Hub at Elimbah

A potential new intermodal freight terminal between Caboolture and Landsborough to better service the Moreton Bay and Sunshine Coast councils and freight from Northern Queensland was first mooted in the 2010 transport plan for SEQ²². More recently, a short-term action of the latest transport plan²³ is to:

"Undertake planning to identify and protect a future intermodal freight terminal north of Brisbane."
(p82)

The MBRC planning scheme mentions a Northern Rail Freight Terminal. It is understood that a preliminary investigation of a potential site east of the existing Elimbah train station and west of the Bruce Highway has been undertaken.

However, to our knowledge, there is no firm commitment to an intermodal freight hub at Elimbah from either Commonwealth or State governments, or from the private sector.

Ethos Urban have not formed a view about whether a rail-road intermodal freight hub at Elimbah would be commercially feasible. A decision about the viability of such a facility would presumably be informed by the detailed investigations of logistics experts and a fully documented business case.

Nevertheless, general research and selected case studies do indicate opportunities that may arise if an intermodal freight hub was constructed at Elimbah, as the following discussion highlights.

²² Draft Connecting SEQ 2031 – An integrated Regional Transport Plan for South East Queensland, Queensland Government, 2010

²³ South East Queensland, North Coast, Metropolitan, South Coast Regional Transport Plans, Department of Transport and Main Roads, 2021

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

8.8.4 Intermodal Terminals

A 2017 study by PwC/Ranbury²⁴ describes an intermodal terminal as:

“an intermodal terminal (IMT) is a facility along the supply chain that provides for the transfer of freight from one transport mode to another. Facilities may range from transfer points that provide a limited set of services, to purpose-built terminals or hubs, designed for transfers, storage, distribution and a host of associated services.” (p11)

Fundamentally, intermodal terminals are about minimising transportation costs, particularly for containerised freight. Rail is cost-effective for transporting large quantities over long distances, while road is flexible in route planning and distribution over short to medium distances.²⁵

Drawing on the PwC/Ranbury study, key success factors for intermodal terminals include:

- Location – typically because of significant site requirements, freight hubs are located in outer suburban or rural industrial areas where land is more available and less expensive.
- Network connections – easy access to heavy rail and major road links is an obvious requirement.
- Nearby complementary warehousing and distribution centres – to reduce end-to-end transport costs, and drive terminal throughput.
- Operational efficiency – terminal throughput is critical to the viability of an intermodal terminal. Reducing both truck and train turnaround times significantly influence throughput and costs. Trucks queuing for excessive time periods would be a sign of operational inefficiency.
- Tailored and scalable infrastructure to meet customer requirements – capital intensive intermodal rail terminals face a significant stranding risk if road-based transport becomes cheaper, more flexible and more efficient. Technology improvements, shorter equipment replacement cycles and lower taxation arrangements can improve road-based transport competitiveness.

In short, for intermodal terminals to be successful, they need to be well located relative to customers and transport infrastructure and must operate with a very high degree of efficiency.

Given the significant capital costs to establish an intermodal terminal, and the need for a commercially acceptable return on investment, government and private sector co-funding models are relatively common.

²⁴ Future of Intermodal Terminals, Department of Infrastructure and Regional Development, May 2017; PwC, Ranbury

²⁵ Planning the Location of Intermodal Freight Hubs: An Agent Based Approach, Koen H. van Dam, Zofia Lukszo, Luis Ferreira and Ackchai Sirikijpanichkul Proceedings of the 2007 IEEE International Conference on Networking, Sensing and Control, London, UK, 15-17 April 2007

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

8.8.5 Land Requirements and Co-Location Opportunities

The land required for an intermodal terminal varies widely:

"Each terminal is a bespoke facility that reflects the nature of its location, envelope and site configuration, connection to the rail and road networks, loading roads, holding roads, hardstand, container storage, lifting equipment, support facilities and the nominated maximum train configuration that can operate on the relevant proximate network section specified by the network manager (the reference train configuration)." (PwC/ Ranbury P26).

Large metropolitan facilities, such as the Moorebank intermodal terminal in south-western Sydney, began development in 2017 on 240ha of land former occupied the Australian Army. This facility will ultimately have capacity to manage²⁶:

- 1.05 million TEU (twenty-foot equivalent units) of international containerised freight, mainly through Port Botany,
- 500,000 TEU of interstate and regional freight; and
- Trains of up to 1.8km in length.

The precinct will have up to 850,000m² of high specification warehousing onsite, as well as being close to existing industrial areas.

A regional example is the Logic logistics hub²⁷ at Barnawartha near Wodonga in north-eastern Victoria. The hub has a total land area of 567ha and will progressively develop over the next 30 years.

On the main Melbourne-Sydney rail route, the hub accommodates an \$18 million intermodal terminal operated by SCT Logistics. The 23ha intermodal terminal site has a 6,000m² cross dock terminal, a 5,000m² container handling area and more than 5km of internal rail track.

The hub also accommodates a 60,000m² Woolworths distribution centre, which employs more than 400 people, generates 450 truck movements per day and services 58 outlets in the region. In addition, a cross-laminated timber manufacturing plant, various freight companies and a service centre, fatigue management centre and trailer interchange are current tenants at the Logic logistics hub.

²⁶ Moorebank Intermodal Company <https://www.micl.com.au/the-project1>

²⁷ <https://www.logicwodonga.com.au/index.asp>

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

More generally, the PwC/Ranbury report notes that co-location of intermodal terminals with freight precincts is an emerging trend, which generates a number of benefits, including:

- Reduced costs through improved operational efficiencies
- Enhanced technology adoption when throughput volumes justify ICT investment; and
- Vertical and horizontal integration of supply chain service providers.

Specific clustering opportunities onsite or nearby include:

- Warehousing and distribution centres
- Container parks offering storage, washing, and repairs and maintenance
- Rollingstock storage and servicing
- Bonded customs facilities; and
- Quarantining, cleaning and fumigation services.

8.8.6 Implications for Elimbah

If it were decided that Elimbah could successfully accommodate an intermodal freight hub, it would likely anchor a very active industrial area, encourage related uses and generate significant demand for industrial land. An intermodal freight hub would enhance the ability of Elimbah to serve both Moreton Bay, the Sunshine Coast and beyond. Moreover, an intermodal hub would complement industrial development at Elimbah East, which is identified in ShapingSEQ as a major enterprise and employment area.

However, at this stage, without clear commitment to the project and no knowledge about the scale of an intermodal freight hub at Elimbah, it is not possible to be more definitive about potential industrial land requirements.

It is clearly in Council's interests to be up to date on the possibility of an intermodal freight hub at Elimbah through regular and active engagement with relevant Commonwealth and State authorities.

Finally, for the purposes of this report, it is not assumed that an intermodal freight hub is established at Elimbah before 2051.

8.9 COVID-19 Implications

The economic impacts of the COVID-19 pandemic will impact MBRC's economy with flow-on implications for employment land development.

Figure 8.2 below is extracted from the recently released Federal budget (delivered 11 May 2021).

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure 9.2. Federal Budget 2021-22 Economic Forecasts

	Outcomes		Forecasts			
	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25
Real GDP	-0.2	1 1/4	4 1/4	2 1/2	2 1/4	2 1/2
Employment	-4.2	6 1/2	1	1	1 1/4	1 1/4
Unemployment rate	6.9	5 1/2	5	4 3/4	4 1/2	4 1/2
Consumer price index	-0.3	3 1/2	1 3/4	2 1/4	2 1/2	2 1/2
Wage price index	1.8	1 1/4	1 1/2	2 1/4	2 1/2	2 3/4
Nominal GDP	1.7	3 3/4	3 1/2	2	4 3/4	5

(a) Real GDP and Nominal GDP are percentage change on preceding year. The consumer price index, employment, and the wage price index are through-the-year growth to the June quarter. The unemployment rate is the rate for the June quarter.
 (b) Total is equal to the sum of amounts from 2021-22 to 2024-25
 (c) Excludes net Future Fund earnings before 2020-21.
 (d) Gross debt measures the face value of Australian Government Securities (AGS) on issue.
 Source: ABS Australian National Accounts: National Income, Expenditure and Product; Labour Force, Australia; Wage Price Index, Australia; Consumer Price Index, Australia and Treasury.

A strong recovery in 2021-22 (real GDP growth of 4 ¼%) is forecast by the Commonwealth, followed by three years of real growth in the range 2 ¼% to 2 ½%. Benign inflation and low wage increases are also expected, along with relatively low unemployment over the forward estimates.

However, there is considerable uncertainty about the pace and trajectory of national economic recovery. The Federal Budget forecasts are predicted on:

- A population-wide vaccination program being in place by the end of 2021.
- Any outbreaks of COVID-19 being effectively contained.
- Most domestic activity restrictions being lifted, including no extended or sustained state border restrictions.
- A gradual return of temporary and permanent migration to occur from mid-2022.
- Inbound and outbound international travel remaining low until mid-2022, followed by a gradual recovery in international tourism.

While the economic recovery is, so far, better than expected any variations from the underlying assumptions could significantly impact the forecasts.

The macro-level economic impacts of COVID-19 on employment land demand in MBRC will be closely linked to population growth, as has already been discussed at length.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Other COVID-19 impacts on employment land demand are likely to be mixed. It is conceivable that there will be downward pressure on rents and valuations, as some tenants seek to renegotiate leases following a down-turn in business conditions. Industries geared to population growth (such as construction and building materials) would be most vulnerable to a downturn with flow-on implications for employment land demand.

However, e-commerce has increased markedly during the pandemic, and this trend will continue to support new investment in supply chains including 3PL. Six months into the pandemic online shopping has topped +75% year-on-year (YOY) growth according to Australia Post.

Implication

Broader recessionary impacts have the potential to impact demand across all sectors, although warehousing/logistics development could be stimulated off the back of e-commerce growth.

8.10 Summary

The key findings from the analysis of demand drivers include:

- Population growth will play a prominent role in shaping the demand context for employment land in the municipality.
- For modelling purposes in subsequent chapters, demand is divided into:
 - Population Growth Demand (PGD) – demand generated in-line with population growth; and
 - New Business Demand (NBD) – demand generated by new businesses that would not otherwise develop in MBRC due to local population growth.
- A host of other potential demand drivers exist, including warehousing and logistics; technology and big data; demand from local industries (manufacturing, construction, food and forestry etc; demand transfers from neighbouring municipalities; infrastructure induced demand; and industrial precincts accommodating an increasingly wide mix of uses.
- Although some of these demand drivers are relatively static, others will continue to evolve into the future. Likewise, some demand drivers function separately, but many – to varying degrees – are interrelated.
- If an intermodal freight hub was established at Elimbah East, it would likely anchor a very active industrial area, encourage related uses and generate significant demand for industrial land.
- The impacts of COVID-19 on the MBRC industrial land market are highly uncertain due to intermittent outbreaks, international border closures and the speed of vaccination roll-out. However, e-commerce has increased markedly during the pandemic, and this trend will continue to support new investment in supply chains and warehousing.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

9 Demand Scenarios

Previous analysis has established:

- The current size, composition, and vacancy rate of industrial land in MBRC's urban areas.
- Historic take-up of industrial land between 2016 and 2021 for all precincts, and as far back as 2009 for the Brendale and Boundary Road Narangba precincts.
- That industrial land in MBRC is subject to a variety of demand drivers, including:
 - Population growth generating demand for land accommodating urban services, such as building supplies and auto repair shops.
 - Businesses with broader markets than a local area, such as: warehousing and logistics centres; manufacturers of products supplied to national and international markets; marine servicing specialists; or construction firms supporting major infrastructure projects.
 - Overflow demand generated by companies wishing to establish or expand in SEQ, but unable to secure appropriately priced, sized or located land in either Brisbane or the Sunshine Coast.

This chapter estimates future demand for industrial land in MBRC to 2051. Considerations relating to demand for innovation/health/aviation uses are discussed in Chapter 11.

For modelling purposes, future industrial land demand is statistically divided into two categories:

- **Population Growth Demand (PGD):** demand in line with population growth, estimated by maintaining a constant ratio of occupied land per capita between 2021 and 2051. This forms the main component of demand and drives the shift in demand from the south to the north.
- **New Businesses Demand (NBD):** demand **over and above** a fixed per capita supply level, representing demand generated by new or expanding businesses with markets extending beyond Moreton Bay and/or companies choosing Moreton Bay in preference to other locations.

The scale of NBD in any given year is informed by the consultant's judgement of the extent of additional floorspace from new or expanding markets (or spill over demand from other locations) that could conceivably be delivered. For example, in the Base Case Scenario between 2026 and 2031, it is estimated an average 7.0ha of industrial land will be taken up by NBD on an annual basis. Based on a plot ratio of 70% and site coverage of 50% this practically translates to a single 24,500m² warehouse or, say, two smaller warehouses in the order of 12,250m² developed per year over the period.

Significant uncertainty is associated with the NBD component of future demand. Accordingly, the NBD component forms the basis of the Low and High projection scenarios (as discussed further on the below page). Three future demand scenarios are considered which vary NBD. In all three scenarios, PGD is structured so that per capita supply increases from 2021 levels, based on permanent structural changes to demand, such as the established trend towards higher shares of online retailing. Scenarios differ by varying NBD as follows:

- **Base Case Scenario** whereby total demand is approximately **+20%** higher in 2051 compared with demand derived from population growth.
- **High Demand Scenario** whereby total demand is almost **+30%** higher in 2051 compared with demand derived from population growth.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- **Low Demand Scenario** whereby total demand is approximately **+10%** higher in 2051 compared with demand derived from population growth.

These growth scenarios have been constructed to 'stress-test' the adequacy of supply of industrial land in MBRC (refer Chapter 10).

The demand model, and key assumptions and outputs from the model are now described in more detail.

9.1 Demand Model Methodology

The main steps in constructing the demand model are:

- 1 Adjust future population growth patterns using official ABS Estimated Resident Population (Cat: 3218.0), Queensland Treasury projections and expected changes in net overseas migration due to COVID-19.
- 2 Estimate the current supply of occupied industrial land per capita based on 2021 VUT data supplied by MBRC and adjusted by EU, and ABS ERPs.
- 3 Project future population-based demand by adjusting the 2021 supply per capita rate to account for permanent structural changes to demand, to 2051 in 5-year blocks.
- 4 Calculate a "New Businesses Premium" for each 5-year time block and an "Aggregate New Business Premium" covering the entire 2021-2051 period. These premiums quantify the margins by which total demand exceeds population-based demand.
- 5 Add an allowance for New Businesses demand to reach specified targets noted earlier.
- 6 Distribute PGD into zones, based on historical take up patterns by zone calculated from MBRC VUT data. Zones used in this model are:
 - GI
 - MIBA
 - Light Industry
 - Restricted Industry
 - Marine Industry
- 7 Distribute NBD into either GI or MIBA zones.
- 8 Based on the north/south split, amount of NVL available for each zone precinct, and development status of each precinct; demand is sequenced through individual precincts.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

9.2 Adjusted Population Projections

For ease of reference, previously discussed long-term population growth projections are repeated in Table 9.1 below.

Table 9.1 Adjusted Population Projections, MBRC, 2019-2051

Region/Area	2019	2021	2031	2041	2051
Population (no.)					
Northern Region	128,340	133,330	169,840	223,420	267,160
Southern Region	341,390	352,860	420,160	464,960	499,050
MBRC Total	469,730	486,190	590,000	688,390	766,210
Annual Growth (no.)					
Northern Region		2,500	3,650	5,360	4,370
Southern Region		5,740	6,730	4,480	3,410
MBRC Total		8,230	10,380	9,840	7,780
		2019-21	2021-31	2031-41	2041-51
Annual Growth (%)					
Northern Region		1.9%	2.4%	2.8%	1.8%
Southern Region		1.7%	1.8%	1.0%	0.7%
MBRC Total		1.7%	2.0%	1.6%	1.1%
QLD Treasury Medium Series		2.0%	2.0%	1.5%	n.a.
Share of Growth (%)					
Northern Region		30%	35%	54%	56%
Southern Region		70%	65%	46%	44%
MBRC Total		100%	100%	100%	100%

Source: ABS, Regional Population Growth (Cat: 3218.0), Queensland Treasury Medium Series Population Projections, Ethos Urban

Note: Figures have been rounded.

9.3 Base Case Scenario

To illustrate the workings of the projected demand model, and to report results, Table 9.2 considers the Base Case Scenario. This scenario is constructed to generate total demand in 2051 to be approximately 20% higher than would be the case if demand were solely derived from population growth:

- PGD, averaged within time blocks, varies between 12.0ha and 19.0ha per year.
- The allowance for NBD varies from 7.0ha per year to 10.0ha per year.
- These annual forecast demand rates would result in **720.0ha** of demand for industrial land by 2051, comprising **470.0ha** generated by population growth and a further **250.0ha** generated by New Businesses.
- The New Business share of total demand across the period 2021-2051 would be 34.7%.
- Adjusted projected population in the Council Area grows from 486,190 in 2021 to 766,210 by 2051.
- Per capita occupied industrial land driven by population growth increases from 1.62 to 1.64 per '000 over the period 2021 to 2026 and then remains constant to 2051.
- Occupied land generated by New Businesses grows to 0.33ha per '000 by 2051.
- Per capita occupied industrial land, which comprises PGD and NBD, grows from 1.62ha per '000 population in 2021 to 1.97ha per '000 by 2051.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 9.2 Projected MBRC Urban Industrial Land Demand 2021-2051 – BASE CASE SCENARIO

Factor	Unit	Time Periods					
		Annual Forecast Demand					
		2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
Population Based Demand	ha pa	17.0	19.0	15.0	17.0	14.0	12.0
New Businesses Demand	ha pa	8.0	7.0	7.0	8.0	10.0	10.0
Total Demand	ha pa	25.0	26.0	22.0	25.0	24.0	22.0
Total Forecast Demand							
		2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051
Population Based Demand	ha	85.0	95.0	75.0	85.0	70.0	60.0
New Businesses Demand	ha	40.0	35.0	35.0	40.0	50.0	50.0
Total Demand	ha	125.0	130.0	110.0	125.0	120.0	110.0
New Business Share	%	32.0%	26.9%	31.8%	32.0%	41.7%	45.5%
Per Capita Occupied Industrial Land							
		2021	2026	2031	2036	2041	2046
Projected Population	'000	486.2	533.0	590.0	638.9	688.4	730.8
Occupied Industrial land							
Population Based	ha	789.2	874.2	969.2	1,044.2	1,129.2	1,199.2
New Businesses	ha	0.0	40.0	75.0	110.0	150.0	200.0
Total	ha	789.2	914.2	1,044.2	1,154.2	1,279.2	1,509.2
Occupied Industrial land per '000							
Population Based		1.62	1.64	1.64	1.64	1.64	1.64
New Businesses		0.00	0.08	0.13	0.17	0.22	0.33
Total		1.62	1.72	1.77	1.81	1.86	1.97
New Businesses Premiums							
		2021	2026	2031	2036	2041	2046
New Businesses Premium		0.0%	4.6%	7.7%	10.5%	13.3%	16.7%
Aggregate New Businesses Premium							53.2%
Distribution of Total Take Up to Zones							
		2021-26	2026-31	2031-36	2036-41	2041-46	2046-51
General Industry	ha	70.4	72.3	61.9	70.4	69.0	63.8
MIBA	ha	35.3	36.0	31.0	35.3	35.0	32.5
Light Industry	ha	15.3	17.1	13.5	15.3	12.6	10.8
Restricted Industry	ha	3.0	3.3	2.6	3.0	2.5	2.1
Marine Industry	ha	1.1	1.2	1.0	1.1	0.9	0.8
Total	ha	125.0	130.0	110.0	125.0	120.0	110.0

Source: Ethos Urban

Note: Figures have been rounded.

By 2051, the New Businesses Premium reaches 19.9%. This premium is interpreted as the marginal increase in demand for industrial land attributable to New Businesses.

Another measure of the impact of New Businesses is the Aggregate New Business Premium, calculated to be 53.2%. This figure represents the projected total demand for industrial land in the 30-year period from 2021 and 2051 over and above the demand that would have resulted from population growth alone. (i.e. $[720.0\text{ha}/470.0\text{ha} - 1] * 100$).

Finally, Table 9.2 shows the expected distribution of newly occupied land by zone. This distribution is based on:

- PBD being distributed to zones, as follows:
 - 52.2% to GI

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- 25.0% to MIBA
- 18.0% to Light Industry
- 3.5% to Restricted Industry
- 1.3% to Marine Industry
- NBD distributed to zones as follows:
 - 65% to General Industry
 - 35% to MIBA

Over 2021 to 2051, these assumptions result in demand for:

- 407.8ha zoned GI (57%),
- 205.0ha zoned MIBA (28%),
- 84.6ha zoned Light Industry (12%),
- 16.5ha zoned Restricted Industry (2%); and
- 6.1ha zoned Marine Industry (1%).

9.4 High Demand Scenario

Table 9.3 shows the results for the High Demand Scenario in the same format as Table 9.2. Based on total demand being around 30% higher than would result from population growth alone, key results of the High Demand Scenario projection include:

- PBD is set to the same levels as for the Base Case Scenario.
- NBD is slightly higher, resulting in overall demand for industrial land (Population Based + New Businesses) totalling **830.0ha** between 2021 and 2051.
- Over the period 2021 to 2051, NBD generates 360.0ha of demand for industrial land.
- Per capita occupied industrial land reaches 2.11 per '000 by 2051.
- The New Businesses Premium reaches 28.6% by 2051, and the Aggregate New Businesses Premium is 76.6%.
- Of the 830.0ha of demand, 58% would be zoned General Industry.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 9.3 Projected MMRC Urban Industrial Land Demand 2021-2051 – HIGH DEMAND SCENARIO

Factor	Unit	Time Periods						
		Annual Forecast Demand						
		2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051	
Population Based Demand	ha pa	17.0	19.0	15.0	17.0	14.0	12.0	
New Businesses Demand	ha pa	11.0	11.0	12.5	12.5	12.5	12.5	
Total Demand	ha pa	28.0	30.0	27.5	29.5	26.5	24.5	
Factor	Unit	Total Forecast Demand						
		2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051	Total
Population Based Demand	ha	85.0	95.0	75.0	85.0	70.0	60.0	470.0
New Businesses Demand	ha	55.0	55.0	62.5	62.5	62.5	62.5	360.0
Total Demand	ha	140.0	150.0	137.5	147.5	132.5	122.5	830.0
New Business Share	%	39.3%	36.7%	45.5%	42.4%	47.2%	51.0%	43.4%
Factor	Unit	Per Capita Occupied Industrial Land						
		2021	2026	2031	2036	2041	2046	2051
Projected Population	'000	486.2	533.0	590.0	638.9	688.4	730.8	766.2
Occupied Industrial land								
Population Based	ha	789.2	874.2	969.2	1,044.2	1,129.2	1,199.2	1,259.2
New Businesses	ha	0.0	55.0	110.0	172.5	235.0	297.5	360.0
Total	ha	789.2	929.2	1,079.2	1,216.7	1,364.2	1,496.7	1,619.2
Occupied Industrial land per '000								
Population Based		1.62	1.64	1.64	1.63	1.64	1.64	1.64
New Businesses		0.00	0.10	0.19	0.27	0.34	0.41	0.47
Total		1.62	1.74	1.83	1.90	1.98	2.05	2.11
Factor	Unit	New Businesses Premiums						
		2021	2026	2031	2036	2041	2046	2051
New Businesses Premium		0.0%	6.3%	11.3%	16.5%	20.8%	24.8%	28.6%
Aggregate New Businesses Premium								76.6%
Factor	Unit	Distribution of Total Take Up to Zones						
		2021-26	2026-31	2031-36	2036-41	2041-46	2046-51	Total
General Industry	ha	80.1	85.3	79.8	85.0	77.2	71.9	479.3
MIBA	ha	40.5	43.0	40.6	43.1	39.4	36.9	243.5
Light Industry	ha	15.3	17.1	13.5	15.3	12.6	10.8	84.6
Restricted Industry	ha	3.0	3.3	2.6	3.0	2.5	2.1	16.5
Marine Industry	ha	1.1	1.2	1.0	1.1	0.9	0.8	6.1
Total	ha	140.0	150.0	137.5	147.5	132.5	122.5	830.0

Source: Ethos Urban

Note: Figures have been rounded.

9.5 Low Demand Scenario

To round out discussion of the projected demand scenarios, Table 9.4 shows the key assumptions and results of the Low Demand Scenario.

Briefly, under the Low Demand Scenario, a total of **610.0ha** of industrial land would be required, comprising 470.0ha generated by population growth and 140.0ha generated by New Businesses. The New Businesses share of total demand to 2051 would be 23.0%.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 9.4 Projected MBRC Urban Industrial Land Demand 2021-2051 – LOW DEMAND SCENARIO

Factor	Unit	Time Periods						
		Annual Forecast Demand						
		2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051	
Population Based Demand	ha pa	17.0	19.0	15.0	17.0	14.0	12.0	
New Businesses Demand	ha pa	3.0	5.0	5.0	5.0	5.0	5.0	
Total Demand	ha pa	20.0	24.0	20.0	22.0	19.0	17.0	
Factor	Unit	Total Forecast Demand						
		2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051	Total
Population Based Demand	ha	85.0	95.0	75.0	85.0	70.0	60.0	470.0
New Businesses Demand	ha	15.0	25.0	25.0	25.0	25.0	25.0	140.0
Total Demand	ha	100.0	120.0	100.0	110.0	95.0	85.0	610.0
New Business Share	%	15.0%	20.8%	25.0%	22.7%	26.3%	29.4%	23.0%
Factor	Unit	Per Capita Occupied Industrial Land						
		2021	2026	2031	2036	2041	2046	2051
Projected Population	'000	486.2	533.0	590.0	638.9	688.4	730.8	766.2
Occupied Industrial land								
Population Based	ha	789.2	874.2	969.2	1,044.2	1,129.2	1,199.2	1,259.2
New Businesses	ha	0.0	15.0	40.0	65.0	90.0	115.0	140.0
Total	ha	789.2	889.2	1,009.2	1,109.2	1,219.2	1,314.2	1,399.2
Occupied Industrial land per '000								
Population Based		1.62	1.64	1.64	1.63	1.64	1.64	1.64
New Businesses		0.00	0.03	0.07	0.10	0.13	0.16	0.18
Total		1.62	1.67	1.71	1.74	1.77	1.80	1.83
Factor	Unit	New Businesses Premiums						
		2021	2026	2031	2036	2041	2046	2051
New Businesses Premium		0.0%	1.7%	4.1%	6.2%	8.0%	9.6%	11.1%
Aggregate New Businesses Premium								29.8%
Factor	Unit	Distribution of Total Take Up to Zones						
		2021-26	2026-31	2031-36	2036-41	2041-46	2046-51	Total
General Industry	ha	54.1	65.8	55.4	60.6	52.8	47.6	336.3
MIBA	ha	26.5	32.5	27.5	30.0	26.3	23.8	166.5
Light Industry	ha	15.3	17.1	13.5	15.3	12.6	10.8	84.6
Restricted Industry	ha	3.0	3.3	2.6	3.0	2.5	2.1	16.5
Marine Industry	ha	1.1	1.2	1.0	1.1	0.9	0.8	6.1
Total	ha	100.0	120.0	100.0	110.0	95.0	85.0	610.0

Source: Ethos Urban

Note: Figures have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

9.6 Comparison of Scenarios

Finally, to compare the three scenarios, Table 9.5 summarises projected demand by zone precinct over the period to 2051.

Table 9.5 Comparison of Projected MBRC Urban Industrial Land Demand 2021-2051 by Zone-Base Case, High Demand and Low Demand Scenarios

Zone Precinct			Time Periods						
			Base Case Scenario						
		2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051	Total	
General Industry	ha	70.4	72.3	61.9	70.4	69.0	63.8	407.8	
MIBA	ha	35.3	36.0	31.0	35.3	35.0	32.5	205.0	
Light Industry	ha	15.3	17.1	13.5	15.3	12.6	10.8	84.6	
Restricted Industry	ha	3.0	3.3	2.6	3.0	2.5	2.1	16.5	
Marine Industry	ha	1.1	1.2	1.0	1.1	0.9	0.8	6.1	
Total	ha	125.0	130.0	110.0	125.0	120.0	110.0	720.0	
			High Growth Scenario						
		2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051	Total	Relative to Base Case
General Industry	ha	80.1	85.3	79.8	85.0	77.2	71.9	479.3	18%
MIBA	ha	40.5	43.0	40.6	43.1	39.4	36.9	243.5	19%
Light Industry	ha	15.3	17.1	13.5	15.3	12.6	10.8	84.6	0%
Restricted Industry	ha	3.0	3.3	2.6	3.0	2.5	2.1	16.5	0%
Marine Industry	ha	1.1	1.2	1.0	1.1	0.9	0.8	6.1	0%
Total	ha	140.0	150.0	137.5	147.5	132.5	122.5	830.0	15%
Relative to Base Case		12%	15%	25%	18%	10%	11%	15%	
			Low Growth Scenario						
		2021-2026	2026-2031	2031-2036	2036-2041	2041-2046	2046-2051	Total	Relative to Base Case
General Industry	ha	54.1	65.8	55.4	60.6	52.8	47.6	336.3	-18%
MIBA	ha	26.5	32.5	27.5	30.0	26.3	23.8	166.5	-19%
Light Industry	ha	15.3	17.1	13.5	15.3	12.6	10.8	84.6	0%
Restricted Industry	ha	3.0	3.3	2.6	3.0	2.5	2.1	16.5	0%
Marine Industry	ha	1.1	1.2	1.0	1.1	0.9	0.8	6.1	0%
Total	ha	100.0	120.0	100.0	110.0	95.0	85.0	610.0	-15%
Relative to Base Case		-20%	-8%	-9%	-12%	-21%	-23%	-15%	

Source: Ethos Urban

Note: Figures have been rounded.

Key conclusions from Table 9.5 include:

- The Base Case Scenario results in demand for 720.0ha of land to 2051.
- The High Demand Scenario results in demand for 830.0ha of land to 2051, 110.0ha or +15% more land than in the Base Case Scenario.
- The Low Demand Scenario results in demand for 610.0ha of land to 2051, 110.0ha or -15% less land than in the Base Case Scenario.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

9.7 Limitations of Modelling Approach

All models, which are essentially simplified representations of very complex real-world interactions, have practical limitations. In this instance, there are a number of factors that could impact the modelled projected patterns of industrial demand in Moreton Bay, including:

- Industrial land demand tends to be 'lumpy' rather than 'smooth' as a consequence of broad economic trends, trends in specific markets and factors influencing location decisions. In practice, it is unlikely that actual demand will be as smooth as modelled.
- The models presume a relatively quick return to 'normal' economic conditions as the COVID-19 pandemic eases. For example, adjusted population projections assume that net overseas migration patterns revert to established trends after 2026. Whether the underpinning assumptions about a return to 'normal' economic conditions eventuate is uncertain.

These factors have the potential to impact the quantity, mix and timing of demand for industrial land. Accordingly, the results of this demand modelling approach should be regarded as indicative.

9.8 Summary

The key finding from the analysis in this chapter include:

- Three future projections of demand for industrial land have been constructed by separating demand driven by population growth and demand generated by new or expanding businesses with markets extending beyond MBRC and/or companies choosing MBRC in preference to other locations.
- Based on revised population growth projections, and assumptions about New Businesses demand, the three scenarios show:
 - **Base Case Scenario** – demand ranging from 22 to 26ha per year, generating a requirement for 720ha over the period 2021-2051.
 - **High Growth Scenario** – demand ranging from 25 to 30ha per year, generating a requirement for 830ha over the period 2021-2051.
 - **Low Growth Scenario** – demand ranging from 17 to 24ha per year, generating a requirement for 610ha over the period 2021-2051.
- Further, assuming a distribution of demand among zones, the Base Case Scenario projects demand for:
 - 407.8ha of GI land.
 - 205.0ha for MIBA land.
 - 84.6ha for Light Industry land.
 - 16.5ha for Restricted Industry.
 - 6.1ha for Marine Industry.
- Demand for Restricted Industry (High Impact industry land) could be less than 16.5ha in total up to 2051. However, a low future supply of land suitable to accommodate High Impact industries would run the risk of deterring viable and job generating businesses away from MBRC. Accordingly, it would be prudent for MBRC to consider a higher future supply of land suitable for High Impact industries through appropriate planning instruments.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

10 Adequacy of Industrial Land Supply

This chapter:

- Describes the methodology developed to assess whether the volume and zoning of currently available industrial land will be adequate to meet projected demand.
- Compares the expected demand under the three scenarios against current supply of Net Vacant Land (NVL), and projects take-up of land by precinct and zone precinct to 2051.
- Discusses the adequacy of industrial land supply in MBRC over the next 30 years, having regard to the ShapingSEQ threshold for 15-years supply.
- Discusses employment implications.

10.1 Modelling Approach to Assessing Supply Adequacy

The volume of NVL in 2021 was estimated in Chapter 6, after considering constraints on future development and the potential availability of underutilised land.

Across MBRC, NVL in 2021 totalled 757.4ha of future industrial supply, including precincts yet to be formally zoned as industrial (e.g., Caboolture West).

The demand projections discussed in the previous chapter concluded that between 610.0ha and 830.0ha of land would be required in the period 2021 to 2051, depending on key assumptions about how much land would be needed to accommodate New Businesses to the region over and beyond demand naturally generated by population growth.

A simple calculation shows the extent of Council wide over/under-supply of industrial land by 2051.

However, to model the pattern of take up of industrial land during the period 2021 to 2051 is a significantly more complex task. In developing this model, we have sought to address a number of important issues relevant to Council's strategic and statutory planning, including:

- When Council would face 15-years or less of future supply of land that is appropriately zoned and able to be serviced.
- With regards to particular precincts:
 - When demand would theoretically be pushed to specific precincts due to constrained supply.
 - When Council needs to progress provision of civil infrastructure to facilitate industrial development.
 - When supply within particular precincts is likely to be exhausted.

The dimensions of the task complicate the modelling, with the following elements incorporated in the take-up model:

- Three demand scenarios
- Five zone precinct types (GI, MIBA, Light Industry, Restricted Industry, Marine Industry)
- 22 precincts; and
- 30 years.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

A number of practical and simplifying assumptions have been adopted in constructing the simulation, and these assumptions along with the basic workings of the model are described below:

1. Assemble 2021 NVL (supply) by zone precinct type, divided into northern and southern regions.
2. Assemble total demand to 2051 by zone precinct type and northern/southern region, filtered by Base/High/Low demand scenarios.
3. Distribute demand by zone to single years to 2051 by taking the annual average of demand within time period blocks.
4. Calculate cumulative demand to 2051.
5. Calculate 'Effective Supply' – i.e. supply that is 'zoned and able to be serviced' – for the purposes of calculating the ShapingSEQ 15-year minimum supply threshold.
6. Calculate Effective Supply surplus/deficit at northern/southern region level, and when overall Effective Supply in the south is exhausted, transfer future demand to the north.
7. Calculate years of Effective Supply per zone precinct remaining for each year to 2051.
8. Sequence precincts in likely order of development, taking Effective Supply, extent of existing developments and potential readiness for development of new sites, including adequacy of civil and internal infrastructure.
9. Distribute demand to individual precincts within northern/southern region as per the sequencing.
10. If the capacity of a precinct reduces to 30% of the initial NVL, transfer 50% of the following year's demand to the next precinct in the sequence.

This demand transfer between precincts recognises that as the NVL in a precinct approaches exhaustion, demand usually slows down. Prime sites are likely to have been already occupied and remaining sites are generally less desirable.

11. Calculate when zones within specific precincts either need to come on stream, are exhausted or retain NVL capacity beyond 2051.

An important output of the model is the likely timing of development of different precincts based on projected demand, precinct sequencing and projected demand.

A key assumption is that when capacity of a precinct reaches 70% of initial NVL (i.e., 30% of initial NVL remains), some demand is pushed to the next precinct in the sequence. In reality, development could occur earlier than the timing identified due to a range of factors such as a developer seeking to bring new supply to market in a new location to provide a point of difference in the market.

10.2 Model Limitations

As noted earlier, models of the real-world have practical limitations. Factors that would influence the take-up of industrial land in MBRC include:

- Spare capacity embedded in developed land parcels could be utilised to absorb increasing demand without requiring new land to be developed. For example, a manufacturing business could increase production capacity by adding to a current line within the footprint of their existing shed.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- The definition of NVL measures vacant land and does not account for vacant premises. It is feasible that vacant buildings could absorb some proportion of increasing demand before new land is required.
- Older developed sites currently zoned industrial could be renewed. Industrial zoned land, that could be repurposed or redeveloped, could reduce the requirement for new industrial land.
- In practice, sites zoned for industrial are simultaneously released, developed and occupied, depending on infrastructure availability amongst other considerations.
- Finally, and importantly, owners of vacant sites may choose to withhold land parcels from the market for a variety of reasons. This factor would potentially reduce the volume of available developable land.

These factors have the potential to impact the timing of the release of new supply to market. Some factors would bring forward the release of new land (e.g., lack of large sites) while others would delay release of new land (e.g., spare capacity, redevelopment potential).

Accordingly, the results of the modelling approach in this report should be regarded as indicative.

10.3 Adequacy of Industrial Land Supply

This study considers two barometers in assessing the adequacy of industrial land supply in MBRC. These are, the Shaping SEQ minimum threshold of 15-years of land supply that is appropriately zoned and able to be serviced, and a direct comparison of supply against demand to understand implications for individual precincts.

10.4 Effective Supply

The **Effective Supply** measure will inform a determination of Council's adequacy of supply as well as help inform the Shaping SEQ benchmark of 15-years of land supply that is appropriately zoned and able to be serviced.

Identifying land that is 'able to be serviced' is somewhat ambiguous. Having regard for how this measure will be used to inform a State benchmark, Council has worked in consultation with the State Government, to assess what industrial land can be considered able to be serviced. The criteria used is based on the same criteria the State Government uses for identifying residential land that is able to be serviced, with some refinements to allow for differences in the nature of servicing industrial verses residential land.

The assessment identified all of Caboolture West (84.2ha), and parts of Bribie Island Road Caboolture (19.8ha) as land that is not currently able to be serviced and therefore excluded from the Effective Supply framework and the adequacy of supply analysis.

Effective Supply is estimated at 653.5ha in 2021 and is equivalent to 757.4ha of NVL less Caboolture West (59.0ha of General Industry and 25.2ha of Light Industry) and parts of Bribie Island Road Caboolture (19.8ha of Light Industry)).

An overview of the process, criteria and results from Council's assessment is provided by Appendix 3.

10.4.1 Adequacy of Supply

For the purpose of this report, 'adequate' supply is considered to be at least 15 years of effective supply.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

This approach has been adopted because it is considered best practice for local governments to maintain at least 15-years of effective supply of industrial land, to:

- Accommodate demand
- Allow for necessary infrastructure planning and delivery
- Provide a buffer while additional land supplies are being identified, investigated, and potentially re-zoned, before supply is exhausted
- Avoid placing undue upward pressure on land prices.

This approach is also consistent with directions provided in Shaping SEQ.

MBRC's land supply, in years, of each industrial zone precinct is calculated by dividing the quantum of **Effective Supply** by the average annual demand forecasted for each zone precinct in Chapter 9. Results from the assessment are detailed in Table 10.1. Under the **Base Case Scenario, 15-year minimum threshold would be reached as follows:**

- GI: 2032
- MIBA: 2035
- Light industry: 2038
- Restricted industry: 2027

As outlined in Chapter 9, the scenarios only vary in the NBD component, which is distributed to GI and MIBA zone precincts. As a result, the High Scenario brings forward the 15-year supply date for GI and MIBA to 2028 and 2031 respectively, and the Low Scenario pushes them back to 2037 and 2042 respectively.

In this regard, it is advised that where possible Council should avoid a situation whereby development approvals result in a reduction in the current quantum of GI and MIBA supply, having regard for:

- The need to provide 15-years of supply that is appropriately zoned and able to be serviced, as directed by ShapingSEQ
- That a planning process has not been undertaken to identify additional industrial supply options
- The 5-7-year timeframe for the planning and servicing of new industry land (subsequent the identification of replacement supply options); and
- The potential that actual demand could be higher than the Base Case scenario.

The 15-year threshold is of limited relevance to the Restricted and Marine Industry zone precincts, due to the limited supply and recent uptake observed by these zone precincts, as well as the limited range of industrial activities and uses that would actively seek to establish in these zone precincts. Further, essentially no effective supply of Marine Industry currently exists, noting however that the proposed North Harbour PDA does include a Marine Industry component.

It is acknowledged, however, that potential opportunities and future demand for Restricted Industry may have been tempered by the policy settings in the MBRC planning scheme 2016. Specifically, the precinct at Boundary Road, Narangba includes several established High Impact and Special industry uses, which until the commencement of the Narangba Innovation Precinct TLPI were located in the GI zone precinct.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

The GI zone precinct does not envisage Special industry uses and only envisages High impact Industry uses where these achieve a minimum separation distance of 500m to an existing or approved sensitive land use or sensitive zone. Further, establishing High Impact industry uses in the GI zone precinct is subject to the higher order Impact Assessment, except for batching or manufacturing of concrete. Accordingly, there is a potential that this policy setting has limited recent opportunities for High Impact industry uses.

In view of the potential that policy settings have restricted High Impact uses, it would be prudent that MBRC's supply framework support other supply options that provide the flexibility for ongoing High Impact uses. This issue is addressed by recommendations provided in Chapter 12.

Table 10.1 Years of Effective Supply at 2021 by Zone Precinct and Demand Scenario, MBRC

Zone/Demand Scenario	General Industry	MIBA	Light Industry	Restricted Industry	Marine Industry
Effective Supply 2021 (ha)	349.3	201.2	91.5	11.5	0.0
Base Case Scenario					
Years of supply at 2021	26 years	29 years	32 years	21 years	0 years
Year when 15-years supply reached	2032	2035	2038	2027	Already less than 15-years
High Growth Scenario					
Years of supply at 2021	22 years	25 years	32 years	21 years	0 years
Year when 15-years supply reached	2028	2031	2038	2027	Already less than 15-years
Low Growth Scenario					
Years of supply at 2021	31 years	36 years	32 years	21 years	0 years
Year when 15-years supply reached	2037	2042	2038	2027	Already less than 15-years

Source: Ethos Urban

Note: Figures have been rounded.

10.4.2 NVL Supply

For reference, the total years of supply for each zone precinct based on total NVL supply (not effective supply) is provided in Table 10.2. Note, these figures are provided for comparative purposes and to inform Council's long-term strategic planning. NVL supply is not considered when calculating adequacy of supply, nor does it conform with the ShapingSEQ direction for supply that is 'appropriately zoned and able to be serviced'.

Table 10.2 Years of NVL Supply at 2021 by Zone and Demand Scenario, MBRC

Zone/Demand Scenario	General Industry	MIBA	Light Industry	Restricted Industry	Marine Industry
NVL 2021 (ha)	408.3	201.2	136.4	11.5	0.0
Base Case Scenario					
Years of supply at 2021	30 years	29 years	48 years	21 years	0 years
Year when 15-years supply reached	2036	2035	2054	2027	Already less than 15-years
High Growth Scenario					
Years of supply at 2021	26 years	25 years	48 years	21 years	0 years
Year when 15-years supply reached	2032	2031	2054	2027	Already less than 15-years
Low Growth Scenario					
Years of supply at 2021	36 years	36 years	48 years	21 years	0 years
Year when 15-years supply reached	2042	2042	2054	2027	Already less than 15-years

Source: Ethos Urban

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

10.5 Individual Precinct Implications for the Base Case Scenario

An overview of the implications for the Base Case scenario for Effective Supply at the individual industrial precincts level is outlined by this section. A summary of the supply is provided by Table 10.3 which aggregates all zone precincts for the southern and northern regions. Appendix 2 contains tables in the same format as Table 10.3 for individual zone precincts under the Base, High, and Low scenarios.

10.5.3 Southern Region

The more established southern region of MBRC currently accommodates more than three-quarters of occupied industrial land in the Council area but only has around one-third of known future supply. As population growth patterns are projected to shift northwards, supply in the southern region will be increasingly constrained and new supply will be released in the northern region. Accordingly, the relative importance of the southern region as a location for New Businesses is likely to diminish over the next 10-20 years.

Brendale

Brendale has NVL totalling approximately 85ha.

Under the Base Case Scenario, GI land would be exhausted by around 2030, MIBA zoned land by 2039, and Light Industry zoned land by 2034. (See Appendix 2).

Price pressures in Brendale as well as issues associated with access to sites and the lack of larger allotments may reduce the attractiveness of Brendale in the broader industrial market. On the other hand, Brendale's transport links and relative proximity to Brisbane Port may attract certain New Businesses that require port access for import or export functions. However, these companies may also consider new supply at Ipswich, as well as the Logan Motorway Corridor and Trade Coast in locational decisions.

Boundary Road Narangba

Boundary Road Narangba has NVL totalling 64ha.

Importantly, the 11.5ha of NVL zoned Restricted Industry is the only remaining area of such supply in the municipality. Restricted Industry land is projected to be exhausted by 2041, it would be prudent for Council to consider adding to the future supply of Restricted Industry land so as not to preclude certain New Businesses from considering MBRC as a location.

Otherwise, GI land would be exhausted by 2030, MIBA by 2029, and land zoned Light Industry would last until approximately 2043.

Old Gympie Road Narangba

Old Gympie Road has NVL totalling 26ha, of which around 19ha is zoned MIBA.

Under the Base Case Scenario, GI land would be exhausted before 2030, MIBA zoned land by 2033, while land zoned Light Industry would be exhausted by around 2049.

Deception Bay Road

Deception Bay Road has NVL totalling 17ha, all of which is zoned MIBA.

Under the Base Case scenario, MIBA zoned land in Deception Bay Road would be exhausted by 2039.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town

The Mill has approximately 1ha supply of MIBA zoned land in the current masterplan. This land allocation to industrial uses is unlikely to be of consequence in employment generation.

Deception Bay, Scarborough Marina, Newport, Rothwell, Kippa Ring, Clontarf, Paisley Drive Lawnton, and The Hills District

These eight precincts, combined, have NVL of 13ha. Paisley Drive Lawnton and Clontarf supply 10ha of the total.

Accordingly, these areas are best suited to infill development, and are unlikely to be significant contributors to future employment growth.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

10.5.4 Northern Region

As noted earlier, the Northern Region of MBRC is likely to be the focus of future residential and industrial land development.

Elimbah East

As a key future industrial precinct, Elimbah East is currently anticipated to support 233ha of NVL under current zoning and based on an assessment of Council's constraints data. Of that NVL, 224ha will be zoned GI, with a further 9ha zoned Light Industrial.

A proposal from the majority landowner, which would reduce the provision of GI land through a mixed-use residential/industrial scheme is currently being reviewed by Council.

Under the demand projections in the Base Case Scenario, demand would be pushed to Elimbah East by around 2028 at the latest, due to supply constraints elsewhere. This timing would necessitate active planning for the provision of civil infrastructure to begin immediately. GI zoned land would be exhausted by approximately 2046 and LI zoned land by approximately 2047.

Overall, Elimbah East is important strategically as a future long-term industrial destination. Significant potential for large allotments, proximity to population growth in both the northern part of MBRC and the Sunshine Coast, proximity to a potential intermodal facility and major transport connections suggest Elimbah East will play an important future industrial role.

However, other factors, such as the cost of providing civil infrastructure will need to be considered as the planning for Elimbah East progresses.

North East Business Park

North East Business Park would provide 120ha of future MIBA land under current planning expectations.

Based on projected demand in the Base Case Scenario, development of this MIBA land is expected to occur by around 2026 at the latest and would be near exhaustion by 2051. Accordingly, planning for civil infrastructure, if not already in train, would need to commence immediately.

Caboolture West - Enterprise and employment - EC

As previously noted, the 84.2ha of NVL at Caboolture West does not form part of Effective Supply. The industrial component of Caboolture West remains in the emerging community zone and is outside Council's intent to service area. Moreover, it is understood that the timing of industrial land at Caboolture West is uncertain and likely to be long-term.

The industrial precinct envisaged for Caboolture West is broadly equivalent to four years of GI and nine years of Light Industry supply, based on current plans and the demand projections discussed previously.

Bribie Island Road Caboolture

Bribie Island Road Caboolture has 44ha of GI NVL, noting that this excludes the 19.8ha of Light Industry land that is considered to not meet the criteria for Effective Supply (i.e. appropriately zoned and able to be serviced).

As an established industrial precinct, with good transport connections and serviced land, Bribie Island Road Caboolture is well placed to absorb demand for new industrial land in the short-medium term. The Base Case Scenario suggests that GI land may be exhausted by 2031.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Note, the 19.8ha Light Industry precinct excluded from Effective Supply is broadly equivalent to seven years supply.

Bruce Highway Burpengary

The Bruce Highway Burpengary site has 38ha of NVL, comprising 12ha of MIBA land and 26ha of Light Industry land.

With projected demand for Light Industry land is expected to be modest, the pressure is likely to be on the MIBA land. While Light Industry land may be exhausted by 2046, the simulation model projects MIBA land could be exhausted by 2029.

Henzell Road Caboolture

The Henzell Road site has 11ha of NVL, mostly zoned as Light Industry. Light Industry zoned land is expected to be needed in 2047.

North Harbour PDA

Yet to be formally zoned, North Harbour is expected to accommodate some Marine Industry zoned land. The scale and timing of when this land becomes available for development is unclear at this stage.

PAC Morayfield, First Avenue Bribie Island, Sandstone Point

Collectively these precincts have around 3ha of NVL. Accordingly, these sites would be suitable for infill uses, and are unlikely to contribute to significant future employment.

As noted earlier, Table 10.3 below shows aggregates of all zone types under the Base Case.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Table 10.3 Effective Supply Implications by Precinct Under the BASE CASE SCENARIO

Precinct Name	Effective Supply		Forecast Demand						Effective Supply	
	2021	2026	2031	2036	2041	2046	2051	Total	2051	
Northern Region										
(01) Elimbah East	232.7	-	17.5	61.9	74.8	72.6	5.8	232.7	-	-
(02) Caboolture West – Enterprise and employment – EC	-	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	44.3	21.4	22.9	-	-	-	-	44.3	-	-
(05) Henzell Road Caboolture	10.7	1.1	0.1	-	-	-	5.6	6.8	4.0	-
(06) First Avenue Bribie Island	1.2	-	-	-	-	-	-	-	1.2	-
(07) PAC Morayfield	1.7	-	-	-	-	-	-	-	1.7	-
(08) North East Business Park	120.0	1.1	10.6	15.6	29.0	35.0	28.7	120.0	-	-
(09) Bruce Highway Burpengary	38.2	13.2	10.0	6.8	4.5	3.6	0.1	38.2	-	-
Sub-total	448.9	36.8	61.2	84.4	108.3	111.3	40.2	442.1	6.9	
Southern Region										
(10) Old Gympie Road Narangba	25.7	4.9	15.5	1.7	-	2.4	1.2	25.7	-	-
(11) Deception Bay	0.8	-	-	0.4	0.3	-	0.1	0.8	-	-
(12) Deception Bay Road	16.7	-	4.4	9.0	3.3	-	-	16.7	-	-
(13) Boundary Road Narangba	64.0	27.5	22.8	7.3	5.7	0.6	-	64.0	-	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-	-
(16) Rothwell	0.7	-	-	-	-	-	0.7	0.7	-	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-	-
(18) Clontarf	3.9	-	3.1	-	-	-	0.9	4.0	-	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	0.6	-	-	0.4	0.2	-	-	0.6	-	-
(20) Paisley Drive Lawnton	5.5	-	-	-	3.2	2.3	-	5.5	-	-
(21) Brendale	84.8	54.7	21.8	5.8	2.5	-	-	84.8	-	-
(22) The Hills District	1.8	-	-	-	-	-	1.8	1.8	-	-
Sub-total	204.5	87.1	67.6	24.7	15.2	5.4	4.6	204.5	6.9	
Total (excl. residual)	653.5	123.9	128.8	109.0	123.5	116.6	44.8	646.6	6.9	
Residual Demand	-	1.1	1.2	1.0	1.5	3.4	65.2	73.4	-	-
Total (incl. residual)	-	125.0	130.0	110.0	125.0	120.0	110.0	720.0	-	

Source: Ethos Urban

Notes: 0 = between 0 and 0.5 hectares.

Residual demand represents demand that exceeds supply and is unable to be allocated to an individual precinct. Detailed Tables providing a breakdown of residential demand each zone precinct and scenario are provided in Appendix 2.
Figures have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

10.6 Importance of New Greenfield Supply Areas

The municipality currently has limited options in its supply framework for new areas of greenfield industrial supply to be developed. In effect, Elimbah East represents the only new greenfield area for GI that is yet to come online within the framework of Effective Supply (i.e. supply that is appropriately zoned and is able to be serviced). Likewise, North East Business Park is the only new greenfield area to come online for MIBA.

Accordingly, MBRC currently faces an 'eggs in one basket' industrial land supply situation for new GI and MIBA supply that is yet to be developed.

The existing framework of Effective Supply could be affected if the existing quantum of GI and MIBA supply identified at Elimbah East and North East Business Park respectively, is reduced or not able to be delivered.

For example:

- **Elimbah East** contributes a 224ha of GI and 9ha of Light Industry supply; and
- **North East Business Park** provides for 120ha of MIBA supply.

Focusing on demand for GI and MIBA land under the Base Case, if these two areas were not reserved for industrial use:

- The Effective Supply of GI zoned land at the municipal level would be approximately **9-years** at 2021, and already below the 15-year minimum threshold.
- The Effective Supply of MIBA zoned land at the municipal level would be approximately **12-years** at 2021, and already below the 15-year minimum threshold.

When considering the GI supply it is important to note that GI supply is envisaged at Caboolture West; however, this supply is currently in the emerging community zone and is not able to be serviced and therefore is not considered in the Effective Supply framework.

MBRC's existing limited options for new greenfield GI and MIBA supply is considered a significant risk to industrial land planning and development in the municipality. This issue is addressed by recommendations provided in Chapter 12.

10.7 Infrastructure Implications

The minimum lead time to provide civil infrastructure to a greenfield industrial estate prior to the estate becoming available to the market is **at least 5-7 years**. This infrastructure lead time is needed to secure funding, undertake engineering and environmental site investigations, co-ordinate with other government agencies (e.g., Department of Transport and Main Roads) before proceeding to design and construct phases.

Therefore, to avoid overcommitment of capital resources to underutilised infrastructure, while simultaneously ensuring sufficient industrial land supply, MBRC needs to be able to anticipate take-up of industrial land at least 5-7 years in advance.

As noted under the Base Case, MIBA zoned land at North East Business Park is projected to be needed by 2026 and GI zoned land at Elimbah East needed by 2028. Accordingly, given infrastructure lead times, the servicing of these two areas will need to be prioritised.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

10.8 Implications of High & Low Demand Scenario

A summary of relevant timing for individual precincts under the High and Low Scenarios for Effective Supply is shown Table 10.4 and 10.5, respectively which aggregate all zone precincts. More detailed tables by zone precincts are in Appendix 2.

As discussed in Chapter 9, demand of 830ha to 2051 is projected under the High Demand Scenario. Of that demand, 479ha of GI and 244ha of MIBA would be required.

However, at 2051 there is insufficient Effective Supply of GI and MIBA to satisfy this demand. This implication is shown Table 10.3 by the last line ("Residual Demand"), which represents GI, MIBA, Restricted Industry, and Marine Industry demand in excess of Effective Supply (183.4ha). Under the High Growth Scenario, only 646.6ha of the 830ha of total demand would be taken up to 2051. A supply of land zoned LI totalling 6.9ha would remain.

Under the Low Growth Scenario (Table 6.5), a total supply of 54.5ha would remain at 2051.

Moreton Bay Regional Council

GENERAL MEETING - 551
20 April 2022

PAGE 128
Supporting Information

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 10.4 Effective Supply Implications by Precinct HIGH SCENARIO

Precinct Name	Effective Supply			Projected Demand				Total	Effective Supply 2051
	2021	2026	2031	2036	2041	2046	2051		
Northern Region									
(01) Elimbah East	232.7	-	40.2	79.8	89.5	22.2	1.0	232.7	-
(02) Caboolture West – Enterprise and employment – EC	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	44.3	24.4	20.0	-	-	-	-	44.3	-
(05) Henzell Road Caboolture	10.7	1.2	-	-	-	0.5	5.1	6.8	4.0
(06) First Avenue Bribie Island	1.2	-	-	-	-	-	-	-	1.2
(07) PAC Morayfield	1.7	-	-	-	-	-	-	-	1.7
(08) North East Business Park	120.0	1.3	14.8	26.9	43.1	33.9	-	120.0	-
(09) Bruce Highway Burpengary	38.2	14.5	8.7	6.8	4.5	3.6	0.1	38.2	-
Sub-total	448.9	41.3	83.7	113.5	137.1	60.2	6.2	442.1	6.9
Southern Region									
(10) Old Gympie Road Narangba	25.7	7.0	15.1	-	-	2.4	1.2	25.7	-
(11) Deception Bay	0.8	-	-	0.7	-	-	0.1	0.8	-
(12) Deception Bay Road	16.7	-	10.6	6.1	-	-	-	16.7	-
(13) Boundary Road Narangba	64.0	33.9	16.4	7.3	5.7	0.6	-	64.0	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-
(16) Rothwell	0.7	-	-	-	-	-	0.7	0.7	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-
(18) Clontarf	3.9	1.4	1.7	-	-	-	0.9	3.9	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	0.6	-	-	0.6	-	-	-	0.6	-
(20) Paisley Drive Lawnton	5.5	-	-	-	3.2	2.3	-	5.5	-
(21) Brendale	84.8	55.2	21.2	8.3	-	-	-	84.8	-
(22) The Hills District	1.8	-	-	-	-	-	1.8	1.8	-
Sub-total	204.5	97.6	65.1	23.0	8.9	5.4	4.6	204.5	-
Total (excl. residual)	653.5	138.9	148.8	136.5	146.0	65.6	10.8	646.6	6.9
Residual Demand	-	1.1	1.2	1.0	1.5	61.5	117.1	183.4	-
Total (incl. residual)	-	140.0	150.0	137.5	147.5	127.1	127.9	830.0	-

Source: Ethos Urban

Note: 0 = between 0 and 0.5 hectares.

Residual demand represents demand that exceeds supply, thus unable to be allocated to an individual precinct. Tables with implications for each zone precinct and scenario are provided in

Appendix 2.

Figures have been rounded.

Moreton Bay Regional Council

GENERAL MEETING - 551
20 April 2022

PAGE 129
Supporting Information

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 10.5 Effective Supply Implications by Precinct LOW SCENARIO

Precinct Name	Effective Supply			Projected Demand				Effective Supply	
	2021	2026	2031	2036	2041	2046	2051	Total	2051
Northern Region									
(01) Elimbah East	232.7	-	7.7	42.4	60.6	52.8	47.6	211.1	21.6
(02) Caboolture West – Enterprise and employment - EC	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	44.3	16.5	18.0	9.9	4.5	3.6	6.1	58.6	-
(05) Henzell Road Caboolture	10.7	-	1.2	-	-	-	-	1.2	9.6
(06) First Avenue Bribie Island	1.2	-	-	-	-	-	-	-	1.2
(07) PAC Morayfield	1.7	-	-	-	-	-	-	-	1.7
(08) North East Business Park	120.0	-	7.7	13.9	17.5	22.5	23.8	85.3	34.7
(09) Bruce Highway Burpengary	38.2	12.7	10.5	6.8	4.5	3.6	0.1	38.2	-
Sub-total	448.9	29.2	45.1	73.0	87.1	82.5	77.5	394.4	54.5
Southern Region									
(10) Old Gympie Road Narangba	25.7	1.8	12.9	6.8	0.6	2.4	1.2	25.7	-
(11) Deception Bay	0.8	-	-	-	0.3	0.4	0.1	0.8	-
(12) Deception Bay Road	16.7	-	1.9	6.8	6.9	1.1	-	16.7	-
(13) Boundary Road Narangba	64.0	19.6	29.7	8.4	5.7	0.6	-	64.0	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-
(16) Rothwell	0.7	-	-	-	-	-	0.7	0.7	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-
(18) Clontarf	3.9	-	2.9	0.2	-	-	0.9	3.9	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	0.6	-	-	-	0.3	0.3	-	0.6	-
(20) Paisley Drive Lawnton	5.5	-	-	-	3.2	3.0	-	5.5	-
(21) Brendale	84.8	48.3	26.3	3.9	4.4	1.3	-	84.8	-
(22) The Hills District	1.8	-	-	-	-	-	1.8	1.8	-
Sub-total	204.5	69.7	73.7	26.0	21.4	9.1	4.6	204.5	-
Total (excl. residual)	653.5	98.9	118.8	99.0	108.5	91.6	82.1	598.9	54.5
Residual Demand	-	1.1	1.2	1.0	1.5	3.4	2.9	11.1	-
Total (incl. residual)	-	100.0	120.0	100.0	110.0	95.0	85.0	610.0	-

Source: Ethos Urban

Note: 0 = between 0 and 0.5 hectares.

Residual demand represents demand that exceeds supply, thus unable to be allocated to an individual precinct. Tables with implications for each zone precinct and scenario are provided in Appendix 2.

Figures have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

10.9 Comparison of Employment Outcomes with Other Sources

For the purposes of this study, estimates of the jobs supported by industrial land to 2051 have been undertaken for the industrial land demand scenarios under the Base Case, as shown in Table 10.6.

Projections represent the theoretical employment that would be supported by the demand forecasted for each scenario in Chapter 9. That is, the projected employment is based on the total projected industrial land demand for each scenario (Base – 720ha, High – 830ha, Low – 610ha).

These estimates are high-level. The purpose is to provide a broad understanding of the number of jobs that could be supported by industrial land to 2051. Estimates of employment for industrial land for a timeframe of 30+ years represent a long-term forecast and contain a significant level of uncertainty given the potential for different industry sectors to be transformed by technology and other factors. The activities, functions and jobs supported by industrial land in 2051 could be quite different to what is observed today, for a wide variety of reasons, many of which are unforeseen at this point of time.

Assumptions employed in calculations include:

- Average site coverage of 50% and a plot ratio of 70% for all industrial land; and
- Floorspace to employment ratios of:
 - **GI** – 225m² of floorspace per job
 - **MIBA** – 100m² of floorspace per job
 - **Light Industry** – 100m² of floorspace per job
 - **Restricted Industry** – 80m² of floorspace per job
 - **Marine Industry** – 80m² of floorspace per job.

While it is likely that employment densities in specific industries will change over time, for the purposes of this high-level assessment employment densities have been held constant.

On this basis, Table 10.6 shows that that by 2051:

- MBRC's urban industrial areas would accommodate approximately 36,970 jobs, representing an increase of approximately +17,440 jobs on the 2021 level of 19,530 (+580 jobs or +2.2% per year over the 30 years).
- Industrial land in the northern region would accommodate 15,220 jobs (or +11,400) additional jobs over the current level; and
- Industrial in the southern region would accommodate approximately 21,750 jobs (or +6,040) additional jobs over the current level.
- The focus of new industrial employment will shift to the northern region, with this area to capture 65% of total additional jobs over the period to 2051.
- Employment estimates presented include 1,530 jobs associated with forecast industrial land demand in excess of Effective Supply (i.e. supply that is zoned and able to be serviced).

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 10.6 Estimated Employment Supported under the Base Case Scenario

Category	2021	2026	2031	2036	2041	2046	2051
Northern Region							
General Industry	1,040	1,370	2,000	2,960	4,050	5,120	6,110
MIBA	590	970	1,460	2,010	3,020	4,250	5,390
Light Industry	2,100	2,260	2,490	2,730	3,040	3,290	3,510
Restricted Industry	0	0	0	0	0	0	0
Marine Industry	90	100	120	140	170	190	210
Total	3,820	4,700	6,070	7,840	10,280	12,850	15,220
Southern Region							
General Industry	6,250	7,010	7,510	7,510	7,510	7,510	7,510
MIBA	2,720	3,580	4,350	4,890	5,110	5,110	5,110
Light Industry	4,900	5,270	5,630	5,860	6,080	6,270	6,430
Restricted Industry	1,130	1,260	1,410	1,520	1,650	1,760	1,850
Marine Industry	710	740	770	790	810	830	850
Total	15,710	17,860	19,670	20,570	21,160	21,480	21,750
MRBC Total							
General Industry	7,290	8,380	9,510	10,470	11,560	12,630	13,620
MIBA	3,310	4,550	5,810	6,900	8,130	9,360	10,500
Light Industry	7,000	7,530	8,120	8,590	9,120	9,560	9,940
Restricted Industry	1,130	1,260	1,410	1,520	1,650	1,760	1,850
Marine Industry	800	840	890	930	980	1,020	1,060
Total	19,530	22,560	25,740	28,410	31,440	34,330	36,970

Source: Ethos Urban

Notes: Figures have been rounded.

The annual growth profiles of other relevant employment projections are summarised by Table 10.7. Direct comparison with the growth rates derived from Table 10.6 are difficult because of differences in scope, geographical coverage and methodology, as discussed below:

- **AEC (2017)** – Prepared as part of the Moreton Bay Council Industrial Land Supply and Demand Review, AEC forecast employment growth at +2.1% per year to 2041, marginally below the UAELI Low Case (+2.2% p.a.). Note, the AEC forecasts do not include all UAELI precincts.
- **REDS (2021)** – Employment at the municipal level is forecast to grow by +2.4% p.a. between 2019 and 2041. This rate of growth is broadly in-line with the UAELI Base Case Scenario of +2.4% between 2021 and 2041, however noting that the UAELI figures relate only to industrial land.
- **MBRC (2019)** – MBRC's internal employment model employs top-down approach and envisages employment growth in the period 2021 to 2046 of +3.0% p.a. compared to the UAELI High Demand Scenario of +2.5% p.a. Note that the ABS SA2 areas on which the MBRC projections were based do not precisely match the UAELI precincts.

Unitywater (2019) – Unitywater produced employment forecasts using its Demand Modeller and Tracking Tool (DMaTT). Employment growth of +1.5% p.a. to 2051 envisaged for UAELI precincts is below the UAELI Low Case scenario (+1.9% p.a.).

The reasons for the differences are unclear. Specific inputs for the modelling are not disclosed, but the model considers development approvals, constraints, planning scheme density provisions, State Government population projections and gross floor area projections.

- **ShapingSEQ (2017)** – Municipal wide employment in ShapingSEQ is forecast to grow by +1.7% p.a. to 2041, significantly below the UAELI Low Case (+2.2% p.a.). Shaping SEQ

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

forecasts are municipal wide and include established commercial precincts with significant employment bases where relative growth will be low.

Table 10.7 Ethos Urban Employment Projections comparison against MBRC Employment Projections, 2021 to 2046

	Annual Growth 2021-41	Annual Growth 2021-46	Annual Growth 2021-51
Ethos Urban – UAELI Precincts			
Base	+2.4%	+2.3%	+2.2%
High	+2.7%	+2.5%	+2.4%
Low	+2.2%	+2.1%	+1.9%
UAELI Precincts			
AEC (2017)*	+2.1%	n.a.	n.a.
MBRC (2019)**	+2.2%	+3.0%	n.a.
Unitywater (2019)	+1.7%	+1.6%	+1.5%
Municipal-wide			
Shaping SEQ (2017)	+1.7%	n.a.	n.a.
REDS (2020)	+2.4%	n.a.	n.a.

Source: Moreton Bay Regional Council, Ethos Urban

Notes: *Does not include all UAELI precincts.

**Figures are for a visual 'best-fit' of projection geographical boundaries to urban area employment precincts.

10.10 Economic Value of Industrial Precincts

Estimates of value added generated by urban area employment land to 2051 have been prepared for the Base Case scenario. These estimates are based on the employment projections discussed earlier and information from economy.id, which publishes estimates of economic activity prepared by the National Institute for Economic and Industry Research (NIEIR). Assumptions underpinning the calculations of direct and indirect jobs, and value added²⁸, are detailed in Table 10.8 below.

²⁸ Direct jobs are persons employed onsite in businesses.

Indirect jobs are persons employed in the broader economy through upstream and downstream supply chains and other economic linkages.

Value-added by industry is an indicator of business productivity and shows how productive each industry sector is at increasing the value of its inputs. It is a more refined measure of the productivity of an industry sector than output (total gross revenue), as some industries have high levels of output but require large amounts of input expenditure to achieve that output.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 10.8 Value Added Assumptions

Land Use	Indirect Employment Multiplier	Value Added/ Direct Job ¹	Value Added/ In-direct Job ¹
General Industry	2.15	\$171,750	\$120,530
MIBA	1.89	\$154,700	\$121,530
Light Industry	2.03	\$169,500	\$120,450
Restricted Industry	1.89	\$154,700	\$121,530
Marine Industry	1.89	\$154,700	\$121,530

Notes: 1. At 2021

Source: NIER, Ethos Urban

Estimates of value added are shown in Table 10.9. These estimates have been derived as follows:

- Starting with estimates of new direct employment supported by precinct and land use, the number of indirect jobs supported in the wider economy is estimated by applying the indirect employment multipliers shown in Table 10.8.
- Value added generated by direct jobs is calculated by multiplying the number of direct jobs by value added per direct job. A similar calculation yields indirect value added, and total value added is the sum direct and indirect value added.
- Value added per direct and indirect job has been indexed by +1% p.a. real growth.
- Future year's value added are expressed in constant real 2021 terms.

The numbers in Table 10.8 are total cumulative value added generated by industrial development that is projected to occur after 2021 at the reference year. For example, the \$473 million value added at Brendale in 2026 excludes the contribution from businesses that were already operating prior to 2021.

By 2031, new businesses established in industrial precincts after 2021 are projected to generate \$2,795 million in cumulative value added, of which \$1,023 million (37%) would be from the northern region.

By 2051, new businesses established in industrial precincts after 2021 are projected to generate \$9,566 million (or \$9.6 billion) in cumulative value added, representing growth of +\$6,771 million since 2031. By 2051, \$6,294 million (66%) of cumulative value added would be generated in the northern region. For reference, the REDS outlines a target of MBRC generating approximately \$40 billion in total value added by 2041.

Residual demand (excess demand relative to Effective Supply) could support a total of \$849 million in value added to 2051.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 10.9 Base Case Scenario, Cumulative Value Added¹ by Urban Area Employment Land, Selected years 2021 to 2051 (Constant \$2021)

Precinct	2026	2031	2036	2041	2046	2051
Northern Region						
(01) Elimbah East	-	130m	618m	1,304m	2,031m	2,198m
(02) Caboolture West – Enterprise and employment – EC	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	151m	328m	345m	363m	381m	401m
(05) Henzell Road Caboolture	15m	18m	19m	20m	21m	126m
(06) First Avenue Bribie Island	-	-	-	-	-	-
(07) PAC Morayfield	-	-	-	-	-	-
(08) North East Business Park	15m	174m	427m	925m	1,576m	2,176m
(09) Bruce Highway Burpengary	192m	358m	491m	595m	693m	730m
Subtotal	379m	1,023m	1,925m	3,246m	4,755m	6,294m
Southern Region						
(10) Old Gympie Road Narangba	69m	280m	321m	338m	400m	443m
(11) Deception Bay	-	-	6m	12m	12m	14m
(12) Deception Bay Road	-	65m	210m	272m	286m	300m
(13) Boundary Road Narangba	365m	663m	827m	978m	1,040m	1,093m
(14) Scarborough Marina	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-
(16) Rothwell	-	-	-	-	-	13m
(17) Kippa Ring	-	-	-	-	-	-
(18) Clontarf	-	23m	24m	25m	27m	45m
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	-	-	6m	10m	10m	11m
(20) Paisley Drive Lawnton	-	-	-	73m	120m	126m
(21) Brendale	473m	712m	841m	910m	956m	1,005m
(22) The Hills District	-	-	-	-	-	36m
Subtotal	920m	1,772m	2,275m	2,677m	2,975m	3,271m
Total	1,299m	2,795m	4,200m	5,923m	7,729m	9,566m
Residual	20m	43m	65m	99m	177m	849m

Source: Ethos Urban

Note: 1 Excluding developments in place at 2021.

Figures have been rounded

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

10.11 Comparison with MBRC Industrial Land Supply and Demand (2017)

The differences between the UAELI and MBRC Industrial Land Supply and Demand (2017) report produced by AEC in terms of the approach and modelling outcomes are summarised below.

10.11.1 Differences in Scope & Methodology

The UAELI and AEC report differ significantly in coverage, scope and methodology employed. In particular:

- The UAELI considered areas in the enterprise and employment place type and additional industrial areas identified by Council, as well site-specific uses focused on innovation, health, employment and knowledge (Mill Innovation, Redcliffe Health Precinct, Caboolture Health Precinct and Bribie Island Hospital). In total, 22 precincts were included in the UAELI's scope, the AEC report considered the supply and demand situation for only 19 industrial precincts. Precincts relevant to both studies are shown in Tables 10.11 and 10.12.
- The base year for the UAELI's land supply estimates is 2021 with demand projections to 2051. The AEC report outlined demand projections to 2041 with the base year supply being 2016.
- Land supply estimates in the UAELI are based on VUT data supplied by Council and informed by an assessment of underutilised land and site constraints (refer Chapter 6). AEC estimated land supply through a visual audit of Google Earth data, and an allowance for constraints and infrastructure requirements; however, underutilised land was not considered.
- A significant difference between the two assessments is at Bribie Island Road Caboolture. The UAELI estimate of zoned industrial land, after accounting for constraints totals 123ha (with effective supply at 104ha). On the other hand, AEC estimated zoned industrial land to total 267ha. The reasons for this difference are not clear.
- Population projections are a key input of the UAELI demand modelling, projections used were produced in 2018, after the AEC report was completed, and then rebased and adjusted for COVID-19.
- The modelling methodology employed by Ethos Urban is a bottom-up approach with top-down checks. Demand projections are underpinned by analysis of historic uptake at individual site and zone precinct level. Population Growth Demand (PGD) and New Business Demand (NBD) are the primary drivers of future demand (refer Chapter 8). The ShapingSEQ employment projections and MBRC Employment Model are considered as a point of reference but do not underpin demand projections.
- In contrast AEC employed a top-down approach with bottom-up checks. AEC's internal input-output modelling of employment formed the basis of demand projections. Land requirements were estimated at the individual precinct level by applying assumptions relating to floorspace ratios, site coverage, plot ratios and the like.

Notwithstanding AEC's use of an input-output model as the basis for precinct level land demand projections, the most fundamental difference between the UAELI and AEC reports relates to estimated development capacity (or occupied land plus Effective Supply).

The Total Development Capacity estimated by the UAELI is 600ha lower than the AEC estimate, as shown in Table 10.10. The higher AEC estimate is higher partly because no allowance for land that is 'able to be serviced' was made, as well as the earlier date for base supply (2016 compared to 2021).

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 10.10 Total Development Capacity (Occupied + NVL) by Region, AEC and UAELI

Regions*	AEC (2016)	UAELI (2021)	Difference
Norther Region	917.0	594.8	-322.2
Southern Region	1,134.8	856.9	-277.9
Total	2,051.8	1,451.7	-600.1

Source: AEC, MBRC Industrial Land and Supply Report, 2017; Ethos Urban

Note: *Only includes the 18 out of 19 AEC precincts that are in the scope of UAELI (excludes Redcliffe Aerodrome)

UAELI figures are based on Effective Supply.

Figures have been rounded.

10.11.2 Comparison of Demand Projections

Two observations flow from a comparison of the demand projections (from 2021 to 2041) for industrial land and supported employment outlined by the UAELI and AEC reports.

First, average annual increase in both land demand and employment across 20 years to 2041 under the UAELI projections is +2.3% p.a. This estimate is higher than AEC projections (+2.0% p.a. and +2.1% p.a., respectively).

AEC note that projected employment was allocated across precincts and regions based on outcomes and findings from consultations undertaken, precinct capacity and the 'professional judgement of AEC staff', and then converted the employment figures to industrial land demand.

Second, unlike the AEC estimates, the UAELI projections assume a gradual demand transfer between the northern and southern regions of MBRC will occur over the next 20+ years as established industrial precincts in the southern region become increasingly supply constrained and strong population growth occurs in the northern region driving local industrial demand. The potential for demand transfer from neighbouring Sunshine Coast Council is a further factor that contributes to stronger projected demand in the northern region.

Accordingly, total land demand allocated to the southern region from 2021 to 2041 under the UAELI projections (38%) is significantly lower than AEC report (80%). The same dynamic is broadly reflected in a comparison of the employment projection figures.

A comparison of the AEC and UAELI industrial land demand and employment projections for each of the 18 precincts identified in the AEC (excludes Redcliffe Aerodrome) report between 2021 and 2041 is provided by Tables 10.7 and 10.8.

Differences in the quantum of land and employment are influenced by the different approaches and assumptions on GFA per employee for different land uses, site coverage, etc.

As noted, there is a significant discrepancy between the two AEC and UAELI figures for Bribie Island Road Caboolture.

Moreton Bay Regional Council

GENERAL MEETING - 551
20 April 2022

PAGE 137
Supporting Information

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 10.11 Urban Area Land Demand Project Comparison, AEC (2017) and UAELI (2021), 2021 to 2041

Precincts*	AEC 2017				UAELI 2021				Difference	
	Occupied Land		Annual Change 2021-41		Occupied Land		Annual Change 2021-41			
	2021	2041	(ha)	(%)	2021	2041	(no.)	(%)	(no.)	(%)
Norther Region										
(01) Elimbah East	20.7	27.1	0.3	1.4%	6.4	160.6	7.7	17.5%	7.4	16.1%
(02) Caboolture West**	0.0	0.1	0.0	-	0.0	0.0	-	-	-	-
(03) Sandstone Point	1.2	2.2	0.1	3.1%	2.1	2.1	0.0	0.0%	-0.1	-3.1%
(04) Bribie Island Road Caboolture	237.8	288.5	2.5	1.0%	59.3	103.6	2.2	2.8%	-0.3	1.9%
(05) Henzell Road Caboolture	35.3	47.9	0.6	1.5%	30.7	31.9	0.1	0.2%	-0.6	-1.3%
(06) First Avenue Bribie Island	9.6	9.7	0.0	0.1%	8.1	8.1	0.0	0.0%	0.0	-0.1%
(07) PAC Morayfield	18.1	22.5	0.2	1.1%	6.8	6.8	0.0	0.0%	-0.2	-1.1%
(08) North East Business Park	2.1	12.0	0.5	9.1%	3.8	60.1	2.8	14.9%	2.3	5.8%
(09) Bruce Highway Burpengary	29.1	48.0	0.9	2.5%	28.8	63.3	1.7	4.0%	0.8	1.5%
Sub-total	353.9	458.0	5.2	1.3%	145.9	436.5	14.5	5.6%	9.3	4.3%
Southern Region										
(10) Old Gympie Road Narangba	105.7	135.5	1.5	1.2%	77.2	99.4	1.1	1.3%	-0.4	0.0%
(11) Deception Bay	2.6	4.6	0.1	2.9%	3.2	3.9	0.0	1.0%	-0.1	-1.9%
(13) Boundary Road Narangba	116.3	210.6	4.7	3.0%	155.8	219.1	3.2	1.7%	-1.5	-1.3%
(14) Scarborough Marina	11.4	14.8	0.2	1.3%	14.8	14.8	0.0	0.0%	-0.2	-1.3%
(18) Clontarf	83.1	82.4	0.0	0.0%	59.3	62.4	0.2	0.3%	0.2	0.3%
(19) Petrie Mill**	44.4	118.1	3.7	5.0%	2.1	2.7	0.0	1.3%	-3.7	-3.7%
(20) Paisley Drive Lawnton	44.9	44.7	0.0	0.0%	33.4	37.6	0.2	0.6%	0.2	0.6%
(21) Brendale	317.6	538.5	11.0	2.7%	288.7	372.6	4.2	1.3%	-6.9	-1.4%
(22) The Hills District	17.9	17.9	0.0	0.0%	13.3	13.3	0.0	0.0%	0.0	0.0%
Sub-total	638.2	1,031.6	19.7	2.4%	647.9	825.9	7.8	1.2%	11.9	-1.2%
Total	1,097.8	1,625.1	26.4	2.0%	793.8	1,262.4	23.4	2.3%	-2.9	0.4%

Source: AEC, MBRC Industrial Land and Supply Report, 2017; Ethos Urban

Note: *Only includes the 18 out of 19 AEC precincts that are in the scope of UAELI (excludes Redcliffe Aerodrome)

**Names have been shortened

UAELI occupied land for each precinct is based on Effective Supply capacity.

Figures have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 10.12 Urban Area Employment Projections Comparison, AEC (2017) and UAELI (2021), 2021 to 2041

Precincts*	AEC 2017				UAELI 2021				Difference	
	Employment 2021	Employment 2041	Annual Change 2021-41 (ha)	Annual Change 2021-41 (%)	Employment 2021	Employment 2041	Annual Change 2021-41 (no.)	Annual Change 2021-41 (%)	(no.)	(%)
Norther Region										
(01) Elimbah East	110	170	0	2.2%	190	2,680	120	14.1%	120	11.9%
(02) Caboolture West**	0	0	0	-	0	0	0	-	-	-
(03) Sandstone Point	30	40	0	1.4%	90	90	0	0.0%	0	-1.4%
(04) Bribie Island Road Caboolture	2,250	2,980	40	1.4%	920	1,610	30	2.8%	-10	1.4%
(05) Henzell Road Caboolture	720	940	10	1.3%	960	1,000	0	0.2%	-10	-1.1%
(06) First Avenue Bribie Island	170	170	0	0.0%	280	280	0	0.0%	0	0.0%
(07) PAC Morayfield	240	310	0	1.3%	240	240	0	0.0%	0	-1.3%
(08) North East Business Park	30	380	20	13.5%	130	2,100	100	14.9%	80	1.4%
(09) Bruce Highway Burpengary	540	850	20	2.3%	1,010	2,220	60	4.0%	40	1.7%
Sub-total	4,090	5,840	90	1.8%	3,820	10,220	310	5.0%	220	3.2%
Southern Region										
(10) Old Gympie Road Narangba	1,620	2,170	30	1.5%	1,460	2,170	40	2.0%	10	0.5%
(11) Deception Bay	60	90	0	2.0%	110	140	0	1.2%	0	-0.8%
(13) Boundary Road Narangba	3,190	5,600	120	2.9%	4,390	6,420	100	1.9%	-20	-0.9%
(14) Scarborough Marina	340	440	10	1.3%	650	650	0	0.0%	-10	-1.3%
(18) Clontarf	1,890	1,880	0	0.0%	1,560	1,610	0	0.2%	0	0.2%
(19) Petrie Mill**	1,440	4,230	140	5.5%	70	90	0	1.3%	-140	-4.3%
(20) Paisley Drive Lawnton	1,310	1,300	0	0.0%	1,170	1,310	10	0.6%	10	0.6%
(21) Brendale	9,930	15,280	270	2.2%	5,340	7,110	90	1.4%	-180	-0.7%
(22) The Hills District	760	760	0	0.0%	470	470	0	0.0%	0	0.0%
Sub-total	18,920	29,580	540	2.3%	13,760	17,800	200	1.3%	-340	-1.0%
Total	24,630	37,590	648	2.1%	19,040	30,190	560	2.3%	-88	0.2%

Source: AEC, MBRC Industrial Land and Supply Report, 2017; Ethos Urban

Note: *Only includes the 18 out of 19 AEC precincts that are in the scope of UAELI (excludes Redcliffe Aerodrome)

**Names have been shortened

UAELI employment for each precinct is based on Effective Supply capacity.

Figures have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

10.11.3 Summary

Key findings from this analysis of the adequacy of land supply include:

- A model to assess the adequacy of supply of industrial land in MBRC, relative to projected demand, has been constructed to address key strategic and statutory planning requirements of Council.
- At a Council wide level, existing and planned Effective Supply is insufficient to meet demand for GI, MIBA to 2051 under the Base Case and High Demand scenarios.
- Under all scenarios, Restricted Industry and Marine Industry zoned land would be in deficit by -5.0ha and -6.1ha respectively to 2051.
- Focusing on the Base Case Scenario, the threshold of 15-years minimum supply would be reached as follows:
 - GI – approximately 2032
 - MIBA – approximately 2035
 - Light Industry – approximately 2038
 - Restricted Industry – approximately 2027
 - Marine Industry – current supply is already below the 15-year threshold.
- The Base Case demand modelling envisages that:
 - Demand would be pushed to Elimbah East for GI land by around 2028.
 - Demand would be pushed to North East Business Park for MIBA land by approximately 2026.
- If these two precincts in the Northern Region of MBRC were not part of future supply:
 - GI land supply would be equivalent to 9 years at 2021.
 - MIBA land supply would be equivalent to 12 years at 2021.
- MBRC's existing limited options for new greenfield GI and MIBA supply is considered a significant risk to industrial land planning and development in the municipality. The existing framework of Effective Supply could be affected if the existing quantum of GI and MIBA supply identified at Elimbah East and North East Business Park respectively, is reduced or not able to be delivered.
- In view of the general 5-7-year lead time to provide civil infrastructure to greenfield industrial estates prior to these areas being occupied, both North East Business Park and Elimbah East are infrastructure pressure points.
- Projected land development under the Base Case Scenario would result in MBRC's urban industrial areas supporting an estimated 36,970 jobs by 2051, an increase of +17,440 jobs on the current level. The northern region would capture 65% of total additional jobs over the time period (+11,400 jobs).
- Direct comparison of the employment projections derived in this report with other results are difficult because of differences in timing, scope, geographical coverage and methodology.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- The MBRC employment projections to 2046 (3.0% p.a. growth) are more optimistic than those projected under the Base Case Scenario (2.3% p.a.).
- An estimate of the economic contribution of industrial precincts under the Effective Supply framework shows that new development projected to occur after 2021 would contribute value added of \$9,566 million in 2051 (Real \$2021), with the northern region generating 66% of activity.
- A further \$849 million in value added could be captured by MBRC if additional land is added to the Effective Supply.
- Comparison of demand and supply of industrial land between UEALI and the AEC 2017 report is problematic. The two reports differ significantly in coverage, scope and methodology employed.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

11 Demand & Supply Considerations for Innovation/Health/Aviation Precincts

This chapter provides a high-level overview of considerations which frame the demand and supply context for innovation/health/aviation precincts in the scope of this assessment:

- Petrie Mill Innovation Precinct (Mill Innovation)
- Petrie Mill Transit Precinct (Mill Transit)
- Redcliffe Health Precinct, Caboolture Health Precinct and Bribie Island Hospital
- Aerodrome Caboolture
- Redcliff Aerodrome

11.1 Mill Innovation, Transit Demand & Supply Context

11.1.1 Planning Background

The Mill at Moreton Bay was declared a priority development area (PDA) on 2 September 2016 in accordance with the Economic Development Act 2016 (Queensland).

The primary purpose of the PDA is to facilitate development of the proposed University of Sunshine Coast Moreton Bay Campus and associated uses.²⁹ The PDA is proposed to be developed in the timeframe 2017 to 2041³⁰. Stage-one of the University Campus was completed in March 2020.

Planning guidance is currently provided by The Mill at Moreton Bay PDA Development Scheme (the Development Scheme) which commenced on 18 August 2017, replacing The Mill at Moreton Bay PDA Interim Land Use Plan (2016).

The Development Scheme comprises:

- A land use plan that sets a vision and regulations to guide development in the PDA
- An infrastructure plan; and
- An implementation strategy.

The vision provided in the Development Scheme is for development of the PDA to create “a world-class destination in the heart of the Moreton Bay Region” that would “revitalise the local area, act as a catalyst for the broader transition of Moreton Bay Region’s economy, and support positive local and regional economic, social and environmental outcomes.” (p9)

²⁹ Source: <https://www.moretonbay.qld.gov.au/Services/Building-Development/Planning-Schemes/The-Mill-PDA>

³⁰ Queensland Government, Mill at Moreton Bay PDA Infrastructure Plan Background Report, October 2017

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)
Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

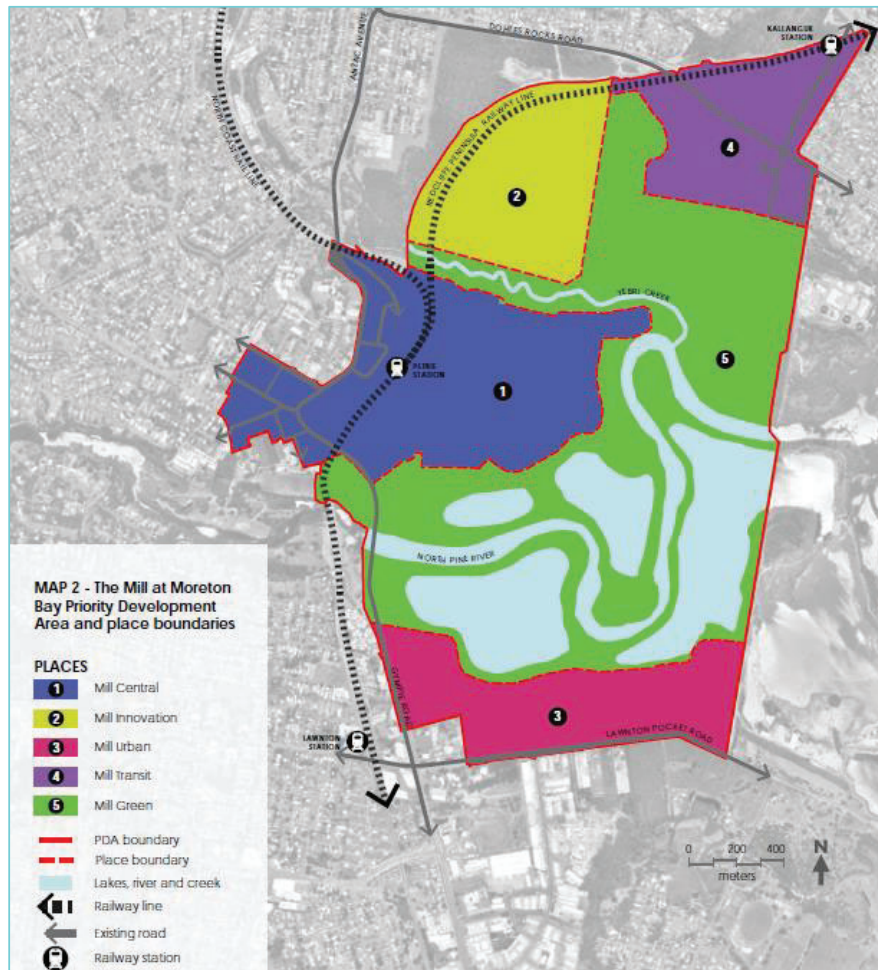
The vision notes that The Mill PDA will be anchored by a full-service university campus and would be also home to innovative businesses and organisations that want to co-locate with the University.

As outlined in The Development Plan, the PDA comprises five 'place provisions' (or places) – Mill Central, Mill Innovation, Mill Urban, Mill Transit and Mill Green (refer Figure 11.1).

Mill Innovation (Place 2 in Figure 7.1) is identified as “an area of opportunity which will be characterised by key attractors for the region that will stimulate regional economic growth”, in which “uses that have a direct nexus with the full-service university will be encouraged” (p31).

Mill Transit (Place 2 in Figure 7.1) is envisaged as a “new transit orientated residential community and neighbourhood hub which supports convenience retail and commercial uses focused around Kallangur Station. It will provide for medium to high density residential development north of Dohles Rocks Road and the continuation of existing light and general industrial activities south of Dohles Rocks Road” (p39).

Figure 11.1 The Mill at Moreton Bay PDA and Place Boundaries



Source: The Mill at Moreton Bay PDA Development Scheme

The Development Scheme notes (p32) that preferred land uses to anchor **Mill Innovation** would:

- Complement the function of the full-service university campus to the south; or

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- Involves a key attractor(s) that will stimulate regional economic growth; or
- Involves a high employment generating use (e.g., business innovation); or
- Maximises the strategic location, proximity to the rail corridor and open space areas.

Mill Innovation would also include a residential component in the form of medium to high-density housing that complements the primary preferred land uses (listed above).

In essence, it is intended that **Mill Innovation** be developed for an employment precinct accommodating high-profile businesses with an innovation focus and potential links to the university campus. Although some residential uses (medium and high-density) would be permitted, these would need to support office and 'research and technology industry' as the primary land uses, as noted by the Development Scheme.

Preferred land uses for **Mill Transit**, north of Dohles Rocks Road include:

- Housing in medium to high rise residential buildings; or
- Convenience retail, personal services, specialty retail and supporting uses including shops and food and beverage uses; or
- Minor employment-generating uses such as small-scale offices; or
- Innovative live and work environments.

Development south of Dohles Rocks Road excludes (including intensification of existing uses) uses that are incompatible with residential development in the north.

11.1.2 Supply Context

The Development Scheme does not provide a breakdown of floorspace for the **Mill Innovation** precinct specifically. A development yield for the **Mill Innovation** precinct is provided in the Infrastructure Background Report prepared by the Queensland Government; however, this only identifies a provision of retail floorspace and is not directly reconcilable with the land use vision identified in the Development Scheme (which includes employment and residential aspects).³¹

The envisaged development yield for **Mill Transit** is 245 dwellings, 240m² (GFA) for commercial uses, 60,300m²(GFA) for industrial uses, and 700m² (GFA) for retail (*The Mill at Moreton Bay PDA Infrastructure Plan*).

The Infrastructure Background Report indicates that development would commence at **Mill Innovation** by 2021. And it is understood site works have begun, as at November 2021.

The Development Scheme does not provide an indication of timing for **Mill Transit**, noting industrial uses already occupy parts of the precinct, south of Dohles Rocks Road.

³¹ Only retail floorspace is identified for the Mill Innovation precinct by the Mill at Moreton Bay PDA Infrastructure Plan Background Report (refer PDA Projected Development Yields at p6)

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

For the purpose of this assessment, high-level estimates of the breakdown of GFA that could, conceivably, be accommodated at **Mill Innovation** have been prepared, based on calculations of NVL (7.1 hectares).³²

Assuming a site coverage of approximately 40% and an average height of three levels, it is estimated that 84,120m² of gross floorspace could be accommodated in the precinct. Having regard for the directions provided in the Planning Scheme for **Mill Innovation**, a possible breakdown of this floorspace would be:

- 62% for commercial office/innovation (52,200m²)
- 34% for residential (28,600m²) or around 218 dwellings; and
- 4% for retail (3,300m²).

11.1.3 Demand Considerations

In broad terms, the primary land uses at **Mill Innovation** are likely to be campus-style offices accommodating conventional office activities as well as 'white collar' research and technology industry (activities). From a demand perspective the outlook for Brisbane CBD and CBD Fringe Office market is of relevance as it is likely the office space delivered would attract tenants from these locations, in addition to research and technology uses. Other possible land uses of note from a demand perspective include co-working and residential apartments – including potential for build-to-rent – in a vertical mixed-use type of arrangement with residential on upper floors.

Residential demand will form the primary driver of development at **Mill Transit**, with retail and commercial uses to follow. Proximity to employment areas such as **Mill Innovation**, Anzac Avenue, Paisley Drive Lawnton, and Westfield North Lakes, as well as co-location of the Kallangur Station will drive demand for residential development.

Office Market

Both the Brisbane CBD and Brisbane CBD Fringe office markets³³ are relevant to the delivery of office floorspace at **Mill Innovation**, having regard for the objective that the precinct attract high-value tenants. It would be expected in the future that some tenants considering office floorspace at **Mill Innovation** would also potentially consider CBD or CBD Fringe tenancies. Limited information is available regarding the wider (suburban) office market in Brisbane.

Pre COVID-19, both the Brisbane CBD and Fringe office markets were performing strongly, supported by positive net absorption, and relatively strong rental growth and investor activity. Indeed, 2019 was a record year for office market investment in the Brisbane CBD (at \$2.65 billion) according

³² NVL equals GVL less estimate constraints and civil infrastructure (as per method outlined in Chapter 6).

³³ CBD Fringe – refers to those suburbs immediately surrounding Brisbane's CBD

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

to Knight Frank.³⁴ Engineering, construction, IT and professional services (in general) were seen to be driving leasing activity.

Following the economic disruption caused by COVID-19 pandemic, the office market faces an uncertain short-term future. Leasing activity has stalled as tenants delay workplace plans and leasing decisions. Vacancy rates have increased for both the CBD and CBD Fringe markets (refer Tables 11.1 and 11.2 below), though this is broadly attributed to new stock entering the market rather than existing tenants vacating premises.

The new pipeline is now limited, with the Midtown Centre at 155 Charlotte Street (42,000m²) and 80 Ann Street (60,000m²) representing the major projects to be delivered in the CBD over the next two to three years, according to Cushman and Wakefield.

For **Mill Innovation**, current subdued market conditions could play-out favourably with the potential for a new market cycle to have commenced once the **Mill Innovation** comes online, resulting in increasing demand for tenancies from higher-order occupiers. This scenario is predicated on a strong economic recovery from the COVID-19 economic downturn, including the recommencement of international migration.

Table 11.1 Brisbane Fringe Office Market Vacancy, July 2020

Market	Vacancy Rate %		
	Jul-20	Jan-20	Jul-19
Brisbane Fringe	14.2	13.6	13.7
Total metro (non-CBD markets)	10.3	9.2	9.5
Australia			

Source: Property Council of Australia, 2020

Table 11.2 Brisbane CBD Office Market Vacancy, July 2020

Market	Vacancy Rate%		
	Jul-20	Jan-20	Jul-19
Brisbane CBD	12.9	12.7	11.9
Total (all CBD markets)	9.2	8	8

Source: Property Council of Australia, 2020

Co-working/Flexible Workspace

The provision of co-working/flexible workspace has been a prominent trend in the Australian office market that is now being tested by the COVID-19 pandemic. Pre COVID-19, Brisbane's co-working/flexi-space market was experiencing significant supply increases putting downward pressure on contract (lease) values (refer Table 11.3).

³⁴ Knight Frank, Office Market Overview, March 2020

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Additional CBD-based supply from offerings such as of the We Work co-working spaces in Brisbane CBD saw CBD-based co-working and flexible workspaces become less expensive in 2018-19 than many city-fringe or metropolitan locations.³⁵

As the result of the COVID-19 pandemic, the sector is now under pressure, with viability concerns surrounding some providers. Post COVID-19, as the co-working/flexi-space sector matures, the service offering is likely to increasingly differentiate based on the following categories:

- **Co-working** – shared working space with standard amenities for range of potential users. Can be themed to a specific industry and/or form part of a business incubator program, or non-industry specific.
- **Flexi-space** – 'spill-over' office space with tailored amenities geared to the needs of one-specific tenant. An emerging trend in the delivery of premium or A-grade floorspace is for the provision of high-quality onsite flexi-space to be used as an incentive to attract high-profile anchor tenants.
- **Serviced offices** – typically 'spill-over' or remote office space with standard amenities.

Conceivably, all three of the above typologies could be provided at **Mill Innovation**. Co-working space could be general in nature (e.g., We Work); or geared to a specific sector (e.g. technology start-ups) and potentially part of an incubator program cross subsidised by the University or MILLovate.

In contrast, the provision of flexi-space at **Mill Innovation** would, if delivered, likely form part of conventional commercial office complexes, and in particular offices providing an A-grade or premium grade offering.

A limited provision of commercial floorspace at **Mill Transit** (240m²) is likely to attract small scale users such as small medical practices, accounting, or legal firms. These businesses will primarily serve the needs of residents in the local area.

Table 11.3 Brisbane Co-working/Flexi-space Market Trends

Category	2017-18	2018-19	% Change
Average Contract Value	\$9,704	\$9,148	-5.7%
Average Desks per Rental	3.4	3.6	5.9%
Average Move-in Time (days)	41	34	-17.1%
Average Term (months)	6.35	9.02	42.0%

Source: Office Hub, The Australian Co-working Market Report 2018-19

³⁵ Office Hub, The Australian Co-working Market Report 2018-19

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

High Density Residential

Brisbane's high-density residential market is now in a downturn phase after strong development activity in recent years, fuelled by international investor activity and low domestic interest rates among other factors.

Prior to the COVID-19 pandemic, segments of Brisbane's apartment market were considered to be in oversupply with evidence of price discounting. Some 10.6% of units completed from 2016 to 2020 (year ending January) remained in ownership of the developer based on analysis undertaken by M3 Property.³⁶ Although Brisbane's overall residential market has held up well during COVID-19, the apartment segment remains relatively weak.

In the next 5-years it is likely that the high-density residential market in Brisbane will shift from investor grade offerings to higher-quality owner occupier developments and new typologies such as build-to-rent (BTR or multi-family).

BTR developments are beginning to be delivered in Australia and would likely be considered by developers for **Mill Innovation** and **Mill Transit** in view of the market being geared to younger age cohorts (professionals) and providing relatively high levels of amenity coupled with tenure flexibility. Co-living, a subset of the build to rent sector, which is geared towards younger temporary workers (particularly in the tech industry) and students would also likely be considered by developers in both precincts in addition to generic student apartments.

BTR promises to service an existing gap in the residential market and would, at face value, be suited to **Mill Innovation** and **Mill Transit** (and areas of the broader PDA site). However, BTR is currently regarded as difficult to deliver due to:

- Conventional development financing services in Australia being unable to provide 'patient capital' at a scale required for BTR; and
- Current taxation issues relating to GST and managed investment trusts.

Although the likely timing of **Mill Innovation** and **Mill Transit** provides scope for these regulatory and structural issues to be addressed, providing height bonuses in planning could assist with the viability of BTR and would provide further opportunities for the inclusion of social or affordable housing components (to be included within BTR developments).

Retail

Retail floorspace delivered in **Mill Innovation** and **Mill Transit** would be internally focused, service those residents and workers supported in the precinct, and would primarily comprise cafes + convenience retail.

³⁶ M3 Property, Inner Brisbane Unit Market Residual Stock Analysis, January 2020

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

11.1.4 Anchor Infrastructure & Tenants

For the Mill Innovation precinct, an additional consideration is the potential for delivery of anchor infrastructure by MILLOvate (or other stakeholders) and proactive attraction of major tenants to stimulate private sector development and build the precinct's reputation and brand.

For example, the delivery of an incubator (with co-working space) geared to technology start-ups is an option that may stimulate flow-on private sector development. It would also signal the land use intent for the precinct to the private sector, if accompanied by appropriate marketing, among other factors.

The Implementation Strategy provided by the Development Scheme (refer p52) notes as an action that a specific economic development strategy would be prepared for the PDA, which:

- Includes a targeted investment and business attraction program; and
- Explores strategies to attract businesses and encourages high quality development.

Securing anchor tenants early in the development phase is likely to be crucial. MILLOvate and MBRC's economic development team may consider 'deal making' such as rate deductions or rental subsidies to attract suitable tenants. Examples for anchor tenants which may assist from a branding and promotional perspective include head offices of firms in the technology (health, mining etc), renewable energy sectors or advanced manufacturing sectors.

11.2 Health/Hospital Uses Demand & Supply Context

11.2.5 Site Context

Redcliffe Health Precinct & Redcliffe Private Hospital

Redcliffe Health Precinct includes the Redcliffe Public Hospital site, (refer Appendix 1). The Hospital currently comprises 427-beds and includes the Moreton Bay Integrated Care Centre.

The Hospital serves a local catchment from Brighton to Deception Bay and west to Kallangur, providing services including surgery, cancer care, dialysis, maternity, paediatrics, palliative care and emergency care.

Clustering of complementary medical and allied health services is occurring in the area adjacent to the Hospital, including an aged care facility, radiology clinic, medical centre, mental health services and rehabilitation centre.

Approximately 1.1km west of Redcliffe Public Hospital is the smaller Peninsula Private Hospital on George Street, which supports around 70-beds and provides medical, surgical and rehabilitation health services to a local catchment.

An approved expansion/redevelopment of the Private Hospital will increase the number of beds to 140, and deliver seven new operating theatres, enhanced medical facilities and consulting offices with a total GFA of 5,960m² and a new multilevel carpark. Completion of the expansion/redevelopment is expected to be in the first half of 2025.

Adjacent to the existing Private Hospital is the Peninsula Specialist Medical Centre, supporting a range of health services including pathology, urology, a medical centre and radiology clinic. Two aged care centres are located on neighbouring lots west of the hospital.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Caboolture Health Precinct

Caboolture Health Precinct is situated immediately south of the Central Lakes Shopping Village and McLean Street in Caboolture. The precinct accommodates Caboolture Public Hospital and Caboolture Private Hospital, (refer Appendix 1).

The Public Hospital is a 281-bed facility and provides services including obstetrics, gynaecology, general surgery, intensive and critical care, paediatrics, and mental and allied health, to a regional catchment which generally comprises the northern reaches of MBRC. An onsite Education and Skills Centre, developed in 2013, provides clinical training facilities including a library, lecture theatre and simulation areas.

The Private Hospital includes a 43-bed facility with three operating theatres, a 12-chair day procedure unit, and oncology unit.

A significant redevelopment of the Caboolture Public Hospital is currently underway and includes construction of a new 4-storey clinical services building, patient transport hub, emergency department and satellite medical imaging unit, six new operating theatres and two new endoscopy rooms and refurbishment of various units. The redevelopment has an estimated value of \$678 million across three stages and is expected to be completed in 2026.

Nearby medical related uses include an aged care centre (Regis Caboolture) adjacent to the east, and a pathology clinic, dental clinic, dietitian, and medical centre at Central Lakes Shopping Village.

Bribie Island Hospital

Development of the new Bribie Island Hospital has been approved for land the north-west of Bongaree Avenue adjacent to Bribie Island Shopping Centre, (refer Appendix 1).

The new Hospital is planned to include medical retail³⁷, 35-bed hospital, 78 aged care units, and 100-place childcare centre. Development is expected to commence in 2021 with completion in early 2025.

South of the site is a residential aged care and retirement village facility (McKenzie Aged Care and Retirement). Retail uses including Brown's Mitre 10 and Domino's Pizza are located on the adjacent site to the west. A number of health-related uses are located in shopfront tenancies (adjacent Domino's Pizza etc), including three medical centres and a pathologist.

11.2.6 Market Considerations

Land use opportunities of most relevance (and compatible) to Redcliffe and Caboolture Health Precincts and Bribie Island Hospital include medical centres and allied services, commercial accommodation and residential apartments.

Medical Centres & Allied Health

At a general level, Medical Centres and Allied Health includes the ANZSIC categories health services and allied health services and represent growing industries in Australia. General health services

³⁷ Medical retail or 'medi-retail' refers to cluster of retail uses aligned to medical, health and wellness.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

include general practitioners (GPs), dental services, and diagnostic services (pathology, x-ray etc.), while allied health services includes services such as optometry, physiotherapy, chiropractic services, dieticians, podiatry, psychology, speech therapy, and natural therapies.

Total industry revenue for health services and allied health services is forecast to increase by +2.0% and +1.9% per annum to 2025 respectively, based on the latest estimates prepared by IBIS World.³⁸

The main demand drivers for medical centres with allied health services are population growth coupled with an aging population.

Although both health and allied health services are used by the entire population, there is a higher rate of visitation and use by the older population. Indeed, with the baby boomer cohort of the population moving into retirement, demand for health and allied health services is expected to increase significantly over the next 20 or so years.

Strong population growth throughout MBRC's urban areas, coupled with an increasing share of residents aged over 50 years, is expected to support an increased provision of medical centres and allied health services in MBRC including or proximate Redcliffe and Caboolture Health Precincts as well as Bribie Island Hospital. The expected aging of the population is illustrated in Table 11.4.

Based on an industry average of approximately 14 GPs per 10,000 persons³⁹, and the revised population estimates for MBRC, some additional 187 GPs would be required in the Northern Region over the 30-year period to 2051. It would be expected that a significant number of additional GPs would operate from more expansive medical centres which would be likely to include allied health services, based on industry trends.

Table 11.4 Proportion of Residents Aged 50 and Older, 2019 to 2041

Relevant SA3s	2019	2041	Change 2019-41
Redcliffe Health Precinct			
Redcliffe	44.8%	52.9%	8.1%
North Lakes	22.8%	29.4%	6.6%
Sub-total	32.0%	39.0%	7.0%
Caboolture Health Precinct			
Caboolture	31%	37.6%	7.1%
Narangba - Burpengary	32%	38.1%	5.8%
Sub-total	31%	37.9%	6.5%
Bribie Island Hospital			
Bribie - Beachmere	58%	67.6%	9.2%

Source: ABS, ERP; Queensland Treasury, Population Projections by Five-Year Age Bracket

Due to the requirement for patients to pay out-of-pocket for many medical and health expenses, discretionary (or disposable) income is another driver of demand, particularly for non-essential health services which can include allied health services such as physiotherapy or dentistry. Except for Bribie

³⁸ IBIS World (Reports Q8539 and Q8400)

³⁹ Based on Medicare Benefit Scheme (MBS) data, the National Health Workforce Data Survey (NHWS) and ABS Regional Population Growth data.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Island, the catchment areas have household incomes above the Regional Queensland average, although relatively high mortgage levels work to reduce amounts available for actual discretionary spending.

For medical centres and allied health services, locational factors for success include:

- Proximity and accessibility to an increasing residential population catchment,
- Location as part of a larger employment area, providing a convenient service to a nearby workforce,
- Sites of sufficient scale to allow economies of scale and clustering to occur; and
- Highly visible and accessible site, for attracting walk-in business.

An additional factor that contributes to the success of medical centres and allied health services is proximity to demand generators such as hospitals, aged-care facilities or schools.

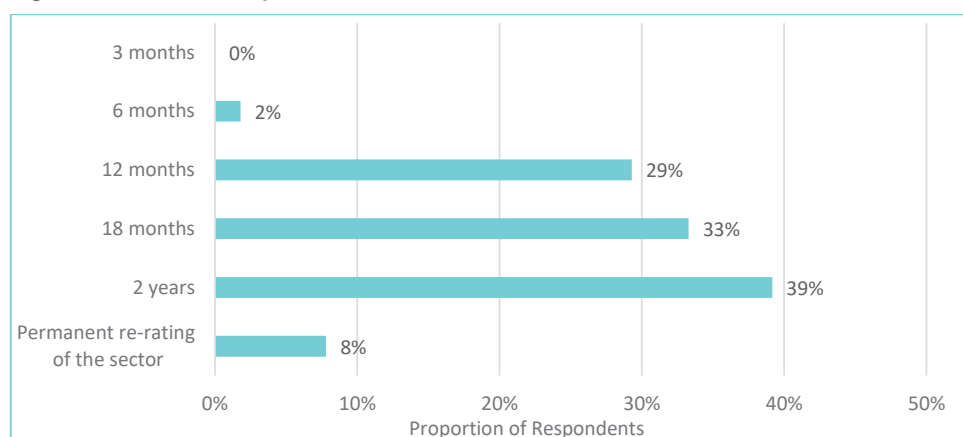
Commercial Accommodation

Pre COVID-19, the commercial accommodation market in Brisbane was relatively strong with indicators including occupancy, average daily rate (ADR) and revenue per available room (RevPAR) all experiencing growth.

However, the sector has been hit hard by movement restrictions and state and national border closures associated with COVID-19, despite Government support measures. In the near-term, it is likely the sector will continue to struggle, with IBIS World forecasting a -24% and -19.3% decline in revenue across the industry in 2020 and 2021 respectively. Investor expectation with regards to the hotel market are illustrated in Figure 11.2.

Although the appetite for new investment in the near-term is likely to be limited, the market can be expected to stabilise should a COVID-19 vaccine prove effective and international travel can resume.

Figure 11.2 Investor Expectations, Time for Australian Hotel Market to Stabilise



Source: Colliers International, Colliers Australian Hotel Investor Survey

Key demand drivers for success for commercial accommodation include:

- **Domestic and international tourist visitors.** Visitors whose primary purpose is for leisure and to visit friends and relatives. Key demand drivers are local tourism attractors, events and population growth.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- **Business travellers.** Visitors whose primary purpose is business. Key demand drivers are proximity to employment hubs and transport nodes, and economic activity.
- **Health accommodation.** Visiting patients or friends/relatives of patients undergoing minor or major procedures. Key demand drivers in proximity to regional and to a lesser extent sub-regional hospitals/health precinct.

For commercial accommodation in proximity to hospitals such as hotels or serviced apartments, the health accommodation and business traveller segments are often related, with facilities drawing patronage from both patients (and families and friends of patients), as well as visiting doctors or other specialists.

Site suitability considerations for commercial accommodation servicing hospitals/health precincts include:

- **Proximity to a primary demand market:** this is particularly relevant for health accommodation as older patients will be the most frequent users and will have limited mobility. Further, the primary reasons for choosing to stay in commercial accommodation is to minimise the amount of traveling after undergoing a procedure.
- **Proximity to retail, and food and beverage amenities:** While not a major criterion for health accommodation users, it is an important consideration for the secondary demand markets (business travellers and tourists). This is of particular relevance to Redcliffe Health Precinct as it is proximate to a small tourism hub at the waterfront.
- **Visibility and accessibility:** Again, this is a consideration for the secondary demand markets such as business travellers and tourists.

High Density Residential

Brisbane's high-density residential market is now in a downturn phase after strong development activity in recent years. As the market emerges from the downturn, it is likely that the focus of the sector will shift from investor grade products to higher-quality offerings geared to owner occupiers and new typologies like BTR, as discussed previously.

Redcliffe has an emerging high-density apartment market with a range of developments on the waterfront, adjacent to Marine Parade and Redcliffe Parade. The current median unit price (\$395,000) represents a decline of 8.3% in 2020, reflecting broader market trends and indicating a local oversupply.⁴⁰ Apartment markets at Caboolture and Bribie Island are less advanced and focused on walk-up units with some examples of medium density development. Medium and higher-density residential development at Bribie Island is largely informed by the retiree market.

Although the median unit price in Caboolture (\$212,000) increased by +10.6% in 2020, it represents a substantially lower price point and is not generally comparable to broader metropolitan trends for conventional high-density residential product. The current median unit price at Bribie Island

⁴⁰ PriceFinder database (10 December, 2020)

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

(\$351,000) has experienced growth over the past 12 months, increasing by +11.5%. Again, the retiree market, and lifestyle investors has been a key driver influencing this market.

Median unit prices at Redcliffe, Caboolture and Bribie Island are all below the Brisbane-metro average of \$415,000⁴¹ which positions affordability as a key driver. The key consideration is whether a location at, or proximate to, the respective hospitals is likely to represent an attractive proposition for apartment development. Although proximity to employment can be a strong driver for higher-density development, lifestyle factors at Redcliffe and Bribie Island, including waterfront views or proximity to water, is likely to be a stronger factor in shaping the viability of the higher-density residential market.

11.2.7 Individual Precinct Considerations

Redcliffe Health Precinct

Increasing demand over time will result in the delivery of additional medical centre and allied health services in and around the Redcliffe Health Precinct, as well as Redcliffe Private Hospital. Over time there may be pressure to convert some residential dwellings located between the two hospital to doctors' surgeries and other health-related uses.

The focus for both commercial accommodation and residential apartments is likely to continue to be in areas nearer to the waterfront. Medium density or smaller scale apartments and commercial accommodation development proximate to the Redcliffe Public Hospital is considered a longer-term prospect.

Caboolture Health Precinct

Delivery of additional medical centres and allied health services is expected to occur over time as demand increases, with the existing Central Lakes Shopping Village to be the focus.

The potential for commercial accommodation in the Caboolture Health Precinct is considered to be limited, given the local-service nature of the Caboolture Hospital and the distance from the Caboolture Station and CBD. There may be potential for serviced apartments in the longer term at a limited scale.

The surrounding residential context is primarily detached residential dwellings, but delivery of walk-up unit typologies is expected to increase over time. Any apartment development at scale would need to be geared to key workers and potentially cross subsidised, having regard for the current residential market at Caboolture, with land prices significantly below the threshold that can support a mature market for conventional high-density development.

Vacant land immediately north-east of the Pettigrew Street and Mclean Street intersection is a strategic development site and could conceivably accommodate a medical centre and allied health services in conjunction with other commercial uses. Delivery of units or serviced apartments is a potential opportunity that would need to be subject to detailed due diligence.

⁴¹ Realestate.investor.com.au

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Bribie Island Hospital

Delivery of both commercial accommodation and unit apartment typologies would likely occur in proximity to the waterfront at Bribie Island, rather than in the area of the new hospital. Over time walk-up unit typologies may become more prevalent (as distinct from aged care and retirement living facilities already being developed in proximity to the site such as the Gem Life Resort). It is likely that persons visiting relatives in these facilities would seek accommodation on the waterfront rather than in the area of the hospital.

It is expected that additional medical centre and allied health services will be developed over time in proximity to the new hospital with nearby aged care and retirement lifestyle communities a prominent demand driver. Sites at or adjacent to Bribie Island Shopping Centre would be the focus.

11.3 Aviation**11.3.8 Airport and Aviation Economic Context**

Airport passenger operations have been strongly affected by the COVID-19 pandemic, with international and interstate border restrictions limiting travel volume to negligible levels. While the recovery in domestic and international travel is expected begin as vaccination rates increase, IBISWorld forecasts revenue to fall by 55.5% in 2020-21 (IBISWorld, *Airport Operations in Australia* June 2021).

As the pandemic impacts subside, tourism travel is expected to normalise and industry revenue is expected to rise quickly from 2021-22 onwards. Large and medium sized airports will likely look to expand terminals and facilities in anticipation of greater numbers of aircraft and passengers, boosting revenue and margins.

The small scale nature of Aerodrome Caboolture and Redcliffe Aerodrome means demand for domestic travel is of limited direct relevance, with no passenger operations at Aerodrome Caboolture, and only regional passenger operations at Redcliffe Aerodrome. However, both airports are used for flight training which could see additional demand as the broader aviation industry recovers.

In contrast to passenger operations, commercial freight demand has boomed during the pandemic, driven by the sharp increase in online retailing, in-line with increased demand for logistics and warehousing capacity, discussed in Section 8.2.

As both Aerodrome Caboolture and Redcliffe Aerodrome do not currently operate freight services, they are of limited relevance to industrial uses such as logistics and warehousing businesses.

11.3.9 Aerodrome Caboolture

Aerodrome Caboolture is conveniently located, adjacent to the Bruce Highway and approximately 3km from the Caboolture CBD. Largely focussed on recreational aviation and flight training, the airport operates two grass runways.

Developable land is split between north and south of the runways, with land in the south largely developed, supporting aviation related uses such as hangars, aviation training, aviation supplies, aviation museums, and the Caboolture Aero Club. Land north of the runway (approximately 72ha) is almost exclusively used by the Caboolture Waste Management Facility, with a small portion used for the LGI Caboolture Power Generation Site.

From a demand perspective the airport itself is unlikely to attract conventional industrial tenants, given the small scale and recreational/training focus of airport operations is expected to continue to have limited industrial/commercial relevance and aviation related uses will continue to be the primary users of airport land.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

11.3.10 Redcliffe Aerodrome

Redcliffe Aerodrome is located adjacent to the Newport residential growth area, north of Anzac Avenue. Operations include regional passenger movements, flight training, and aircraft maintenance. The site is approximately 34ha, with the runway taking up most of the land. Existing development is focussed in the south-east corner of the site, where Nathan Road connects the airport to Anzac Avenue. Vacant land (7ha) is located in the eastern corner of the site.

Underpinned by aircraft maintenance activities with a broad South East Queensland market, the Aerodrome is largely occupied by aircraft maintenance and other aviation related uses, including Australia Airforce Cadets youth organisation, Redcliffe Aero Club, vintage aircraft restoration, and a number of flight schools.

11.4 Summary

The key findings from this chapter include:

- Mill Innovation is to be developed as an employment precinct accommodating high-profile businesses with an innovation focus and potential links to the university campus. In keeping with the current Development Scheme, medium and high-density residential development incorporated within Mill Innovation would support office and 'research and technology industry' as the primary land uses.
- The take up of commercial floorspace will be shaped by broader demand conditions for office floorspace, the markets for co-worker and potentially flex-space and serviced offices. Securing high profile anchor tenants is considered critical for Mill Innovation to establish as an office destination.
- Demand for apartments within the Mill Innovation and Mill Transit will be influenced by the broader apartment market. Establishing a high-quality urban environment will be important if residents are to be attracted to the area. Innovative residential products such as BTR may be viable based on the proximity of the nearby university campus.
- A modest convenience retail provision is planned for Mill Transit and is likely to represent a viable option at the Mill Innovation precinct as well, in terms of retail floorspace provision.
- Hospital precincts at Caboolture and Redcliffe, and a new hospital at Bribie Island are likely to generate additional development in health and allied health services within, or adjacent to the health precincts.
- Based on the locations of the health precincts, it is considered less likely that significant investment in commercial accommodation or higher-density housing will occur in the short to medium term.
- Land uses at Aerodrome Caboolture and Redcliffe Aerodrome are largely focussed on training and recreational flight operations and maintenance and are likely to continue to be associated with these activities.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Part 2C – Recommendations

Part 2C details recommendations concerning:

- Land use planning issues
- Monitoring industrial land trends
- Issues specific to zone precincts
- Economic development.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

12 Land Use Planning Issues and Considerations

This chapter provides recommendations on land use planning considerations and potential refinements to the MBRC planning scheme, as informed by the findings of Parts 2A and 2B of the UAELI.

For each planning recommendation and indicative timing has been outlined in the context of either making amendments to the existing MBRC Planning Scheme 2016 or a new planning scheme for MBRC which is expected to be implemented in the longer term (5+ years):

- **Short-term (1-2 years)** – to occur before the implementation of a new planning scheme
- **Medium-term (3-5 years)** – to occur before or after the implementation of a new planning scheme
- **Long-term (5+ years)** – to occur after the implementation of a new planning scheme.

12.1 The Ongoing Role, Function and Need for the MIBA, Light Industry and General Industry Zone Precincts

Recent take-up and projected demand is lower for the Light Industry zone precinct, compared to the MIBA and GI. This, in addition to the overlap of envisaged uses detailed below, raises the potential for the ongoing role, function and need of the MIBA, Light Industry and GI zone precincts to be reviewed.

The Light Industry precinct offers limited distinction from a land use planning perspective when compared with the MIBA precinct and the GI precinct (refer Table 12.1).

Table 12.1 illustrates the substantial overlap and limited distinction between the land uses envisaged for the MIBA, Light Industry and GI zone precincts. Notably, only two uses, Aquaculture (where in a building) and Car wash, are distinct for Light Industry.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table 12.1 – Envisaged uses in the MIBA, Light industry and GI zone precincts

Uses envisaged in the MIBA precinct only	Uses envisaged in both the MIBA & Light industry precinct	Uses envisaged in the Light industry precinct only	Uses envisaged in both the Light & General industry precincts	Uses envisaged in the General industry precinct only
	Caretakers' accommodation			
	Educational establishment (where for technical and trade related education only)		Agricultural supplies store	
			Animal husbandry	
	Emergency services		Bulk landscape supplies	
Indoor sport and recreation	Food and drink outlet (where not exceeding 100m ² GFA)		Caretaker's accommodation	
Office (where on a District Collector road or higher)	Hardware and trade supplies*	Aquaculture (where in a building)	Emergency services	Where in a Neighbourhood hub:
Showroom (where for industry or trade related products and a maximum of 500m ² GFA)	Low impact industry	Car wash	Food and drink outlet (where not exceeding 100m ² GFA)	• Office
	Medium impact industry**		Medium impact industry**	• Shop
	Outdoor sales***		Research and technology industry	
	Research and technology industry		Sales office	
	Sales office		Warehouse	
	Service industry			
	Service station			
	Warehouse			

* **Note:** Hardware and trade supplies is envisaged in the MIBA precinct where a maximum of 500m² of GFA.

** **Note:** Medium impact industry is envisaged in:

- the MIBA precinct, where at least 250 metres from a sensitive land use or zone (refer to Overall Outcome 6.2.7.1.1.1.s), despite being subject to Impact Assessment,
- the Light industry precinct, where at least 250 metres from a sensitive zone only (refer to Overall Outcome 6.2.7.2.1.1.q), and
- the General industry precinct regardless of a separation distance to a sensitive use of zone (refer to Overall Outcome 6.2.7.3.1.1.r) and is subject to Code Assessment.

*** **Note:** Outdoor sales is envisaged in the MIBA precinct where for the sale of goods manufactured on-site.

Source: MBRC planning scheme - Overall outcome s. 6.2.7.1 Industry zone code - Mixed industry and business precinct,

Overall outcome q. 6.2.7.2 Light industry precinct and Overall outcome r. 6.2.7.3 Industry zone code - General industry precinct

The purpose of the Light Industry zone precinct is to facilitate and maintain the long-term viability of a range of low impact and low intensity industrial and business activities, which are compatible with adjacent commercial and residential areas. In considering the ongoing relevance, role and need for the Light Industry, it is acknowledged that this purpose provides some level of distinction from the MIBA and GI zone precincts, in so far as:

- The MIBA precinct intends to accommodate a range of low impact industry and **associated commercial uses**, as evidenced by Indoor sport and recreation, Office and Showroom being envisaged uses (refer to Table 12.1). Notwithstanding, many of these uses are already established within Light industry precincts (e.g., First Avenue, Bribie Island and Paisley Drive, Lawton).

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- The GI precinct intends to facilitate and maintain the long-term viability of a broad range of industrial uses, including Medium impact industry and High impact industry, where an appropriate separation distance of 500m can be achieved to sensitive zones.

Therefore, investigation of future role and function of the Light industry would need to give due consideration to:

- Ensuring commercial uses do not establish at a frequency which limits the on-going viability of low impact industry uses; and
- Ensuring appropriate separation distances are able to be provided between industry and sensitive uses or zones.

Notwithstanding the above, when considered against the land supply, take-up and demand findings of this investigation and the duplication outlined in Table 12.1, the Light Industry zone precinct could be viewed as having potentially limited on-going relevance from a land use planning perspective and potentially limiting flexibility, innovation and the effective delivery of employment uses.

As part of this review, Council should investigate the long-term potential for some industrial precincts to transition to mixed-use and/or commercial precincts.

Recommendation:

Council to review the ongoing role, function and need of the MIBA, Light Industry and GI zone precincts, with an aim of identifying opportunities to refine their implementation within the MBRC Planning Scheme (existing or new) to maximise utilisation of employment land. Where transitioning any precincts, due consideration should be given to the need for additional provisions or parameters (e.g. floor space limits, intended use or separation distances requirements) in the Industry zone code, to ensure clarity around the ongoing and intended form and function of existing precincts (e.g. including protection of low impact industry uses within new MIBA precincts).

Timing: Short term (1-2 years) as part of the work being undertaken to initially scope a new planning scheme.

12.2 Allowance for Future High Impact Industry Opportunities

The Restricted Industry zone precinct has a land supply (NVL) equivalent to only 11.5ha in 2021 (located in the Boundary Road, Narangba precinct) and is the only zone precinct in the MBRC planning scheme which envisages both High Impact and Special Industry uses.

Existing supply, recent take up and projected future demand (16.5ha by 2051) for Restricted Industry is limited. However, it is also acknowledged that potential opportunities and future demand for Restricted Industry (and other High Impact industry uses) may have been tempered by current policy settings in the MBRC planning scheme. Specifically, the precinct at Boundary Road, Narangba includes several established High Impact and Special industry uses, which until the commencement of the Narangba Innovation Precinct TLPI were located in the GI zone precinct. The GI zone precinct does not envisage Special industry uses and only envisages High impact Industry uses where these achieve a minimum separation distance of 500m to an existing or approved sensitive land use or sensitive zone. Further, establishing High Impact industry uses in the GI zone precinct is subject to the higher order Impact Assessment, except for batching or manufacturing of concrete. Accordingly, there is a potential that this policy setting has limited recent opportunities for High Impact industry uses.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

The introduction of the Narangba Innovation Precinct TLPI has sought to address the above policy issue, albeit temporarily until such time further planning investigations are completed. The TLPI facilitates greater protection of established High Impact industry and Special Industry uses, as well as encouraging opportunities for new High Impact industry in certain parts of the Boundary Road, Narangba precinct, beyond the current extent of the Restricted Industry zone precinct. Whilst the TLPI is in place, Council are undertaking Narangba Innovation Precinct Investigations to gain insights that will guide future decision making on industry operations within the precinct and development in surrounding neighbourhoods.

Aside from the Boundary Road, Narangba precinct there are few instances of High Impact industry occurring within the GI zone precinct, with one identified example being an asphalt plant (DA/39821/2019/V2L) in the Brendale precinct.

This raises a land use planning issue around the extent to which potential high impact industry uses should be accommodated in the MBRC region in the future.

Given the difficulty in establishing new Restricted Industry precincts (particularly in achieving required separation distances), along with the limited projected demand for future Special industry and High Impact industry uses, it may be prudent for Council to accommodate potential future High Impact industry uses in appropriately located areas of land within the GI zone precinct. In doing so, a level of land use flexibility, not provided by the Restricted Industry zone precinct, would be retained should demand for High Impact industry uses not eventuate.

This investigation has identified Elimbah East as the only current future area of GI land supply, which provides a viable location for potential High impact industry uses, which are capable of achieving a 500m separation distance to sensitive uses or zones. To support this opportunity around Elimbah East, land use planning refinements could be made to the strategic framework to provide a greater level of certainty around the appropriateness of High Impact industry uses in these locations. At present, the strategic framework contains limited reference to High Impact industry in locations outside of Narangba, as demonstrated by the below specific outcomes of the Strategic framework:

- *Specific Outcome 3.13.3.5(3) - Employment location* – High Impact industrial uses and associated business activities are consolidated in the Narangba industrial estate east of the Bruce Highway, and
- *Specific Outcome 3.13.2.5(2) - Employment location* – The Enterprise and employment areas located at Elimbah, Caboolture, Morayfield east of the Bruce Highway and Caboolture West accommodate low and medium impact uses and associated business activities.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

- **3.14.12 Element – Enterprise and employment place type** – High impact uses will occur in specified locations well buffered from incompatible uses. High impact uses only occur in Brendale, Narangba and Elimbah East in specific precincts.

Recommendation:

To facilitate potential future High Impact industry opportunities in the northern portion of the MBRC region, it is recommended that Council:

- Identify and actively monitor land within the GI zone precinct with a 500m separation distance to sensitive uses or zones, in particular at Elimbah East.
- Review the strategic framework, with a particular focus on the specific outcomes in themes 3.3.5 Employment Location, 3.3.11 Planning Area Structuring and 3.3.12 Moreton Bay Regional Council Place Model, to incorporate clear outcomes on the intent and appropriate potential locations for High impact industry uses within the enterprise and employment area at Elimbah East.

Whilst it is noted the Industry zone code (GI precinct) does not currently include any location specific provisions, where an intent for High impact industry uses at Elimbah East is established and integrated into the Strategic Framework, equivalent outcomes may also be incorporated into the Industry zone code (GI precinct) for completeness.

Timing: Short to medium term (2-4 years), particularly following the completion of the Narangba Innovation Precinct Investigations.

12.3 Clear Planning Intent for Important Areas of Future Employment Land Supply

Part 2A of this investigation identifies that the majority (448.9ha or 69%) of Effective Supply is located in the northern region of the MBRC area. In particular, two distinct locations are identified as key contributors to the future employment land supply of the region:

- **Elimbah East** contributes 224ha of GI and 9ha of Light Industry supply; and
- **North East Business Park** provides for 120ha of MIBA supply.

Importantly in the context of future employment land supply, if the development of the above areas is not realised consistent with current and expected zoning, the Effective Supply of General Industry and MIBA zoned land would fall to 9-years and 12-years of supply respectively (below the ShapingSEQ 15-year minimum threshold).

The strategic framework of the MBRC planning scheme currently identifies each of the above areas as an enterprise and employment area and contains strategic and specific outcomes outlining the intended role and function of the above areas, as identified in the below Table 12.2.

Table 12.2 - Strategic framework outcomes relevant to key areas of future employment land supply

Strategic framework section	Strategic framework outcome	Comment
3.7.2 Strategic Outcome - Maximise the	6. Major locations for enterprise and employment at Brendale, North Lakes, Clontarf, Narangba, Burpengary, Morayfield, Caboolture and	This outcome acknowledges the role of Caboolture West as a major location for

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Strategic framework section	Strategic framework outcome	Comment
opportunities for development of existing places of employment and business activity	<i>Caboolture West continue to be developed, each with an appropriate mix of compatible uses ranging from low, medium to high impact industry and related business activities as specified in the relevant planning area to service population and business growth in the region while minimising the potential impacts and risks to adjacent areas</i>	enterprise and employment, but does not acknowledge areas at Elimbah East and North East Business Park.
3.7.3 Strategic Outcome - Location of new economic activities	<i>2. Council will seek to provide an adequate supply of additional land appropriately located to meet the needs of industry and related businesses and suitably serviced for a range of future business and industrial purposes across Moreton Bay including land located east of the Bruce Highway at the North East Business Park, Elimbah East, Burpengary East, Caboolture West and investigating the opportunity to provide additional land for appropriate industry and related businesses west of the Bruce Highway at Narangba, to help meet the 70% employment target over the longer term</i>	This outcome outlines the importance of Elimbah East, North East Business Park and Caboolture West in contributing to future employment land supply for business and industrial.
3.13.2 Element - Caboolture planning area	<i>3. Enterprise and employment areas east of the Bruce Highway at Morayfield, Caboolture and Elimbah and a new enterprise and employment area in the Caboolture West growth area</i>	This outcome acknowledges the role of the above identified areas as Enterprise and employment areas.
Specific Outcome 3.13.2.5 - Employment location	<i>2. The Enterprise and employment areas located at Elimbah, Caboolture, Morayfield east of the Bruce Highway and Caboolture West accommodate low and medium impact uses and associated business activities; and</i>	This outcome and statement provide some direction on the high-level land use intent of the Elimbah East enterprise and employment areas.
3.14.12 Element - Enterprise and employment place type	<i>High impact uses will occur in specified locations well buffered from incompatible uses. High impact uses only occur in Brendale, Narangba and Elimbah East in specific precincts.</i>	However, there is a level of inconsistency / ambiguity between the outcome and statement, with specific outcome 3.13.2.5(2) referring to an intent for low and medium impact uses, whilst the statement references to a potential for high impact industry in specific precincts. Further, the strategic framework provides no further guidance

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Strategic framework section	Strategic framework outcome	Comment
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on where these 'specific precincts' exist.

Acknowledging the land supply findings of this investigation and considering the above strategic framework outcomes and statements, it is recommended that refinements be made to the strategic framework to improve clarity around the intended role and land use outcomes of the employment and enterprise areas at Elimbah East, North East Business Park and Caboolture West.

Recommendation:

Based on the above, we recommend the strategic framework would benefit from refinements to:

- Emphasise the importance of the employment and enterprise areas at Elimbah East and North East Business Park in delivering employment land to meet the future needs of industry and related businesses.
- Improve the clarity around the intended high-level land use outcomes for these important areas of future supply, with a focus on clarifying appropriate areas where High Impact industry uses could be located within Elimbah East; and
- Strengthen the intended role and function of the employment and enterprise areas at Elimbah East and North East Business Park, with a particular focus on protection from incompatible land uses.

Timing: Medium to long term (3-5+ years) as part of the work being undertaken to scope a new planning scheme and further planning for Caboolture West.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

12.4 Diversify Industrial Growth Fronts

The municipality currently has limited options in its supply framework for new areas of greenfield industrial supply to be developed. In effect, Elimbah East represents the only new greenfield area for GI that is yet to come online within the framework of Effective Supply (i.e. supply that is appropriately zoned and is able to be serviced). Likewise, North East Business Park is the only new greenfield area to come online for MIBA.

Accordingly, MBRC currently faces an 'eggs in one basket' industrial land supply situation for new GI and MIBA supply that is yet to be developed.

The existing framework of Effective Supply could be affected if the existing quantum of GI and MIBA supply identified at Elimbah East and North East Business Park respectively, is reduced or not able to be delivered.

Recommendation:

MBRC should commence a process to assess and identify potential additional GI and MIBA supply options to diversify future industrial land supply and mitigate risks associated with an 'eggs in one basket' land supply situation.

Timing: Short to medium term (1-4 years), acknowledging the quantum of time to undertake the necessary land use and infrastructure planning and deliver a greenfield supply area, it is recommended that this investigation should commence in the short term but will progress into the medium term and potentially longer term.

12.5 The MBRC Place Model and ShapingSEQ

At present, the strategic framework of the MBRC planning scheme and in particular theme 3.14 MBRC place model, applies a singular place type classification to all major employment land areas, being the *enterprise and employment areas place type*. It is acknowledged that a level of distinction on the intended outcomes for each enterprise and employment area is provided through the specific and strategic outcomes of the strategic framework, in particular through theme 3.13 Planning Areas. Considering the findings of this investigation, a greater level of clarity on the distinct role and planning intent for specific enterprise and employment areas should be provided within the strategic framework.

Further, ShapingSEQ identifies 'Major enterprise and industrial areas' at:

- Narangba, as part of the North Lakes–Mango Hill Regional Economic Cluster
- Brendale, as part of the Strathpine–Brendale–Petrie Regional Economic Cluster
- Morayfield, as an individual major enterprise and industrial area
- Elimbah (East), as an individual major enterprise and industrial area.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Acknowledging ShapingSEQ was finalised after commencement of the MBRC planning scheme, there is an opportunity to establish distinct or tailored outcomes relevant to the major enterprise and industrial areas identified within ShapingSEQ at Elimbah East, Brendale, Morayfield and Narangba.

Recommendation:

In considering the precinct specific findings of Part 2 of this investigation, and the major enterprise and industrial areas identified in ShapingSEQ, an opportunity has been identified to refine the outcomes associated with the enterprise and employment areas place type, with a focus on:

- Providing greater clarity around the intent, role and intended land uses of the major enterprise and industrial areas identified in ShapingSEQ.
- Clarifying the role of the major enterprise and industrial areas identified in ShapingSEQ from other Enterprise and employment areas within the MBRC place model; and
- Reviewing and identifying opportunities to implement the relevant elements, strategies and sub-regional directions within ShapingSEQ, including the strategies within Goal 2, Element 5: Major enterprise and industrial areas.

Timing: Short to medium term (1-3 years) as part of the work being undertaken to scope a new planning scheme.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

12.6 Other Relevant MBRC Planning Scheme Considerations**12.6.1 Planning flexibility in innovation areas**

In promoting opportunities for innovation through the MBRC planning scheme, there is a need to achieve a balance between flexibility and clarity, to ensure the planning scheme does not unnecessarily limit opportunities for contemporary industrial uses and innovations within employment areas; while also ensuring a level of certainty in relation to the intended land use and built form outcomes, in order to maintain market investment confidence.

For example, whilst it may be relevant to implement a clear built form controls (e.g. maximum building height) as examples within the Industry zone code, corresponding Overall or Performance Outcome should allow for flexibility to facilitate innovative outcomes (e.g. an increase building height may be appropriate where necessary to allow for a specific advanced manufacturing use) and avoid being solely focussed on retaining existing 'predominant industrial character of the precincts'

Recommendation:

Based on the above, the MBRC planning scheme should reflect a best practice and contemporary approach to employment land with regard to assessment benchmarks, namely zone codes in the case of the MBRC planning scheme, incorporate land use intents and development requirements (e.g. building height and floor space parameters) that are aligned to contemporary industrial uses and built form typologies.

Timing: Ongoing.

12.6.2 Closer integration of planning scheme with infrastructure preparation, delivery and funding.

Critical to the delivery of employment land supply in the MBRC region is the timely and efficient delivery of supporting urban civil infrastructure.

Recommendation:

Informed by the land supply and demand finding of this investigation, Council should investigate opportunities to improve alignment between development of future additional employment land supplies and assumptions made around the provision of supporting civil infrastructure in the Local Government Infrastructure Plan (LGIP) of the MBRC planning scheme.

Note: the scope of investigations regarding the provision and timing of civil infrastructure is a separate consideration to the scope of this investigation.

Timing: Short to medium term (1-4 years), relevant infrastructure planning will underpin the feasibility and deliver of any additional supply area, therefore this recommendation should be aligned to the investigation of additional employment land supply areas.

12.6.3 Strategic planning directions for health precincts to facilitate the ongoing development of health clusters.

Some clustering of health facilities is already occurring around the Caboolture Hospital and Redcliffe Hospital Precincts. Locational factors driving this clustering and the development of complementary uses health uses includes proximity to demand generators such as hospitals, aged-care facilities, and schools.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Recommendation:

Investigate refinement of planning controls applicable to land proximate hospitals to assist in facilitating and encouraging clustering of allied health and medical uses.

Note: consideration of detailed strategic planning directions for health precincts is outside the scope of this investigation.

Timing: Medium-term (3-5 years).

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

13 Industrial Land Monitoring

This chapter recommends actions relating to the ongoing monitoring of industrial land demand, supply and take-up.

13.1 Enhance and Update VUT Databases

The value of the VUT databases as a core dataset to enable a thorough understanding of demand, supply and take-up of industrial land in MBRC has been demonstrated throughout the investigation. In addition, the VUT databases have allowed a bottom-up approach to employment projections.

Nevertheless, the VUT databases have some inherent weaknesses, including the reliance on aerial imagery to assess the VUT status of particular land parcels, the lack of detail about built form, and the nature of businesses operating on industrial land.

These weaknesses could be addressed by undertaking a detailed on-the-ground census of all industrial zoned land parcels in the municipality either at the one time or on a five-year rolling basis. The results of this census would not only improve the value of the VUT databases, but also add to Council's industrial market intelligence capabilities.

Recommendation:

MBRC to prepare a field survey instrument to capture information about all industrial land parcels in the municipality covering, but not limited to:

- A clear classification of each parcel into Vacant, Underutilised or Taken-up.
- On occupied sites:
 - Type of industry operating classified using ABS ANZSIC codes
 - Whether industrial activities are classified as high, medium or low impact
 - Built form (e.g., single/multiple storeys, age and condition)
 - Gross Floor Area of buildings; and
 - Whether buildings are occupied or vacant.

MBRC conducts a census of all industrial land supply in the municipality, either once every five years or on a five-year rolling basis.

The information from the census of industrial land be integrated into the VUT databases.

Timing: Short term (1-2 years).

13.2 Conduct Major Industrial Land Study in the Next One to Two Years and Subsequently at Least Every Five Years

A key goal of this investigation was to update Council's industrial land supply and demand knowledge base so as to inform policy, strategic and statutory planning.

The industrial land market will continue to evolve, in view of: COVID-19 economic impacts; changes in the type, scale and operating characteristics of business requiring industrial land; infrastructure initiatives; and competitive forces outside MBRC's boundaries. Therefore, to continue to inform policy, strategic and statutory planning, there will be a need to conduct a significant industrial land study, such as the UAELI in future years.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Given recent industrial land take-up (2019 to 2021) has been significant, a revised demand assessment examining changes to the industrial sector should be undertaken in the next one to two years. This will place MBRC in a strong position to respond to changes in the industrial sector associated with COVID-19 as well as broader structural changes.

A key risk in the preparation of successive industrial land studies is if definitions of important modelling inputs and outputs, methodologies, and the level of detail covered in different reports are not consistent. These inconsistencies make comparing the results of different studies a difficult and problematic task.

Recommendation:

MBRC to conduct a significant industrial land study in the next one to two years, and subsequently every five years.

The brief for these studies specifies that significant definitions, methodological approach and coverage kept consistent to enable the results of successive studies to be readily compared.

This includes following established data carpentry conventions in the production, processing, and analysis of the VUT databases.

Timing: Short-term (1-2 years) and ongoing.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

14 Specific Precincts

This chapter recommends actions arising from analysis in the report relating to specific zone precincts.

14.1 Secure Future Supply of Industrial Land at Elimbah East and North East Business Park

Focusing on demand for GI and MIBA land under the Base Case, if these two areas were not reserved for industrial use:

- The Effective Supply of GI zoned land at the municipal level would be approximately **9-years** at 2021, and already below the 15-year minimum threshold.
- The Effective Supply of MIBA zoned land at the municipal level would be approximately **12-years** at 2021, and already below the 15-year minimum threshold.

The importance of Elimbah East as a source of future supply of GI zoned land is further highlighted by the adequacy of supply analysis, which concluded that, under Base Case demand projections, GI demand would be pushed to Elimbah East by 2028 at the latest. Similarly, North East Business Park is projected to be needed for MIBA industrial uses by around 2026.

Alternative schemes for both Elimbah East and North East Business Park have been proposed by landowners, which if approved, would reduce the future supply of GI and MIBA land. Complex considerations, including civil infrastructure provision and alignment with ShapingSEQ and other planning policies, factor into decisions about future land uses at both precincts.

These issues need to be resolved in the short-term, especially given lead times to prepare sites for occupation by industrial tenants before the end of the decade.

Recommendation:

MBRC resolves the land use mix at both Elimbah East and North East Business Park as an immediate priority, in view of their significance to future industrial land supply and the likelihood that both precincts will be needed to accommodate industrial businesses before the end of the decade.

Timing: Short term (1-2 years).

14.2 Investigate Redevelopment Opportunities at Brendale and Boundary Road Narangba

Established industrial precincts at Brendale and Boundary Road Narangba contain, respectively, 41% and 31% of NVL in the southern region. The proximity of Brendale to the Australia Trade Coast, and the existing base of industrial skills means that it will continue to make significant contributions to the economy of the municipality, even as the emphasis of economic development shifts to the northern region.

As noted, the only remaining supply in the Restricted Industry zoned precinct in MBRC is located at Boundary Road, Narangba.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Consideration of the potential contribution of renewal and redevelopment to future supply was out of the scope of this study. However, given the age and strategic importance of, in particular, Brendale and Boundary Road Narangba, it is an issue that should be better understood.

Recommendation:

MBRC initiates an assessment of renewal and redevelopment opportunities in existing industrial estates, in particular, at Brenda and Boundary Road Narangba, to evaluate the potential that redevelopment could contribute to future industrial land supply.

Timing: Medium term (3-5 years).

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

15 Economic Development

This chapter recommends actions arising from analysis in the report relating to economic development.

15.1 Continue to Build Local Industrial Property Market Intelligence Capabilities

The economic development team at MBRC is likely to have a critical role in attracting business to the municipality's industrial land, creating well-paid and secure employment opportunities for residents, and generating economic growth. The transition to a more sophisticated economy, partly through advanced manufacturing is a key pillar of the REDS 2041. This transition will require Council to have deep links with the private sector, where at least 50% of future jobs will be created.

The industrial property market in MBRC has specific characteristics and, as noted in Chapter 4 and elsewhere, is changing. Statistical information in the VUT databases about demand, supply and take-up of industrial land MBRC would be complemented by less formal local market intelligence about industrial property trends. Local market intelligence would include, but not be limited to:

- Industrial land sales and prices
- Enquiries from prospective tenants about industrial land availability, including the likely scale of operations, built form and infrastructure requirements
- Activities of significant institutional industrial property companies
- General trends in the industrial property sector that influence the local market.

Gathering local market intelligence would likely involve:

- Subscriptions to relevant industrial publications and news channels as well as focussed internet searches
- Maintaining regular communication with local industry groups to add to intelligence gleaned from published sources
- Importantly, developing communication channels with property industry professionals, particularly commercial real estate agents.

Local market intelligence gathering capabilities are already a priority of the MBRC economic development team. Given the value that local market intelligence can add to policy, planning and decision making, these capabilities will need to be prioritised and fully supported.

Recommendation:

MBRC prioritises local industrial property market intelligence gathering to complement information formally maintained in VUT databases.

Timing: Short term (1-2 years) and ongoing.

15.2 Monitor Competing Industrial Land Markets

Industrial land in Moreton Bay is part of a competitive landscape that extends well beyond its boundaries. As noted in Chapters 3 and 4, land availability, price, connecting infrastructure, and

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

proximity to suppliers and customers are important features of competing industrial estates in Brisbane, Logan, on the Sunshine Coast and in fast developing Ipswich.

Industrial development can exhibit strong clustering characteristics as noted in the Chapter 8. If an intermodal freight hub was established at Elimbah East, it would likely attract significant logistics and warehousing businesses seeking cost-efficiencies.

Having a solid understanding of the trends in these competing industrial land markets will sharpen MBRC's appreciation of the relative strengths and weaknesses of the industrial land offering in the municipality and inform targeted economic development activities.

MBRC should extend industrial property market intelligence gathering to include monitoring trends in competing locations, particularly in Brisbane, the Sunshine Coast, Ipswich, and Logan.

Recommendation:

MBRC should extend industrial property market intelligence gathering to include monitoring trends in competing locations, particularly in Brisbane, the Sunshine Coast, Ipswich, and Logan.

Timing: Short term (1-2 years) and ongoing.

15.3 Take a Leading Role in the Delivery of Innovation Infrastructure at The Mill at Moreton Bay

Another key pillar of REDS 2041 is innovation and entrepreneurship.

The Mill at Moreton Bay PDA is anchored by the University of Sunshine Coast Moreton Bay campus and contains Mill Innovation, a dedicated 'innovation precinct', as discussed in Chapters 4 and 11.

The Mill at Moreton Bay will likely provide an opportunity for innovation infrastructure to be delivered that can support innovation and entrepreneurship. Advanced manufacturing and medical/health are two sectors that could potentially benefit from infrastructure that supports stronger linkages between research and local industry, and supports skills training and start-ups.

As noted in the Chapter 4 discussion of place-based innovation, the success of innovation initiatives is dependent on a wide range of factors, but cross sectoral partnerships are critical. If, say, advanced manufacturing and health/medical sector were to be a focus of innovation initiatives at the Mill at Moreton Bay it will be important that local businesses and industry representatives have a seat at the table.

One particular suggestion is that the governance structure of university or innovation hub components delivered at the Mill at Moreton Bay PDA include an 'industry and advisory committee' which includes local business representatives from target sectors.

Recommendation:

MBRC take a leading role in delivering innovation infrastructure at the Mill at Moreton Bay and the establishment of governance structures capable of delivering an innovation agenda with linkages to local industry.

Timing: Short term (1-2 years).

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

15.4 Actively Advocate for Transport Infrastructure Initiatives with Government Authorities

As has been noted in this report, transport infrastructure is a critical component of industrial land markets. For example, an alternative north-south arterial to the west of the Bruce Highway or an intermodal freight hub at Elimbah East would significantly alter the focus of the industrial land market and create opportunities that would otherwise not materialise.

It is clearly in the interests of Council to be up to date on the progress of significant transport infrastructure initiatives. Further, Council should actively advocate for transport infrastructure initiatives where these initiatives will generate a positive and material economic benefit, particularly with regards to employment land.

MBRC should closely engage with government authorities regarding significant transport infrastructure initiatives, with a view to actively advocating for initiatives that will generate positive and material economic benefits.

Recommendation:

MBRC should closely engage with government authorities regarding significant transport infrastructure initiatives, with a view to actively advocating for initiatives that will generate positive and material economic benefits.

Timing: Long-term (5+ years) and ongoing.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Appendix 1: Employment Precinct Overview:

Supply Overview

Table A1.1 Supply Summary for Individual Precincts, 2021

	Total	Less	Plus	Gives	Less	Less	Gives	
Precincts	Total Precinct Area	Occupied**	Underutilised Land Available for Development	Gross Vacant Land	Constrained GVL	Greenfield Civil Infrastructure Allowance	Net Vacant Land	Effective Supply
Northern Region								
(01) Elimbah East	392.9	27.8	21.4	386.5	76.3	77.6	232.7	232.7
(02) Caboolture West*	117.4	-	-	117.4	5.1	28.1	84.2	-
(03) Sandstone Point	2.1	2.1	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	168.8	63.3	4.1	109.5	33.2	12.2	64.1	44.3
(05) Henzell Road Caboolture	47.6	38.9	8.2	16.9	5.9	0.3	10.7	10.7
(06) First Avenue Bribie Island	9.2	8.4	0.3	1.2	0.0	-	1.2	1.2
(07) PAC Morayfield	8.6	6.8	-	1.8	0.1	-	1.7	1.7
(08) North East Business Park	174.2	25.7	22.0	170.5	11.4	39.1	120.0	120.0
(09) Bruce Highway Burpengary	73.4	45.8	17.0	44.6	4.7	1.7	38.2	38.2
Sub-total	994.3	218.9	73.0	848.4	136.7	158.9	552.9	448.9
Southern Region								
(10) Old Gympie Road Narangba	138.2	79.1	1.9	60.9	31.4	3.8	25.7	25.7
(11) Deception Bay	4.0	3.3	0.1	0.8	-	-	0.8	0.8
(12) Deception Bay Road	23.4	5.6	4.4	22.2	5.5	-	16.7	16.7
(13) Boundary Road Narangba	267.4	180.4	24.6	111.6	43.7	3.9	64.0	64.0
(14) Scarborough Marina	14.8	14.8	-	-	-	-	-	-
(15) Newport	1.5	1.4	-	0.0	0.0	-	0.0	0.0
(16) Rothwell	3.8	3.0	-	0.8	0.1	-	0.7	0.7
(17) Kippa Ring	8.1	8.1	-	-	-	-	-	-
(18) Clontarf	66.8	61.8	2.5	7.5	3.5	-	3.9	3.9
(19) Petrie Mill*	2.7	2.1	-	0.6	-	-	0.6	0.6
(20) Paisley Drive Lawnton	44.2	37.8	4.4	10.8	4.6	0.7	5.5	5.5
(21) Brendale	452.6	314.6	25.9	163.8	61.9	17.2	84.8	84.8
(22) The Hills District	15.6	15.3	2.0	2.2	0.4	-	1.8	1.8
Sub-total	1,042.8	727.3	65.7	381.2	151.0	25.6	204.5	204.5
Total	2,037.2	946.2	138.6	1,229.6	287.7	184.5	757.4	653.5

Source: MBRC; Ethos Urban

Notes: *Names have been shortened

**Includes taken-up and underutilised parcels.

Figures have been rounded.

Instances where Effective Supply differs from NVL in individual precincts are highlighted

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table A1.2 Zone Precinct Summary for Individual Precincts, 2021

Precincts	General Industry			Light Industry			Mixed Industry And Business			Restricted Industry			Marine Industry			Total		
	T^	NVL	ES**	T^	NVL	ES**	T^	NVL	ES**	T^	NVL	ES**	T^	NVL	ES**	T^	NVL	ES**
Northern Region																		
(01) Elimbah East	1.6	223.6	223.6	4.8	9.1	9.1	-	-	-	-	-	-	-	-	-	6.4	232.7	232.7
(02) Caboolture West*	-	59.0	-	-	25.2	-	-	-	-	-	-	-	-	-	-	-	84.2	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-	-	-	-	2.1	-	-	2.1	-	-
(04) Bribie Island Road Caboolture	59.3	44.3	44.3	-	19.8	-	-	-	-	-	-	-	-	-	-	59.3	64.1	44.3
(05) Henzell Road Caboolture	6.0	0.5	0.5	19.2	9.1	9.1	5.5	1.2	1.2	-	-	-	-	-	-	30.7	10.7	10.7
(06) First Avenue Bribie Island	-	-	-	8.1	1.2	1.2	-	-	-	-	-	-	-	-	-	8.1	1.2	1.2
(07) PAC Morayfield	-	-	-	6.8	1.7	1.7	-	-	-	-	-	-	-	-	-	6.8	1.7	1.7
(08) North East Business Park	-	-	-	-	-	-	3.8	120.0	120.0	-	-	-	-	-	-	3.8	120.0	120.0
(09) Bruce Highway Burpengary	-	-	-	21.3	26.3	26.3	7.6	11.9	11.9	-	-	-	-	-	-	28.8	38.2	38.2
Sub-total	66.9	327.4	327.4	60.1	92.3	92.3	16.8	133.1	133.1	-	-	-	2.1	-	-	145.9	552.9	448.9
Southern Region																		
(10) Old Gympie Road Narangba	64.1	3.1	3.1	13.1	3.6	3.6	-	19.0	19.0	-	-	-	-	-	-	77.2	25.7	25.7
(11) Deception Bay	-	-	-	0.5	0.1	0.1	2.7	0.7	0.7	-	-	-	-	-	-	3.2	0.8	0.8
(12) Deception Bay Road	-	-	-	-	-	-	1.2	16.7	16.7	-	-	-	-	-	-	1.2	16.7	16.7
(13) Boundary Road Narangba	66.1	15.1	15.1	19.5	12.7	12.7	44.3	24.7	24.7	25.8	11.5	11.5	-	-	-	155.8	64.0	64.0
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-	-	-	-	14.8	-	-	14.8	-	-
(15) Newport	-	-	-	-	-	-	-	-	-	-	-	-	1.4	0.0	0.0	1.4	0.0	0.0
(16) Rothwell	-	-	-	3.0	0.7	0.7	-	-	-	-	-	-	-	-	-	3.0	0.7	0.7
(17) Kippa Ring	-	-	-	8.1	-	-	-	-	-	-	-	-	-	-	-	8.1	-	-
(18) Clontarf	26.5	3.1	3.1	32.8	0.9	0.9	-	-	-	-	-	-	-	-	-	59.3	3.9	3.9
(19) Petrie Mill*	-	-	-	-	-	-	2.1	0.6	0.6	-	-	-	-	-	-	2.1	0.6	0.6
(20) Paisley Drive Lawnton	-	-	-	23.6	5.5	5.5	9.8	-	-	-	-	-	-	-	-	33.4	5.5	5.5
(21) Brendale	245.3	59.6	59.6	26.0	18.9	18.9	17.4	6.3	6.3	-	-	-	-	-	-	288.7	84.8	84.8
(22) The Hills District	-	-	-	13.3	1.8	1.8	-	-	-	-	-	-	-	-	-	13.3	1.8	1.8
Sub-total	402.1	80.9	80.9	139.9	44.1	44.1	77.6	68.1	68.1	25.8	11.5	11.5	16.3	0.0	0.0	661.7	204.5	204.5
Total	468.9	408.3	408.3	200.1	136.4	136.4	94.4	201.2	201.2	25.8	11.5	11.5	18.4	0.0	0.0	807.6	757.4	653.5

Source: MBRC; Ethos Urban

Notes: *Name has been shortened.

**Effective Supply

^Taken, includes portion of underutilised lots not able to be developed.

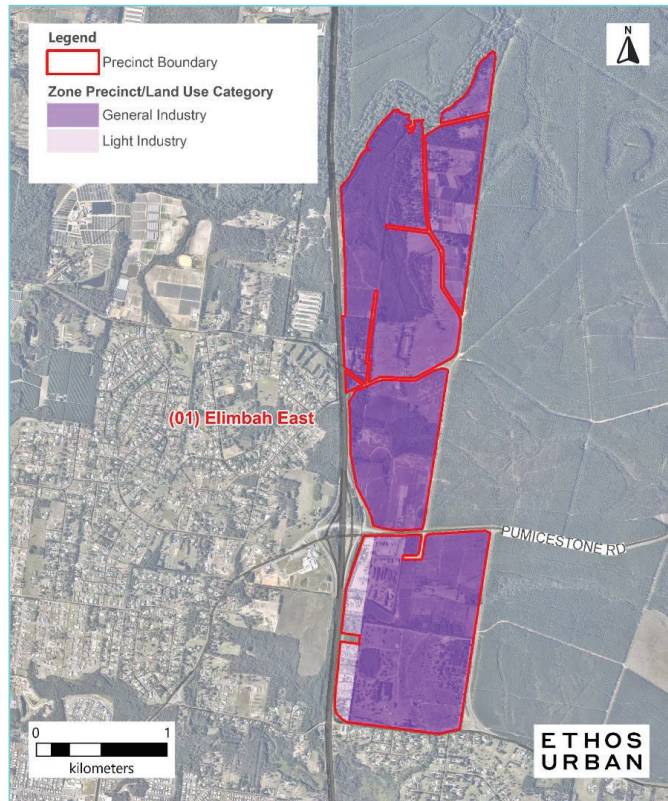
Figures have been rounded; Instances where Effective Supply differs from NVL in individual precincts are highlighted

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.1 Elimbah East, Land Use Categories



Source: MBRC, Ethos Urban

Precinct Name: (01) Elimbah East

Total Zone Land Area: 392.9ha

Net Vacant Land: 232.7ha

Location: Northern region, located adjacent to the Bruce Highway. The precinct is the northern-most Enterprise and Employment Area in MBRC. The regional inter-urban break adjoining the precinct to the north and east.

MBRC Planning Scheme Controls:

- Place Type – Enterprise and Employment Area
- Zone – Industry Zone (General Industry, Light Industry)

Land Use Mix: The precinct remains largely undeveloped and is surrounded by established forestry plantations to the east and north. There is a strong presence of rural production uses and activities, including a strawberry farm and nursery as well as an off-road race circuit. Adjoining the Bruce Highway and with direct access to the Pumicestone Road interchange, there are several existing industrial uses including a granite haulage, house removal and caravan sales use.

Strategic Attributes: Adjacent to the Bruce Highway, with an upgraded Pumicestone Road interchange completed in 2015, this precinct represents a strategic opportunity for the location of a mix of future industrial uses. The precinct includes a substantial amount of relatively flat, vacant and unconstrained land, adding to the strategic opportunity for future employment growth within the precinct.

Constraints: The precinct is largely unconstrained for an undeveloped area. Some environmental, flooding and waterway constraints, associated with Ningi Creek and Six Mile Creek, affect the middle and northern portions of the precinct respectively.

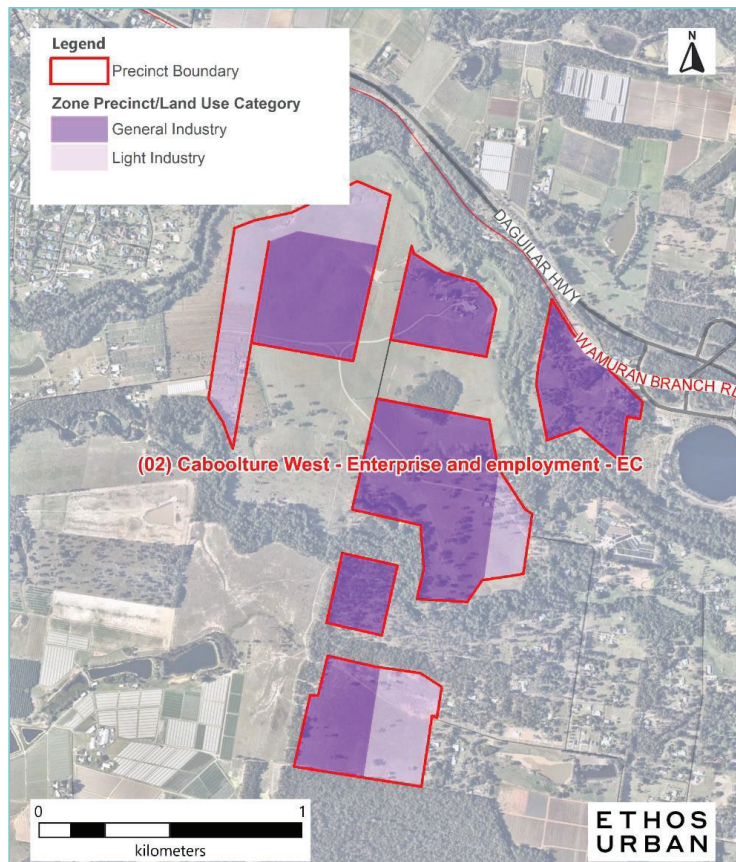
Average Consumption (2016-2019): 0.8ha per year.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.2 Caboolture West – Enterprise and employment - EC, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (02) Caboolture West – Enterprise and employment - EC

Total Zone Land Area: 117.4ha

Net Vacant Land: 84.2ha,
(not considered 'able to be serviced' and excluded from Effective Supply)

Location: Northern Region, located in the northern extent of the Caboolture West Growth Area. The precinct adjoins the D'Aguilar Highway, which is located immediately to the north.

MBRC Planning Scheme Controls:

- Place Type – Enterprise and Employment Area
- Zone – Industry (General Industry)
- Zone – Industry (Light Industry)
- Zone – Industry (Mixed Industry and Business)
- Zone – Centre (Specialised Centre)

Land Use Mix: At present, the precinct comprises predominantly vacant land, with no established employment focussed land use. Instead, the precinct currently comprises several rural properties.

Strategic Attributes: The precinct forms part of the wider Caboolture West Growth Area which represents the largest long-term growth area for the MBRC region. The precinct enjoys close proximity to the D'Aguilar Highway, which will provide connectivity between the precinct and the centres of Caboolture and Morayfield, as well as the Bruce Highway, which are located east of the precinct. These attributes provide a strategic opportunity for future long-term employment growth in the precinct.

Constraints: Several constraints impact upon the precinct and broader Caboolture West Growth Area, at a high-level these have been considered in the Place Type mapping which generally avoids highly constrained areas, but these constraints will require further consideration as part of future development.

Average Consumption (2016-2021): no take up over the period.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.3 Sandstone Point, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (03) Sandstone Point (Spinnaker Sound Marina)

Total Zone Land Area: 2.1ha

Net Vacant Land: 0.0ha

Location: Northern Region, located on the northern side of Bribie Island Road and adjoining the Pumicestone Passage with direct water access. Proximate to the Bribie Bridge, as well as the major entertainment and dining facility, Sandstone Point hotel.

MBRC Planning Scheme Controls:

- Place Type – Suburban Neighbourhood
- Zone – Industry Zone (Marine Precinct)

Land Use Mix / Role: The precinct comprises a small cluster of marine industry and related activities focussed on the Spinnaker Sound Marina, including a marine workshop, jet ski hire and a boat charter business, with strong focus on serving surrounding local coastal communities and visitors. Ancillary food and drink uses are also located within the precinct.

Strategic Attributes: The established marina and dry-dock facilities within the precinct, combined with the convenient access to Pumicestone Passage, has resulted in a small cluster of marine industry uses that provide a unique local service and employment opportunities. There is limited opportunity for future employment growth within this precinct due to the zero remaining NVL. A recent multiple dwelling development has been approved and constructed (Council ref: DA/29644/2014/VCHG/4) adjacent to the marina and the remaining vacant parcel within the precinct is approved for future stages of this residential development or a service station and food and drink outlet (Council ref: DA/38485/2019/V23N). This signifies an evolving function of the precinct, shifting to a greater lifestyle, food and entertainment focus.

Constraints: The precinct is relatively unconstrained but is impacted by some constraints associated with coastal hazards.

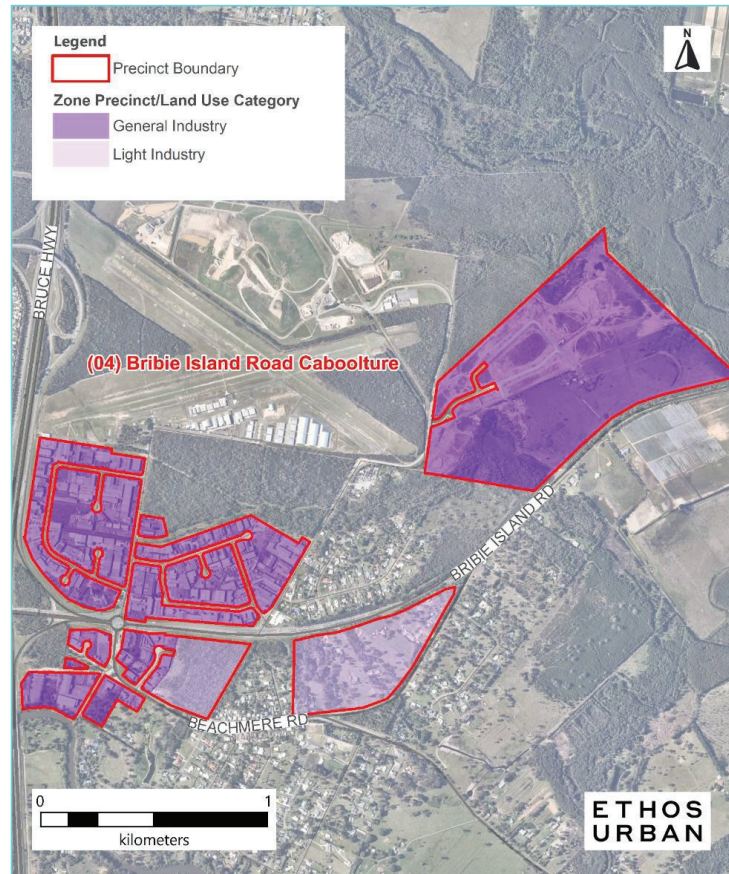
Average Consumption (2016-2021): 0.2ha per year.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.4 Bribie Island Road Caboolture, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (04) Bribie Island Road Caboolture

Total Zoned Land: 168.8ha

Net Vacant Land: 64.1ha

(19.8ha of which is not considered 'able to be serviced' and excluded from Effective Supply)

Location: Northern Region, located adjacent to the Bruce Highway and Bribie Island Road interchange to the west and the Caboolture Aerodrome to the north. The precinct is also strategically located in proximity to the Caboolture CBD to the west.

MBRC Planning Scheme Controls:

- Place Type – Enterprise and Employment Area & Coast and Riverlands
- Zone – Industry Zone (Light Industry Precinct, General Industry Precinct)

Land Use Mix: The precinct comprises a mix of light and general industry activities, business activities and some centre activities. Land uses reflect key industries, with a strong presence of uses focussed on marine and leisure (inc. manufacturing, sales and servicing for caravans, 4wds and cars). The precinct also contains several uses focussed on local trade and building supplies (inc. earth moving, equipment hire, cabinet making, powder-coating, timber and hardware supplies).

Strategic Attributes: The precinct is strategically located adjacent to the Bruce Highway, and proximate to the Caboolture Aerodrome and Caboolture CBD. These locational attributes ensure the precinct provides a key employment node for the northern region. There is a notable addition to the precinct currently being developed immediately west of the Caboolture Aerodrome, through an approved industrial subdivision (Council ref: DA/34556/2017/VCHG/1), with several subsequent development applications being lodged recently for a variety of general industry and warehouse uses. Some vacant land located within the Industry zone (Light industry precinct) is located on the southern side of Bribie Island Road.

Constraints: The precinct is affected by some waterway and flood constraints associated with tributaries of Caboolture River. Areas of environmental value are also identified over land south of Bribie Island Road.

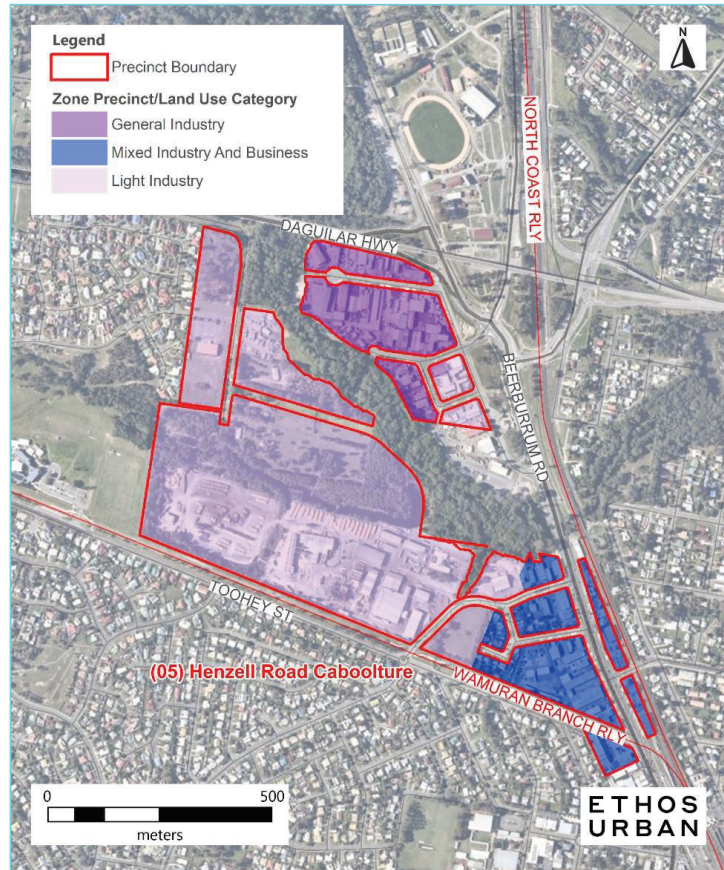
Average Consumption (2016-2021): 0.7ha per year.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.5 Henzell Road Caboolture, Land Use Categories



Source: MBRC, Ethos Urban

Precinct Name: (05) Henzell Road, Caboolture

Total Zone Land Area: 47.6ha

Net Vacant Land: 10.7ha

Location: Northern Region, located adjacent to Beerburum Road to the east and the D'Aguilar Highway to the North. The precinct is also located immediately north of the Caboolture CBD.

MBRC Planning Scheme Controls:

- Place Type – Enterprise and Employment Area & Coast and Riverlands
- Zone – Industry Zone (Light Industry Precinct, General Industry Precinct, Industry and Business Precinct)

Land Use Mix: The precinct exhibits a mix of light and general industry activities, business activities and retail activities (inc. pet store and fishing store). The precinct also contains a small pocket of established low density residential uses along Shell Street. Land uses within the precinct generally reflect a focus on vehicle and leisure associated uses (inc. sales and servicing for caravans, boating and cars) and uses focussed on local trade and building supplies (inc. hardware and building material suppliers). A sawmill (AKD Softwoods) anchors the south-west of the precinct. A recycling centre (Enviro Metal & Waste Recyclers) located in the north of the precinct.

Strategic Attributes: This precinct is proximate to the Caboolture CBD and the major road connections of D'Aguilar Highway to the north and Beerburum Road. The North Coast Railway Line adjoins the precinct to the east. This precinct provides an important local employment node, servicing surrounding residential catchments which are growing rapidly. There is limited vacant land in the precinct, however historical residential uses in the southern part of the precinct may transition to industrial activities in the future consistent with the precincts zone and place type designations.

Constraints: Environmental, flooding and waterway constraints, generally associated with the Lagoon Creek, impact the precinct and separation precinct into a distinct northern and southern sections.

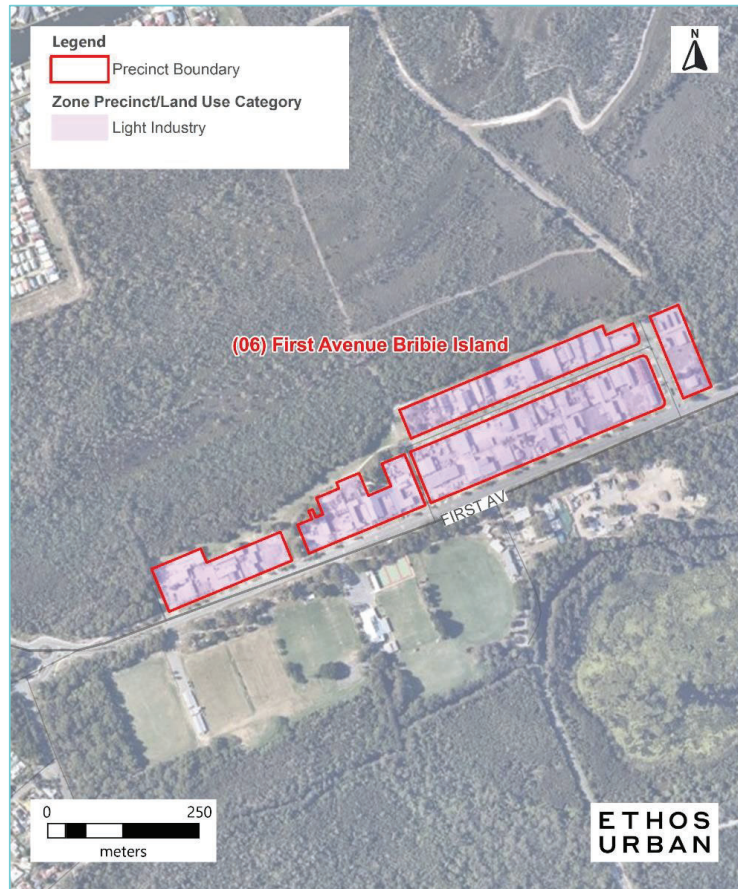
Average Consumption 2016-2021): 0.4 ha per year.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.6 First Avenue Bribie Island, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (06) First Avenue, Bribie Island

Total Zone Land Area: 9.2ha

Net Vacant Land: 1.2ha

Location: Northern Region, located on First Avenue, a main road of the island which links directly to the Benabrow Avenue and the Bribie Bridge.

MBRC Planning Scheme Controls:

- Place Type – Enterprise and Employment Area
- Zone – Industry Zone (Light Industry Precinct)

Land Use Mix: The precinct comprises a mix of light industrial and business activities, servicing the local Bribie Island community. There is a strong presence of workshops, parts suppliers and sales for road and marine vehicles, as well as a pontoon manufacturer, reflecting the coastal location and lifestyle of the locality. The precinct also contains several local trades and engineering suppliers, including landscaping supplier, steel fabrication and a hire shop. Reflecting its strong local service focus, the precinct also accommodates several uses which are less traditional to industrial areas. These include a place of worship, indoor sport and recreation (CrossFit) and local cinema.

Strategic Attributes: The precinct is well-established and offers flat and generally unconstrained sites, with direct access to First Avenue. The location on Bribie Island, well separated from major transport infrastructure such as the Bruce Highway, means the precinct will retain an ongoing local service focus. The locational attributes and lack of vacant land parcels within the precinct limit opportunity for substantial future employment growth or expansion.

Constraints: The precinct is relatively unconstrained; however its immediate surrounds are heavily constrained by flood and bushfire hazards and areas of environmental value. This will constrain spatial expansion of the precinct.

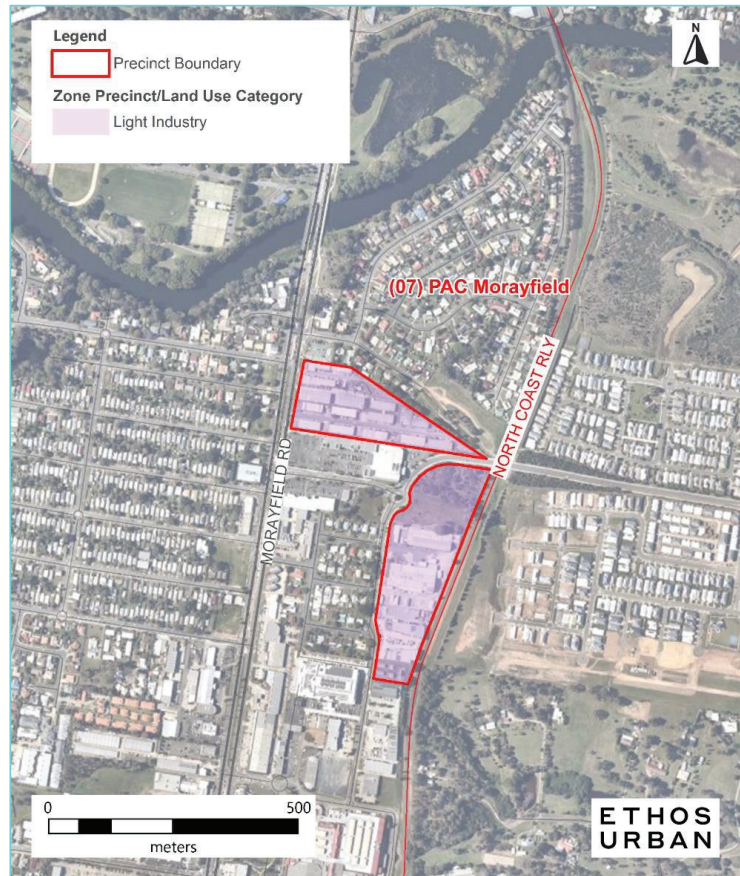
Average Consumption (2016-2021): no take up over period.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.7 PAC Morayfield, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (07) PAC Morayfield

Total Zone Land Area: 8.6ha

Net Vacant Land: 1.7ha

Location: Northern Region, located at the north-western fringe of the Morayfield centre. The precinct is access from Morayfield Road to the west and also adjoins the North Coast Railway Line, which is located immediately to the east.

MBRC Planning Scheme Controls:

- Place Type – Activity Centre
- Zone – Industry Zone (Light Industry Precinct)

Land Use Mix: The precinct comprises a small mix of light industry and business uses. Land uses in the precinct are focussed on local services, with a focus on vehicle associated uses (inc. smash repairs and mechanics) and building and trade supplies (inc. electrical supplies, glass and mirror shop). Reflecting its close proximity to the Morayfield Centre, the precinct also includes some retail and business focussed uses (inc. aquarium shop, print shop and offices).

Strategic Attributes: The precinct is well-established, with limited vacant land or opportunity for future expansion given its interface to adjoining sensitive land uses, the Morayfield Centre and the North Coast Railway Line. The integration of the precinct at the fringe of the Morayfield Centre presents future opportunities for an increased mix of business and light industry uses, which may improve urban environment and the transition to surrounding residential areas to the north and west of the precinct. Proximity to Morayfield Road is also a key attribute of the precinct, providing the precinct with accessibility to local residential populations in the surrounding area.

Constraints: The precinct has limited constraints, which is reflected in its well-established nature. It is noted that the precinct is bordered by sensitive land uses to the west and the North Coast Railway Line to the east.

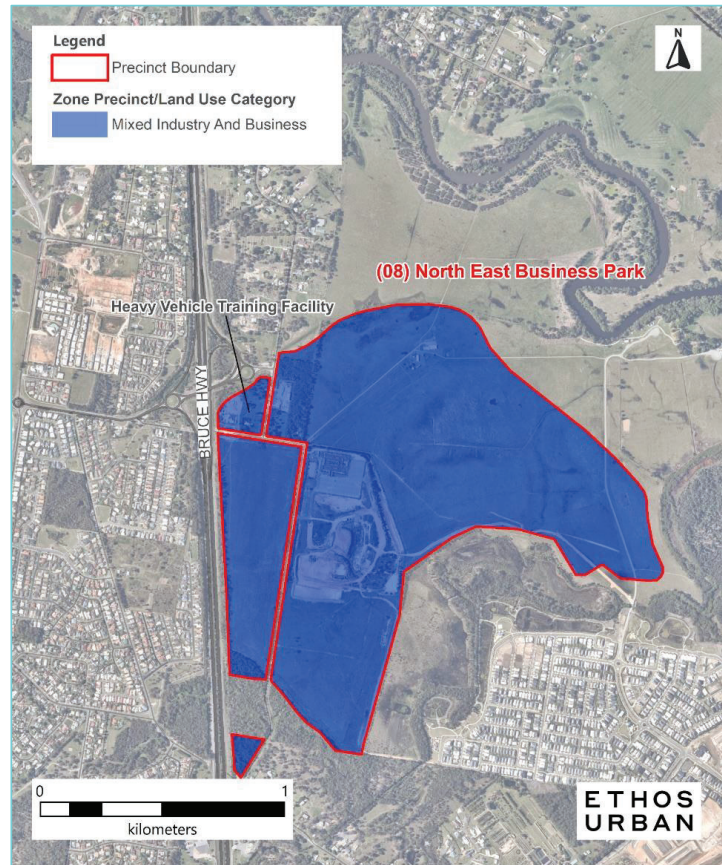
Average Consumption (2016-2021): no take up over period.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.8 North East Business Park, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (08) North East Business Park

Total Zone Land Area: 174.2ha

Net Vacant Land: 120.0ha

Location: Northern Region, located adjacent to the Bruce Highway. The precinct is immediately west of the emerging 'North Harbour' community and future North Harbour PDA. The precinct also enjoys proximity to the Morayfield Centre west of the Bruce Highway.

MBRC Planning Scheme Controls:

- Place Type – Enterprise and Employment Area
- Zone – Industry Zone (Mixed Industry and Business Precinct)

Land Use Mix: The vast majority of the precinct is currently vacant land, with no established land use. The small pocket of land located north of Nolan Drive contains a heavy vehicle training facility and landscape supplies yard, which form some of the only establish uses within the precinct. Currently, land to the east of Nolan Drive is also used for as a temporary 'market' area containing an array of food vendors operating on a Friday and Saturday night.

Strategic Attributes: The Bruce Highway directly adjoins this precinct to the west, and provides the precinct a high level of accessibility. The precinct comprises flat, vacant and generally unconstrained land. These attributes provide a strategic opportunity for future employment growth in the precinct. Further, the precinct is located in close proximity to growing residential catchments, predominately associated with 'North Harbour'.

Constraints: Environmental, flooding and waterway constraints, generally associated with a tributary of the Caboolture River, impact the norther portion of the precinct.

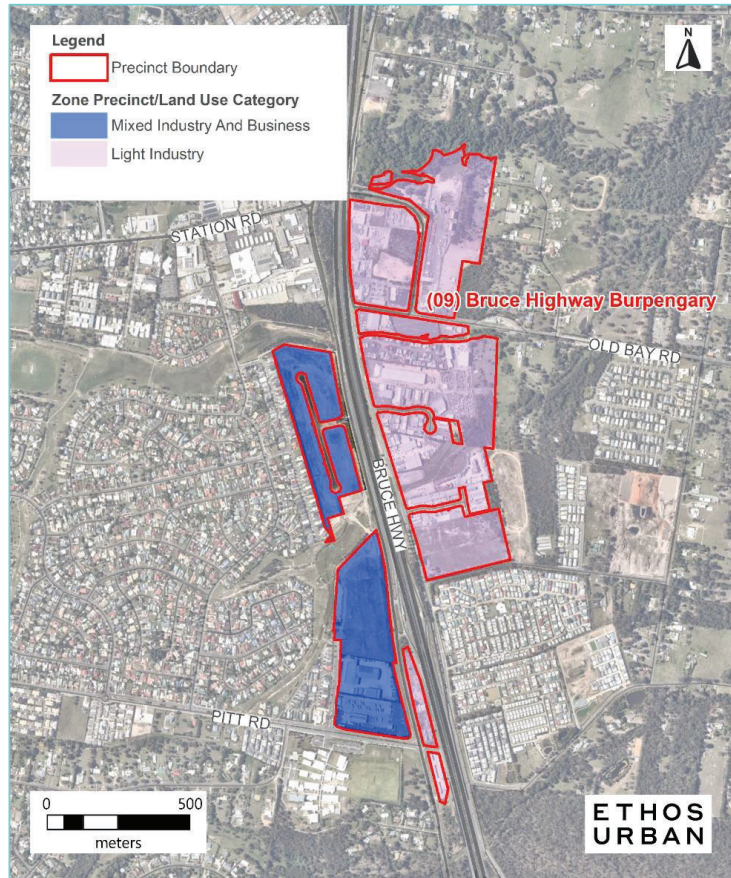
Average Consumption (2016-2021): 0.3ha per year.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.9 Bruce Highway Burpengary, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (09) Bruce Highway, Burpengary

Total Zone Land Area: 73.4ha

Net Vacant Land: 38.2ha

Location: Northern Region, the precinct is bisected by the Bruce Highway and is located immediately south and east of the Burpengary centre.

MBRC Planning Scheme Controls:

- Place Type – Enterprise and Employment Area & Coast and Riverlands
- Zone – Industry Zone (Light Industry Precinct, Mixed Industry and Business Precinct)

Land Use Mix: The precinct comprises a mix of light industry and business activities. Land uses are currently focussed on marine and leisure industries (inc. sales and servicing for caravans, boats and cars). The precinct also contains several uses focussed on trade and building supplies (inc. kitchen manufacturing, construction company and a tile supplier). There is also a hotel (Burpengary Tavern), produce store and shipping container sales and hire premises contained within the precinct.

Strategic Attributes: This precinct is strategically located adjacent to the Bruce Highway, affording the precinct with high levels of accessibility and connectivity. Some vacant land located within the Industry zone (Mixed industry and business precinct) and Industry zone (Light industry precinct) are located on the western and eastern side of the Bruce Highway respectively. There is a notable addition (approximately 37 hectares) to the precinct currently being developed immediately west of the Bruce Highway, commonly referred to as Motorway Business Park Burpengary, which will deliver a range of mixed industry and business activities.

Constraints: The precinct is impacted by flooding and waterway constraints associated with tributaries of Burpengary Creek.

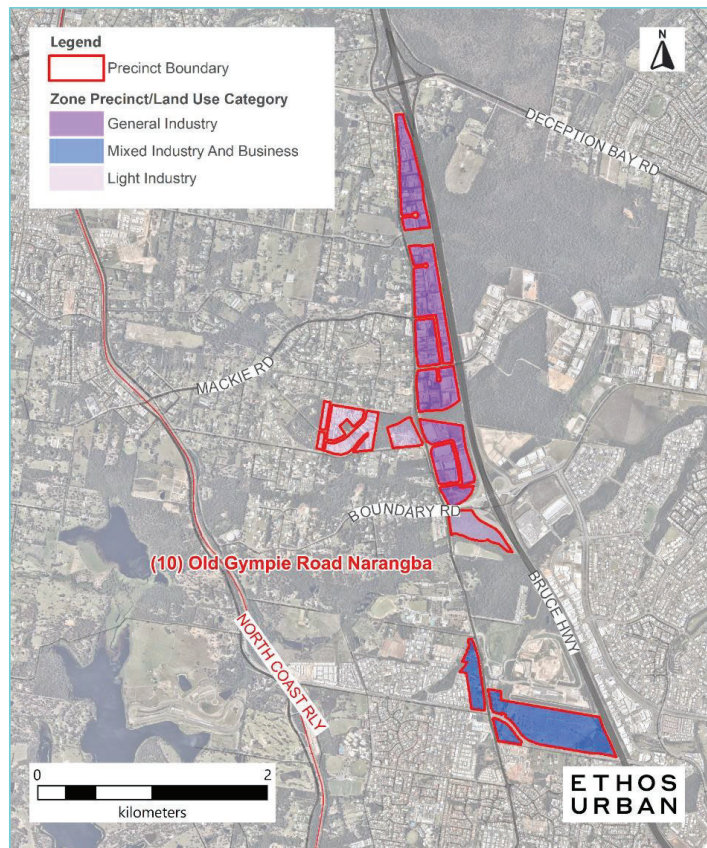
Average Consumption (2016-2021): 0.4ha per year.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.10 Old Gympie Road Narangba North Lakes, Land Use Categories



Source: MBRC, Ethos Urban

Precinct Name: (10) Old Gympie Road, Narangba North Lakes

Total Zone Land Area: 138.2ha

Net Vacant Land: 25.7ha

Location: Southern Region, the precinct extends along the Bruce Highway and is located between the centres of North Lakes and Burpengary.

MBRC Planning Scheme Controls:

- Place Type – Enterprise and Employment Area & Coast and Riverlands
- Zone – Industry Zone (Light Industry Precinct and General Industry Precinct)

Land Use Mix: The precinct comprises areas in the GI, LI and MIBA zone precincts. Land uses are heavily focussed on trade and building supplies with key tenants including Narangba Timbers, G.James Windows & Doors, Hy-tec Concrete & Aggregates and Bretts Trade Plumbing Supplies. The precinct also contains a number of manufacturers and heavy industry activities including concrete batching (Holcim Australia and Hy-tec Concrete & Aggregates), earth moving (e.g. Atlas Heavy Engineering) and more specialist manufacturers (e.g. Steelrod Pty Ltd, Finlay Screening & Crushing Systems, Doyle Sails Queensland and Fero Group Queensland) Pty Ltd). The GI area immediately north-west of the Bruce Highway-Boundary Road intersection is the 'Interchange Industrial Estate', which has been recently developed by ISPT. Key tenants include Cleanaway and Bunnings Trade Centre, reflecting a greater focus on larger scale warehousing and logistics.

Strategic Attributes: The precinct is centrally located in the Moreton Bay and a high-level of connectivity and accessibility is afforded by the Bruce Highway. The precinct, in concert with the Boundary Road Narangba employment area, forms one of the region's key industrial nodes. The vast majority of vacant land is in the MIBA zone precinct, with only a limited number of vacant land parcels in the GI zone precinct and to a lesser extent the LI zone precinct.

Constraints: Although the precinct is largely unconstrained, some areas are impacted by flooding, waterway and environmental constraints associated with Saltwater Creek and its tributaries.

Average Consumption (2016-2021): 1.3ha per year.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.11 Deception Bay, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (11) Deception Bay

Total Zone Land Area: 4.0ha

Net Vacant Land: 0.8ha

Location: Southern Region, the precinct extends along the Deception Bay Road in a strip arrangement. The precinct is embedded within Deception Bay, adjoining the Deception Bay District Centre. Established residential uses surround the precinct to the north, south and west.

MBRC Planning Scheme Controls:

- Place Type – Enterprise and Employment Area
- Zone – Industry Zone (Mixed Industry and Business Precinct)

Land Use Mix: At present the precinct contains a dispersed set of commercial uses, with limited industrial function. These include a service station and several food and drink outlets, as well as a laundromat and car rental business. These uses reflect a predominate local service and convenience function. This is similar to the adjoining district centre which comprises a mixture of shops, showrooms, community uses and a workshop.

Strategic Attributes: The precinct has access to Deception Bay Road, which provides a direct connection to the Bruce Highway. The precinct is also well-located in terms of proximity to the Deception Bay centre and surrounding residential catchments, ensuring it is highly accessible to surrounding local residents. The precinct also exhibits some vacant land parcels which provide opportunity for future growth within the precinct.

Constraints: The precinct is generally unconstrained. However, the limited depth of development sites within the precinct (approximately 70m) and the lack of existing consolidated access points to Deception Bay Road may present a constraint to further development within the precinct. Adjoining sensitive residential uses may also constrain certain uses from establishing within the precinct.

Average Consumption (2016-2021): 0.1ha per year.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.12 Deception Bay Road, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (12) Deception Bay Road

Total Zone Land Area: 23.4ha

Net Vacant Land: 16.7ha

Location: Southern Region, the precinct extends along Deception Bay Road which provides direct access to the Bruce Highway. The precinct is located at the western edge of Deception Bay and north of the Boundary Road industrial precinct, with the two precincts separated by part of Freshwater National Park.

MBRC Planning Scheme Controls:

- Place Type – Enterprise and Employment Area
- Zone – Industry Zone (Mixed Industry and Business Precinct) & Environmental Management and Conservation Zone

Land Use Mix: The precinct is currently largely undeveloped, comprising several established rural residential dwellings. Some industrial uses are dispersed through the precinct, including a vehicle workshop. The precinct also contains an established community use 'Your Town Deception Bay'. Recently (February 2020) land at 185 Deception Bay Road was sold with an approved 12 lot industrial subdivision. Whilst the approved lots have not been sealed or registered, build works associated with the subdivision have occurred, indicating potential for some mixed industrial and business development to proceed within precinct in the future.

Strategic Attributes: The precinct has direct access to Deception Bay Road and is also currently underdeveloped, with substantial portions of land which are clear of vegetation. These attributes present opportunity for future employment growth within the precinct.

Constraints: The precinct, in particularly the western portion, is impacted by bushfire, flooding constraints and some areas of environmental value. Further, the lack of existing consolidated access points to Deception Bay Road presents a further constraint to further development within the precinct.

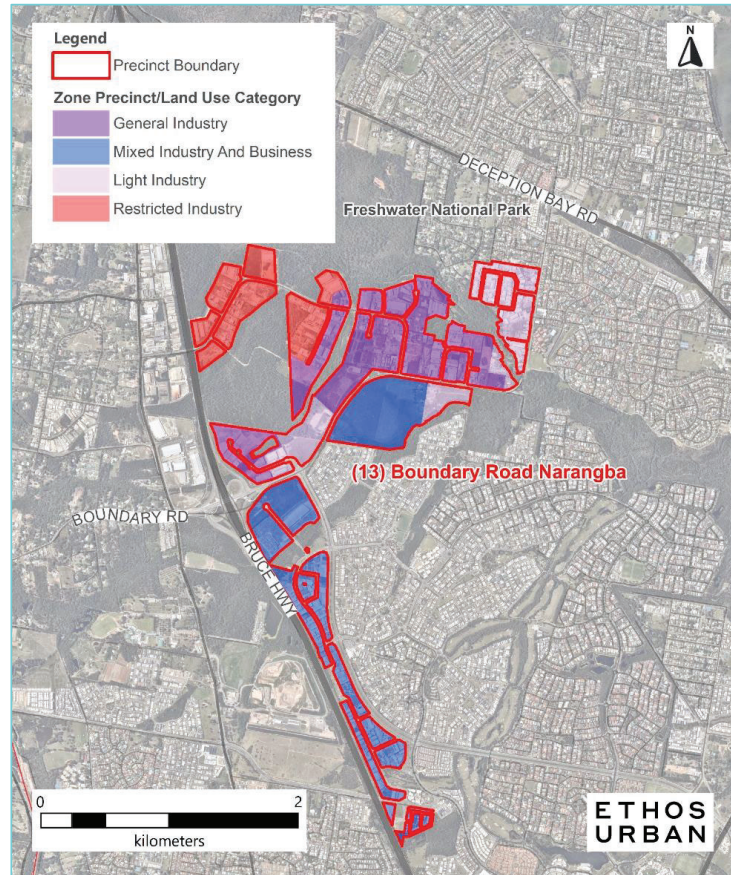
Average Consumption (2016-2021): no take up over the period.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.13 Boundary Road Narangba, Land Use Categories



Source: MBRC, Ethos Urban

Precinct Name: (13) Boundary Road Narangba

Total Zone Land Area: 267.4ha

Net Vacant Land: 64.0ha

Location: Southern Region, the precinct adjoins the Bruce Highway and extends along other the road corridors of Diamond Jubilee Way and Boundary Road. The residential component of the North Lakes master-planned community is located east of the precinct, whilst Old Gympie Road industrial precinct is located west of the precinct, with the two precincts connected via a full diamond interchange extending over the Bruce Highway.

MBRC Planning Scheme Controls:

- Place Type – Enterprise and Employment Area & Coast and Riverlands
- Zone – Industry Zone (Light Industry Precinct, General Industry Precinct, Mixed Industry and Business and Restricted Industry Precinct)
- Mango Hill Infrastructure Development Control Plan (noting this area has been categorised as Mixed Industry and Business area)
- The Narangba Innovation Precinct TLPI facilitates greater protection of established High Impact industry and Special Industry uses, as well as encouraging opportunities for new High Impact industry in certain parts of the Boundary Road, Narangba precinct, beyond the current extent of the Industry zone (Restricted industry precinct).

Land Use Mix: The precinct comprises a key enterprise and employment area, exhibiting a wide array of light, general and restricted (i.e. high impact and special industry) industrial uses. Land uses vary substantially throughout the precinct, with light industrial and mixed industry and business uses at the edges of the precinct, concentrated along Lipscombe Road and Flinders Parade. In these areas land uses are focussed on local services, including but not limited to vehicle servicing and sales, trade supplies, large format retail uses, bulky goods and indoor sport and recreation uses. More centrally located within the precinct is a range of general industries, with a continued focus on building and trade suppliers and vehicle servicing, with specific uses including cabinetry and packaging manufacturers, fabricators, dry-wall and glazing suppliers. The precinct also contains some warehouse and distribution

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

activities (e.g. Nick Scali distribution centre and Australia Post business centre). The core of the precinct exhibits high impact and special industries. Notably, these high impact and special industry uses are unique to this precinct and do not occur elsewhere within the MBRC area, and include a leather tannery, oil recycling and water processing and fertiliser manufacturer.

Strategic Attributes: The precinct is located adjacent the Bruce Highway, affording the precinct with high levels of accessibility and connectivity. The wide variety of industrial activities contained within the precinct, means it has an important role as a major enterprise and industrial area (as recognised by 'ShapingSEQ'). Vacant land parcels, generally within the Industry zone (Mixed Industry and Business Precinct) located on the southern side of Boundary Road provides future opportunity for future employment growth within the precinct.

Constraints: The precinct is relatively unconstrained and has been established around local flooding, waterway and environmental constraints associated with Saltwater Creek and its associated tributaries.

Average Consumption (2016-2021): 7.4ha per year.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.14 Scarborough Marina, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (14) Scarborough Marina

Total Zone Land Area: 14.8ha

Net Vacant Land: 0.0ha

Location: Southern Region, located at the northern edge of the Redcliffe Peninsular with direct water access to Moreton Bay. The precinct also has direct access to Fifth Avenue and Landsborough Avenue, which extends southward as a major road connection for the Redcliffe Peninsula.

MBRC Planning Scheme Controls:

- Place Type – Special Area
- Zone – Industry Zone (Marine Industry Precinct)

Land Use Mix / Role: The precinct comprises a cluster of marine industry and related activities focussed on the Scarborough Marina, including a marine workshop, yacht club, boat club and coast guard. The precinct also comprises a function centre and multiple food and drink uses, as well as a tourist park.

Strategic Attributes: The established marina and dry-dock facilities, provides supporting marine industry uses and a unique local service. The marina facility has also led to the establishment of several leisure, dining and entertainment focussed uses. The marina comprises some sites which may provide future development opportunities. Potential exists for future development of uses with a hospitality and lifestyle focus that leverage the idyllic marina setting; however, the delivery of such uses would need to be balanced against the precinct's function as a working marina.

Constraints: The precinct is impacted by some constraints associated with coastal hazard, both storm-tide inundation and erosion prone areas, and flooding constraints.

Average Consumption (2016-2021): no take up over the period.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.15 Newport Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (15) Newport

Total Zone Land Area: 1.5ha

Net Vacant Land: 0.1ha

Location: Southern Region, the precinct is embedded within the suburb of Newport is located at the northern edge of the Redcliffe Peninsular with direct water access to Moreton Bay. Griffith Road abuts the precinct and provides a convenient road connection to the nearby Kippa-Ring centre.

MBRC Planning Scheme Controls:

- Place Type – Suburban Neighbourhood
- Zone – Industry Zone (Marine Industry Precinct)

Land Use Mix/Role: Number of marine related business such as boat sales, boat rentals, tour cruises and marine licencing; there are also a number of dwellings that occupy the southern half of the precinct. The precinct's role is limited to servicing the marine related needs of Newport residents.

Strategic Attributes: The established marina and dry-dock facilities, provides supporting marine industry uses and a unique local service. Unlike other marinas the precinct is designated under the Suburban Neighbourhood place type within the MBRC Planning Scheme, limits future development opportunities for marine industry. The only vacant parcel in the precinct is abutted on either side by dwellings and is unlikely to be developed for a use other than a dwelling.

Constraints: The precinct is unconstrained.

Average Consumption (2016-2021): 0.1ha per year.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.16 Rothwell, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (16) Rothwell

Total Zone Land Area: 3.8ha

Net Vacant Land: 0.7ha

Location: Southern Region, the precinct adjoins Deception Bay Road and is located adjacent to the Rothwell district centre.

MBRC Planning Scheme Controls:

- Place Type – Next Generation Neighbourhood & Activity Centre
- Zone – Industry Zone (Light Industry Precinct) & Centre Zone (Specialised Centre Precinct)

Land Use Mix: Despite a substantial portion of the precinct being within a light industry precinct, the precinct exhibits a predominance of local convenience retail and food and drink uses. Specifically, land uses within the light industry precinct includes self-storage, service station and fast-food outlets. Land on the southern side of Deception Bay Road, within a specialised centre precinct, comprises uses including vehicle sale and service workshops and showrooms, trade supplies showroom, a commercial office, car wash and childcare centre. Overall the land use mix within this precinct generally reflects a departure from a traditional light industrial function to an increased focus on large-format retail, local services and convenience based uses.

Strategic Attributes: The precinct has direct access to Deception Bay Road, which provides direct connection to the Bruce Highway. The precinct exhibits relatively unconstrained land and a close spatial relationship to the Deception Bay centre, meaning the precinct is accessible for local residential catchments and cluster amongst a high-order retail and business activities. These attributes may encourage further development of underutilised land within the precinct in the future, however it is likely this will continue to reflect a focus on convenience and large-format retail and business uses.

Constraints: The precinct is relatively unconstrained but does adjoin sensitive land uses and zones to the north, south and west.

Average Consumption (2016-2021): 0.2ha per year.

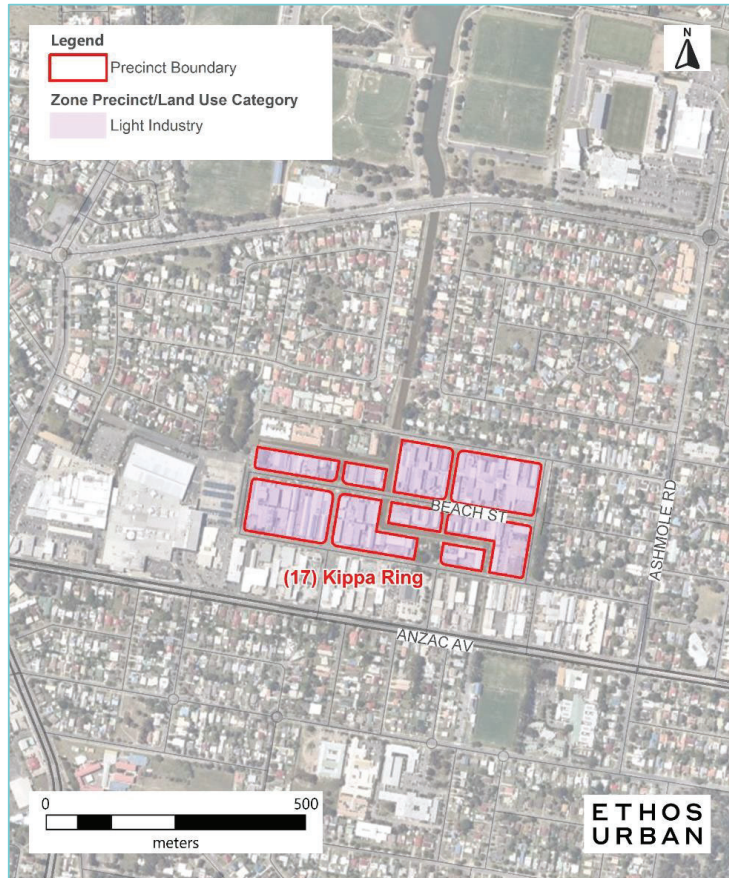
193

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.17 Kippa Ring, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (17) Kippa Ring

Total Zone Land Area: 8.1ha

Net Vacant Land: 0.0ha

Location: Located in the Southern Region, the precinct adjoins Anzac Avenue and is located between the Kippa-Ring centre and the Redcliffe Hospital.

MBRC Planning Scheme Controls:

- Place Type – Enterprise and Employment Area & Coast and Riverlands
- Zone – Industry Zone (Light Industry Precinct) & Centre Zone (Redcliffe Kippa-Ring local plan - Local services precinct)

Land Use Mix: The precinct comprises a mix of LI and GI activities and some commercial and retail uses concentrated along the Anzac Avenue frontage. The majority of light industry uses within the precinct are focussed on local services, with a strong presence of vehicle servicing and sales and trade supplies, including vehicle workshops, smash repairs, part suppliers, lawn mower stores, building material supplies, marquee hire, swimming pool supplies and bakery supplies.

Along the frontage of Anzac Avenue the precinct contains a greater mixture of industrial, business and retail uses. Specifically uses within this portion of the precinct include a small concrete batching plant, shopping centre (ALDI), vehicle showroom and saleyard, food and drink outlets and indoor sport and recreation.

Strategic Attributes: The precinct is strategically located along Anzac Avenue and between the Kippa-Ring centre and Redcliffe Hospital. These attributes position the precinct to continue providing a wide array of local services ranging from light industries, business and some retail uses. The precinct is now fully developed (with 0.0ha of NVL) meaning any future development will be in the form of renewal and redevelopment of existing uses.

Constraints: The precinct is relatively unconstrained and has been established around local flooding and coastal hazard (storm tide inundation) constraints associated with Walkers Creek canal.

Average Consumption (2016-2021): Less than 1,000m² per year.

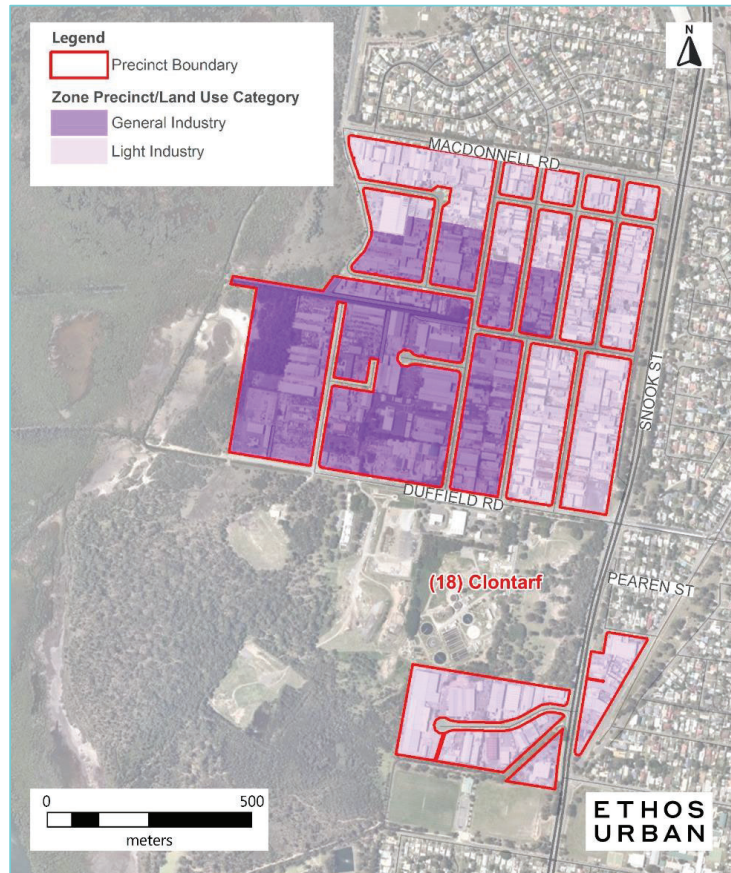
194

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.18 Clontarf, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (18) Clontarf

Total Zone Land Area: 66.8ha

Net Vacant Land: 3.9ha

Location: Southern Region, the precinct is located south of the Kippa-Ring centre and is accessed from Shook Street, a major road north-south road connection for the Redcliffe Peninsular.

MBRC Planning Scheme Controls:

- Place Type – Enterprise and Employment Area
- Zone – Industry Zone (Light Industry Precinct and General Industry Precinct)

Land Use Mix: The precinct comprises areas in the GI and LI zone precincts. LI uses are located in the area of Snook Street and Macdonnell Road (reflecting the nearby interface with residential) and include vehicle workshops, caravan and boat sales, trade and landscape suppliers, building hire services, coffee wholesalers and a brewery. An additional LI precinct node is located to the south and south-west of the Redcliffe Wastewater Treatment Plant. The GI zone precinct is located to the immediate south and west of the LI precinct (fronting Snook Street and Macdonnell Road) and includes a pallet supplier and manufacturer, a recycling centre, a hydraulic equipment supplier, auto wreckers, rainwater tank suppliers, fabricators and a tubing manufacturer.

Strategic Attributes: The precinct is well-established with limited opportunities for expansion due to sensitive land uses to the north and west including the Hays Inlet Conservation area. Like other employment precincts on the Redcliffe Peninsular, the precinct primarily has a local service function.

Constraints: Although the precinct is relatively unconstrained, it is adjacent land subject to flooding and coastal hazard constraints and areas of environmental value associated with the Hays Inlet Conservation area.

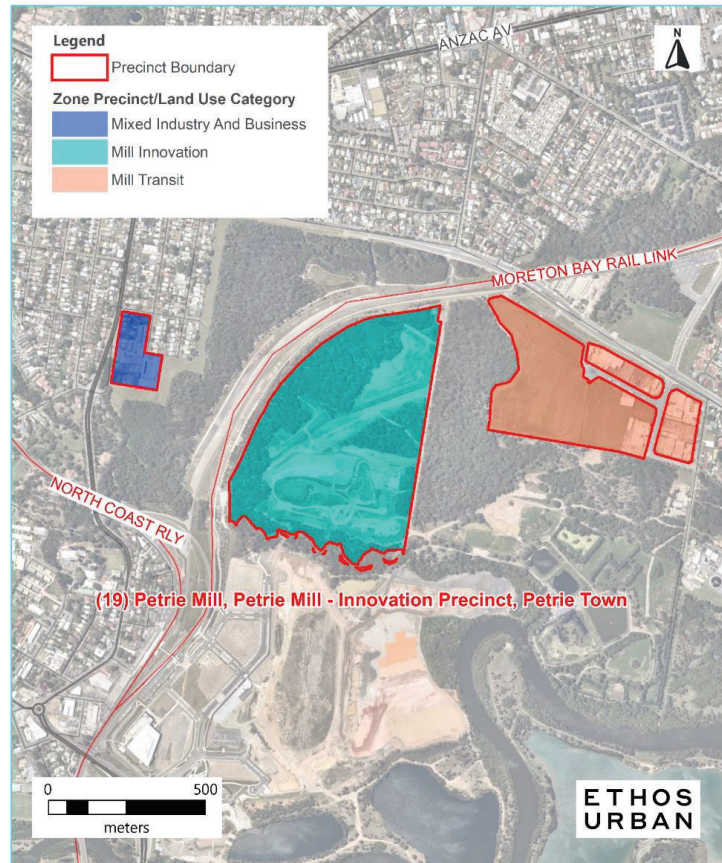
Average Consumption (2016-2021): 0.3ha per year.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.19 Petrie Mill, Land Use Categories



Source: Moreton Bay Regional Council, Ethos Urban

Precinct Name: (19) Petrie Mill

Total Zone Land Area: 2.7ha

Net Vacant Land: 0.6ha

Location: Situated Southern Region, within the Petrie Mill PDA area and adjacent to the Petrie Station. The precinct split across three areas by the Moreton Bay Rail Link and some conservation land.

MBRC Planning Scheme Controls: The Mill at Moreton Bay was declared a priority development area (PDA) in September 2016. The primary purpose of the PDA is to facilitate development of the proposed University of Sunshine Coast Moreton Bay Campus and associated uses. The PDA is proposed to be developed in the timeframe 2017 to 2041 and Stage-one of the University Campus was completed in March 2020 and is located to the south of this precinct in the Mill Central. Planning guidance is currently provided by The Mill at Moreton Bay PDA Development Scheme (the Development Scheme) which commenced on 18 August 2017, replacing a The Mill at Moreton Bay PDA Interim Land Use Plan. Existing land in the MIBA and GI zone precincts have been considered as part of the industrial part of this study. The innovation component reflects the Mill Innovation 'place provision' as identified in the Development Scheme.

Land Use Mix/Role: The Development Scheme notes that Mill Innovation would complement the function of the full-service university campus to the south; involve a key attractor(s) that will stimulate regional economic growth and are high employment generating uses (e.g. business innovation); or maximises the strategic location, proximity to the rail corridor and open space areas.

Strategic Attributes: The PDA is set to play a critically important role as a catalyst for change in MBRC's economy.

Constraints: The central part of the precinct has a number of constraints across it, including matters of state environmental significance, offset receiving areas and landslide hazard (>15% slope); The eastern portion of the precinct has some small koala offset areas.

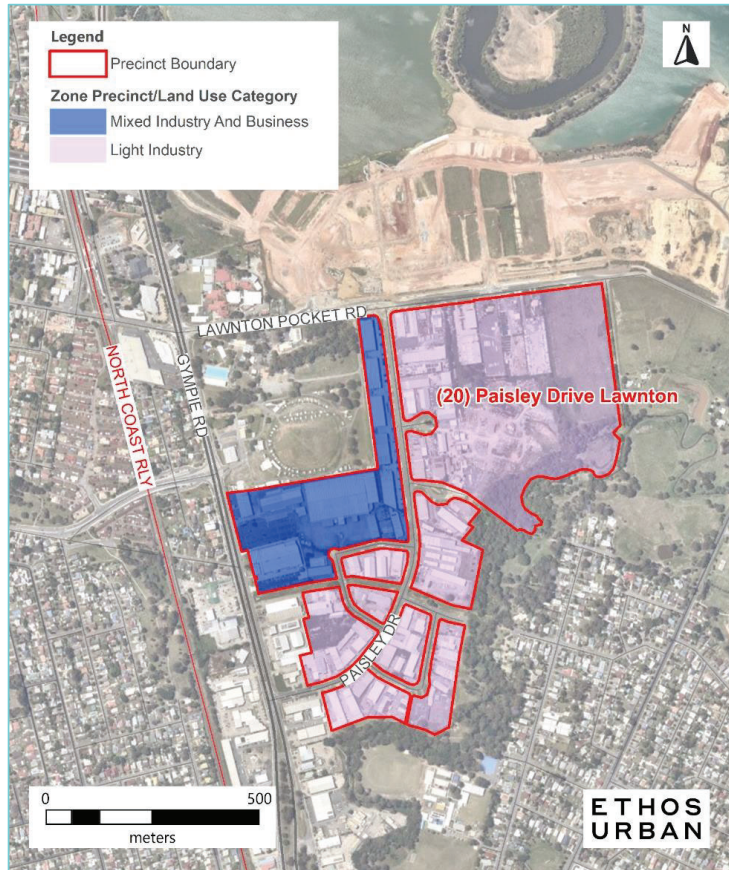
Average Consumption (2016-2021): no take up over the period.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.20 Paisley Drive, Lawnton, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (20) Paisley Drive, Lawnton

Total Zone Land Area: 44.2ha

Net Vacant Land: 5.5ha

Location: Southern Region, the precinct adjoins Gympie Road and the Mill at Moreton Bay PDA, which is located immediately north of the precinct. The precinct is also located immediately north of the Strathpine centre.

MBRC Planning Scheme Controls:

- Place Type – Enterprise and Employment Area & Coast and Riverlands
- Zone – Industry Zone (Light Industry Precinct & Mixed industry and Business Precinct)

Land Use Mix: The precinct comprises a mix of light industry uses as well as a bulk goods retail uses (Bunnings) along the Gympie Road frontage. The majority of light industry uses within the precinct are focussed on local services, with a strong presence of vehicle servicing and sales. The precinct also contains a wide range of other local services including a fabric store, locksmith, dress outlet, place of worship, pet food manufacturer, dance academy and cross-fit gym. The precinct contains a substantial warehouse/distribution centre building, accessed from Walter Crescent, which is currently untenanted. However, a recent development application (Council reference: DA/41755/2020/V2K) has been lodged over the site, utilising part of the exiting building, for a mix of uses.

Strategic Attributes: The precincts location along Gympie Road and in proximity to the Mill at Moreton Bay PDA and Strathpine Centre, means it is well positioned to continue servicing the surrounding area with a wide range of light industries and business activities. Whilst the precinct is well established and comprises little vacant land, there is potential opportunity for renewal of larger land holdings in the future, as demonstrated by the recent development application (Council reference: DA/41755/2020/V2K).

Constraints: The precinct is relatively unconstrained and has been established around local flooding constraints.

Average Consumption (2016-2021): no take up over the period.

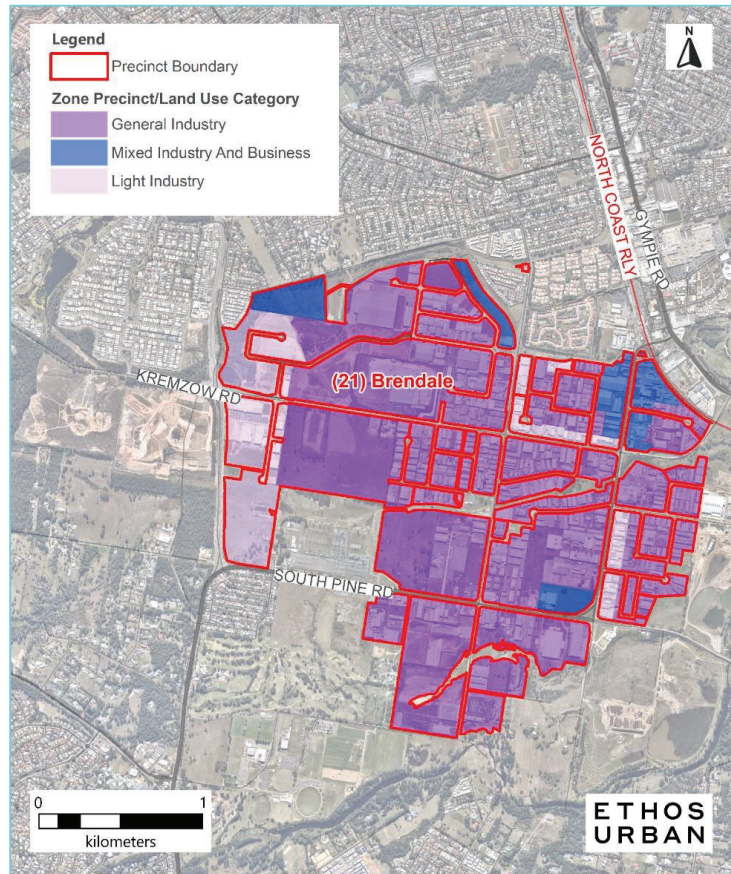
197

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.21 Brendale, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (21) Brendale

Total Zone Land Area: 452.6ha

Net Vacant Land: 84.8ha

Location: Southern Region, the precinct is located immediately south of the Strathpine Centre and west of Gympie Road and the Bruce Highway, with connection to the highway provided via South Pine Road, Gympie Road and Linkfield Road. The precinct is bordered by the South Pine River to the south and east. The Warner Investigation Area, being an identified growth area.

MBRC Planning Scheme Controls:

- Place Type – Enterprise and Employment Area, Special Area & Coast and Riverlands
- Zone – Industry Zone (Light Industry Precinct, General Industry Precinct, Mixed Industry and Business and Restricted Industry Precinct)

Land Use Mix: The precinct comprises the largest enterprise and employment area for the MBRC area, exhibiting a wide array of light and general industrial uses and mixed business uses. Light industrial and mixed industry and business uses are generally located at the edges of the precinct, with general industry uses located more centrally. There is also a range of business and large-format retail uses concentrated along Kremzow Road and South Pine Road, the major road links through the precinct.

The precinct comprises a substantial concentration of land uses reflecting key industries within the MBRC area, including but not limited to:

- Marine, leisure and automotive services (e.g 4WD modifications, vehicle servicing, boats and caravan manufacturing)
- Building supplies (supply and manufacturing of products including doors, windows, joinery, electrical and kitchens)
- Fabrication and mining Services (fabrication of equipment and servicing for mining, hospitality and construction sector)

The north-west portion of the precinct is also anchored by two substantial distribution centres (ALDI and Super Retail Group) which comprise the largest building footprints

198

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

in the precinct. A range of ancillary food and drink uses, including a brewery, are also dispersed through the precinct.

Strategic Attributes: Notwithstanding its separation from the Bruce Highway, the precinct still enjoys accessibility to this infrastructure through the direct connections provided by South Pine Road, Gympie Road and Linkfield Road. Being the largest enterprise and employment area within the MBRC area, the precinct has a vital role as a major enterprise and industrial area and is a key employment node for the MBRC area. Whilst being well established, there are some remaining vacant land parcels located in the north-west part of the precinct, noting these land parcels are currently subject to substantial development activity.

Constraints: Key constraints which impact the precinct include flooding constraints associated with South Pine River and Configuration Creek. The precinct is traversed by several high voltage powerlines and a substation, which constrains development in the south-west portion of the precinct.

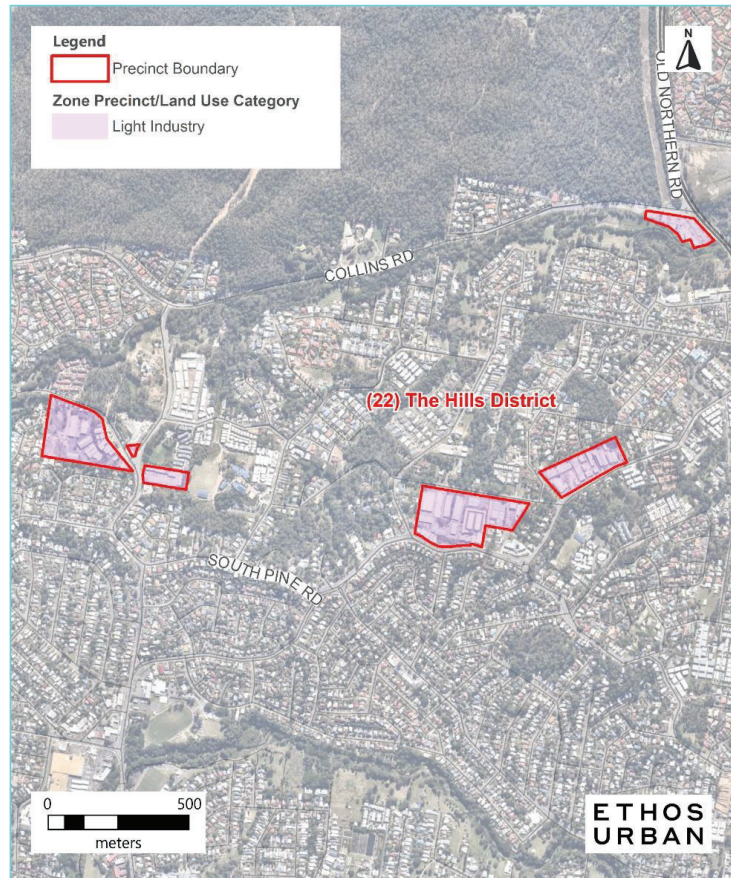
Average Consumption (2016-2021): 9.8ha per year.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.22 The Hills District, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (22) The Hills District

Total Zone Land Area: 15.6ha

Net Vacant Land: 1.8ha

Location: Southern Region, the precinct comprises multiple parts dispersed amongst the suburb of Arana Hills and general located along South Pine Road.

MBRC Planning Scheme Controls:

- Place Type – Enterprise and Employment Area
- Zone – Industry Zone (Light Industry Precinct)

Land Use Mix/Role: light industry uses such as self-storage, automotive servicing, as well as some small-scale manufacturing and wholesale trade/large-format retail services operate in the precinct.

Strategic Attributes: The precinct is largely developed and will have a limited role in providing future employment growth.

Constraints: A number of constraints cover the precinct including power line buffers, landslide hazard areas (>15% slope) and overland flow paths.

Average Consumption (2016-2021): Less than 1,000m² per year.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.23 Bribie Island Hospital, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (A) Bribie Island Hospital (proposed)

Location: Northern Region, Fronting Bongaree Avenue, adjacent to residential development in the east and a retail/commercial precinct to the west. Bongaree Avenue connects to Goodwin Drive which acts as the Island's north-south link.

MBRC Planning Scheme Controls:

- Place Type – Suburban Neighbourhood
- Zone – General Residential (Suburban Neighbourhood)

Land Use Mix/Role: the precinct is based on the future hospital site; half of the site is currently vacant and the other half is a carpark. The approved hospital development will serve a small local catchment.

Strategic Attributes: the precinct is serviced, unconstrained, and development ready. Completion of the new hospital is expected in 2025 supporting some employment growth in the short-term.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.24 Aerodrome Caboolture, Land Use Categories



Source: MBRC, Ethos Urban

Precinct Name: (B) Aerodrome Caboolture

Location: Northern Region, adjacent to the Bribie Island Road Caboolture industrial precinct and the Bruce Highway.

MBRC Planning Scheme Controls:

- Place Type – Special Area
- Zone – Community Facilities Zone (Airfield Precinct)

Land Use Mix/Role: The area south of the runways comprises a small cluster of aviation related activities, including flight schools, aircraft maintenance and aero club. North of the runways is the Caboolture Waste Management Facility. Airport operations largely focus on recreational users and flight training.

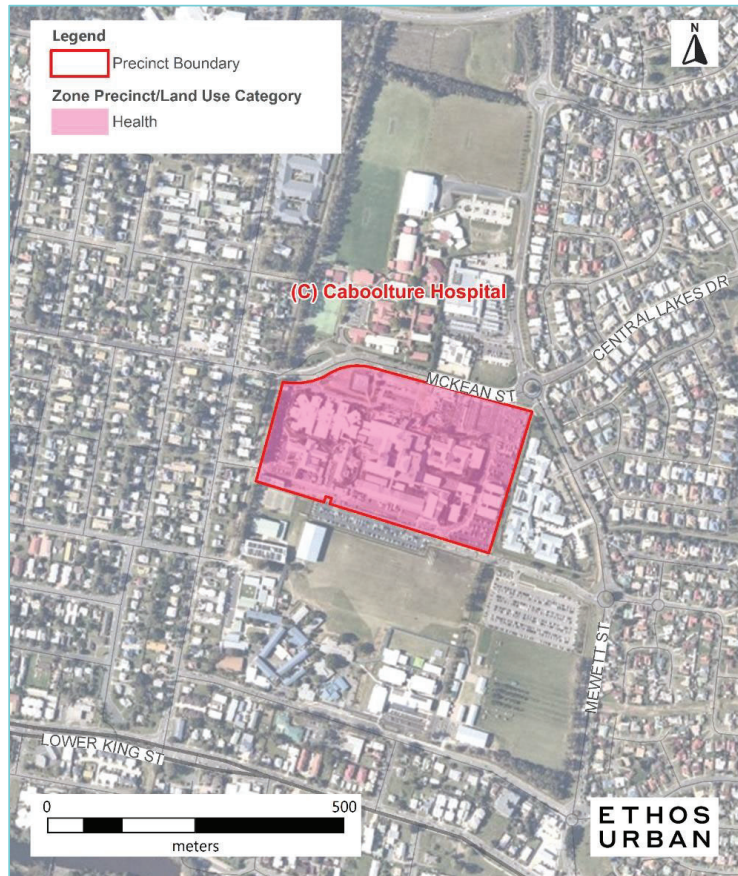
Strategic Attributes: The local aerodrome, provides supporting aviation industry uses and a unique local service. The aerodrome, excluding runway facilities, comprises limited vacant land which may facilitate future development and expansion opportunities for further aviation related uses.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.25 Caboolture Hospital, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (C) Caboolture Hospital

Location: Northern Region, 1km east of the Caboolture CBD and Caboolture Station. The precinct fronts McKean Street which provides linkage to Beerburum Road, a major north-south connector. Surrounding uses include schools, aged care, retail/commercial and residential.

MBRC Planning Scheme Controls:

- Place Type – Urban Neighbourhood
- Zone – General Residential (Urban Neighbourhood)

Land Use Mix/Role: Caboolture Public and Private Hospitals are co-located in the precinct, along with Caboolture Hospital Education Centre. The public hospital is undergoing substantial redevelopment and expansion but will continue to serve a local or sub-regional catchment. Adjacent uses include Central Lakes Shopping Centre, St Columban's Hospital and Arcare Caboolture (and aged care provided) – located to the north; and Regis Caboolture (an aged care provided) situated to the east.

Strategic Attributes: Proximity to the Caboolture CBD and Caboolture Station as well as growth areas of Caboolture West and North Harbour will drive demand for medical services and support the long-term employment growth at the precinct. Redevelopment/expansion is currently underway and will generate additional employment in the short to medium-term. Further employment will also be supported as the hospital's catchment population grows and clustering of health services in and around the precinct expands.

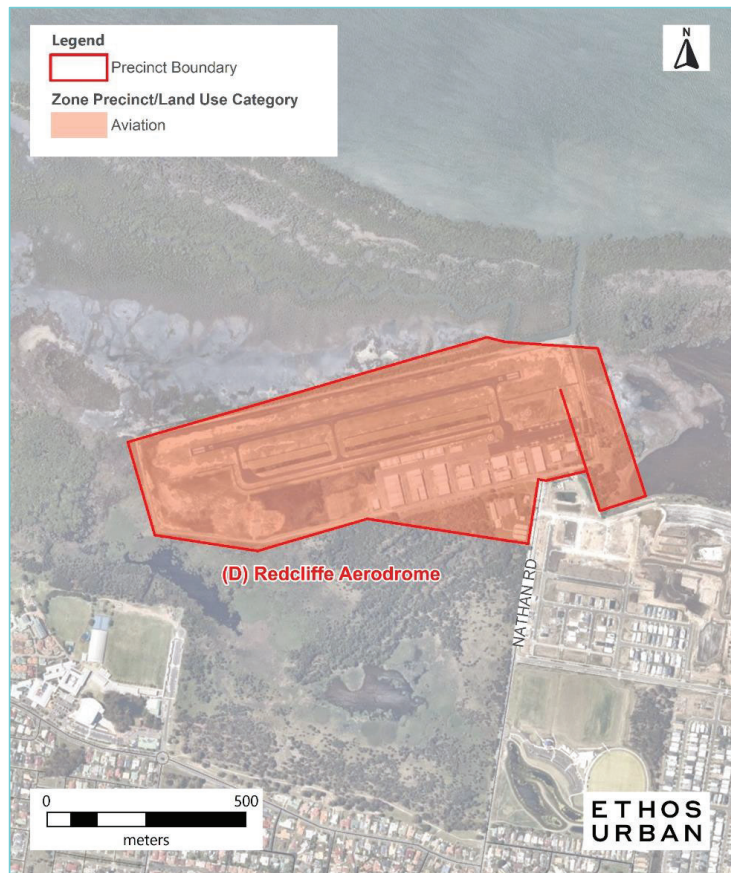
203

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.26 Redcliffe Aerodrome, Land Use Categories



Source: MBRC, Ethos Urban

Precinct Name: (D) Redcliffe Aerodrome

Location: Southern Region, also located at the northern edge and coastline of the Redcliffe Peninsular. The precinct is accessed from Nathan Roads which connects to the major road connection of Anzac Avenue.

MBRC Planning Scheme Controls:

- Place Type – Special Area
- Zone – Community Facilities Zone (Airfield Precinct)

Land Use Mix / Role: The precinct comprises a small cluster of aviation related activities, including flight schools, flight charter, aircraft maintenance and aero club.

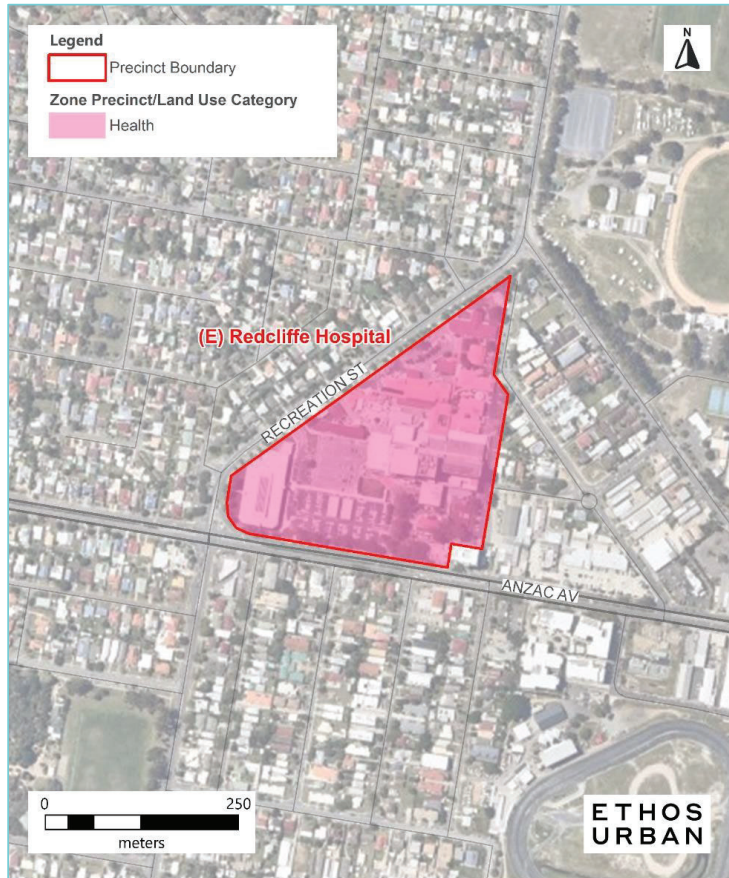
Strategic Attributes: The local aerodrome, provides supporting aviation industry uses and a unique local service. The aerodrome, excluding runway facilities, comprises some vacant land which may facilitate future development and expansion opportunities for further aviation related uses.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Figure A1.27 Redcliffe Hospital, Land Use Categories



Source: MBRC, Ethos Urban

Ethos Urban Pty Ltd

Precinct Name: (E) Redcliffe Hospital

Location: Southern Region, located on a major east-west link, Anzac Avenue, with residential uses to the west, north and south and a mix of residential and commercial uses in the east.

MBRC Planning Scheme Controls:

- Place Type – Activity Centre
- Zone – Centre (Health)

Land Use Mix/Role: The precinct accommodates the Redcliffe Public Hospital and supporting medical and health services as well as an education centre. The precinct services a local catchment that stretches from Brighton to Deception Bay and west to Kallangur. Nearby uses of relevance include an aged-care and retirement node located immediately to the south east an abutting Anzac Avenue. Peninsula Private Hospital is situated some 800m to the south-east.

Strategic Attributes: A corridor of interim residential zoned land lays between the Redcliffe Public Hospital and Peninsula Private Hospital, representing an opportunity for health services development in the long-term as the local population expands. Redevelopment and expansion of the Peninsula Private Hospital will contribute to employment growth in the short-term and may stimulate further investment in health services at nearby sites (or uses with strong synergies to health services such as aged care).

205

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Appendix 2: Detailed Demand Projections Tables

Table A2.1 Demand and Supply Implications by Precinct BASE CASE SCENARIO – General Industry

Precinct Name	Effective Supply		Projected Demand					Effective Supply	
	2021	2026	2031	2036	2041	2046	2051	Total	2051
Northern Region									
(01) Elimbah East	223.6	-	17.5	61.9	70.4	69.0	4.8	223.6	-
(02) Caboolture West - Enterprise and employment - EC	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	44.3	21.4	22.9	-	-	-	-	44.3	-
(05) Henzell Road Caboolture	0.5	-	-	-	-	-	0.5	0.5	-
(06) First Avenue Bribie Island	-	-	-	-	-	-	-	-	-
(07) PAC Morayfield	-	-	-	-	-	-	-	-	-
(08) North East Business Park	-	-	-	-	-	-	-	-	-
(09) Bruce Highway Burpengary	-	-	-	-	-	-	-	-	-
Sub-total	268.4	21.4	40.4	61.9	70.4	69.0	5.3	268.4	-
Southern Region									
(10) Old Gympie Road Narangba	3.1	-	3.1	-	-	-	-	3.1	-
(11) Deception Bay	-	-	-	-	-	-	-	-	-
(12) Deception Bay Road	-	-	-	-	-	-	-	-	-
(13) Boundary Road Narangba	15.1	4.9	10.2	-	-	-	-	15.1	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-
(16) Rothwell	-	-	-	-	-	-	-	-	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-
(18) Clontarf	3.1	-	3.1	-	-	-	-	3.1	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	-	-	-	-	-	-	-	-	-
(20) Paisley Drive Lawnton	-	-	-	-	-	-	-	-	-
(21) Brendale	59.6	44.1	15.5	-	-	-	-	59.6	-
(22) The Hills District	-	-	-	-	-	-	-	-	-
Sub-total	80.9	49.0	31.9	-	-	-	-	80.9	-
Total	349.3	70.4	72.3	61.9	70.4	69.0	5.3	349.3	-
Residual Demand	-	-	-	-	-	-	58.5	58.5	-

Source: Ethos Urban

Note: 0 = between 0 and 0.1 hectares.

Figure have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table A2.2 Demand and Supply Implications by Precinct BASE CASE SCENARIO - MIBA

Precinct Name	Effective Supply			Projected Demand				Effective Supply	
	2021	2026	2031	2036	2041	2046	2051	Total	2051
Northern Region									
(01) Elimbah East	-	-	-	-	-	-	-	-	-
(02) Caboolture West - Enterprise and employment - EC	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	-	-	-	-	-	-	-	-	-
(05) Henzell Road Caboolture	1.2	1.1	0.1	-	-	-	-	1.2	-
(06) First Avenue Bribie Island	-	-	-	-	-	-	-	-	-
(07) PAC Morayfield	-	-	-	-	-	-	-	-	-
(08) North East Business Park	120.0	1.1	10.6	15.6	29.0	35.0	28.7	120.0	-
(09) Bruce Highway Burpengary	11.9	8.6	3.3	-	-	-	-	11.9	-
Sub-total	133.1	10.7	14.1	15.6	29.0	35.0	28.7	133.1	-
Southern Region									
(10) Old Gympie Road Narangba	19.0	4.9	12.4	1.7	-	-	-	19.0	-
(11) Deception Bay	0.7	-	-	0.4	0.3	-	-	0.7	-
(12) Deception Bay Road	16.7	-	4.4	9.0	3.3	-	-	16.7	-
(13) Boundary Road Narangba	24.7	19.6	5.1	-	-	-	-	24.7	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-
(16) Rothwell	-	-	-	-	-	-	-	-	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-
(18) Clontarf	-	-	-	-	-	-	-	-	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	0.6	-	-	0.4	0.2	-	-	0.6	-
(20) Paisley Drive Lawnton	-	-	-	-	-	-	-	-	-
(21) Brendale	6.3	-	-	3.8	2.5	-	-	6.3	-
(22) The Hills District	-	-	-	-	-	-	-	-	-
Sub-total	68.1	24.5	21.9	15.4	6.3	-	-	68.1	-
Total	201.2	35.3	36.0	31.0	35.3	35.0	28.7	201.2	-
Residual Demand	-	-	-	-	-	-	3.8	3.8	-

Source: Ethos Urban

Note: 0 = between 0 and 0.1 hectares.

Figure have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table A2.3 Demand and Supply Implications by Precinct BASE CASE SCENARIO – Light Industry

Precinct Name	Effective Supply				Take Up			Effective Supply	
	2021	2026	2031	2036	2041	2046	2051	Total	2051
Northern Region									
(01) Elimbah East	9.1	-	-	-	4.5	3.6	1.0	9.1	-
(02) Caboolture West - Enterprise and employment - EC	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	-	-	-	-	-	-	-	-	-
(05) Henzell Road Caboolture	9.1	-	-	-	-	-	5.1	5.1	4.0
(06) First Avenue Bribie Island	1.2	-	-	-	-	-	-	-	1.2
(07) PAC Morayfield	1.7	-	-	-	-	-	-	-	1.7
(08) North East Business Park	-	-	-	-	-	-	-	-	-
(09) Bruce Highway Burpengary	26.3	4.7	6.7	6.8	4.5	3.6	0.1	26.3	-
Sub-total	47.4	4.7	6.7	6.8	8.9	7.2	6.2	40.5	6.9
Southern Region									
(10) Old Gympie Road Narangba	3.6	-	-	-	-	2.4	1.2	3.6	-
(11) Deception Bay	0.1	-	-	-	-	-	0.1	0.1	-
(12) Deception Bay Road	-	-	-	-	-	-	-	-	-
(13) Boundary Road Narangba	12.7	-	4.2	4.7	3.2	0.6	-	12.7	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-
(16) Rothwell	0.7	-	-	-	-	-	0.7	0.7	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-
(18) Clontarf	0.9	-	-	-	-	-	0.9	0.9	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	-	-	-	-	-	-	-	-	-
(20) Paisley Drive Lawnton	5.5	-	-	-	3.2	2.3	-	5.5	-
(21) Brendale	18.9	10.6	6.3	2.0	-	-	-	18.9	-
(22) The Hills District	1.8	-	-	-	-	-	1.8	1.8	-
Sub-total	44.1	10.6	10.4	6.7	6.4	5.4	4.6	44.1	-
Total	91.5	15.3	17.1	13.5	15.3	12.6	10.8	84.6	6.9
Residual Demand	-	-	-	-	-	-	-	-	-

Source: Ethos Urban

Note: 0 = between 0 and 0.1 hectares.

Figure have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table A2.4 Demand and Supply Implications by Precinct BASE CASE SCENARIO – Restricted Industry

Precinct Name	Effective Supply		Projected Demand					Effective Supply	
	2021	2026	2031	2036	2041	2046	2051	Total	2051
Northern Region									
(01) Elimbah East	-	-	-	-	-	-	-	-	-
(02) Caboolture West - Enterprise and employment - EC	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	-	-	-	-	-	-	-	-	-
(05) Henzell Road Caboolture	-	-	-	-	-	-	-	-	-
(06) First Avenue Bribie Island	-	-	-	-	-	-	-	-	-
(07) PAC Morayfield	-	-	-	-	-	-	-	-	-
(08) North East Business Park	-	-	-	-	-	-	-	-	-
(09) Bruce Highway Burpengary	-	-	-	-	-	-	-	-	-
Sub-total	-	-	-	-	-	-	-	-	-
Southern Region									
(10) Old Gympie Road Narangba	-	-	-	-	-	-	-	-	-
(11) Deception Bay	-	-	-	-	-	-	-	-	-
(12) Deception Bay Road	-	-	-	-	-	-	-	-	-
(13) Boundary Road Narangba	11.5	3.0	3.3	2.6	2.6	-	-	11.5	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-
(16) Rothwell	-	-	-	-	-	-	-	-	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-
(18) Clontarf	-	-	-	-	-	-	-	-	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	-	-	-	-	-	-	-	-	-
(20) Paisley Drive Lawnton	-	-	-	-	-	-	-	-	-
(21) Brendale	-	-	-	-	-	-	-	-	-
(22) The Hills District	-	-	-	-	-	-	-	-	-
Sub-total	11.5	3.0	3.3	2.6	2.6	-	-	11.5	-
Total	11.5	3.0	3.3	2.6	2.6	-	-	11.5	-
Residual Demand	-	-	-	-	0.4	2.5	2.1	5.0	-

Source: Ethos Urban

Note: 0 = between 0 and 0.1 hectares.

Figure have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table A2.5 Demand and Supply Implications by Precinct BASE CASE SCENARIO – Marine Industry

Precinct Name	Effective Supply			Projected Demand				Effective Supply	
	2021	2026	2031	2036	2041	2046	2051	Total	2051
Northern Region									
(01) Elimbah East	-	-	-	-	-	-	-	-	-
(02) Caboolture West - Enterprise and employment - EC	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	-	-	-	-	-	-	-	-	-
(05) Henzell Road Caboolture	-	-	-	-	-	-	-	-	-
(06) First Avenue Bribie Island	-	-	-	-	-	-	-	-	-
(07) PAC Morayfield	-	-	-	-	-	-	-	-	-
(08) North East Business Park	-	-	-	-	-	-	-	-	-
(09) Bruce Highway Burpengary	-	-	-	-	-	-	-	-	-
Sub-total	-	-	-	-	-	-	-	-	-
Southern Region									
(10) Old Gympie Road Narangba	-	-	-	-	-	-	-	-	-
(11) Deception Bay	-	-	-	-	-	-	-	-	-
(12) Deception Bay Road	-	-	-	-	-	-	-	-	-
(13) Boundary Road Narangba	-	-	-	-	-	-	-	-	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-
(16) Rothwell	-	-	-	-	-	-	-	-	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-
(18) Clontarf	-	-	-	-	-	-	-	-	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	-	-	-	-	-	-	-	-	-
(20) Paisley Drive Lawnton	-	-	-	-	-	-	-	-	-
(21) Brendale	-	-	-	-	-	-	-	-	-
(22) The Hills District	-	-	-	-	-	-	-	-	-
Sub-total	-	-	-	-	-	-	-	-	-
Total	-	-	-	-	-	-	-	-	-
Residual Demand	-	1.1	1.2	1.0	1.1	0.9	0.8	6.1	

Source: Ethos Urban

Note: 0 = between 0 and 0.1 hectares.

Figure have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table A2.6 Demand and Supply Implications by Precinct HIGH CASE SCENARIO – General Industry

Precinct Name	Effective Supply			Projected Demand				Effective Supply	
	2021	2026	2031	2036	2041	2046	2051	Total	2051
Northern Region									
(01) Elimbah East	223.6	-	40.2	79.8	85.0	18.6	-	223.6	-
(02) Caboolture West - Enterprise and employment - EC	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	44.3	24.4	20.0	-	-	-	-	44.3	-
(05) Henzell Road Caboolture	0.5	-	-	-	-	0.5	-	0.5	-
(06) First Avenue Bribie Island	-	-	-	-	-	-	-	-	-
(07) PAC Morayfield	-	-	-	-	-	-	-	-	-
(08) North East Business Park	-	-	-	-	-	-	-	-	-
(09) Bruce Highway Burpengary	-	-	-	-	-	-	-	-	-
Sub-total	268.4	24.4	60.2	79.8	85.0	19.1	-	268.4	-
Southern Region									
(10) Old Gympie Road Narangba	3.1	1.4	1.7	-	-	-	-	3.1	-
(11) Deception Bay	-	-	-	-	-	-	-	-	-
(12) Deception Bay Road	-	-	-	-	-	-	-	-	-
(13) Boundary Road Narangba	15.1	8.4	6.7	-	-	-	-	15.1	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-
(16) Rothwell	-	-	-	-	-	-	-	-	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-
(18) Clontarf	3.1	1.4	1.7	-	-	-	-	3.1	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	-	-	-	-	-	-	-	-	-
(20) Paisley Drive Lawnton	-	-	-	-	-	-	-	-	-
(21) Brendale	59.6	44.6	15.0	-	-	-	-	59.6	-
(22) The Hills District	-	-	-	-	-	-	-	-	-
Sub-total	80.9	55.8	25.1	-	-	-	-	80.9	-
Total	349.3	80.1	85.3	79.8	85.0	19.1	-	349.3	-
Residual Demand	-	-	-	-	-	58.1	71.9	130.0	-

Source: Ethos Urban

Note: 0 = between 0 and 0.1 hectares.

Figure have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table A2.7 Demand and Supply Implications by Precinct HIGH CASE SCENARIO - MIBA

Precinct Name	Effective Supply			Projected Demand				Effective Supply	
	2021	2026	2031	2036	2041	2046	2051	Total	2051
Northern Region									
(01) Elimbah East	-	-	-	-	-	-	-	-	-
(02) Caboolture West - Enterprise and employment - EC	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	-	-	-	-	-	-	-	-	-
(05) Henzell Road Caboolture	1.2	1.2	-	-	-	-	-	1.2	-
(06) First Avenue Bribie Island	-	-	-	-	-	-	-	-	-
(07) PAC Morayfield	-	-	-	-	-	-	-	-	-
(08) North East Business Park	120.0	1.3	14.8	26.9	43.1	33.9	-	120.0	-
(09) Bruce Highway Burpengary	11.9	9.9	2.0	-	-	-	-	11.9	-
Sub-total	133.1	12.3	16.8	26.9	43.1	33.9	-	133.1	-
Southern Region									
(10) Old Gympie Road Narangba	19.0	5.6	13.4	-	-	-	-	19.0	-
(11) Deception Bay	0.7	-	-	0.7	-	-	-	0.7	-
(12) Deception Bay Road	16.7	-	10.6	6.1	-	-	-	16.7	-
(13) Boundary Road Narangba	24.7	22.5	2.2	-	-	-	-	24.7	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-
(16) Rothwell	-	-	-	-	-	-	-	-	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-
(18) Clontarf	-	-	-	-	-	-	-	-	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	0.6	-	-	0.6	-	-	-	0.6	-
(20) Paisley Drive Lawnton	-	-	-	-	-	-	-	-	-
(21) Brendale	6.3	-	-	6.3	-	-	-	6.3	-
(22) The Hills District	-	-	-	-	-	-	-	-	-
Sub-total	68.1	28.2	26.2	13.7	-	-	-	68.1	-
Total	201.2	40.5	43.0	40.6	43.1	33.9	-	201.2	-
Residual Demand	-	-	-	-	-	-	42.3	42.3	-

Source: Ethos Urban

Note: 0 = between 0 and 0.1 hectares.

Figure have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table A2.8 Demand and Supply Implications by Precinct HIGH CASE SCENARIO – Light Industry

Precinct Name	Effective Supply				Take Up			Effective Supply	
	2021	2026	2031	2036	2041	2046	2051	Total	2051
Northern Region									
(01) Elimbah East	9.1	-	-	-	4.5	3.6	1.0	9.1	-
(02) Caboolture West - Enterprise and employment - EC	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	-	-	-	-	-	-	-	-	-
(05) Henzell Road Caboolture	9.1	-	-	-	-	-	5.1	5.1	4.0
(06) First Avenue Bribie Island	1.2	-	-	-	-	-	-	-	1.2
(07) PAC Morayfield	1.7	-	-	-	-	-	-	-	1.7
(08) North East Business Park	-	-	-	-	-	-	-	-	-
(09) Bruce Highway Burpengary	26.3	4.7	6.7	6.8	4.5	3.6	0.1	26.3	-
Sub-total	47.4	4.7	6.7	6.8	8.9	7.2	6.2	40.5	6.9
Southern Region									
(10) Old Gympie Road Narangba	3.6	-	-	-	-	2.4	1.2	3.6	-
(11) Deception Bay	0.1	-	-	-	-	-	0.1	0.1	-
(12) Deception Bay Road	-	-	-	-	-	-	-	-	-
(13) Boundary Road Narangba	12.7	-	4.2	4.7	3.2	0.6	-	12.7	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-
(16) Rothwell	0.7	-	-	-	-	-	0.7	0.7	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-
(18) Clontarf	0.9	-	-	-	-	-	0.9	0.9	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	-	-	-	-	-	-	-	-	-
(20) Paisley Drive Lawnton	5.5	-	-	-	3.2	2.3	-	5.5	-
(21) Brendale	18.9	10.6	6.3	2.0	-	-	-	18.9	-
(22) The Hills District	1.8	-	-	-	-	-	1.8	1.8	-
Sub-total	44.1	10.6	10.4	6.7	6.4	5.4	4.6	44.1	-
Total	91.5	15.3	17.1	13.5	15.3	12.6	10.8	84.6	6.9
Residual Demand	-	-	-	-	-	-	-	-	-

Source: Ethos Urban

Note: 0 = between 0 and 0.1 hectares.

Figure have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table A2.9 Demand and Supply Implications by Precinct HIGH CASE SCENARIO – Restricted Industry

Precinct Name	Effective Supply		Projected Demand					Effective Supply	
	2021	2026	2031	2036	2041	2046	2051	Total	2051
Northern Region									
(01) Elimbah East	-	-	-	-	-	-	-	-	-
(02) Caboolture West - Enterprise and employment - EC	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	-	-	-	-	-	-	-	-	-
(05) Henzell Road Caboolture	-	-	-	-	-	-	-	-	-
(06) First Avenue Bribie Island	-	-	-	-	-	-	-	-	-
(07) PAC Morayfield	-	-	-	-	-	-	-	-	-
(08) North East Business Park	-	-	-	-	-	-	-	-	-
(09) Bruce Highway Burpengary	-	-	-	-	-	-	-	-	-
Sub-total	-	-	-	-	-	-	-	-	-
Southern Region									
(10) Old Gympie Road Narangba	-	-	-	-	-	-	-	-	-
(11) Deception Bay	-	-	-	-	-	-	-	-	-
(12) Deception Bay Road	-	-	-	-	-	-	-	-	-
(13) Boundary Road Narangba	11.5	3.0	3.3	2.6	2.6	-	-	11.5	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-
(16) Rothwell	-	-	-	-	-	-	-	-	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-
(18) Clontarf	-	-	-	-	-	-	-	-	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	-	-	-	-	-	-	-	-	-
(20) Paisley Drive Lawnton	-	-	-	-	-	-	-	-	-
(21) Brendale	-	-	-	-	-	-	-	-	-
(22) The Hills District	-	-	-	-	-	-	-	-	-
Sub-total	11.5	3.0	3.3	2.6	2.6	-	-	11.5	-
Total	11.5	3.0	3.3	2.6	2.6	-	-	11.5	-
Residual Demand	-	-	-	-	0.4	2.5	2.1	5.0	-

Source: Ethos Urban

Note: 0 = between 0 and 0.1 hectares.

Figure have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table A2.10 Demand and Supply Implications by Precinct HIGH CASE SCENARIO – Marine Industry

Precinct Name	Effective Supply			Projected Demand				Effective Supply	
	2021	2026	2031	2036	2041	2046	2051	Total	2051
Northern Region									
(01) Elimbah East	-	-	-	-	-	-	-	-	-
(02) Caboolture West - Enterprise and employment - EC	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	-	-	-	-	-	-	-	-	-
(05) Henzell Road Caboolture	-	-	-	-	-	-	-	-	-
(06) First Avenue Bribie Island	-	-	-	-	-	-	-	-	-
(07) PAC Morayfield	-	-	-	-	-	-	-	-	-
(08) North East Business Park	-	-	-	-	-	-	-	-	-
(09) Bruce Highway Burpengary	-	-	-	-	-	-	-	-	-
Sub-total	-	-	-	-	-	-	-	-	-
Southern Region									
(10) Old Gympie Road Narangba	-	-	-	-	-	-	-	-	-
(11) Deception Bay	-	-	-	-	-	-	-	-	-
(12) Deception Bay Road	-	-	-	-	-	-	-	-	-
(13) Boundary Road Narangba	-	-	-	-	-	-	-	-	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-
(16) Rothwell	-	-	-	-	-	-	-	-	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-
(18) Clontarf	-	-	-	-	-	-	-	-	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	-	-	-	-	-	-	-	-	-
(20) Paisley Drive Lawnton	-	-	-	-	-	-	-	-	-
(21) Brendale	-	-	-	-	-	-	-	-	-
(22) The Hills District	-	-	-	-	-	-	-	-	-
Sub-total	-	-	-	-	-	-	-	-	-
Total	-	-	-	-	-	-	-	-	-
Residual Demand	-	1.1	1.2	1.0	1.1	0.9	0.8	6.1	-

Source: Ethos Urban

Note: 0 = between 0 and 0.1 hectares.

Figure have been rounded.

Moreton Bay Regional Council

GENERAL MEETING - 551
20 April 2022

PAGE 216
Supporting Information

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table A2.11 Demand and Supply Implications by Precinct LOW CASE SCENARIO – General Industry

Precinct Name	Effective Supply			Projected Demand				Effective Supply	
	2021	2026	2031	2036	2041	2046	2051	Total	2051
Northern Region									
(01) Elimbah East	223.6	-	7.7	42.4	60.6	52.8	47.6	211.1	12.5
(02) Caboolture West - Enterprise and employment - EC	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	44.3	16.5	18.0	9.9	-	-	-	44.3	-
(05) Henzell Road Caboolture	0.5	-	-	-	-	-	-	-	0.5
(06) First Avenue Bribie Island	-	-	-	-	-	-	-	-	-
(07) PAC Morayfield	-	-	-	-	-	-	-	-	-
(08) North East Business Park	-	-	-	-	-	-	-	-	-
(09) Bruce Highway Burpengary	-	-	-	-	-	-	-	-	-
Sub-total	268.4	16.5	25.7	52.3	60.6	52.8	47.6	255.5	13.0
Southern Region									
(10) Old Gympie Road Narangba	3.1	-	3.1	-	-	-	-	3.1	-
(11) Deception Bay	-	-	-	-	-	-	-	-	-
(12) Deception Bay Road	-	-	-	-	-	-	-	-	-
(13) Boundary Road Narangba	15.1	-	14.0	1.0	-	-	-	15.1	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-
(16) Rothwell	-	-	-	-	-	-	-	-	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-
(18) Clontarf	3.1	-	2.9	0.2	-	-	-	3.1	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	-	-	-	-	-	-	-	-	-
(20) Paisley Drive Lawnton	-	-	-	-	-	-	-	-	-
(21) Brendale	59.6	37.7	20.1	1.9	-	-	-	59.6	-
(22) The Hills District	-	-	-	-	-	-	-	-	-
Sub-total	80.9	37.7	40.1	3.1	-	-	-	80.9	-
Total	349.3	54.1	65.8	55.4	60.6	52.8	47.6	336.3	13.0
Residual Demand	-	-	-	-	-	-	-	-	-

Source: Ethos Urban

Note: 0 = between 0 and 0.1 hectares.

Figure have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table A2.12 Demand and Supply Implications by Precinct LOW CASE SCENARIO - MIBA

Precinct Name	Effective Supply			Projected Demand				Effective Supply	
	2021	2026	2031	2036	2041	2046	2051	Total	2051
Northern Region									
(01) Elimbah East	-	-	-	-	-	-	-	-	-
(02) Caboolture West - Enterprise and employment - EC	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	-	-	-	-	-	-	-	-	-
(05) Henzell Road Caboolture	1.2	-	1.2	-	-	-	-	1.2	-
(06) First Avenue Bribie Island	-	-	-	-	-	-	-	-	-
(07) PAC Morayfield	-	-	-	-	-	-	-	-	-
(08) North East Business Park	120.0	-	7.7	13.9	17.5	22.5	23.8	85.3	34.7
(09) Bruce Highway Burpengary	11.9	8.1	3.8	-	-	-	-	11.9	-
Sub-total	133.1	8.1	12.7	13.9	17.5	22.5	23.8	98.4	34.7
Southern Region									
(10) Old Gympie Road Narangba	19.0	1.8	9.8	6.8	0.6	-	-	19.0	-
(11) Deception Bay	0.7	-	-	-	0.3	0.4	-	0.7	-
(12) Deception Bay Road	16.7	-	1.9	6.8	6.9	1.1	-	16.7	-
(13) Boundary Road Narangba	24.7	16.6	8.2	-	-	-	-	24.7	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-
(16) Rothwell	-	-	-	-	-	-	-	-	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-
(18) Clontarf	-	-	-	-	-	-	-	-	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	0.6	-	-	-	0.3	0.3	-	0.6	-
(20) Paisley Drive Lawnton	-	-	-	-	-	-	-	-	-
(21) Brendale	6.3	-	-	-	4.4	1.9	-	6.3	-
(22) The Hills District	-	-	-	-	-	-	-	-	-
Sub-total	68.1	18.4	19.8	13.6	12.5	3.7	-	68.1	-
Total	201.2	26.5	32.5	27.5	30.0	26.3	23.8	166.5	34.7
Residual Demand	-	-	-	-	-	-	-	-	-

Source: Ethos Urban

Note: 0 = between 0 and 0.1 hectares.

Figure have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table A2.13 Demand and Supply Implications by Precinct LOW CASE SCENARIO – Light Industry

Precinct Name	Effective Supply				Take Up			Effective Supply	
	2021	2026	2031	2036	2041	2046	2051	Total	2051
Northern Region									
(01) Elimbah East	9.1	-	-	-	4.5	3.6	1.0	9.1	-
(02) Caboolture West - Enterprise and employment - EC	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	-	-	-	-	-	-	-	-	-
(05) Henzell Road Caboolture	9.1	-	-	-	-	-	5.1	5.1	4.0
(06) First Avenue Bribie Island	1.2	-	-	-	-	-	-	-	1.2
(07) PAC Morayfield	1.7	-	-	-	-	-	-	-	1.7
(08) North East Business Park	-	-	-	-	-	-	-	-	-
(09) Bruce Highway Burpengary	26.3	4.7	6.7	6.8	4.5	3.6	0.1	26.3	-
Sub-total	47.4	4.7	6.7	6.8	8.9	7.2	6.2	40.5	6.9
Southern Region									
(10) Old Gympie Road Narangba	3.6	-	-	-	-	2.4	1.2	3.6	-
(11) Deception Bay	0.1	-	-	-	-	-	0.1	0.1	-
(12) Deception Bay Road	-	-	-	-	-	-	-	-	-
(13) Boundary Road Narangba	12.7	-	4.2	4.7	3.2	0.6	-	12.7	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-
(16) Rothwell	0.7	-	-	-	-	-	0.7	0.7	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-
(18) Clontarf	0.9	-	-	-	-	-	0.9	0.9	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	-	-	-	-	-	-	-	-	-
(20) Paisley Drive Lawnton	5.5	-	-	-	3.2	2.3	-	5.5	-
(21) Brendale	18.9	10.6	6.3	2.0	-	-	-	18.9	-
(22) The Hills District	1.8	-	-	-	-	-	1.8	1.8	-
Sub-total	44.1	10.6	10.4	6.7	6.4	5.4	4.6	44.1	-
Total	91.5	15.3	17.1	13.5	15.3	12.6	10.8	84.6	6.9
Residual Demand	-	-	-	-	-	-	-	-	-

Source: Ethos Urban

Note: 0 = between 0 and 0.1 hectares.

Figure have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table A2.14 Demand and Supply Implications by Precinct LOW CASE SCENARIO – Restricted Industry

Precinct Name	Effective Supply		Projected Demand					Effective Supply	
	2021	2026	2031	2036	2041	2046	2051	Total	2051
Northern Region									
(01) Elimbah East	-	-	-	-	-	-	-	-	-
(02) Caboolture West - Enterprise and employment - EC	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	-	-	-	-	-	-	-	-	-
(05) Henzell Road Caboolture	-	-	-	-	-	-	-	-	-
(06) First Avenue Bribie Island	-	-	-	-	-	-	-	-	-
(07) PAC Morayfield	-	-	-	-	-	-	-	-	-
(08) North East Business Park	-	-	-	-	-	-	-	-	-
(09) Bruce Highway Burpengary	-	-	-	-	-	-	-	-	-
Sub-total	-	-	-	-	-	-	-	-	-
Southern Region									
(10) Old Gympie Road Narangba	-	-	-	-	-	-	-	-	-
(11) Deception Bay	-	-	-	-	-	-	-	-	-
(12) Deception Bay Road	-	-	-	-	-	-	-	-	-
(13) Boundary Road Narangba	11.5	3.0	3.3	2.6	2.6	-	-	11.5	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-
(16) Rothwell	-	-	-	-	-	-	-	-	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-
(18) Clontarf	-	-	-	-	-	-	-	-	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	-	-	-	-	-	-	-	-	-
(20) Paisley Drive Lawnton	-	-	-	-	-	-	-	-	-
(21) Brendale	-	-	-	-	-	-	-	-	-
(22) The Hills District	-	-	-	-	-	-	-	-	-
Sub-total	11.5	3.0	3.3	2.6	2.6	-	-	11.5	-
Total	11.5	3.0	3.3	2.6	2.6	-	-	11.5	-
Residual Demand	-	-	-	-	0.4	2.5	2.1	5.0	-

Source: Ethos Urban

Note: 0 = between 0 and 0.1 hectares.

Figure have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Table A2.15 Demand and Supply Implications by Precinct LOW CASE SCENARIO – Marine Industry

Precinct Name	Effective Supply			Projected Demand				Effective Supply	
	2021	2026	2031	2036	2041	2046	2051	Total	2051
Northern Region									
(01) Elimbah East	-	-	-	-	-	-	-	-	-
(02) Caboolture West - Enterprise and employment - EC	-	-	-	-	-	-	-	-	-
(03) Sandstone Point	-	-	-	-	-	-	-	-	-
(04) Bribie Island Road Caboolture	-	-	-	-	-	-	-	-	-
(05) Henzell Road Caboolture	-	-	-	-	-	-	-	-	-
(06) First Avenue Bribie Island	-	-	-	-	-	-	-	-	-
(07) PAC Morayfield	-	-	-	-	-	-	-	-	-
(08) North East Business Park	-	-	-	-	-	-	-	-	-
(09) Bruce Highway Burpengary	-	-	-	-	-	-	-	-	-
Sub-total	-	-	-	-	-	-	-	-	-
Southern Region									
(10) Old Gympie Road Narangba	-	-	-	-	-	-	-	-	-
(11) Deception Bay	-	-	-	-	-	-	-	-	-
(12) Deception Bay Road	-	-	-	-	-	-	-	-	-
(13) Boundary Road Narangba	-	-	-	-	-	-	-	-	-
(14) Scarborough Marina	-	-	-	-	-	-	-	-	-
(15) Newport	-	-	-	-	-	-	-	-	-
(16) Rothwell	-	-	-	-	-	-	-	-	-
(17) Kippa Ring	-	-	-	-	-	-	-	-	-
(18) Clontarf	-	-	-	-	-	-	-	-	-
(19) Petrie Mill, Petrie Mill - Innovation Precinct, Petrie Town	-	-	-	-	-	-	-	-	-
(20) Paisley Drive Lawnton	-	-	-	-	-	-	-	-	-
(21) Brendale	-	-	-	-	-	-	-	-	-
(22) The Hills District	-	-	-	-	-	-	-	-	-
Sub-total	-	-	-	-	-	-	-	-	-
Total	-	-	-	-	-	-	-	-	-
Residual Demand	-	1.1	1.2	1.0	1.1	0.9	0.8	6.1	-

Source: Ethos Urban

Note: 0 = between 0 and 0.1 hectares.

Figure have been rounded.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Appendix 3: Council Assessment of 'Able to be Serviced'

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

LSDM Intent to Service Layer - Local Refinement for Industrial Zoned Land

The UAELI will be used as the foundational document to inform future planning for industrial land in the region and as part of that will need to respond to any relevant State interests.

The *State Planning Policy 2017, Table 1: The Guiding Principles* includes a requirement that:

"Plans support a 15 year supply of land for development." (p14)

ShapingSEQ includes an assessment benchmark as follows:

*"At all times, ShapingSEQ expects local government planning schemes to have at least 15 years supply of land – land that has been appropriately zoned and **is able to be serviced.**"* (p46)

The State Government has developed an Intent to Service GIS layer to inform the Land Supply and Development Monitoring Report (LSDMR) determination in relation to "able to be serviced" residential land. The Technical notes of the draft LSDMR 2021 states:

The Current Intent to Service layer is made up of the following six indicators:

- *priority infrastructure area,*
- *existing and future sewerage connection area,*
- *priority development area,*
- *infrastructure agreements,*
- *preliminary approvals, and*
- *development permits.*

Other indicators related to proximity and capacity were not readily available for incorporation into the 2021 LSDM Report.

No such layer has been created by the State Government for industrial land. However, the criteria used to inform the residential layer, are considered to be a reasonable starting point for an assessment of industrial land "that is able to be serviced". Therefore, MBRC reviewed the State Governments residential land Intent to Service layer (Data provided DSDILGP dated 09/08/2020) and identified those UAELI precincts that are excluded from the layer. 10 UAELI precincts are excluded or partly excluded from the residential Intent to Service layer, 8 of these are in an industry related zone.

Given the residential focus of the State Governments Intent to Service layer, MBRC has undertaken an assessment of the industrial precincts that are excluded, or partly excluded, to determine if they should be included in a locally refined intent to service layer for industrial purposes. This locally refined intent to service layer for industrial purposes will inform MBRC's determination of industrial land "that is able to be serviced".

The **local refinement for industry purposes is based on the following criteria:**

- The six indicators identified in the LSDMR;
 - priority infrastructure area,
 - existing and future sewerage connection area,
 - priority development area,
 - infrastructure agreements,
 - preliminary approvals, and
 - development permits.
- Adjacency/proximity to land subject to one of the six indicators.

This document details the assessment of the 8 industrial sites to inform the development of a locally refined intent to service layer for industrial purposes.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Summary of the State Governments Intent to Service layer UAELI Coverage

UAELI areas that are included

- Industrial
 - Sandstone point
 - Henzell Road Caboolture
 - First Avenue Bribie Island
 - PAC Morayfield
 - North East Business Park
 - Old Gympie Road Narangba
 - Deception Bay
 - Scarborough Marina
 - Newport
 - Rothwell
 - Kippa Ring
 - Clontarf
 - The Hills District
 - Paisley Drive Lawnton
- Not Industrial
 - Bribie Island Hospital
 - Caboolture Hospital
 - Redcliffe Hospital

UAELI areas that are excluded (partially or completely)

- Industrial
 - Brendale Precinct (Partial - Cribb Road area)
 - Caboolture West Enterprise and employment - EC
 - Elimbah East
 - Caboolture aerodrome (Partial - Hickey Road area)
 - Burpengary Road Narangba North Lakes (Boundary Road) (Partial - waste facility)
 - Petrie Mill, Petrie Mill Innovation Precinct, Petrie town (Partial - Innovation precinct)
 - Bruce Highway Burpengary (Partial - Arthur Drewett Drive area)
 - Deception Bay Road, Rothwell
- Not Industrial
 - North Harbour PDA
 - Caboolture airfield
 - Redcliffe Aerodrome

Summary of Local Refinements

The following UAELI industrial areas are proposed to be included in the Locally Refined Intent to Service layer for Industry:

- Brendale Precinct (Partial - Cribb Road area)
- Elimbah East
- Burpengary Road Narangba North Lakes (Boundary Road) (Partial - waste facility)
- Petrie Mill, Petrie Mill Innovation Precinct, Petrie town (Partial - Innovation precinct)
- Bruce Highway Burpengary (Partial - Arthur Drewett Drive area)
- Deception Bay Road, Rothwell

The following UAELI industrial areas are proposed to be excluded in the Locally Refined Intent to Service layer for Industry:

- Caboolture aerodrome (Partial - Hickey Road area)
- Caboolture West Enterprise and employment - EC

The assessment of these industrial areas against the criteria on page 1 are detailed on the following pages.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Brendale Precinct

(Partial - Cribb Road, Brendale)



(Subject area in yellow outline, Intent to service layer in red outline, Individual parcels outlined in blue) - indicative only

Zone Precinct	General Industry
Existing Development (aerial imagery assessment)	Majority of site heavily developed for industrial use remainder developed for turf farm and as car storage in the South East corner of the turf farm since 2017
Priority Infrastructure Area	Outside PIA
Development Permits	Parcel A - MCU Car and Heavy Vehicle Depot Development Permit DA/18515/2007/DA
	Parcel B - LE/2021/0016 - Leases & Licences - Turf farm lease currently in negotiation for a 5-year extension
	Parcel C - MCU for extension to existing warehouse and contractors depot (DA/24376/2010/DA) Approved 2010.
	Parcel D - MCU for Warehousing and storage (2006/11043/MCU) approved in December 2007. (DA/16004/2006/DA).
Infrastructure agreement	DA/18515/2007/IA/1 applies to the southern portion of the area.
Existing and future sewerage connection area	Not included
Preliminary approvals	Not applicable
Priority Development Area	Not applicable
Proximity to Serviced Area	Adjoining southern end of Brendale industrial precinct.

Recommendation: Local refinement - include in intent to service layer.

Criteria met: *Development permits* - Industry related development permits issued across the majority of the parcels. *Proximity* - Parcel B which is not subject to a specific industry related permit is surrounded by lots approved/developed for industrial type uses.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Deception Bay Road Precinct



(Subject area in yellow outline, Intent to service layer in red outline, Individual parcels outlined in blue) - indicative only

Zone Precinct	MIBA
Existing Development (aerial imagery assessment)	Primarily rural residential development but some low-level industrial type uses on the eastern most lots including a service station.
Priority Infrastructure Area	Outside PIA
Development Permits	Parcel A - Domestic building approvals only
	Parcel B - Domestic building approvals only
	Parcel C - Domestic building approvals only
	Parcel D - Domestic building approvals only
	Parcel E - Domestic building approvals only
	Parcel F - Domestic building approvals only
	Parcel G - Garden Supply Centre - DA/1681/1992/DA and Domestic building applications
	Parcel H - Material Change of Use - Development Permit for Storage Facility and Transport Depot and Operational Works - Development Permit for Vegetation Clearing – DA/31326/2016/V24N . Material Change of Use - Development Permit for Telecommunications Facility DA/29218/2014/V2U and Domestic building applications.
Infrastructure Agreement	Not applicable
Existing and future sewerage connection area	Not included
Priority Development Area	Not applicable
Preliminary approvals	Not applicable
Proximity to Serviced Area	Two parcels in the middle of the MIBA strip are included in the Intent to service layer and the parcels on the northern side of Deception Bay Road are serviced.

Recommendation: Local refinement - include in intent to service layer - all MIBA precinct land.

Criteria met: *Development permits* - Industry related development permits issued across eastern parcels. *Proximity* - Parcels A-F which are not subject to specific industry related permits adjoin lots to the east and on the northern side of Deception Bay Road that are able to be serviced.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Boundary Road, Narangba, North Lakes Precinct (Boundary Road)

(Partial - waste facility)



(Subject area in yellow outline, Intent to service layer in red outline, Individual parcels outlined in blue) - indicative only

Zone Precinct	General Industry
Existing Development	Narangba Waste Facility
Priority Infrastructure Area	Outside PIA
Development Permits	Parcels A and B - MCU Development Permit Council vehicle depot, workshop, storage sheds, fuel filling station
Infrastructure Agreement	Not applicable
Existing and future sewerage connection area	Not included
Preliminary approvals	Not applicable
Priority Development Area	Not applicable
Proximity to Serviced Area	Surrounded by land in Intent to service layer

Recommendation: [Local refinement - include in intent to service layer.](#)

Criteria met: *Development permits* - Industry related development permits issued for both sites.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Bruce Highway, Burpengary Precinct

(Partial - Arthur Drewett Drive)



(Subject area in yellow outline, Intent to service layer in red outline, Individual parcels outlined in blue) - indicative only

Zone Precinct	Light Industry
Existing Development	Significant existing industrial development particularly fronting Arthur Drewett Drive
Priority Infrastructure Area	Outside PIA
Development Permits	Parcel A - Domestic building approvals only
	Parcel B - Request to Change (Other) - Material Change of Use - Development Permit for a Warehouse, Caretaker's Accommodation, Bulk Landscape Supplies, Agricultural Supplies Store, Medium Impact Industry and Environmentally Relevant Activity (ERA 62). DA/25589/2011/VCHG/3 . Material Change of Use - Development Permit for General Industry (3 Stages) - DA/26891/2012/V2N
	Parcel C - Domestic building approvals only
	Parcel D - Material Change of Use - Development Permit for Caretaker's Accommodation, Food & Drink Outlet, Office, Service Industry, Low Impact Industry, Medium Impact Industry, Warehouse and Transport Depot DA/41835/2020/V2K 11 June 2021 Material Change of Use - Development Permit for General Industry (3 Stages) - DA/26891/2012/V2N Approved 9 October 2013
	Parcel E - Domestic building approvals only
Infrastructure Agreement	Not applicable
Existing and future sewerage connection area	Not included
Preliminary approvals	Not applicable
Priority Development Area	Not applicable
Proximity to Serviced Area	Land on the western side of Arthur Drewett Drive and on the southern side of Old Bay road are within the Intent to service area

Recommendation: Local refinement - include in intent to service layer - all Light Industry precinct land.

Criteria met: Development permits - Industry related development permits issued across the majority of the parcels. Proximity - Parcels which are not subject to a specific industry related permit are adjoining lots approved/developed for industrial type uses.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Aerodrome Caboolture Precinct

(Partial - Hickey Road area)



(Subject area in yellow outline, Intent to service layer in red outline, Individual parcels outlined in blue) - indicative only

Zone Precinct	Light Industry
Existing Development	Rural residential and heavy vegetation
PIA	Outside PIA
Development Permits	Parcel A - No relevant development approval
	Parcel B - No relevant development approval
	Parcel C - No relevant development approval
	Parcel D - No relevant development approval
	Parcel E - No relevant development approval
	Parcel F - No relevant development approval
	Parcel G - No relevant development approval
	Parcel H - No relevant development approval
	Parcel I - No relevant development approval
	Parcel J - No relevant development approval
	Parcel K - No relevant development approval
Infrastructure Agreement	Not applicable
Existing and future sewerage connection area	Not within future connection area
Preliminary approvals	Not applicable
Priority Development Area	Not applicable
Proximity to Serviced Area	Generally removed from Intent to Service area, surrounding rural residential land is included within the Intent to Service layer as an exception rather than the rule.

Recommendation: No change - remain outside of intent to service layer

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Petrie Mill, Petrie Mill Innovation Precinct, Petrie Town Precinct



(Subject area in yellow outline, Intent to service layer in red outline, Individual parcels outlined in blue) - indicative only

Zone Precinct	The Mill at Moreton Bay PDA - Innovation Precinct
Existing Development	Heavily vegetated
Priority Infrastructure Area	Within PIA
Development Approval	Not applicable
Infrastructure Agreement	Not applicable
Existing and future sewerage connection area	Outside Sewer connection area
Preliminary approval	N/A
Priority Development Area	Within The Mill at Moreton Bay PDA
Proximity to Served Area	Surrounded by Intent to service area in heavily built up area.

Recommendation: [Local refinement - include in intent to service layer.](#)

Criteria met: [Priority Development Area - Within The Mill at Moreton Bay PDA](#)

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Caboolture West - Enterprise and employment - EC



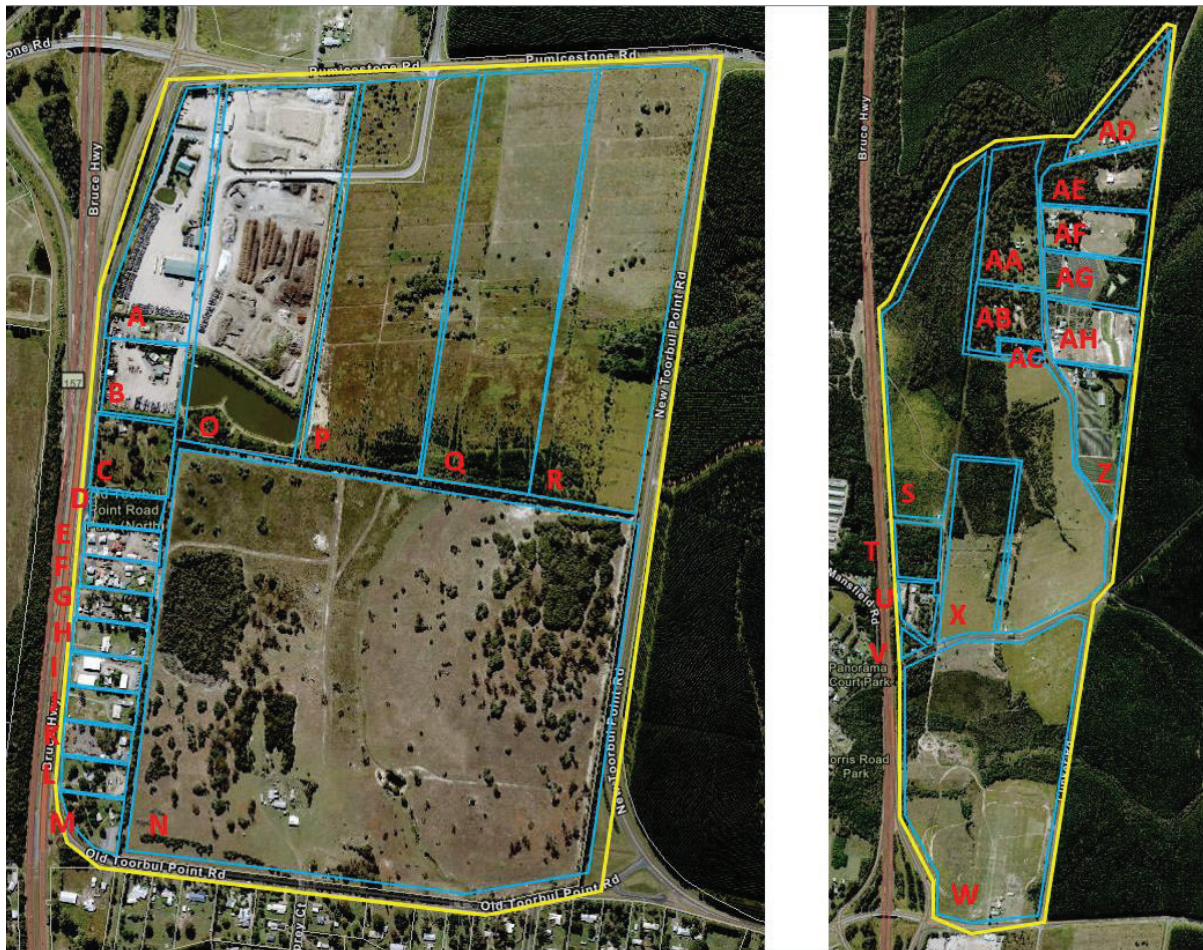
(Subject area in yellow outline, Intent to service layer in red outline, Individual parcels outlined in blue) - indicative only

Zone Precinct	Emerging Community Zone Enterprise and Employment Precinct
Existing Development	Rural/Rural Residential
Priority Infrastructure Area	Outside PIA
Development Permits	Parcel A - No relevant development approval
	Parcel B - No relevant development approval
	Parcel C - No Relevant development approval
	Parcel D - No relevant development approval
	Parcel E - No relevant development approval
	Parcel F - No relevant development approval
	Parcel G - No relevant development approval
	Parcel H - No relevant development approval
Infrastructure Agreement	Not applicable
Existing and future sewerage connection area	Not included
Priority Infrastructure Area	Not applicable
Preliminary approval	Not applicable
Proximity to Served Area	Significantly removed from the Intent to Service layer and serviced areas.

Recommendation: No change - remain outside of intent to service layer

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Elimbah East Precinct



(Subject area in yellow outline, Intent to service layer in red outline, Individual parcels outlined in blue) - indicative only

Zone Precinct	General and Light Industry
Existing Development	Northern portion comprised of rural, rural residential and agricultural uses. Southern portion comprised of well-established industrial uses fronting the Bruce Highway and the corner of Pumicestone road and the remainder for rural purpose.
Priority Infrastructure Area	Outside PIA
Development Approval	Parcel A - MCU- development permit for Telecommunication Facility DA/34675/2017/V2U
	Parcel B - MCU- development permit for Telecommunication Facility DA/34675/2017/V2U
	Parcel C - No relevant development approvals
	Parcel D - No relevant development approvals
	Parcel E - DA/39028/2019/V2N -MCU- development Permit for Outdoor Sales, Warehouse, Low Impact Industry and Caretaker's Accommodation- Approved - 22 November 2019
	Parcel F - DA/39028/2019/V2N -MCU- development Permit for Outdoor Sales, Warehouse, Low Impact Industry and Caretaker's Accommodation- Approved - 22 November 2019
	Parcel G - DA/38438/2019/V2N -MCU- Development Permit for Outdoor Sales and Medium Impact Industry approved 30 March 2020
	Parcel H - No relevant development approvals
	Parcel I - DA/31429/2016/V2N Material Change of use- Development Permit for Low Impact Industry and Outdoor Sales Negotiated Decision Notice approved 11 Jan 2019
	Parcel J - DA/42690/2020/V2N MCU- Development Permit for Warehouse, Low Impact Industry, Transport Depot and Outdoor Sales-Determined Negotiated Decision
	Parcel K - No relevant development approvals
	Parcel L - No relevant development approvals
	Parcel M - No relevant development approvals
	Parcel N - No relevant development approvals
	Parcel O - MCU- development permit for Telecommunication Facility DA/34675/2017/V2U
	Parcel P - No relevant development approvals
	Parcel Q - No relevant development approvals
	Parcel R - No relevant development approvals

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

	Parcel S - No relevant development approvals
	Parcel T - No relevant development approvals
	Parcel U - No relevant development approvals
	Parcel V - No relevant development approvals
	Parcel W - DA/34237/2017/V2C MCU - Development Permit for Service Station and Food and Drink Outlet approved 12 April 2019
	Parcel X - No relevant development approvals
	Parcel Z - No relevant development approvals
	Parcel AA - No relevant development approvals
	Parcel AB - No relevant development approvals
	Parcel AC - No relevant development approvals
	Parcel AD - No relevant development approvals
	Parcel AE - No relevant development approvals
	Parcel AF - No relevant development approvals
	Parcel AG - No relevant development approvals
	Parcel AH - No relevant development approvals
Infrastructure Agreement	Not applicable
Existing and future sewerage connection area	Not included
Preliminary approval	Parcel W - DA/27459/2013/V2L Material Change of Use - Preliminary Approval to vary the effect of the Planning Scheme (predominately industrial) Approved- December 2015. DA/27458/2013/V2L Material Change of Use- Preliminary Approval to vary the effect of the Planning Scheme- Approved 14 December 2015
	Parcel P - DA/27459/2013/V2L Material Change of Use - Preliminary Approval to vary the effect of the Planning Scheme (predominately industrial) Approved- December 2015
	Parcel Q - DA/27459/2013/V2L Material Change of Use - Preliminary Approval to vary the effect of the Planning Scheme (predominately industrial) Approved- December 2015
	Parcel R - DA/27459/2013/V2L Material Change of Use - Preliminary Approval to vary the effect of the Planning Scheme (predominately industrial) Approved- December 2015
Proximity to Serviced Area	Removed from land within the intent to service layer, surrounded by rural and rural residential land.

Current Variation Application DA/37202/2018/V2L MCU - variation application for preliminary approval of the Elimbah East Master Plan - decision stage	Parcel P Parcel Q Parcel R Parcel W Parcel X Parcel Z
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Recommendation: Local refinement - include in intent to service layer.

Criteria met: *Development permits* - Industry related development permits have been issued for the vast majority of lots fronting the Bruce Highway in the area south of Pumicestone Road as well as the significant Parcel W north of Pumicestone Road. *Proximity* - Parcels which are not subject to a specific industry related permit are generally adjoining/proximate to lots approved/developed for industrial type uses. In order to service those sites already developed or approved for development, services will be developed such that they will then be sufficiently proximate to the remaining lots to justify inclusion within the intent to service layer.

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Appendix 4 Glossary of Terms

Term	Definition
Advanced manufacturing	The set of technology-based offerings, systems and processes that will be used to transition the current manufacturing sector into one that is centred on adding value across entire supply chains. Advanced manufacturers are companies that rapidly create and adopt these technologies
Bottom-up approach	Method of analysis that is based on observed on the ground trends, using the MBRC's VUT data complemented with the consultants own analysis of uptake rates is considered to be a bottom up approach.
Constraints	Where constraints are referenced in relation to the supply of industrial land, it refers to physical and planning considerations that may limit the extent of future development. These include landslide hazards, high-risk flood areas, landscape heritage areas, etc.
Co-working	Shared working space with standard amenities for range of potential users. Can be themed to a specific industry and/or form part of a business incubator program, or non-industry specific.
Direct Employment	Employment generated by the initial activity/investment
Effective Supply	Volume of supply that could be realistically developed, which is calculated as gross available land less constrained land and less civil infrastructure allowances for greenfield sites, that is also appropriately zoned and able to be serviced.
Employment self-containment	The share of employed residents who work in local jobs.
Flexi-space	'spill-over' office space with tailored amenities geared to the needs of one-specific tenant. An emerging trend in the delivery of premium or A-grade floorspace is for the provision of high-quality onsite flexi-space to be used as an incentive to attract high-profile anchor tenants.
Gross Vacant Land	Volume of industrial land that is vacant or underutilised (only the proportion of underutilised land that could be developed) before allowing for planning constraints or civil infrastructure requirements.
High Impact Industry	<p>Premises used for industrial activities that include the manufacturing, producing, processing, repairing, altering, recycling, storing, distributing, transferring or treating of products and have one or more of the following attributes:</p> <ul style="list-style-type: none"> - potential for significant impacts on sensitive land uses due to off-site emissions including aerosol, fume, particle, smoke, odour and noise; - potential for significant off-site impacts in the event of fire, explosion or toxic release; - generates high traffic flows in the context of the locality or the road network; - generates a significant demand on the local infrastructure network; - the use may involve night time and outdoor activities; - on-site controls are required for emissions and dangerous goods risks <p>Further guidance on individual activities and uses can be found in Schedule 1.22 of the Planning Scheme</p>

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Term	Definition
Indirect Employment	Flow on employment in supply-chains and retail activity from initial activity/investment.
Indirect Employment Multiplier (Type 2B)	Additional employment generated from every direct job.
Innovation Infrastructure	Programs, technology, and institutions that can support innovation.
Land Use - 'Other'	This is a grouping of zone precincts, including Restricted Industry, Marine Industry, Specialised Centre, and Airfield.
Low Impact Industry	<p>Premises used for industrial activities that include the manufacturing, producing, processing, repairing, altering, recycling, storing, distributing, transferring or treating of products and have one or more of the following attributes:</p> <ul style="list-style-type: none"> - negligible impacts on sensitive land uses due to off-site emissions including aerosol, fume, particle, smoke, odour and noise; - minimal traffic generation and heavy-vehicle usage; - demands imposed upon the local infrastructure network consistent with surrounding uses; the use generally operates during the day (e.g. 7am to 6pm); - off-site impacts from storage of dangerous goods are negligible; - the use is primarily undertaken indoors <p>Further guidance on individual activities and uses can be found in Schedule 1.22 of the Planning Scheme</p>
Medium Impact Industry	<p>Premises used for industrial activities that include the manufacturing, producing, processing, repairing, altering, recycling, storing, distributing, transferring or treating of products and have one or more of the following attributes:</p> <ul style="list-style-type: none"> - potential for noticeable impacts on sensitive land uses due to off-site emissions including aerosol, fume, particle, smoke, odour and noise; - potential for noticeable off-site impacts in the event of fire, explosion or toxic release; - generates high traffic flows in the context of the locality or the road network; - generates an elevated demand on the local infrastructure network; on-site controls are required for emissions and dangerous goods risks; - the use is primarily undertaken indoors; evening or night activities are undertaken indoors and not outdoors. <p>Further guidance on individual activities and uses can be found in Schedule 1.22 of the Planning Scheme</p>
Net Vacant Land	Volume of supply that could be realistically developed, which is calculated as gross available land less constrained land and less civil infrastructure allowances for greenfield sites.
New Business Demand	Component of industrial land demand driven by new businesses that would not otherwise develop in MBRC due to local population growth.
Occupied industrial land per capita	Area of taken-up industrial land divided by the municipal population

ITEM 3.1 - RESHAPING OUR REGION'S PLANNING: URBAN AREAS EMPLOYMENT LANDS INVESTIGATION (Cont.)

Urban Area Employment Land Investigation (UAELI) Report 2022

Final Report

Term	Definition
Population Growth Demand	Component of industrial land demand driven by population, i.e. auto mechanics, trade supplies retailing, vehicle sale yards, etc.
Serviced offices	Typically 'spill-over' or remote office space with standard amenities.
SMEs	Small to Medium Enterprises.
Taken-up	Land that contains an active land use and has built form for the purposes of industrial or other use. Land that contains construction of an improvement/building that has commenced but may not be completed.
Top-down approach	Method of analysis that is based on broad or macro level variables and assumptions, in this instance for employment land estimates a top down approach the model being underpinned by a general equilibrium or input output model.
Underutilised	Land used for temporary storage or materials, machinery, vehicles, etc. that does not contain a permanent structure, or land not used to its full potential i.e. containing a significant proportion of open space associated with industrial built form or operation.
Unitywater	Queensland water utility provider.
Urban Area Employment Lands	The industrial and employment precincts identified as within the scope of this investigation paper.
Vacant	Land that does not contain significant built-form or evidence of an industrial operation or use. Land that is being used for rural, farming or agricultural operations.
Value Added	The net value of outputs after deducting the cost of inputs.
VUT database	Digitally mapped database of land parcels in industrial and employment precincts within the scope of this study. The database categorises each parcel of land as either taken, underutilised or vacant, the primary land use on-site, and identifies the zone precinct and level 1 zone the parcel sits in.
Workforce	People who work in an area (different from Labour force which is the number of employed residents).
Years of Remaining Supply	Net Vacant Land divided by forecast annual demand.