

Leichhardt Employment Lands Stud

Appendic

Leichhardt Council

JANUARY 2

This report has been prepared for:



This report has been prepared by:



SGS Economics and Planning Pty. Ltd.

ACN 007 437 729

Suite 12/50 Reservoir St

Surry Hills NSW 2010

phone: 61 2 83070121

fax: 61 2 83070126

email: sgsnsw@sgsep.com.au

web: www.sgsep.com.au

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Appendix 1 - Industry Survey

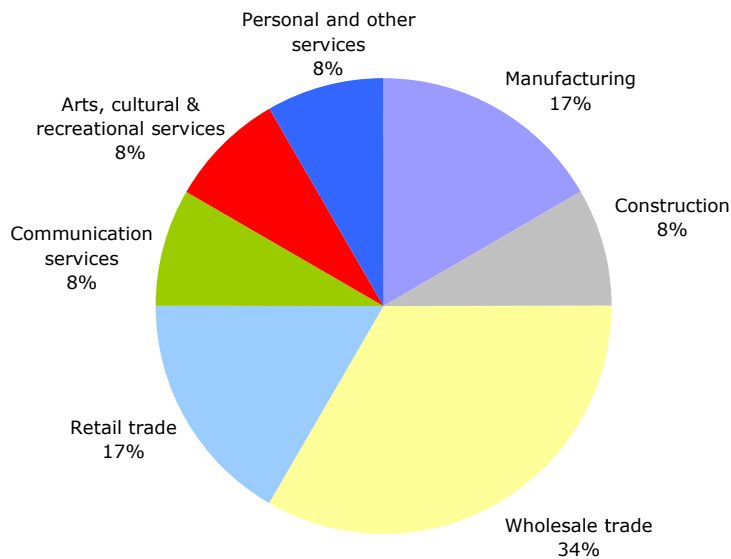
Only 15 responses to the Leichhardt business survey were received. This is 4.5 percent of the 333 surveys distributed by Council. Surveys were sent to businesses listed on the rates database as well as some arts contacts.

Overall, the majority of the questions have been answered satisfactorily; the number of missing values is low; however the number of responses is not sufficient to draw any firm conclusions. The results of the survey should only be used as an indication of business activity and the local business climate.

Industry activity

Most of the businesses were able to indicate the industry category of their activities. The distribution of businesses among industry categories is displayed in the pie-chart figure below.

Figure 1. Business activity by broad industry sector



Source: SGS (2007), Leichhardt Business Survey

The largest category of businesses represented in the survey results is formed by Wholesale Trade; approximately 34%, but with the low number of respondents this is only four wholesale businesses. The next largest categories are Retail Trade (17%) and Manufacturing (17%), followed by Construction, Arts, Cultural & Recreational Services, Communication Services and Personal & Other Services each representing 8% of respondent businesses.

The majority of business sales (61%), and businesses inputs (50%), were from Elsewhere in Sydney and Elsewhere in New South Wales. However the majority of staff live within Leichhardt or the Inner West.

Employment

All businesses that responded to the survey could be classified as small to medium-sized with no respondents employing more than 24 people. On average, respondents indicated their businesses employ 12 persons (in Full Time Equivalent – FTE - terms). However, the majority of businesses are small sized and the median size is 9 employees (FTE).

Businesses were asked to specify if they have any difficulty in attracting or maintaining employees in different income brackets. More businesses expressed difficulty in recruiting in the lower and higher income brackets than in the middle income bracket of \$600 - \$1,299 per week. There were a significant number of businesses that expressed no problem in recruiting and retaining employees across all income brackets, which suggests Leichhardt is considered a desirable place to work.

Floorspace

On average businesses reported that the majority of their floorspace is used for warehousing (45%), followed by office use (29%). This is consistent with the type of businesses that responded to the survey.

Average land area used by respondent businesses is 778 sqm and average floorspace used by respondent businesses is 526 sqm.

Business Movement and Transportation

Businesses were asked to specify whether they use rail, road, Sydney Airport and Port Botany for import/export, transport or storage, delivering services and supplies or for employee or client movement.

Most business do not use rail transport. One-third of businesses use Sydney Airport for import/export and for transport of employees or travelling clients, 20% use Sydney Airport for transport, storage or to transfer goods, 13% deliver services and supplies via Sydney Airport. Businesses use Port Botany for the delivery of services (53%), transport, storage and transfer of goods (33%), and import or export of good via the Port (7%).

The M2 and M4 are the freeways most used by businesses in Leichhardt. Forty-seven percent of business use the M2 freeway to deliver services and supplies and for employee or client travel. The M4 is used by 47% of businesses for employee or client travel and 40% for delivering services and supplies.

Future intentions

The survey asked the businesses to comment on their future expectations and intentions.

Most businesses indicate they expect their business will remain stable in terms of employees and land / floorspace area. Nonetheless, future expectations are fairly positive as 40% of businesses intend to expand the number of employees compared to only 7% expecting to decrease the number of employees.

Markedly, while many businesses intend to expand the number of employees, they do not intend to expand the floor or land area they are currently using. Many intended to remain in the same location and reasons given by business for this were:

- Good central location;
- Proximity to City and Eastern Suburbs;
- Proximity to clients and markets;
- Location growing as an artistic hub;
- Goodwill established at current location;
- Have purchased business premises; and
- To avoid cost of moving.

Regulations

The survey asked the businesses whether Council controls and regulations had ever impacted on their business operations. A majority of businesses answered no. However, some businesses did indicate that some controls and regulations have impacted upon their business activities.

Only one respondent indicated that a regulation had affected business activity and that was in a positive way, stating that heritage controls in Balmain have strengthened its character.

Business Climate

The survey asked the businesses for their opinion on the quality of the local business climate. Aspects taken into account were availability of suitable land and business premises, accessibility of transport infrastructure and the facilitating role of the Council.

Overall, businesses in Leichhardt are reasonably content with the local business climate; on a scale of 1 (very poor) to 5 (very good) most businesses tended to answer that the local business climate is average or better.

However, some aspects are clearly seen as competitive advantages to other locations: Accessibility to current premises, access to major road infrastructure, and access to public transport are all seen as strong attributes.

Suggestions to improve Leichhardt's business environment

The survey asked businesses for their suggestions and ideas to improve Leichhardt as a business environment. All responses are listed below. Each response was made by one respondent only.

- **Develop and arts and culture strategy that promotes artistic venues, resources and opportunities in Leichhardt;**
- **Provision of street banners like City of Sydney;**
- **Short-term (15min) free parking near essential business services e.g. banks, post offices;**
- **Better parking controls;**
- **Better street drainage to cope with heavy rain;**
- **Provide more parking on or near Norton St;**
- **Address traffic issues on Norton St between Marion and Parramatta Rd;**
- **Strengthen 'special' aspects of area i.e. history and harbour.**

Appendix 2 - Consultation Groups

Balmain/Rozelle Chamber of Commerce

Leichhardt Chamber of Commerce

Sydney Ports

Anthony El Hazouri, Portfolio Realty Pyrmont, Spoke to 27/1/08

Michael Montano, Raine and Horne Leichhardt , Spoke to 29/1/08

Appendix 3 - Document Review

Terry St (Carrier site) Precinct, Balmain (October 2007)

The Carrier site which is currently zoned for industrial use has a concept plan to provide higher density development with a range of commercial, residential and employment generating uses. Balmain is characterised by high income households, mainly singles or couples without children. Household sizes are small and average retail spending levels are high.

The existing neighbourhood consists of Rozelle retail strip – located on Darling St, accommodating approximately 100 shops with limited parking and no anchor supermarket, Balmain retail strip – located along Darling St containing around 160 shops and a Woolworths supermarket, Birkenhead Point – located 1 km north west from site, consists of just under 23,000 sqm in retail floorspace featuring factory outlets, a supermarket and specialty stores, and Victoria Rd, Drummoyne – has mainly convenience retailers and a small supermarket.

In the trade area (includes the whole of Balmain Peninsula, City West Link road provides southern boundary of trade area) there is approximately 60,000 sqm of retail floor space. The report states that there is provision for additional retail facilities. Total supermarket floorspace is 108 sqm per 1,000 residents. This is well below the Sydney average of 225 sqm and the Australian average of 300 sqm.

An Economic Impact Assessment was undertaken and looked at the impact of the site on competing centres. There is likely to be some impact on centres in the trade area. The extent of the impact will depend on individual centres' proximity and competitiveness.

There will also be a number of benefits to the local community from the proposed development. Employment generation from the site is expected to provide 679 jobs during construction and 349 on-going jobs. The report also states that the site will benefit local consumers by allowing them greater choice at a modern facility and that the site will also help reduce car usage.

Key employment sectors in Leichhardt are retail, commercial and health sectors. Little redevelopment has been undertaken in industrial lands in Leichhardt.

The site is currently zoned industrial, with the proposed Masterplan including 58,800 sqm of Net Lettable Area, which consists of:

- Retail – 9,000 sqm
- Bulky goods/showroom – 4,4000 sqm
- Commercial (including gym) – 11,800 sqm
- Residential – 33,600 sqm

Retail Structure

Regional Centres

- Sydney CBD – located 4 kms east of site, with over 553,000 sqm of retail floorspace
- Burwood – located 6 kms west of site, contains 80,000 sqm of retail floorspace

Sub-regional Centres

- Marketplace Leichhardt – located at Marion St and Flood St, 3 kms south west of site, contains 17,400 sqm of gross leasable area
- Broadway Shopping Centre – 3.5 kms south east of site, contains 43,000 sqm of retail floorspace

Supermarket Centres

- Birkenhead Point – located 1 km north west from site, has 21,300 sqm of retail floorspace including factory outlets and a supermarket
- Sutton Place – located at Lyons Rd and Victoria Rd, Drummoyne, contains a 800 sqm supermarket and 7 other specialty shops
- Norton Plaza – located on Norton St, contains 8,500 sqm of retail floorspace

Retail Strips

- Darling St, Rozelle – includes approximately 60 shops including a further 35 shops on Cambridge St
- Darling St, Balmain – includes around 150 shops plus some non-retail services. There is a 1,800 sqm supermarket
- Victoria Rd, Drummoyne – contains around 80 retail stores, on south-eastern part of retail strip there are more showroom style stores
- Norton St – extends for 1 km, includes a shopping centre and supermarket

Other Centres

- Balmain Tigers Club (proposed) – will include over 7,500 sqm of retail floorspace including a 2,550 sqm supermarket, specialty stores and further 179 residential units
- Pyrmont – located 2.5 kms south east of subject site, contains many high density commercial office buildings and numerous tourist orientated facilities. Also comprises of two supermarkets (2,500 sqm and 1,840 sqm) and many specialty stores

Leichhardt Travel Patterns 2005 (PowerPoint presentation)

In 2005, 96,000 trips were made from Leichhardt – 30,000 trips people leaving to go home, 16,000 were leaving for social/recreational purposes, 16,000 trips were people going to work and 12,000 trips were for work-related purposes and 8,000 trips for shopping.

96,000 trips were also made back to Leichhardt – 34,000 trips were residents returning home, 15,000 trips were coming for social/recreational purposes, 13,000 trips were coming for work-related reasons and 12,000 trips were coming to work.

For trips from Leichhardt the main destination was the City of Sydney with 19,000 trips made, and then it was 18,100 trips made East, 13,000 trips made to Marrickville, 11,600 trips made to the Inner West and other trips made to the South, North, North-west, Ashfield, West and North Sydney.

Of those people going home 26% of workers and visitors made the trip from Leichhardt to Marrickville, 14% came from the Inner West, 12% came from Ashfield and 12% came from South. Of those people making the trip from Leichhardt going to work, 46% trips are to the City of Sydney, 19% to the East and 6% to Marrickville, Inner West and North. Of those people making the trip from Leichhardt for work-related trips, 24% go to the City, and 15% each to East and Inner West.

50% of all trips made from Leichhardt were made by 30-49 year olds, 25% of trips were made by 50-64 year olds, 17% of trips were made by 20-29 year olds and 4% each of trips made by 15-19 year olds and +65 year olds. Age was a factor in people's destination, older people tended to travel locally, while middle aged people travelled to the City and East and younger people travelled to the City, East and Marrickville.

73% of all trips from Leichhardt are made by car, 15% use a bus and 6% walk, which is mainly to catch the train at Marrickville station.

17,300 trips into Leichhardt originated in the East, then from the City of Sydney with 16,700 trips, then Marrickville with 14,500 trips and then from the Inner West with 11,400 trips.

Half of all trips made to Leichhardt are by 30-49 year olds, a quarter of all trips are made by 50-64 year olds, a sixth of all trips is made by 20-29 year olds and 5% of all trips are made by both 15-19 years and +65 year olds.

Trips into and out of Leichhardt both peak around noon. 74% of all trips made into Leichhardt are made by car. 13% of people catch a bus and 7% of people walk into Leichhardt. Car trips dominate both trips into and out of Leichhardt, except for the City where the majority of people come by bus.

Leichhardt Council Snapshot 2007

Population and Growth

- In the 2006 Census, 48,776 residents were counted in Leichhardt – 26,436 women and 23,340 men (ratio of 1.09 female to 1 male)
- There has been a population decrease of 12,544 residents (20%) since 2001 (part of this is due to Leichhardt boundary changing)
- There were 409 indigenous residents

Age Structure

- From 2001 to 2006, the fastest growing age group was people aged 55-64
- The 15-24 year age group declined
- In 2006, there were 17,405 residents aged between 25-54 (prime working age)
- There were 4,472 young adults 15-24 years old (9% of population) this is compared to the Sydney average of 14%
- 14% of residents were children (aged under 14), this is compared to the Sydney average of 20%

- 4,661 residents (10%) were aged over 65, compared to Sydney average of 12%

Social Structure

- There are 20,159 private dwellings occupied in 2006
- Average household size is 2.2 people
- 61% of occupied dwellings were occupied by families. This was the fastest growing household type
- 31% were lone person households
- The remaining 8% dwellings were occupied by group households

Families

- In 2001, there were 12,367 families living in 12,249 households (suggesting 118 dwellings held two families)
- 38% of couple with children, 46% were couples without children, 13% were one parent families, 3% of other family types
- Fastest growing household type was couples with children

Incomes

- In 2006, the median individual income was approximately \$895 per week
- The median family income was approximately \$2,307 per week (\$957 more than the Sydney median)
- Median income of households tended to be lower, as many households have just one person
- Median household income was \$1,733 per week (13% higher than 2001, and \$579 more per week than the Sydney median)

Housing Types

- In 2006, there were 24,060 private dwellings, of which 2,0966 were vacant
- 37% (8,078 dwellings) of occupied dwellings were attached houses
- 35% (7,631 dwellings) were separate houses; 27% (5,950 dwellings) were flats and 335 were other dwelling types
- Compared to Sydney as a whole, Leichhardt has a higher proportion of attached houses (37% compared to 12%)
- From 2001 to 2006, Leichhardt had a net loss of 6,243 dwellings. This included an increase of 4.5% of separate houses; decline of 3.2% of flats

Housing Costs

- Median monthly mortgage payment was \$2,400 a month compared to \$1,800 for Sydney
- Average weekly rent was \$350 per week, compared to \$250 per week for Sydney

- Housing affordability – median housing cost was about 26% of median household incomes, compared to 30% for Sydney

Housing Tenure

- 38% (8,462 dwellings) of dwellings were rented or rent-free
- 29% (6,456 dwellings) of households were being bought
- 23% (4,998 dwellings) were fully owned; and 77 other dwellings were in other tenure

Review of Business and Industrial Lands in Leichhardt 2002

LEP's objectives:

"Ensure the sustainable growth of Leichhardt's economy by retaining existing employment uses and fostering a range of new industrial and business uses, to meet the needs of the community"

"Ensure that buildings to be used for employment are appropriately located and designed to minimise the generation of noise, traffic, carparking, waste, pollution and other adverse impacts, to maintain the amenity of surrounding land uses, and to avoid harm to the environment".

The Leichhardt LEP introduced broad Business and Industrial Zones – this primarily contained ten different Business and Industrial sub-zones.

Commercial areas (with the exception of Broadway) are predominantly traditional small frontage strip shopping centres. Some of these contain larger developments which comprise of centre developments located around an anchor. Commercial areas in "out of centre" locations are intersected and dominated by residential built forms.

Existing industrial areas consist of larger industrial areas, isolated pockets and existing uses in residential areas. Because of this there are a number of industrial areas surrounded by residential development. In Leichhardt there is very little new construction of industrial developments, with most premises seeking conversion or partitioning of existing space to meet their needs.

In the area there has been a declining trend in the manufacturing sector. With the gentrification of the area, the manufacturing sector has been replaced by service, commercial and retail sectors. In 1996, 60% of persons employed in Leichhardt were "managers and administrators", "professionals" or "associate professionals", with another 25% employed in "advanced clerical, sales and service workers" sector.

Between 1994 and 1996 the sectors of businesses that grew the most in Leichhardt were: property and business services, construction, retail trade, cultural and recreational services and accommodation, cafes and restaurants. Employment generation can be associated with different land uses and the age of buildings. Shops and offices have the highest employment rates, while

manufacturing, showroom and wholesaling/retailing from older style industrial buildings have lower employment generation rates.

Leichhardt Regional Context

Key commercial and industrial economic drivers in the area are the Sydney CBD, the Airport, Port Botany and to a lesser extent Port Jackson. As the area is located in close proximity to these drivers, it also benefits from regional road infrastructure including the City West link road and Anzac Bridge. (The study indicated that there may also be benefits from the Cross City Tunnel, which was yet to be constructed at the time of the study). The area is also serviced by a light rail system, which links the area directly to the CBD.

Leichhardt LGA has large areas of land set aside for port and employment uses which are serviced by a good rail line. The area also has active port uses and a public ferry service to the city and other parts of the harbour.

The M5 extension, improvements to the goods line and proposed freight distribution terminal at Enfield will see some industries move away from the area. But there will still be demand for land from industries that require close access to the City or Airport or which serve the local population. These land uses will mainly include: offices and warehouses, transport and container storage facilities.

In 2002, Leichhardt offered older style industrial floor space with poor office space and a lack of carparking and loading facilities. Average rental prices in the area were \$90/m² to \$130/m². More modern accommodation with larger office facilities had an average rental value of \$130/m² to \$160/m². The small size and dispersed nature of industrial lands within Leichhardt adds a risk to long term tenure of properties.

In 1995, Leichhardt did not have an established office market. Offices that are located in the area are usually small private sector businesses with a floorspace of less than 200m². From the Leichhardt Town Centre Business Strategy it was expected that there would be an "ongoing demand for small professional office spaces".

Within Leichhardt LGA there is a distinct hierarchy of retail premises. These are influenced by Broadway, major shopping centres, strip shopping centres, neighbourhood shopping centres and zoned corner shop developments. Parking is a major constraint for smaller retail developments. From the Leichhardt Town Centre Business Strategy, in 1995 there was not one particular centre which stood out in floorspace or functional usage and shopping centres in the area mainly only service the local community and other local catchment areas.

Planning directions from adjoining LGAs may impact on Leichhardt LGA. These include: South Sydney LEP 1998 and Marrickville LEP 2001.

Leichhardt LEP 2000 is the major planning control that guides industrial and business development in the LGA. The LEP outlines two broad zones, which identify key land uses and characteristics of the two zones.

- Industrial zone – provide a range of employment opportunities focusing on traditional industrial activities and other uses deemed appropriate in Industrial zones. Shops, commercial premises and dwellings are prohibited. With an Floorspace Ratio (FSR) for the zone of 1:1.
- Business zone – applies to land within existing business centres where retail, commercial and associated uses are concentrated. Zone permits shops and commercial premises and industrial development is permissible with exception of warehouses and smash repairs. Zone has FSR of 1:1.
- Spatial configuration of zones – looks at different industrial and business sub-zones located in Leichhardt LGA.

***Development Control Plan 2000**

In 2002 an extensive land use survey was undertaken on the existing employment area within Leichhardt LGA. The land use survey identified industrial, business and non-residential uses in residential zones.

Traditional Industrial Land Uses – characterised by larger industrial areas, where potential conflict from other land uses is limited:

- Lords Estate in Lords Rd, Leichhardt
- Moore St, John St, Catherine St and Hill St, Leichhardt
- Robert St, Crescent St, Mullens St and Parsons St, Rozelle
- Balmain Rd, Alberto St, Fred St and Fred Lane, Rozelle

Retailing in Industrial Zones – includes retailing ancillary and industrial uses, bulky goods, trade supplies and developments uses primarily as shops.

- Parramatta Rd, Camperdown between Mallet St and Johnsons Creek and Marion St near Hawthorne St (furniture retailers)
- Parramatta Rd between Mallet St and Pymont Bridge Rd and Pymont Bridge Rd, Camperdown (kitchen/bathroom showrooms and supplies, with little or no parking facilities)
- Allen St, Flood St, Leichhardt (bulk retailing)
- Moore St between Balmain Rd and MacKenzie St (factory outlets)

Self storage – provide little employment compared to other industrial sectors.

- Booth St and Pymont Bridge Rd
- Allen St, Leichhardt

Car-related uses – includes motor showrooms, smash repairs and spare parts sales.

- Parramatta Rd between Elswick St and Flood St, Leichhardt
- Pymont Bridge Rd, Camperdown

Commercial Uses in Industrial – include communication and design uses. With most buildings adapted for commercial use and having limited carparking facilities.

- Wentworth Park Rd, Bay St and Cowper St, Glebe (now within the City Of Sydney LGA)
- Parramatta Rd, Leichhardt
- Parsons St, Rozelle

Residential Use in Industrial Zones –residential use of industrial properties:

- Victoria Rd, Balmain and Rozelle
- Justin St, Lilyfield
- Lower Avon St, Glebe

Isolated/pockets of business zones

- Nutrimetics site – Elliot St, Balmain
- Nicholson St, East Balmain
- Nelson St, Annandale
- Darley St, Lilyfield
- Catherine/Styles St, Leichhardt
- Catherine/Piper St, Leichhardt
- Perry/Mary St, Lilyfield
- Perry/Glover St, Lilyfield

Findings and Recommendations

1. If Leichhardt is going to attract employment generating uses, it needs to provide a greater range of accommodation
2. Expansion of Business zones is required to encourage redevelopment to attract greater range of office/ commercial employment opportunities
3. Provide incentives for redevelopment e.g. Increased/bonus FSRs
4. Protect remaining traditional industrial areas
5. Expand permissible uses on certain industrial zoned land (rezoning areas)
6. Rezoning industrial areas dominated by residential uses (to limit industrial uses)
7. Define role of neighbourhood centres and review nominated neighbourhood centres (to reinforce role of centres)
8. Review and rezone isolated Business Pockets
9. Manage interface issues (the character, design and amenity impacts)
10. General amendments to the DCP are required to protect and reinforce the employment lands within the LGA
11. Council's commitment to Employment Growth

Retail Needs Study 2006

In 2006, residential population of Leichhardt was 51,769, with limited growth to occur between 2006 and 2016. The total available annual retail spending in 2006 was \$657 million, which is estimated to rise to \$836.5 million by 2016. In theory this would support an additional 32,636 sqm of retail floorspace. Supermarket spending is expected to increase from \$210.1 million to \$267.7 million, this would support a further 6,760 sqm of new supermarket floorspace. Bulky goods spending is also projected to increase from \$217 million to \$276.4 million, being able to support an additional 14,836 sqm of new floorspace.

There is currently a deficiency of 37,514 sqm of overall retail floorspace. The largest deficiencies occur in:

- Lilyfield – 14,759 sqm
- Annandale – 13,608 sqm
- Rozelle – 5,813 sqm
- Balmain – 5,487 sqm

There is a deficiency of 10,314 sqm in supermarket floorspace, with the major deficiencies in:

- Annandale – 3,595 sqm
- Rozelle – 3,418 sqm
- Lilyfield – 3,163 sqm

There is a deficiency of 33,395 sqm of bulky goods floorspace. If this trend were to continue there would be a shortfall of 47,197 sqm by 2016.

Growth in office based jobs over the next 20 years in Leichhardt could see between 1,280 to 1,680 jobs being generated, with an approximate demand for between 19,200 and 25,200 sqm of additional office floorspace needed.

Factors to consider when estimating demand for floorspace are: home-based employment is a growing but misunderstood trend, some employment is mobile and therefore does not require floorspace and office space used by government cannot be predicted.

The study looks at the proposal to redevelop two sites – Balmain Leagues Club and Carrier (Multiplex masterplan) site.

Existing Retail Centres:

- **Balmain** – major shopping strip with 18,671 sqm of floorspace, concentrated on Darling St between King St and Queens Place. The largest tenant is Woolworths supermarket with 1,800 sqm in floorspace. Mainly services the local community.
- **Rozelle** – located on Darling St and a bit on Victoria Rd. Has a small grocery store outlet (IGA). Contains approximately 11,662 sqm of floorspace. Is affected by heavy traffic.
- **Leichhardt** – in suburb of Leichhardt retailing found on Norton St to the north and south of Marion St and at the western end of Marion St. On Norton St, north of Marion St is approximately 6,000 sqm of floorspace; on Norton St, south of Marion St is approximately 3,455 sqm of floorspace, plus centres of Leichhardt Plaza and Italian Forum. The Centres and a Coles supermarket include a further 17,920 sqm in floorspace. At western end of Marion St is Leichhardt Marketplace which contains 17,955 sqm of floorspace plus a 4,265 sqm Woolworths supermarket, a 2,340 Bi-Lo supermarket and 3,961 sqm Target store, plus a further 950 sqm of strip retailing adjacent to Marketplace.
- **Annandale** – retailing is concentrated along Johnston and Booth St. contains approximately 5,900 sqm of retail floorspace and includes MCF and IGA supermarkets and a Mini Market. Area is dominated by cafes/restaurants, takeaway food stores and fresh and gourmet food stores, with also many local convenience retailers.
- **Balmain East** – is a traditional shopping strip containing 1,830 sqm of floorspace (in 2006 920 sqm were vacant). Centre has a small supermarket and deli which service locals and ferry commuters.

- **Birchgrove** – 490 sqm strip centre located on Rowntree St. Shops consist mainly of small local convenience retailers. In 2006, there was one vacant 70sqm shop in centre.
- **Lilyfield** – has several concentrations of retailing, these are located on the corner of Cecily and O’Neill St, on Balmain Rd and on Lilyfield Rd between Grove St and Trevor St. There is also another concentration of shops south of the City West Link Rd. The retailers mainly comprise of takeaway food outlets, cafes and small convenience stores.
- **Birkenhead Point** – mixed use centre containing 23,136 sqm, plus a 2,350 sqm Coles supermarket. Located in Canada Bay LGA. 16,000 sqm of factory outlet retailing centre. Well located from Victoria Rd and carparking provision.

Address	Store	Size (sqm)
Leichhardt Marketplace, Leichhardt	Woolworths	4,265
Norton Plaza, Leichhardt	Coles	3,900
Darling and Beattie Streets, Balmain	Woolworths	1,800
Balmain East	JT Supermarket/Deli	210
Leichhardt Marketplace, Leichhardt	Bi-Lo	2,349
Norton St, Leichhardt	IGA	300
Norton St, Leichhardt	Welcome Mart	200
356 Catherine St, Lilyfield	Lilyfield Food Market	200
710-712 Darling St, Rozelle	IGA Express	100
Shop 3/35 Terry St, Balmain	Balmain Cove Convenience Store	200
115 Johnston St, Annandale	MFC	180
67 Perry St, Leichhardt	G & M Corner Shop	150
137 Rowntree St, Birchgrove	Fares F & S	100
351 Darling St, Balmain	Sleiman & Saba	100
90 Beattie St, Balmain	XQF Convenience Shop	100
47 Booth St, Annandale	Abouchrouche B & K	100
153 Booth St, Annandale	Jarjoura G	100
Total		14,414

There are limited dedicated office buildings in Leichhardt. They tend to be concentrated along Balmain Rd and in the Council Chambers. Existing supply of office space in centres:

- Balmain – 9,970 sqm
- Rozelle – 4,195 sqm
- Leichhardt – 13,635 sqm
- Annandale – 2,150 sqm

Balmain Leagues Club proposed development includes:

- Two residential apartment towers
- Redeveloped Leagues Club of 4,195 sqm
- Leisure centre of 1,660 sqm
- Retail component of 9,057 sqm over three levels (will include a 3,080 sqm supermarket , 1,500 sqm fresh food market, a 670 sqm mini-major tenant and 3,807 sqm of retail floorspace)

- Carparking (400 retail spaces, 200 residential spaces)

Carrier site (which is opposite Balmain Leagues Club) proposed development includes:

- Rezoning of current industrial land to provide 18,500 sqm centre, with 17,000 sqm retail component
- Supermarket of 4,000 sqm
- Mini-major tenant of 3,800 sqm
- Specialty food retail of 3,000 sqm
- Specialty non-food retail of 5,500 sqm
- Specialty services of 700 sqm
- Non retail of 1,500 sqm
- Commercial/office of 3,000 sqm

An Economic Impact Assessment has been prepared by the proposed development on the site. In-depth consultation was used to prepare the report.

It is believed that the total annual sales for the Balmain Leagues Club would be \$51.6 million and for the Carrier site it would be \$95.1 million (this is taking passing trade from Victoria Rd into account). There is a large component of specialty retailing at both sites, which could pose a threat to the economy.

The impact that the supermarkets would have on the area, is that they would reduce the level of escape expenditure of Leichhardt residents to other supermarkets. It must be noted that spending at these supermarkets would affect spending at specialty stores in the centres. Total overall retail impact would be a generalised impact of sales of selected centres within the trade area. Overall impact would depend on what kind of retailers are ultimately located within the centre.

The commercial floorspace located at the Carrier site could put some pressure on surrounding commercial floorspace; however, in the long term it should benefit the area. Both developments will generate a substantial level of employment. It is estimated that the Leagues Club site would generate 482 (full and part time) positions. With the Carrier site projected to create 846 (full and part time) positions when fully developed.

Callan Park Natural Environment – Environmental and Community Management

The document seeks to maintain Callan Park within public ownership; and to also provide health care facilities, particularly for mental health care. It must be recognised that the sites' landscape and natural features are important, including the parts of the built environment.

Uses that have been identified as allowable on the site include: health, community, education, arts, culture and recreation. Vehicular traffic on the site should be kept to a minimum. Callan Park is to remain a specialised mental health facility, including Rozelle Hospital.

- Callan Park Trust committee

- Callan Park Masterplan – ongoing commitment to produce Masterplan
- Callan Park Taskforce

Callan Park City Farm Proposal – based on CERES in Melbourne. Provide a place to grow food, graze poultry and integrate into overall landscape of Callan Park.

Demand Assessment – Retail and Commercial Floorspace, Balmain/Rozelle 2005

Prepared by Leyshon Consulting Pty Ltd to review the demand for retail and commercial floorspace in Balmain and Rozelle. Looks at four sites:

- Balmain Leagues Club site
- Carrier site (Victoria Rd/Terry ST)
- Martin Bright Steel (MBS) site (Mansfield/Roberts Streets, Rozelle)
- Roche Group site (Balmain Rd, Rozelle)

Balmain Leagues Club – redevelopment of site for a mix of uses, including new Club, supermarket and supporting specialty retailing (up to 10,171 sqm), leisure centre, carparking and 6 storey apartment block.

Carrier site – redevelopment plans include 15,100 sqm of retail floorspace, including a supermarket. Plus 11,500 sqm of commercial floorspace and small amount of residential land use.

MBS site – Masterplan has been developed. Site is 41,100 sqm, of which 2,100 sqm will be used for retail and the rest a mix of uses.

Roche Group site – if plan approved, mix of uses proposed. There would be 682 sqm of retail, 3,550 sqm of commercial office/hi tech space and 400 sqm for restaurants/cafes. With the majority of the site occupied by residential development.

If the four projects proceed, there combined annual retail sales would be \$140.2 million (Balmain Leagues Club site – \$49 million, Carrier site - \$59.1 million, MBS site - \$9.1 million, Roche Group site - \$2.7 million)

The Balmain/Rozelle trade area in 2001 had a population of 60,588, which grew to 64,115 by 2004. Between 2004 and 2011 it is expected that the trade population will only increase by a further 883 people. While annual retailing spending in the trade area is expected to rise from \$741.9 million in 2004 to \$864.4 million by 2011. Annual supermarket spending in the area is projected to rise from \$237.4 million in 2004 to \$276.7 million by 2011.

Projected growth in retail spending would support 24,520 sqm of additional floorspace, while projected growth for supermarket spending would support a further 4,367 sqm in floorspace.

Balmain/Rozelle contains approximately 19,181 sqm in supermarket and related floorspace. In 2004, there was a shortage of supermarket floorspace, of 7,196 sqm, which is expected to increase to 11,461 sqm in 2011 if no new supermarkets are constructed in the area.

If both the Leagues Club site and Carriers site were to go ahead it may adversely affect other town centres around the area, including Balmain, Norton St and Leichhardt. It has been recommended that only one of the two sites be developed before 2011.

Existing Retail Centres:

- **Balmain** – major shopping strip with 18,671 sqm of floorspace, concentrated on Darling St between King St and Queens Place. The largest tenant is Woolworths supermarket with 1,800 sqm in floorspace. Mainly services the local community.
- **Rozelle** – located on Darling St and a bit on Victoria Rd. Has a small grocery store outlet (IGA). Contains approximately 11,662 sqm of floorspace. Is affected by heavy traffic.
- **Leichhardt** – in suburb of Leichhardt retailing found on Norton St to the north and south of Marion St and at the western end of Marion St. On Norton St, north of Marion St is approximately 6,000 sqm of floorspace; on Norton St, south of Marion St is approximately 3,455 sqm of floorspace, plus centres of Leichhardt Plaza and Italian Forum. The Centres and a Coles supermarket include a further 17,920 sqm in floorspace.
At western end of Marion St is Leichhardt Marketplace. Contains 17,955 sqm of floorspace plus a 4,265 sqm Woolworths supermarket, a 2,340 Bi-Lo supermarket and 3,961 sqm Target store. Plus a further 950 sqm of strip retailing adjacent to Marketplace.
- **Haberfield** – traditional shopping strip on Ramsay St. contains 7,500 sqm of floorspace. 1,300 sqm IGA supermarkets also located in vicinity. Focus on food services and restaurants/cafes.
- **Birkenhead Point** – mixed use centre containing 23,136 sqm, plus a 2,350 sqm Coles supermarket. Located in Canada Bay LGA. 16,000 sqm of factory outlet retailing centre. Well located from Victoria Rd and carparking provision.

Address	Store	Size (sqm)
Leichhardt Marketplace, Leichhardt	Woolworths	4,265
Norton Plaza, Leichhardt	Coles	3,900
Darling and Beattie Streets, Balmain	Woolworths	1,800
Birkenhead Point, Drummoyne	Coles	2,350
Leichhardt Marketplace, Leichhardt	Bi-Lo	2,349
155 Ramsay Road, Haberfield	IGA	1,300
Sutton Place, Drummoyne	Franklins	767
Norton St, Leichhardt	IGA	300
96 Lyons Rd, Drummoyne	Drummoyne IGA Express	300
Norton St, Leichhardt	Welcome Mart	200
356 Catherine St, Lilyfield	Lilyfield Food Market	200
710-712 Darling St, Rozelle	IGA Express	200
Shop3/35 Terry St, Balmain	Balmain Cove Convenience Store	200
55 Waratah St, Haberfield	Waratah St Supermarket	200
115 Johnston St, Annandale	Cut Price Food Markets	200
67 Perry St, Leichhardt	G & M Corner Shop	150
137 Rowntree St, Birchgrove	Fares F & S	100

351 Darling St, Balmain	Sleiman & Saba	100
90 Beattie St, Balmain	XQF Convenience Shop	100
47 Booth St, Annandale	Abouchrouche B & K	100
153 Booth St, Annandale	Jarjoura G	100
Total		19,181

Iron Cove Bridge and Victoria Rd Widening – Transport (Policy Register)

In November 2006, the NSW Government announced that it would be duplicating the Iron Cove Bridge, widening Victoria Rd and adding more bus services. Many residents welcome the need for extra bus services but are worried that the road works will lead to increased pollution, congestion and bottlenecks.

Meetings have been held between the Leichhardt City Council Mayor and the Mayor of Canada Bay to discuss the road works. The main objective from this is to improve bus services in the transport corridor, but no community input has been sought and what affect this will have on local business and residents.

Leichhardt 2020+ Strategic Plan 2007

The new strategic plan has input from members of the local community, businesses, visitors, Councillors to identify current and long term issues and priorities. It will help prepare the area for the future.

- 3 key values, to provide a broad vision for what is needed to and guide/link values.
- 6 key service areas – the future directions, to establish a framework and direction to plan and deliver integrated social, environmental and economic outcomes for the community.
- Strategic actions, to provide a way to achieve strategic outcomes.
- Measures of success, to help assess how successful the strategic priorities and actions are in implementing plan and community needs.

Will help guide and review Leichhardt LEP/DCP 2000 and other long term strategic service plans. Will also be able to review and modify management plans and annual budgets accordingly to reflect strategic plan and targets.

Leichhardt 2020+ Environmental Scan Challenges 2007

- To have a shared community purpose – integrated planning and innovative models in building and more engagement with the community.
- Accessibility – integrated accessibility planning. Reduction on dependence for private cars, and integrated place plans, service design, information and support. To target local public transport.

- Where we live and work – a wider integrated vision to optimise how we build a sustainable and liveable community, also enhancing beauty and character of area. Clear vision and community expectations with a regulatory framework to make development process improvements more effective.
To find a balance between contemporary community demands and older, ageing suburbs infrastructure, environment and heritage.
The area has high levels of support services in transport, health, education and employment, etc – with its proximity to CBD it creates advantages.
- Applying and delivering sustainability principles to social, economic and environmental activities – Integrated Environmental Strategy.
- Businesses in the community can be provided with accessibility, sustainability, a diverse range of services and support systems.
Build on area's restaurant/café and boutique business lifestyle.
- "Sustainable and liveable community" – planning and decision making processes are informed, participative and transparent.

Leichhardt 2020+ Key Service Area Analysis

Leichhardt Local Government Area covers an area of 10.03 sq km and has a population of around 52,000 people. With a projected increase to 54,800 by 2031 (low growth rate). The population and housing profile of the area, reflect Leichhardt's proximity to the CBD, with high cost housing and almost half of residents renting.

There is a high proportion of people aged 25-39, with a low proportion of youths and people aged over 60. The area is characterised by a high proportion of professionals and managers, and surprisingly 90% of households own more than one car. However, the area compared to the wider Sydney Metropolitan area has a high proportion of residents who use public transport and a low proportion of car usage to get to work.

In 2006, the Leichhardt 2020+ Futures Forum was held with consultation and analysis revealing many issues. Strong issues include: development, environment, parking/traffic, public transport, heritage and local amenity.

Developing integrated strategic planning cannot just occur at a local level, it must be at a city-wide, state and national level. The Metro Strategy and State Plan can provide guidelines for how to achieve future development. The purpose of Leichhardt 2020+ is to build a framework to produce a "sustainable and liveable community".

The aim of the Key Criteria for each Key Service area is to guide the review and development of Strategic Service Plans and Policies. This framework will then provide an outline for the Management Plan and other operational plans.

- Social – Community well-being

- Goal: A Leichhardt community that is cohesive, connected, caring, diverse, healthy, safe, culturally active, creative and innovative, and has a strong sense of belonging and place.
- Social - Accessibility
 - Goal: Easy access for people, services and facilities that promotes the amenity and sustainability of the community.
- Environmental - Place where we live & work
 - Goal: A social, environmental and economically sustainable and liveable community.
- Environmental - A Sustainable Environment
 - Goal: A sustainable environment created by inspiring, leading and guiding our social, environmental and economic activities.
- Economic - Business in the Community
 - Goal: Thriving businesses and vital sustainable communities built through shared activities and interests.
- Economic – Sustainable Services & Assets
 - Goal: Delivery of sustainable services and assets to support the community

Leichhardt 2020+ Draft Strategic Plan April 2007 (leaflet)

1. Our Local Community – making it the place where we want to live, work, play and visit. Provides a vision of what we want in the community to guide our thinking and strengthens the way council focuses its work on the community.
2. Democratic Responsible Government – an open, participative and proactive Council leading the community. Define roles, practices and processes that improve Council’s open, participatory and transparent governance to form the foundations for a Democratic Responsible Government.
3. Sustainability – shared passion and commitment to consistently do all the things required to enhance and preserve the social, environmental and economic factors that are important to the community for future generations. Develops the commitment systems and practices for Leichhardt to be a role model and economically sustainable.

Leichhardt 2020+ Shifts in Thinking

- Planning Shift – to provide a planning framework that will resolve competing issues and obtain shared solutions.
- Vision and values – working together to develop a shared understanding and long-term solutions (sustainable and liveable community).

Businesses in the community can become thriving businesses and part of a vital sustainable community built on shared values, activities and interests. This can be achieved through integrated planning, developing accessible and environmentally sustainable businesses to build local communities, develop effective partnerships between Council, businesses and residents, and plan for business and employment growth opportunities that allow for residents to work locally.

Leichhardt DCP – Part C: Non-residential

- Applies to all business, industrial and non-residential development irrespective of zoning.
- Site layout and building design
 - Should integrate with existing character of area – scale, form and bulk
 - Respect height and building envelope of neighbouring buildings – determined on a site by site basis
 - Guidelines for non-residential development can be suburb specific - DCP: Part A
 - New development must front street
 - Must consider access, servicing and parking
- Parking layout, servicing and manoeuvring
 - Parking must meet figures outlined in Part A 8.0.
 - Provide enough parking that is going to be meet potential demand from development
 - Integrate design of carparking into overall site and building design
 - Access driveways for underground parking: minimise visual impact on street, maximise pedestrian safety and maintain pedestrian access
 - If non-residential development adjoins or is within residential development should: minimise conflict between land uses, provide off-street parking and servicing of premises and respect character of surrounding streetscape
 - Surface parking should use different surface treatments
 - Parking and driveways should be designed to reduce run-off and allow for storm water drainage onto site
- Landscaping
 - Provide landscaping plan with development
 - 85% of plantings in common open space are native species
 - Provide shading for parking
- Elevation and materials
 - Elevation features should be in proportion into surrounding character and streetscape
 - Building materials and finishes should complement finishes predominant in area
 - Make sure heritage items are respected
- Site facilities
 - Ensure garbage storage and waste recycling areas are not located next to habitable residential rooms
 - Water fountains provided should be accessible to children and disadvantaged people
 - Refer to DCP No. 38 – for further information on Waste, Avoid, Reuse and Recycle
- Shopfronts
 - New shopfronts
 - Relate to building's architectural form, structure and materials,
 - Should relate to surrounding streetscape, scale and elevation proportions
 - Provide a 'frame' for the shopfront, generally formed by pilasters, fascia and stallboard

- Council should not allow the loss of shop fronts on Heritage Items
- Alteration to Heritage Items shopfronts is not encouraged. Where necessary should use traditional materials
- Shop signs and advertising should be placed within the fascia area
- Shopfronts should allow for safe and convenient access by pedestrians
- Use of roller shutters is discouraged

- Protective structures in the public domain – verandas, balconies and awnings
 - All retail frontages shall provide permanent structures for shade and weather protection
 - Setback from kerb for safety will be between 300mm and 600mm
 - Heritage items should try to retain original
 - Structure should complement building and streetscape

- Site drainage and storm water control
 - Must install rainwater tanks
 - Must meet Council’s Storm water Management Policy

Leichhardt LEP 2000

Zone	Applies to	Development allowed with consent	Prohibits
Business zone	Development within the business zone. Land within existing business centres where commercial, retail and associated uses are concentrated		Advertising panels, bulk stores, drive-in takeaway stores, smash repairs and warehouses, etc
Industrial zone	Development within the industrial zone, provides a range of employment opportunities	Advertisements, bulky goods retailing, community facilities, industries, local shops, smash repairs, warehouses, etc	Items not included in item (2) or (3)

Commercial floorspace control

- Consent not granted to non-residential development if the floorspace ratio exceeds 1:1
- Consent may be granted to mixed residential and other development on land within the Business zone which results in a floorspace ratio of 1.5:1, but only if ground floor is used for non-residential purposes

Industrial floorspace control

- Consent not granted to development on land within the Industrial zone if the floorspace ratio exceeds 1:1

Development for the Purpose of Bulky Goods Retailing

- Consent must not be granted unless the affects of the development have been considered and are deemed acceptable
- Consent must not be granted unless consideration to the number of retail outlets that exist or are proposed in the Industrial zone, will detract from the predominantly industrial nature of the zone.

Development for the Purpose of Backpacker Hostels or Serviced Apartments

- Consent must not be granted unless there is a need to control the number of backpacker hostels and serviced apartments in Leichhardt LGA
- Consent must not be granted unless there is a need to protect the stock of low-cost, long-term rental accommodation within the area
- Consent must not be granted unless there is a need to prevent the reduction on residential amenity associated with the encroachment of backpacker hostels and serviced apartments

Development for the Purpose of Brothels or Sex Shops

- Consent must not be granted unless consideration for whether it is operating in view of a place of worship, hospital or school or a place frequented by children
- Consent must not be granted unless the impact on the amenity of the neighbourhood had been considered
- Consent must not be granted unless suitable access had been considered

Commercial Use of Non-residential Buildings in the Residential Zone

- Consent may be granted if part or whole of the building was constructed for non-residential use
- Consent may be granted if the building is substantially retained without replacement for most of the structure
- Consent may be granted if the consent authority is satisfied that the amenity of the area will not be affected

Refreshment Rooms in Non-residential Buildings

- Consent not granted unless the gross floor area of the refreshment room will not exceed 60 sqm
- Consent not granted unless the refreshment room does not trade past 6 pm.

Mainstreet Plans – Darling St Streetscape Masterplan and Norton St Streetscape Masterplan (Policy Register)

Darling Street

- Provision of traffic improvements and new pedestrian crossing
- Widening of footpath to the Eastern side of Darling St and new paving from Beattie St to Nelson St
- Avenue planting and a pedestrian link towards Balmain cove residential development along Wise St
- Negotiations for redevelopment of Telstra Building, the establishment of Rozelle Square and undergrounding of powerlines
- Plan of Management for Gladstone Park

- Installation of street furniture along entire length of Darling St

Norton Street

- Widening of footpath on Western side of Norton St from Marlborough St to Carlisle St
- Widening of footpath of Eastern side of Norton St from Wetherill St to Short St
- Delete road blisters on both sides of Norton St
- New planting along carriageway does not result in net loss of parking
- Defer consideration of the entry statements including intersection modifications at Parramatta Rd and city West Link Rd until such time as the traffic and transport implications associated with the M4 East and the Parramatta Rd Revitalisation Project are known

Norton Street Streetscape Masterplan is currently in Stage 1.

The Leichhardt Town Plan 2005

The Plan, which is a statutory document, controls and guides all development within Leichhardt LGA. The main documents in the Town Plan are the Leichhardt LEP and the Leichhardt DCP.

Sydney Harbour and Parramatta River Development Control Plan for Sydney Regional Environmental Plan No. 22 and Parramatta River and Sydney Regional Environmental Plan 23 – Sydney and Middle Harbour. The DCP has been prepared to replace the existing Design and Management Guidelines and includes more detailed provisions than previously in the REPs.

Contributions Plans – Section 94, EP&A Act 1979. Fall into three categories:

- Developer Contributions Plan No 1 – Open Space and Recreation
- Transport and Access Contributions Plan
- Communities Facilities and Services Contributions Plan

SEPP No 1: Development Standards – provides Council, in certain circumstances, to grant consent that does not strictly comply with development standards contained in the environmental instruments applying to the land.

SEPP No 4: Development Without Consent and Miscellaneous Exempt and Complying Development – provides that development consent is not needed for certain minor or ancillary development. Policy also allows as exempt development certain filming activities and rainwater tanks up to 10,000 litres in capacity not located in heritage conservation areas or on land containing a heritage item.

SEPP No 6: Number of Storeys in a Building – policy to determine height of building where height is controlled by reference to number of storeys

SEPP No 8: Surplus Public Land

SEPP No 10: Retention of Low-cost Housing – aims to provide a mechanism for the retention of low cost housing accommodation. Policy establishes criteria to determine low cost housing.

SEPP No 11: Traffic Generating Developments – provides that applications for development (listed in Schedules 1 and 2) shall be referred to the RTA for its views prior to determination.

SEPP No 19: Bushland in Urban Areas

SEPP No 21: Caravan Parks

SEPP No 22: Shops and Commercial Premises – this policy allows, with the consent of Council, a change of use in business zones from a shop to another kind of shop or commercial premises, or vice versa, where the new use of is prohibited under the environmental planning instrument.

SEPP No 32: Urban Consolidation

SEPP No 33: Hazardous and Offensive Development – provides new definitions for 'hazardous industry', 'hazardous storage establishment', 'offensive industry' and 'offensive storage establishment'. The definitions are to be applied in all planning instruments.

SEPP No 34: Major Employment Generating Industrial Development – relates to assessment of major industries which employ more than 11 people and would be of state significance. Minister would be consent authority for developments under SEPP.

SEPP No 38: Olympic Games Projects

SEPP No 55: Remediation of Land – aims to promote the remediation of contaminated land for the purpose of reducing the risk of harm to human health or other aspects of environment. Considerations of rezoning land and determining development applications.

SEPP No 56: Sydney Harbour Foreshores and Tributaries – relates to developments on foreshore.

SEPP No 61: Exempt and Complying Development for Glebe Island and White Bay Ports – identifying land of minimal environmental impact to be exempt from consent and to specific standards and conditions for complying development.

SEPP No 64: Advertising and Signage – to make sure that signage is compatible with the desired amenity and visual character of area; suitable location, design and finish.

SEPP No 65: Design Quality of Residential Flat Development

Draft SEPP No 66: Integration of Land Use and Transport – aim is to ensure that urban structure, building forms, land use locations, development designs, subdivisions and street layouts achieve a range of objectives including: improving accessibility to housing, employment and services by walking, cycling and public transport, improving choice of transport and reducing dependence on cars.

SEPP No 70: Affordable Housing

SEPP (Seniors Living) 2004

SEPP (Building Sustainability Index: BASIX) 2004

SEPP (State Significant Development) 2005

Draft SEPP (Application of Development Standards) 2004

SREP No 22: Parramatta River – regulates development on sections of Parramatta River and its tributaries and on land adjoining the River; enacts controls additional to those contained in LEPs, in particular waterfront land, wetlands, conservations areas, heritage and Aboriginal items; allows additional development on land zoned Special Uses and Industrial under LEPs and land designated Foreshore Open Space.

SREP No 23: Sydney and Middle Harbour – regulates development on Sydney and Middle Harbours, establishes waterway zones and within them permits development with or without consent, and prohibits certain development.

SREP No 26: City West – establishes planning principles and other matters for consideration within the City West areas (Pyrmont Ultimo, Eveleigh Railway Yards, part of Central Station and the Bays Precinct, and also land within the Leichhardt area – Blackwattle Bay, Wentworth Park, Annandale and Balmain Rd, Lilyfield and Victoria Rd, Rozelle, Glebe Island and White Bay).

Draft SREP (Sydney Harbour Catchment) 2004 – to ensure catchments, foreshores, waterways and islands of Sydney Harbour are protected, recognised and maintained.

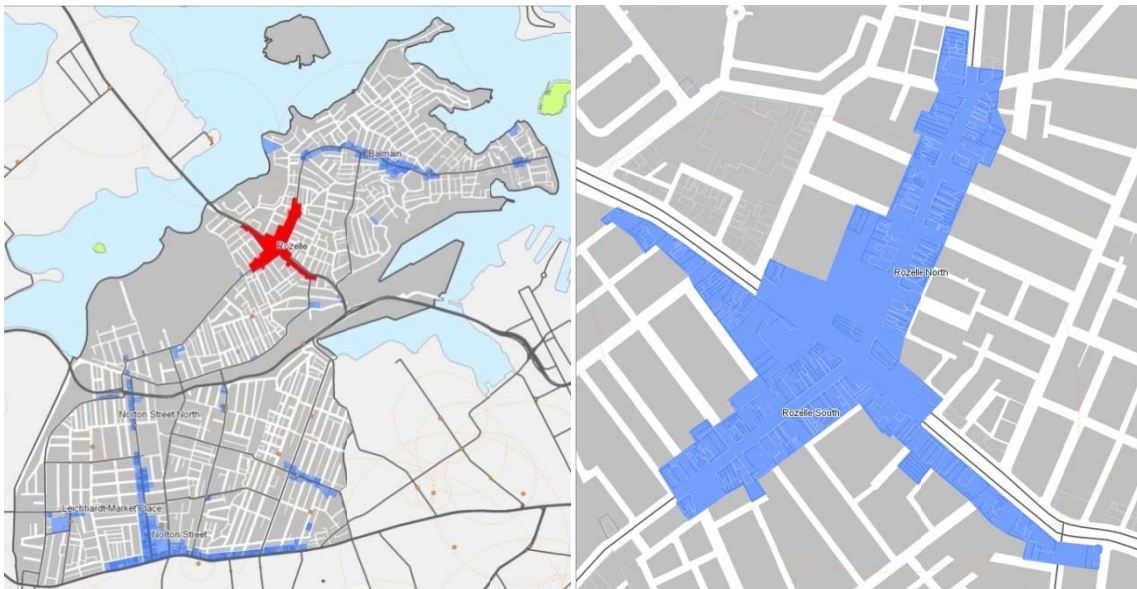
Appendix 4 - BLC Category Description

Land Use Category	Description
Freight and Logistics (FL)	<ul style="list-style-type: none"> Warehousing and distribution activities. Includes buildings with a number of docking facilities; 'hard stand' areas with trucks or goods awaiting distribution; and large storage facilities. Warehousing and distribution is a metro level issue with activities preferably locating close to air, sea and inter-modal inland ports, or with access to the motorway system.
Local light industrial and urban support (LL)	<ul style="list-style-type: none"> Car service and repair, joinery, construction and building supplies; and domestic storage. Wide range of businesses that service other business (components, maintenance and support) and subregional populations. Needed at local (LGA) to sub-regional level.
Manufacturing – Heavy (MH)	<ul style="list-style-type: none"> Large scale production activity. Likely to be characterised by high noise emission; emission stacks; use of heavy machinery; and frequency of large trucks. Heavy manufacturing is in decline in Sydney, but will continue to cluster in some locations such as Wetherill Park, Campbelltown/ Ingleburn etc. There are strong arguments for collocation in terms of raw material delivery and to concentrate externalities (though impacts on surrounding uses are generally moderate).
Manufacturing – Light (ML)	<ul style="list-style-type: none"> Clothing manufacturing, boat building and electrical equipment manufacturing Small scale production with lower noise and emission levels than heavy manufacturing.
Urban Services (US)	<ul style="list-style-type: none"> Concrete batching, waste recycling and transfer, construction and local and state government depots, sewerage, water supply, electricity construction yards. These typically have noise dust and traffic implications and need to be isolated or buffered from other land uses. Needed in each sub-region.
Office (O)	<ul style="list-style-type: none"> Administration, clerical, business services, research. Office buildings that are independent (ie, are not ancillary to another use on site) and likely to accommodate a significant number of administration staff (>10 people).
Business / Office Parks (BP)	<ul style="list-style-type: none"> Integrated warehouse, storage, R&D, 'back-room' management and administration with up to 40% office component.
Retail - Main Street (RM)	<ul style="list-style-type: none"> Retailing services traditionally found in main street locations (eg, supermarkets) and small cluster or strips of stores located next to a street or road.
Retail – Big Box (RB)	<ul style="list-style-type: none"> Large shopping complexes, including Westfield.
Retail Bulky Goods (RBG)	<ul style="list-style-type: none"> Typically large, one-story buildings surrounded by car-parking, usually located out of centre and in high exposure (main road) locations.
Special Activities (S)	<ul style="list-style-type: none"> Tertiary level education, health, and community services. Typically require strategic locations and needed in each sub-region.
Dispersed Activities (D)	<ul style="list-style-type: none"> Primary and secondary education, lower level health, social and community services, trades construction, other 'nomads'.
Residential (R)	<ul style="list-style-type: none"> Residential development.
Accommodation (Short Term) (AST)	<ul style="list-style-type: none"> Hotels and Motels (not including pubs), backpacker establishments.
Car park (CP)	<ul style="list-style-type: none"> Stand-alone car parking stations

Appendix 5 - Employment Land Audit Results

Commercial Centres and Precincts

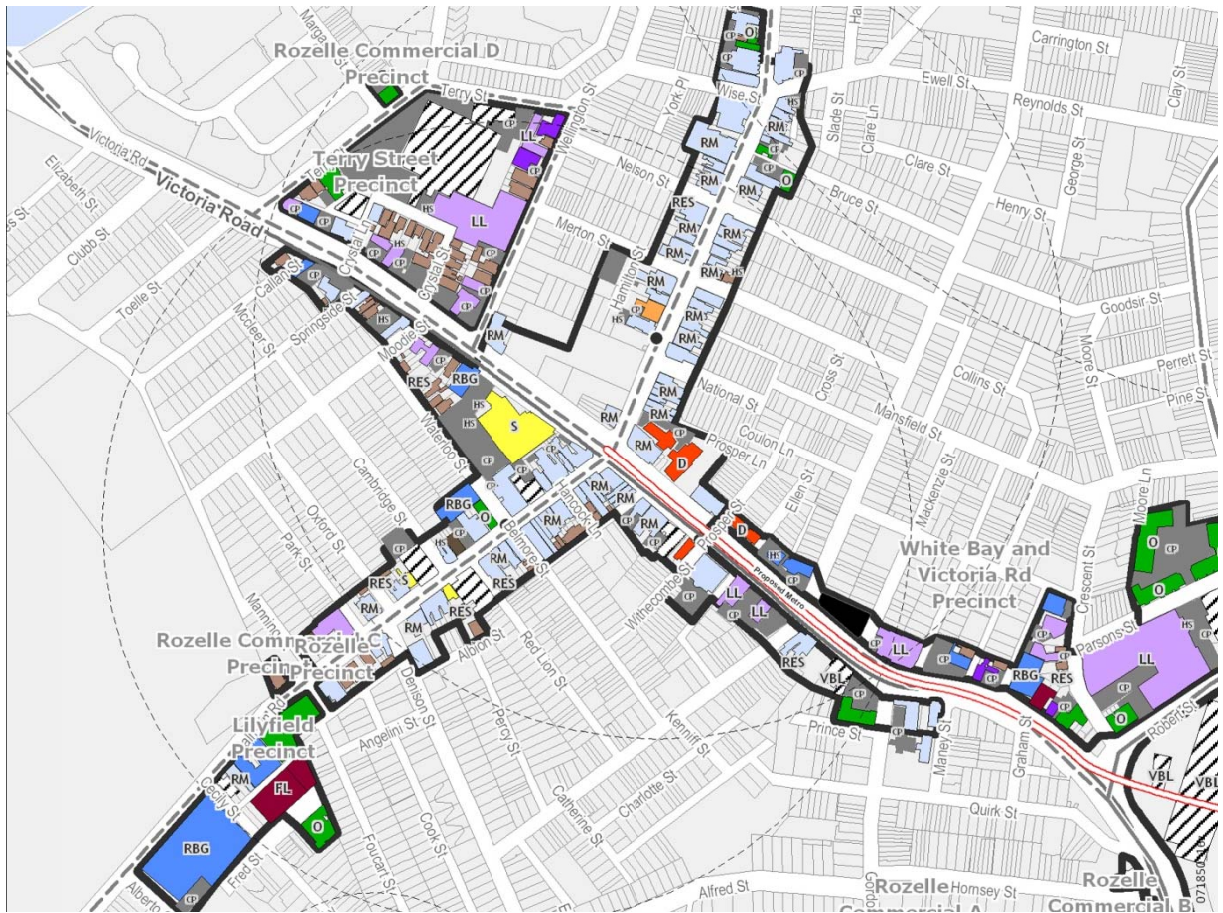
Rozelle Commercial Precinct



Rozelle Precinct is comprised of predominantly mainstreet frontage lots along Darling Street and includes lots with frontage to the southern side of Victoria Road. The Terry Street Industrial Precinct is located adjacent to this precinct to the northwest.

The precinct is predominantly RM landuses with older-style buildings on small lots of predominantly 2 storeys. The lots with frontage to Victoria Road are more varied in landuse and include LL, RBG, and Office development.

Figure 2. Rozelle Commercial Precinct Principal Land Use by Lot



Legend

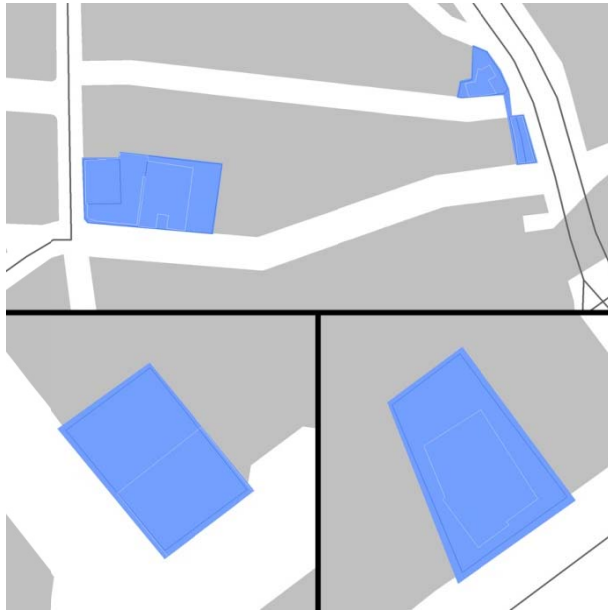
- Metrix Centre
- Bus Route
- ||||| Rail Corridor
- Arterial Road
- - - Metrix Centre Buffer
- ▭ Precinct Boundary

Broad Land Use Categories

- | | | | |
|--|-------------------------------|--|--------------------------|
| | RES - Residential | | RM - Retail Main Street |
| | AST - Short Term Accomodation | | RBG - Retail Bulky Goods |
| | AGM - Agriculture and Mining | | RB - Retail Big Box |
| | S - Special Activities | | LL - Local Light |
| | US - Urban Services | | ML - Manufacturing Light |
| | D - Dispersed | | VBL - Vacant Building |
| | FL - Freight and Logistics | | Vacant Site |
| | BP - Business Park | | HS - Hardstand |
| | O - Office | | CP - Carpark |

Source: SGS 2008.

Rozelle Fragmented Commercial Precinct



These fragmented areas are located outside of the Rozelle centre area and are comprised of single lots used for office (D), residential (C) and retail mainstreet landuses (A and B). Two of the sites (C,D) are located adjacent to industrial precincts while the A and B are surrounded by residential development.



Figure 3. Rozelle South Commercial Precinct Principal Land Use by Lot



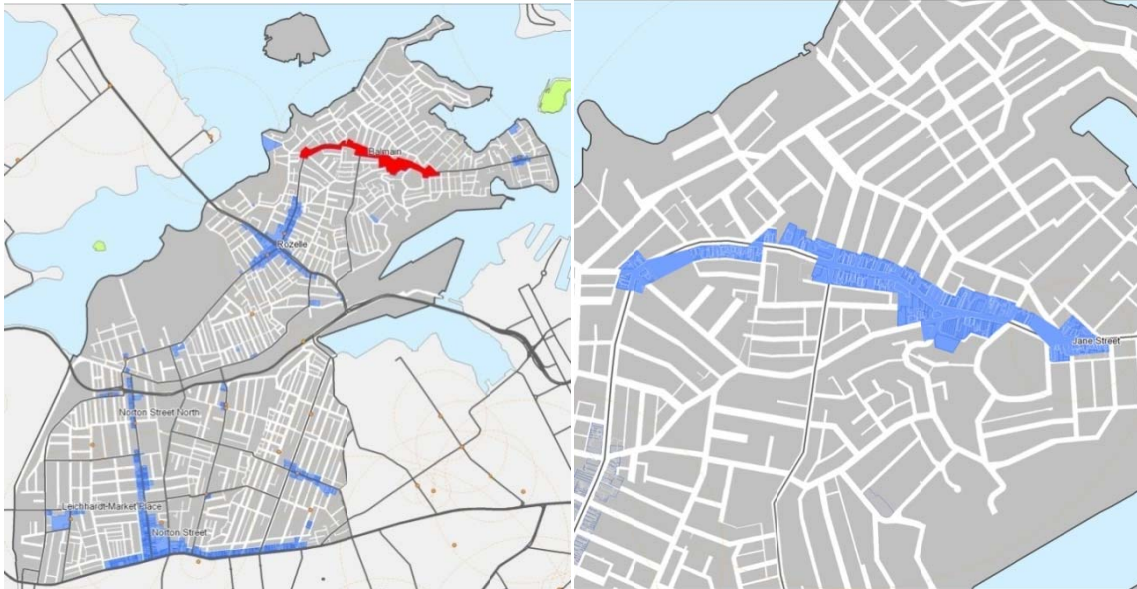
Legend

- Metrix Centre
- Bus Route
- ||||| Rail Corridor
- Arterial Road
- - - Metrix Centre Buffer
- ▭ Precinct Boundary

Broad Land Use Categories

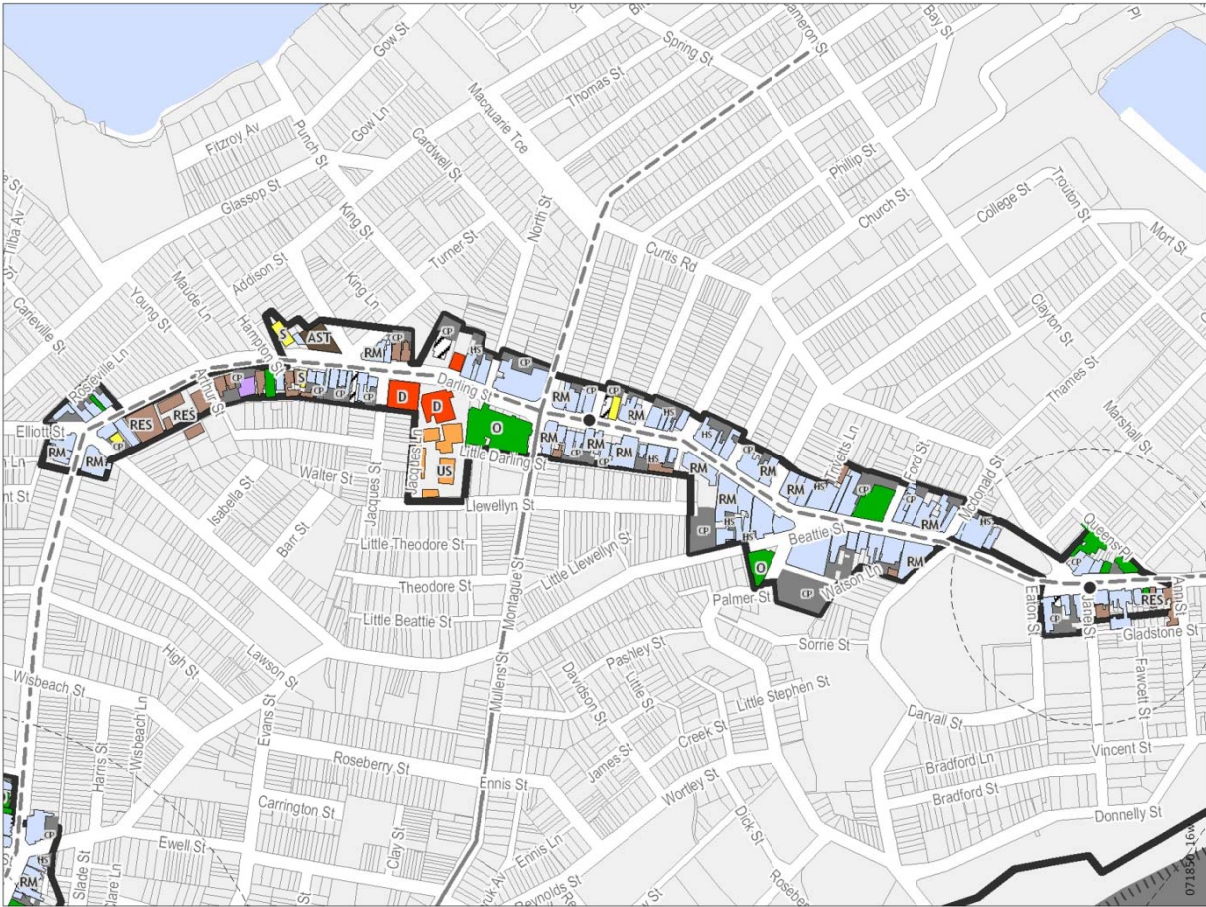
- | | | | |
|--|--------------------------------|--|--------------------------|
| | RES - Residential | | RM - Retail Main Street |
| | AST - Short Term Accommodation | | RBG - Retail Bulky Goods |
| | AGM - Agriculture and Mining | | RB - Retail Big Box |
| | S - Special Activities | | LL - Local Light |
| | US - Urban Services | | ML - Manufacturing Light |
| | D - Dispersed | | VBL - Vacant Building |
| | FL - Freight and Logistics | | Vacant Site |
| | BP - Business Park | | HS - Hardstand |
| | O - Office | | CP - Carpark |

Balmain Commercial Precinct



The Balmain Commercial precinct comprises mainstreet frontage lots between Elliot and Ann Streets. The character of the precinct is predominantly RM landuses on small lots. Built form is generally older style built form of predominantly 2 storeys. A portion of the mainstreet is not zoned for business landuses however is currently used for RM landuses. A significant number of properties on Jane Street are heritage listed. The precinct contains 1 shopping centre (Woolworths).

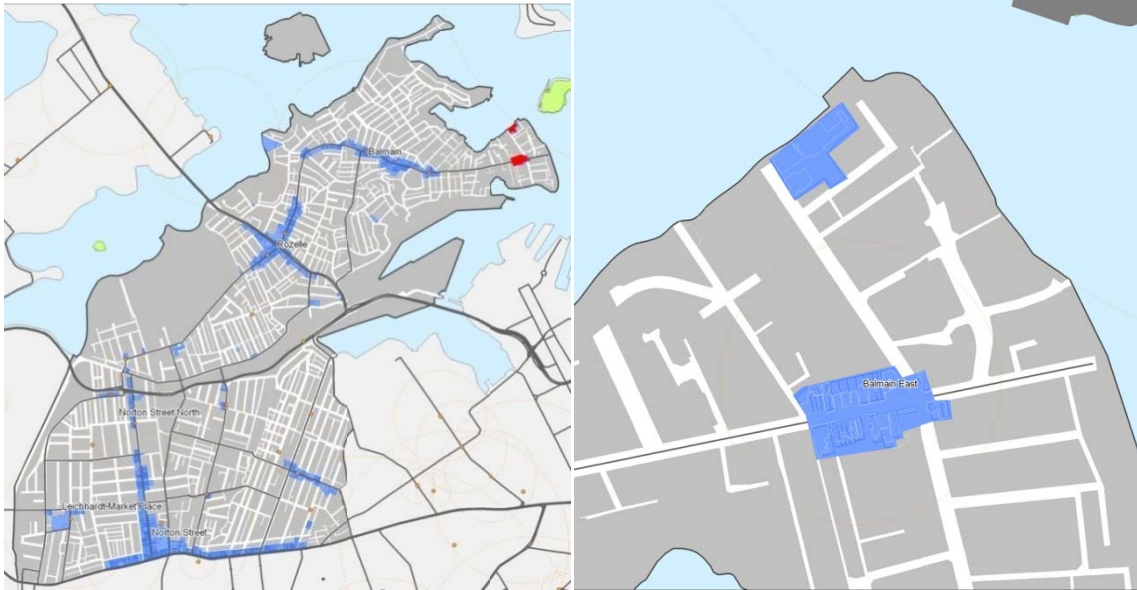
Figure 4. Balmain Commercial Precinct Principal Land Use by Lot



Legend		Broad Land Use Categories	
●	Metrix Centre	RES	RES - Residential
---	Bus Route	AST	AST - Short Term Accommodation
	Rail Corridor	AGM	AGM - Agriculture and Mining
—	Arterial Road	S	S - Special Activities
- - -	Metrix Centre Buffer	US	US - Urban Services
▭	Precinct Boundary	D	D - Dispersed
		FL	FL - Freight and Logistics
		BP	BP - Business Park
		O	O - Office
		RM	RM - Retail Main Street
		RBG	RBG - Retail Bulky Goods
		RB	RB - Retail Big Box
		LL	LL - Local Light
		ML	ML - Manufacturing Light
		VBL	VBL - Vacant Building
		□	Vacant Site
		HS	HS - Hardstand
		CP	CP - Carpark

Source: SGS 2008.

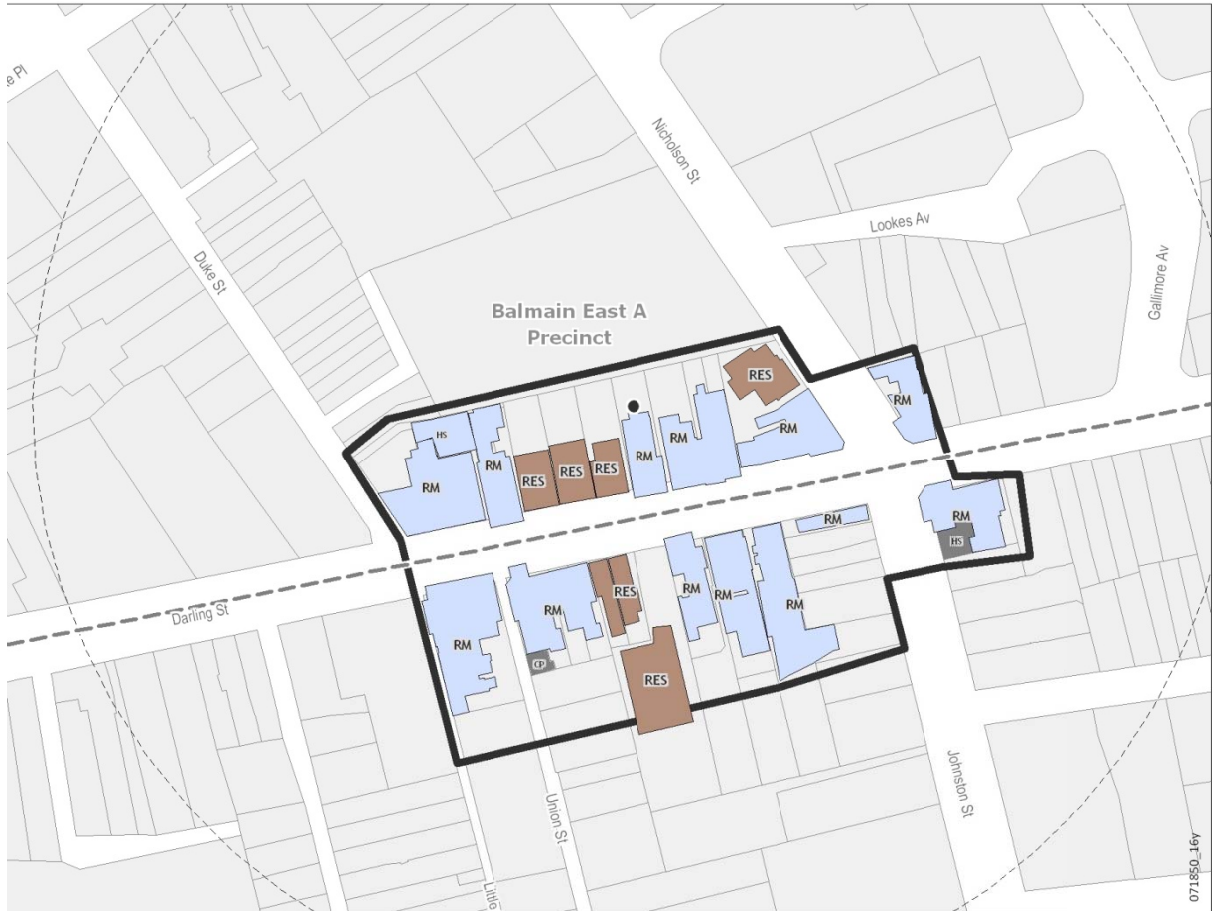
Balmain East Commercial Precinct



Balmain East A is a small mainstreet precinct of RM landuses with some residential lots with mainstreet frontage. The built form is a mixture of older-style 2 storey buildings with some newer built form closer to Duke Street.

Balmain East B is the site of an adaptive re-use of a heritage item being the Waterview Workshops (former Adelaide Steamship Company building). The site is now used by creative industry professionals whose tenants include lawyers, photography, film and media operators and other consulting services. The site has some of the criteria for a business park address without the superior major road access.

Figure 5. Balmain East Commercial Precinct Principal Land Use by Lot



Legend

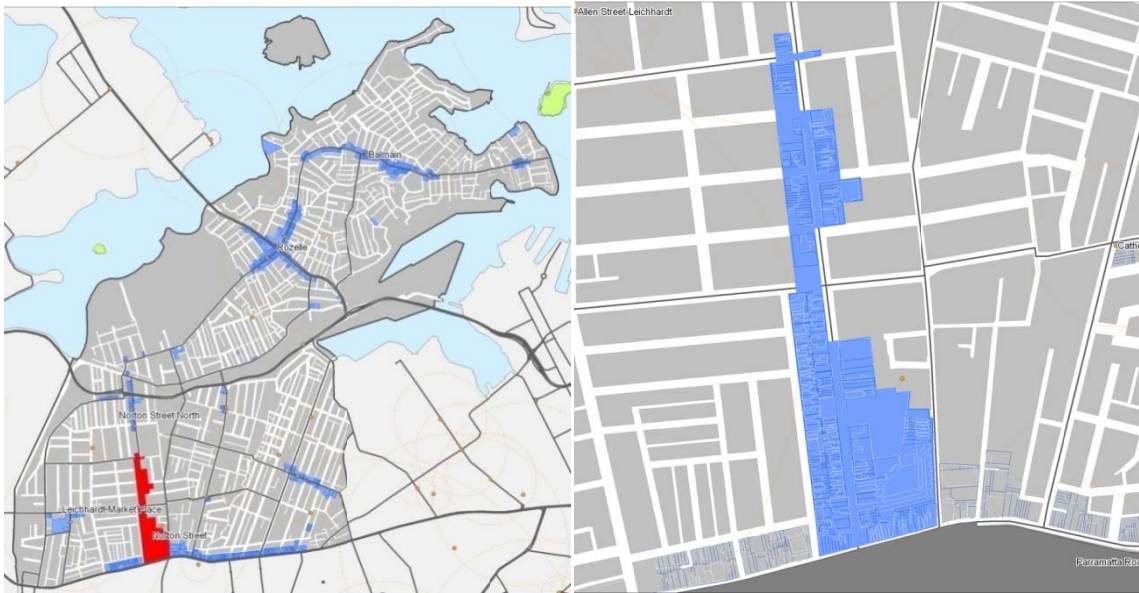
- Metrix Centre
- - - Bus Route
- ||||| Rail Corridor
- Arterial Road
- - - Metrix Centre Buffer
- ▭ Precinct Boundary

Broad Land Use Categories

- | | |
|--|--|
| RES - Residential | RM - Retail Main Street |
| AST - Short Term Accommodation | RBG - Retail Bulky Goods |
| AGM - Agriculture and Mining | RB - Retail Big Box |
| S - Special Activities | LL - Local Light |
| US - Urban Services | ML - Manufacturing Light |
| D - Dispersed | VBL - Vacant Building |
| FL - Freight and Logistics | Vacant Site |
| BP - Business Park | HS - Hardstand |
| O - Office | CP - Carpark |

Source: SGS 2008.

Norton Street Commercial Precinct



Precinct Character

Norton Street is a significant mainstreet in the local and regional landscape. It is recognised in the Inner West Subregional Strategy as a Town Centre. The street frontage to Norton Street is predominantly RM with some office and health services landuses in the southern part of the precinct. The built form of the mainstreet frontage shops is mixed with older-style buildings, renovated older buildings, and new built form (supermarket, the Forum).

Between Parramatta Road and Marion Street there is only minor access to the rear of the mainstreet frontage lots on the east of Norton Street with access from Norton Street. There is significant access to the rear of the mainstreet frontage lots west of Norton Street which include the entrances to Norton Plaza and The Forum.

Residential development is in the form of single detached dwellings with mixed use residential attached to The Forum complex and other mixed use developments.

Figure 6. Norton Street Commercial Precinct Principal Land Use by Lot



Legend

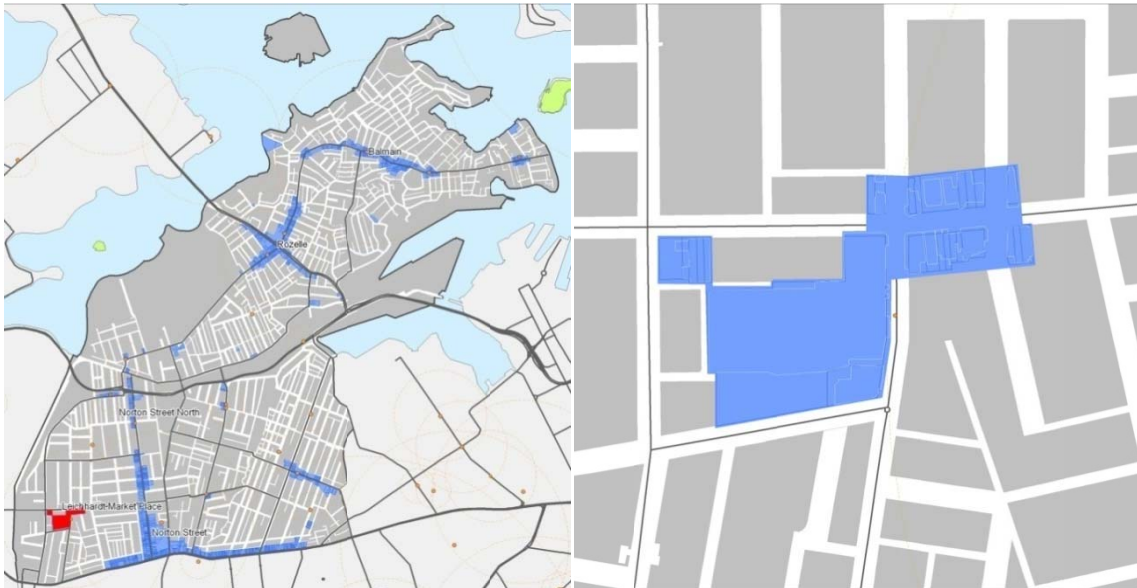
- Metrix Centre
- - - Bus Route
- ||||| Rail Corridor
- Arterial Road
- - - - - Metrix Centre Buffer
- ▭ Precinct Boundary

Broad Land Use Categories

- | | |
|---------------------------------|----------------------------|
| ■ RES - Residential | ■ RM - Retail Main Street |
| ■ AST - Short Term Accomodation | ■ RBG - Retail Bulky Goods |
| ■ AGM - Agriculture and Mining | ■ RB - Retail Big Box |
| ■ S - Special Activities | ■ LL - Local Light |
| ■ US - Urban Services | ■ ML - Manufacturing Light |
| ■ D - Dispersed | ■ VBL - Vacant Building |
| ■ FL - Freight and Logistics | ■ Vacant Site |
| ■ BP - Business Park | ■ HS - Hardstand |
| ■ C - Office | ■ CP - Carpark |

Source: SGS 2008.

Leichhardt Market Place Commercial Precinct



Leichhardt market place commercial precinct is comprised of Leichhardt Market Place and a small stretch of RM landuses along marion street northeast of the shopping centre. Leichhardt market place presents as one storey to Marion Street with the rear of the complex presenting as two storey with a basement level used for carparking. The centre contains two supermarkets (Aldi and Wollworths) along with a range of speciality stores and services. The small mainstreet frontage lots on marion street are predominantly RM landuses.

The precinct is surrounded by single-detached residential dwellings with some high density housing located north of Elswick Street.

Figure 7. Leichhardt Market Place Commercial Precinct Principal Land Use by Lot



Legend

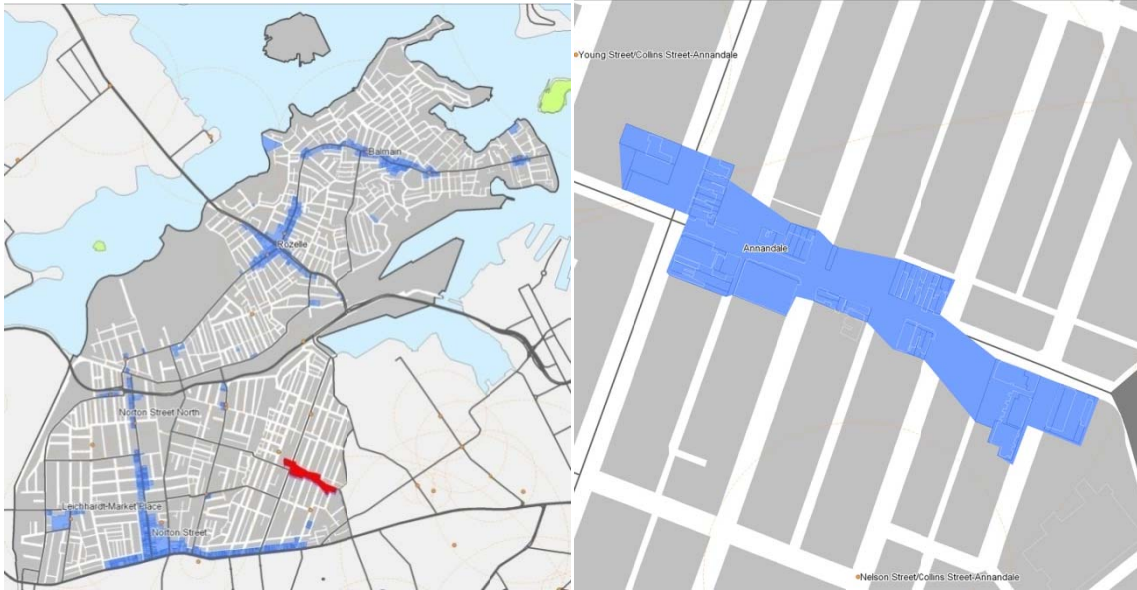
- Metrix Centre
- - - Bus Route
- ||||| Rail Corridor
- Arterial Road
- - - Metrix Centre Buffer
- ▭ Precinct Boundary

Broad Land Use Categories

- | | |
|---|--|
| RES - Residential | RM - Retail Main Street |
| AST - Short Term Accomodation | RBG - Retail Bulky Goods |
| AGM - Agriculture and Mining | RB - Retail Big Box |
| S - Special Activities | LL - Local Light |
| US - Urban Services | ML - Manufacturing Light |
| D - Dispersed | VBL - Vacant Building |
| FL - Freight and Logistics | Vacant Site |
| BP - Business Park | HS - Hardstand |
| O - Office | CP - Carpark |

Source: SGS 2008.

Booth Street Commercial Precinct



This precinct is comprised of lots with frontage to Booth Street in an area between Johnston Street and Wigram Road. Uses are predominantly RM in nature with RBG located close to Wigram Road and has a low-ley village character. There is residential development with frontage to Booth street south of Trafalgar Street, south of Wells Street and south of Nelson Street. The built form is of the RM landuses is older-style buildings with traditional awnings and shop-top housing. Residential development ispredomiannntly single storey older-style buildings with new medium density development around Susan Lane.

Figure 8. Booth Street Commercial Precinct Principal Land Use by Lot



Legend		Broad Land Use Categories		
●	Metrix Centre	RES - Residential	RM - Retail Main Street	
---	Bus Route	AST - Short Term Accommodation	RBG - Retail Bulky Goods	
	Rail Corridor	AGM - Agriculture and Mining	RB - Retail Big Box	
—	Arterial Road	S - Special Activities	LL - Local Light	
- - -	Metrix Centre Buffer	US - Urban Services	ML - Manufacturing Light	
▭	Precinct Boundary	D - Dispersed	VBL - Vacant Building	
		FL - Freight and Logistics	■	Vacant Site
		BP - Business Park	■	HS - Hardstand
		O - Office	■	CP - Carpark

Source: SGS 2008.

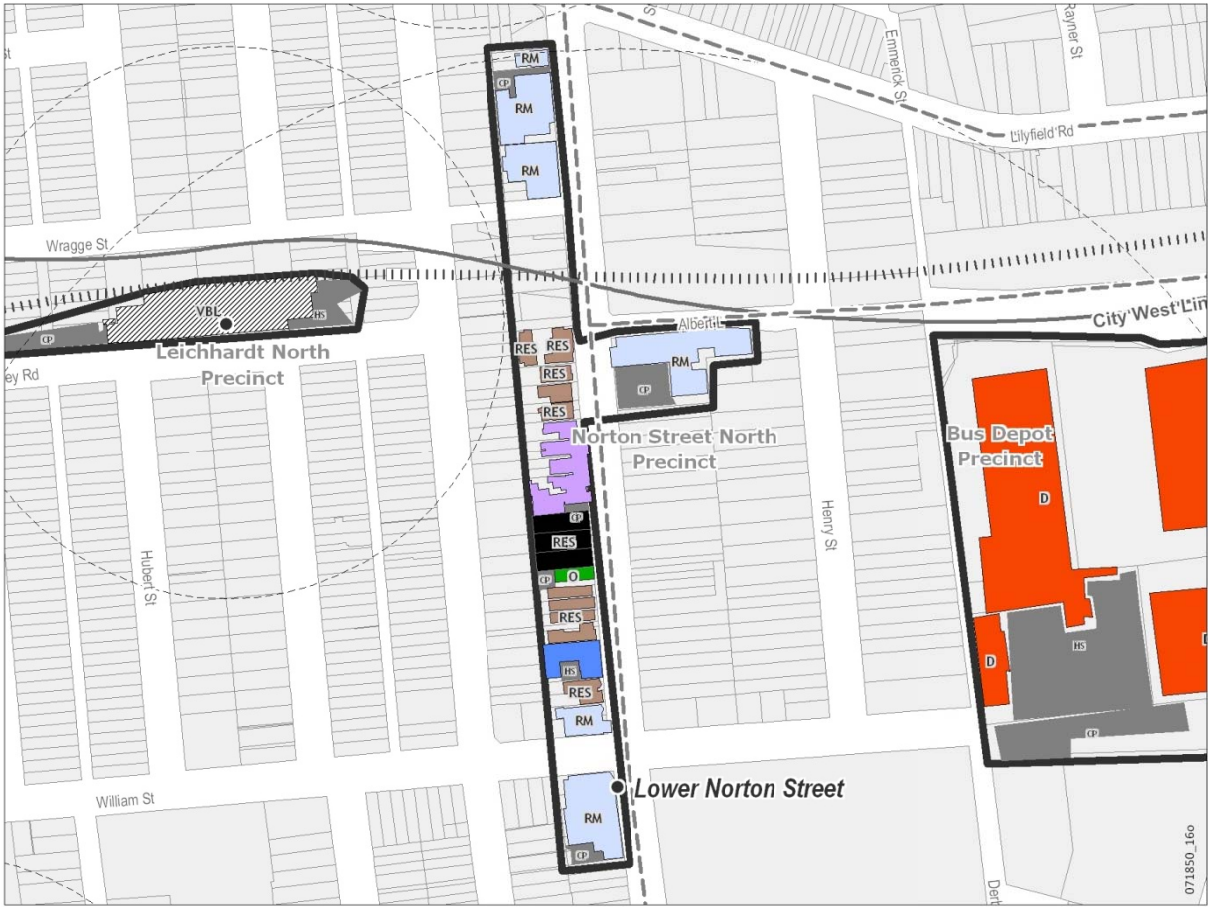
Norton Street North Commercial Precinct



Lower Norton Street precinct is comprised predominantly of mainstreet frontage lots on the eastern side of Norton Street in an area between Allen Street and Lilyfield road. There is a small portion of mainstreet lots on the western side of Norton Street south of Albert Lane. The most northern part of the precinct is separated from the rest of the precinct by City West Link.

The precinct is a mixture of uses including residential, LL, and RM landuses.

Figure 9. Norton Street North Commercial Precinct Principal Land Use by Lot



Legend		Broad Land Use Categories	
●	Metrix Centre	RES	RES - Residential
---	Bus Route	AST	AST - Short Term Accommodation
	Rail Corridor	AGM	AGM - Agriculture and Mining
—	Arterial Road	S	S - Special Activities
- - -	Metrix Centre Buffer	US	US - Urban Services
▭	Precinct Boundary	D	D - Dispersed
		FL	FL - Freight and Logistics
		BP	BP - Business Park
		O	O - Office
		RM	RM - Retail Main Street
		RBG	RBG - Retail Bulky Goods
		RB	RB - Retail Big Box
		LL	LL - Local Light
		ML	ML - Manufacturing Light
		VBL	VBL - Vacant Building
		HS	HS - Hardstand
		CP	CP - Carpark

Source: SGS 2008.

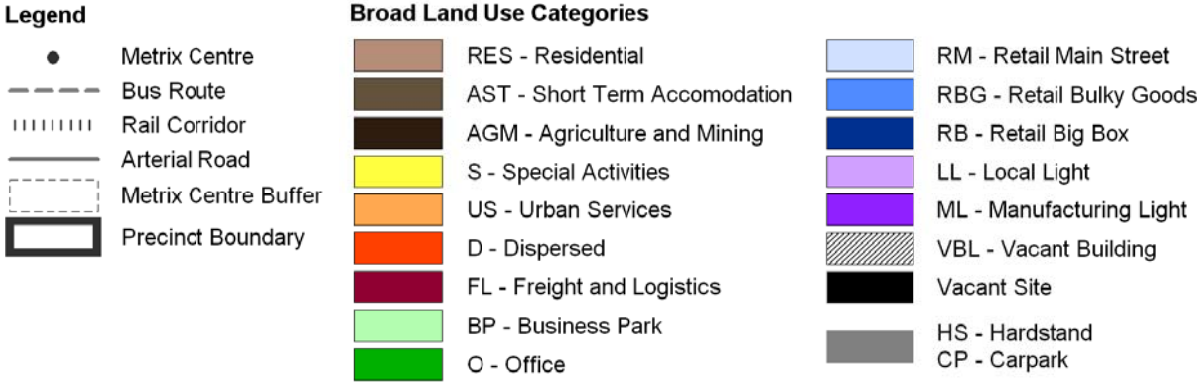
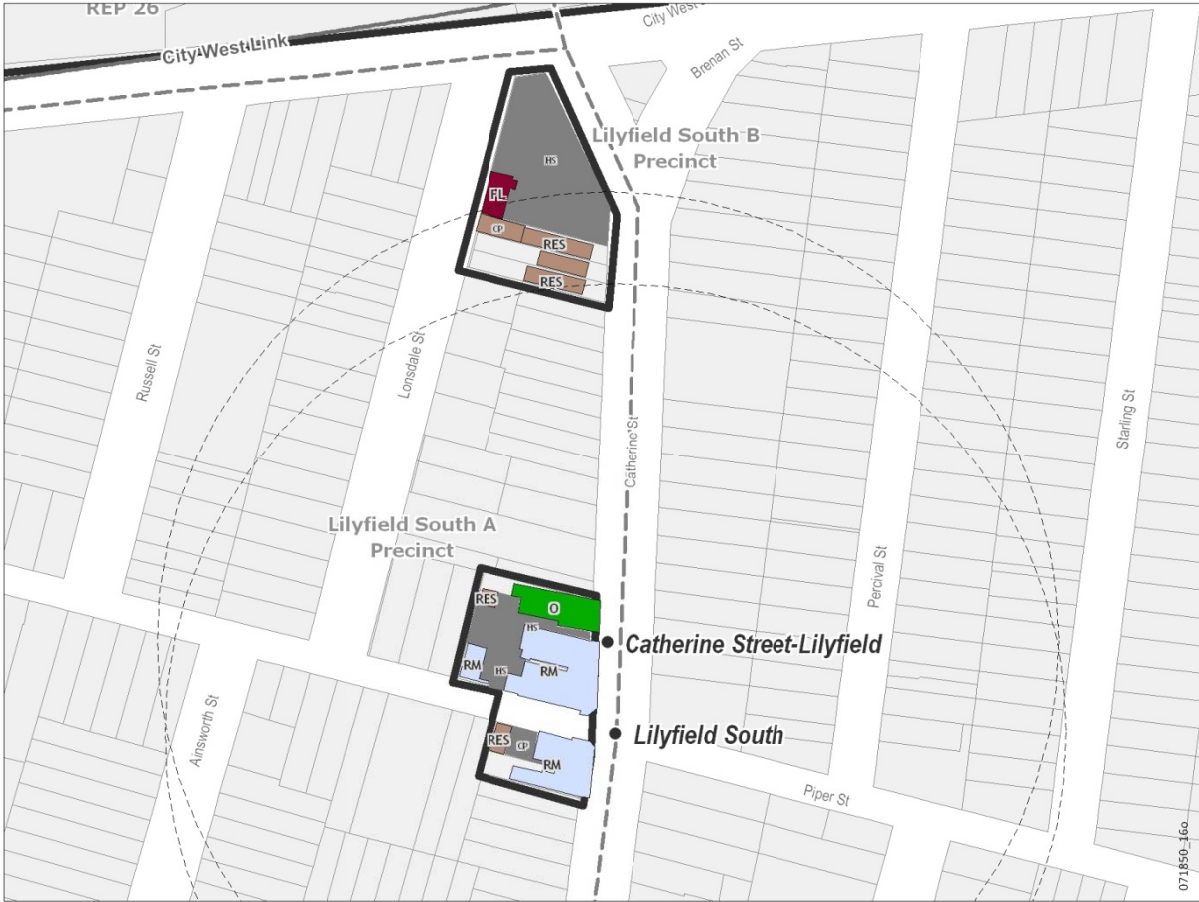
Lilyfield South Commercial Precinct



The precincts are located south of the CityWest link road corridor and surrounded by residential development. The northern concentration of lots located at the intersection of Catherine and Brennan Streets are currently used for freight and logistics purposes rather than commercial landuses. The site has direct access to City West Link. A street closure separates the site from residential development on Lonsdale Street.

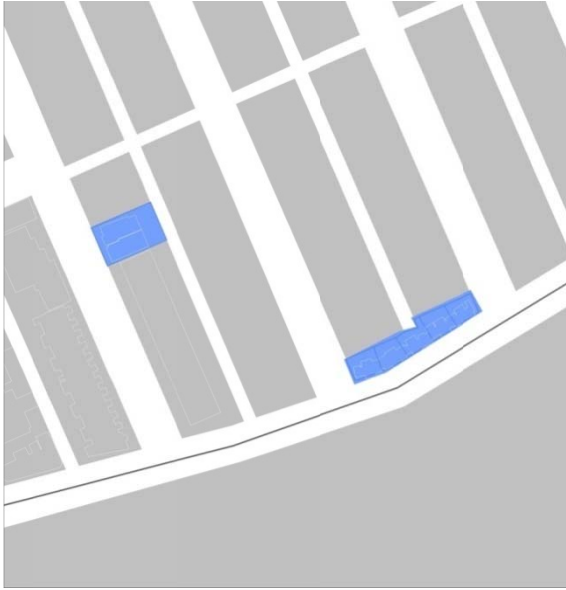
The southern concentration of lots is comprised of neighbourhood retail landuses on the intersection of Catherine and Piper Streets. The built form is of older-style retail mainstreet buildings with traditional awnings and shop-top housing.

Figure 10. Lilyfield South Commercial Precinct Principal Land Use by Lot



Source: SGS 2008.

Lilyfield Commercial Precinct



The precincts are located outside of the nearest centre of Rozelle and southeast of part of the Lilyfield Industrial precinct. The northern portion of the commercial zoned land is located on the edge of industrial zoned land and is not currently used for commercial landuses being residential dwellings. The southern portion is located with frontage to Lilyfield Road and is a live-work development which contains office floorspace at the ground floor and two storeys of residential floorspace above. There are currently vacancies in the office floorspace. Anecdotal evidence finds that the live-work intentions have not been taken-up and that many of the units are principally used for residential only.

Figure 11. Lilyfield Commercial Precinct Principal Land Use by Lot



Legend

- Metrix Centre
- - - Bus Route
- ||||| Rail Corridor
- Arterial Road
- - - Metrix Centre Buffer
- ▭ Precinct Boundary

Broad Land Use Categories

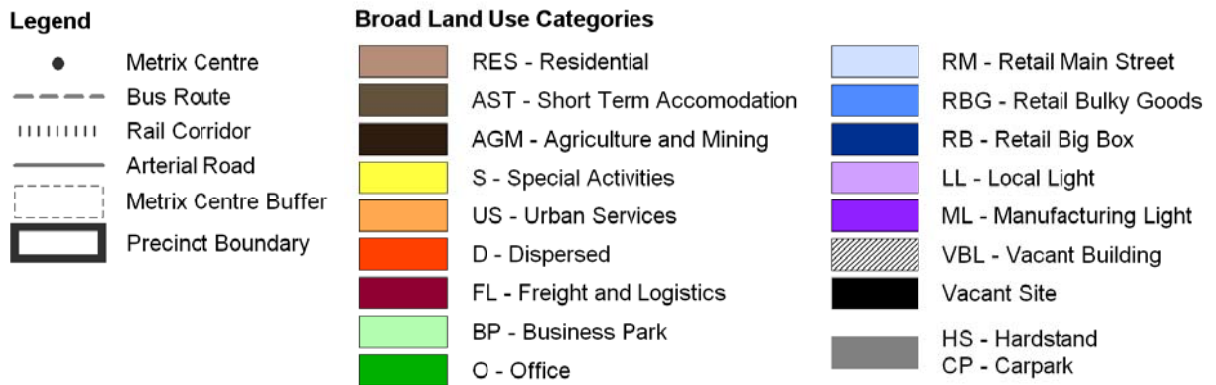
- | | |
|--------------------------------|--------------------------|
| RES - Residential | RM - Retail Main Street |
| AST - Short Term Accommodation | RBG - Retail Bulky Goods |
| AGM - Agriculture and Mining | RB - Retail Big Box |
| S - Special Activities | LL - Local Light |
| US - Urban Services | ML - Manufacturing Light |
| D - Dispersed | VBL - Vacant Building |
| FL - Freight and Logistics | Vacant Site |
| BP - Business Park | HS - Hardstand |
| O - Office | CP - Carpark |

Source: SGS 2008.

Norton Street North Neighbourhood Commercial Precincts

Norton Street North Commercial Precincts are predominately retail mainstreet with the exception of two office blocks, surrounded by residential areas. The commercial sites are located along Perry Street and Lilyfield Road and are all located on a bus route, in close proximity to City West Link and the rail corridor. The Perry Street Lilyfield neighbourhood centre is located to the west of the precinct, north of Norton Street.

Figure 12. Fragmented Commercial Precinct Principal Land Use by Lot



Source: SGS 2008.

Commercial – Other Fragmented

Camperdown Commercial Precinct



Precinct Capacity

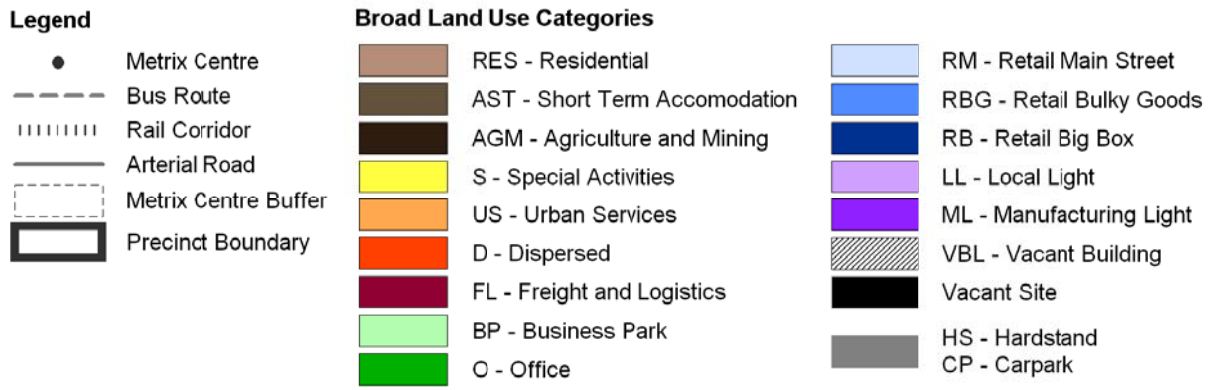
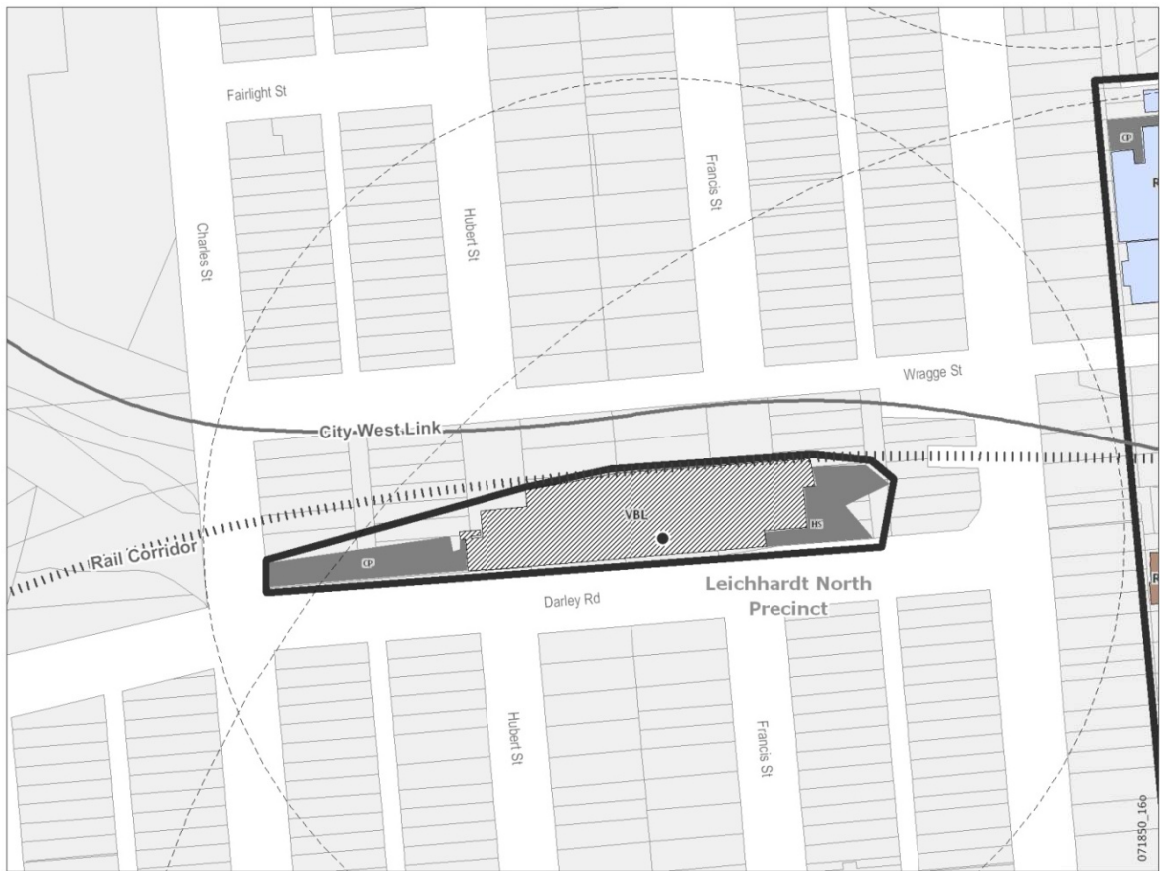
The precinct is located northwest of the Camperdown Industrial precinct and is wholly used for as office. The site has frontage to Nelson Street and is surrounded by residential development. The built form is older style factory building of generally one storey height to Nelson Street and two storeys to Susan Street at the rear. Car parking is located off Susan Street.

Leichhardt North Commercial Precinct



This precinct is a fragmented site and is located on land between the rail corridor and Darley Street. The built form on the site is comprised of a two storey red-brick building with access to the rail line at the rear. Former Fielder's Bread factory.

Figure 13. Leichhardt North Commercial Precinct Principal Land Use by Lot



Source: SGS 2008.

Balmain and Rozelle Fragmented Commercial Precinct

Figure 14. Balmain West Fragmented Commercial Precinct Principal Land Use by Lot

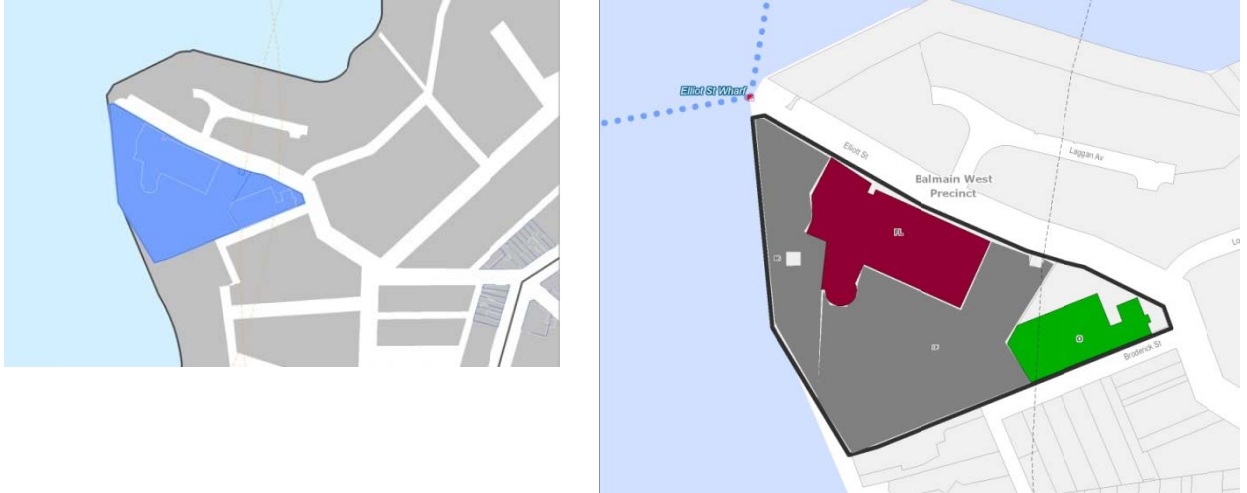
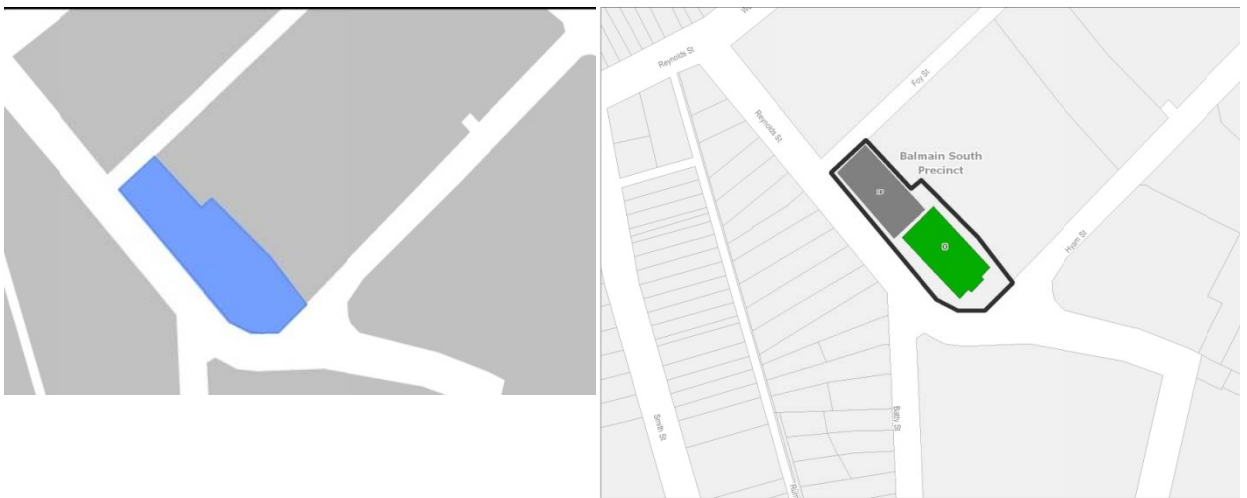


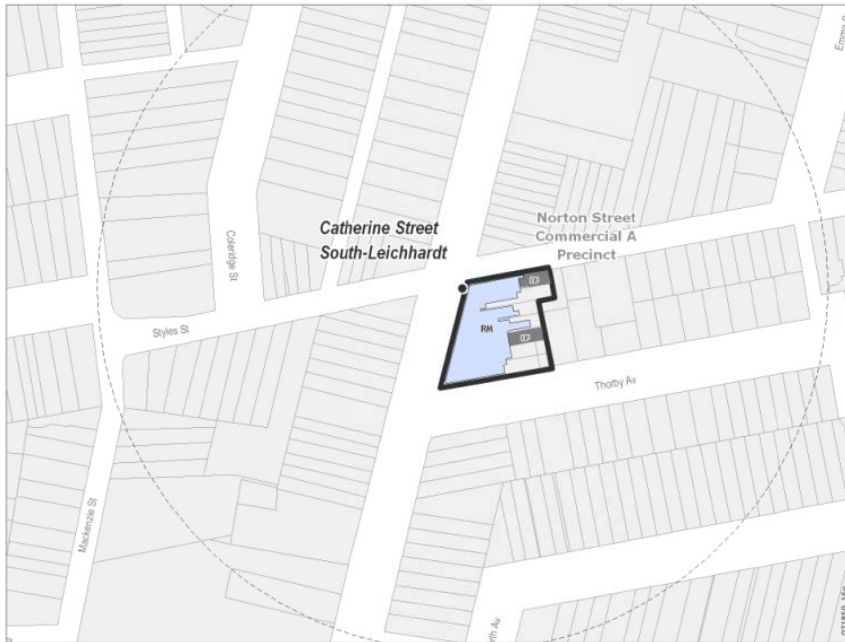
Figure 15. Balmain South Fragmented Commercial Precinct Principal Land Use by Lot



Legend		Broad Land Use Categories		
●	Metrix Centre	RES - Residential	RM - Retail Main Street	
---	Bus Route	AST - Short Term Accomodation	RBG - Retail Bulky Goods	
	Rail Corridor	AGM - Agriculture and Mining	RB - Retail Big Box	
—	Arterial Road	S - Special Activities	LL - Local Light	
- - - -	Metrix Centre Buffer	US - Urban Services	ML - Manufacturing Light	
▭	Precinct Boundary	D - Dispersed	VBL - Vacant Building	
		FL - Freight and Logistics	Vacant Site	
		BP - Business Park	HS - Hardstand	
		O - Office	CP - Carpark	

Source: SGS 2008.

Figure 16. Norton Street Commercial A Precinct Principal Land Use by Lot



Legend

- Metrix Centre
- - - Bus Route
- ||||| Rail Corridor
- Arterial Road
- - - Metrix Centre Buffer
- ▭ Precinct Boundary

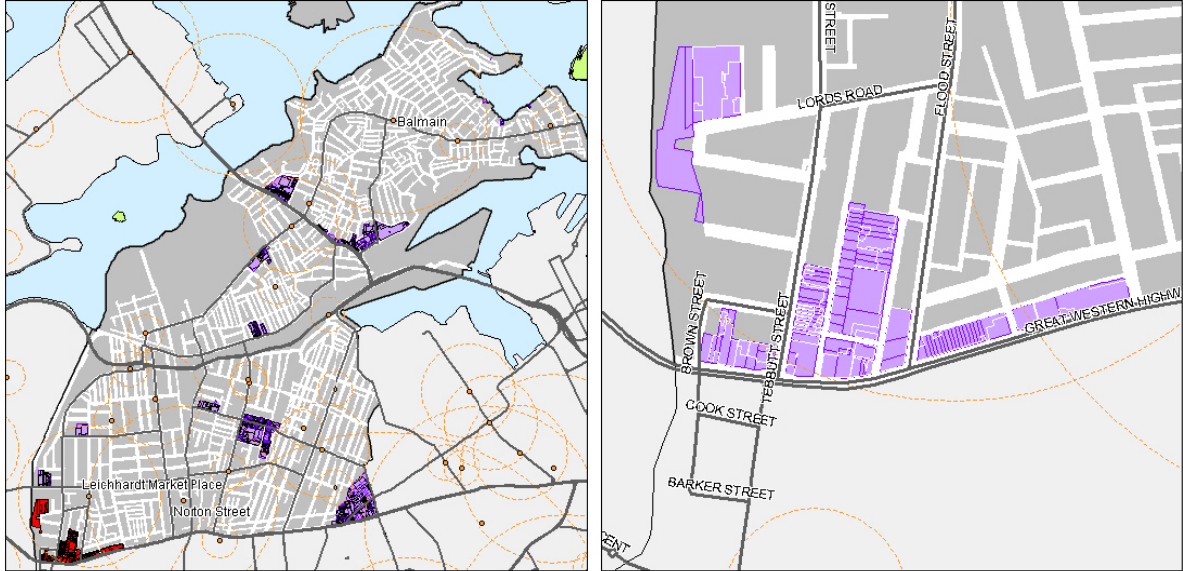
Broad Land Use Categories

- | | |
|--|--|
| RES - Residential | RM - Retail Main Street |
| AST - Short Term Accommodation | RBG - Retail Bulky Goods |
| AGM - Agriculture and Mining | RB - Retail Big Box |
| S - Special Activities | LL - Local Light |
| US - Urban Services | ML - Manufacturing Light |
| D - Dispersed | VBL - Vacant Building |
| FL - Freight and Logistics | Vacant Site |
| BP - Business Park | HS - Hardstand |
| O - Office | CP - Carpark |

Source: SGS 2008.

Parramatta Road Corridor Precincts

Tebutt St /Parramatta Road



A significant amount of employment lands are located along Parramatta Road. Automotive related tenants are strongly represented in this area. The precinct is surrounded by residential areas to the north and some residential development has occurred within the industrial zoned area.

At the time of visiting this location, there appeared to be some vacancies, potentially long-term vacancies with the Lord Street area. Urbis notes that that Lord Street is an 'older industrial complex primarily containing more intensive type uses such as sign-makers, manufacturers and warehousing with off street parking and loading. The complex is bounded by the Hawthorne Canal to the west and Lambert Park to the North and is separated from residential development by Lords Road to the south and a laneway to the east.'

The draft Inner West Subregional Strategy classifies this employment land precinct as Category 1, to be retained for industrial land uses.

Figure 17. Tebutt St / Parramatta Road and Lords Road Precinct Principal Land Use by Lot



Legend

- Metrix Centre
- - - Bus Route
- ||||| Rail Corridor
- Arterial Road
- - - Metrix Centre Buffer
- ▭ Precinct Boundary

Broad Land Use Categories

- | | |
|--------------------------------|--------------------------|
| RES - Residential | RM - Retail Main Street |
| AST - Short Term Accommodation | RBG - Retail Bulky Goods |
| AGM - Agriculture and Mining | RB - Retail Big Box |
| S - Special Activities | LL - Local Light |
| US - Urban Services | ML - Manufacturing Light |
| D - Dispersed | VBL - Vacant Building |
| FL - Freight and Logistics | Vacant Site |
| BP - Business Park | HS - Hardstand |
| O - Office | CP - Carpark |

Source: SGS 2008.

Figure 18. Tebutt St / Parramatta Road Precinct Character

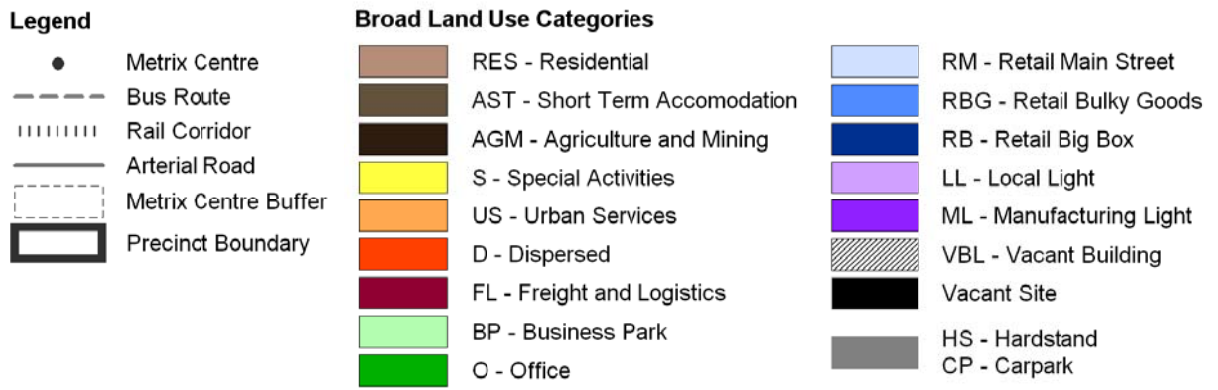


Parramatta Road West Commercial Precinct



This precinct is bound by Jarret Street, Renwick Street, Elswick Street and Parramatta Road. Key through roads off Parramatta are Elswick and Rolfe Streets accessible from east-bound lanes only. Rolfe Street provides side-street RM activity. There is limited rear access to properties with frontage to Parramatta Road with laneway access via Jarret Street to some lot and private entrances to the rear of properties south of Rolf Street.

Figure 19. Parramatta Road West Commercial Precinct Principal Land Use by Lot



Source: SGS 2008.

Parramatta Road East Commercial Precinct



The landuses along this stretch of Parramatta Road are predominantly retail mainstreet uses. Built form is of predominantly older-style smaller shopfronts between Macquarie and Nelson Streets with larger buildings north of Macquarie Street up to Norton Street. These lots have rear access via Albion Lane. Non-retail landuses include office landuses located near Balmain Road and also at Young Street and LL uses at Trafalgar and Nelson Streets. There are 5 sets of traffic lights within this precinct at Balmain, Catherine, Young, Johnston and Nelson Streets.

Figure 20. Parramatta Road East Commercial Precinct Principal Land Use by Lot



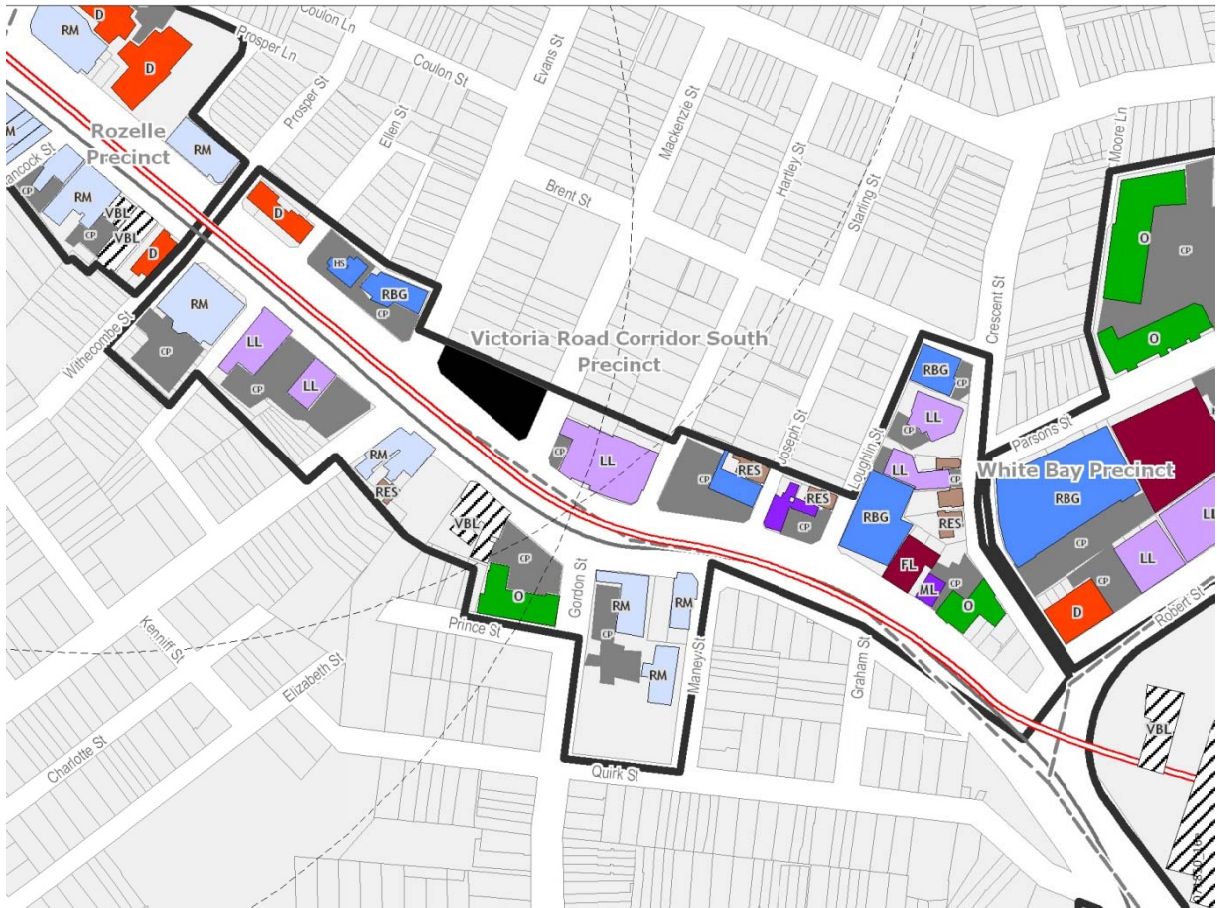
Legend		Broad Land Use Categories		
●	Metrix Centre	RES - Residential	RM - Retail Main Street	
---	Bus Route	AST - Short Term Accomodation	RBG - Retail Bulky Goods	
	Rail Corridor	AGM - Agriculture and Mining	RB - Retail Big Box	
—	Arterial Road	S - Special Activities	LL - Local Light	
- - -	Metrix Centre Buffer	US - Urban Services	ML - Manufacturing Light	
▭	Precinct Boundary	D - Dispersed	VBL - Vacant Building	
		FL - Freight and Logistics	■	Vacant Site
		BP - Business Park	■	HS - Hardstand
		C - Office	■	CP - Carpark

Source: SGS 2008.

Victoria Road Corridor

Victoria Road South

Figure 21. Victoria Road South Principal Land Use by Lot



Legend

- Metrix Centre
- - - Bus Route
- ||||| Rail Corridor
- Arterial Road
- - - Metrix Centre Buffer
- ▭ Precinct Boundary

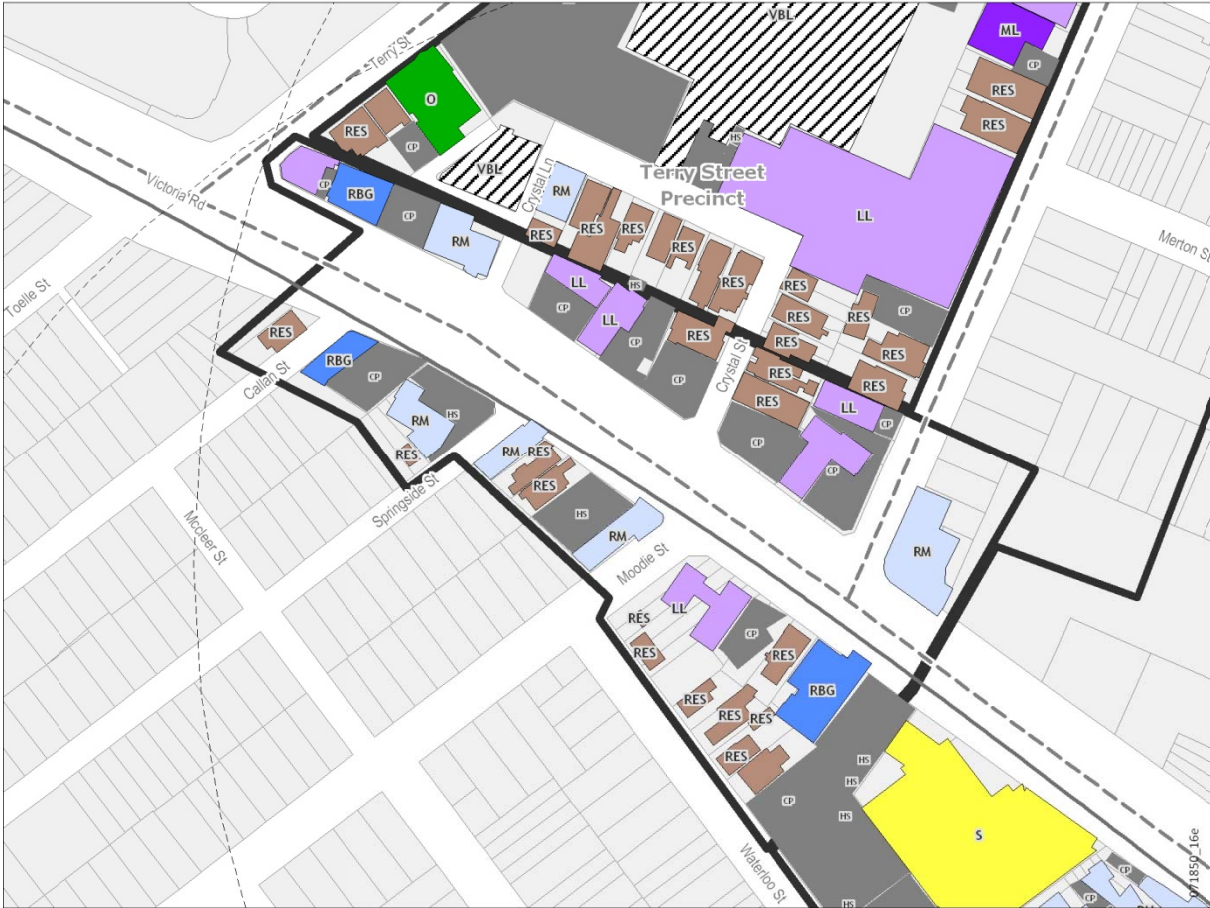
Broad Land Use Categories




















- | | |
|--------------------------------|--------------------------|
| RES - Residential | RM - Retail Main Street |
| AST - Short Term Accommodation | RBG - Retail Bulky Goods |
| AGM - Agriculture and Mining | RB - Retail Big Box |
| S - Special Activities | LL - Local Light |
| US - Urban Services | ML - Manufacturing Light |
| D - Dispersed | VBL - Vacant Building |
| FL - Freight and Logistics | Vacant Site |
| BP - Business Park | HS - Hardstand |
| O - Office | CP - Carpark |

Source: SGS 2008.

Victoria Road North

Figure 22. Victoria Road North Principal Land Use by Lot

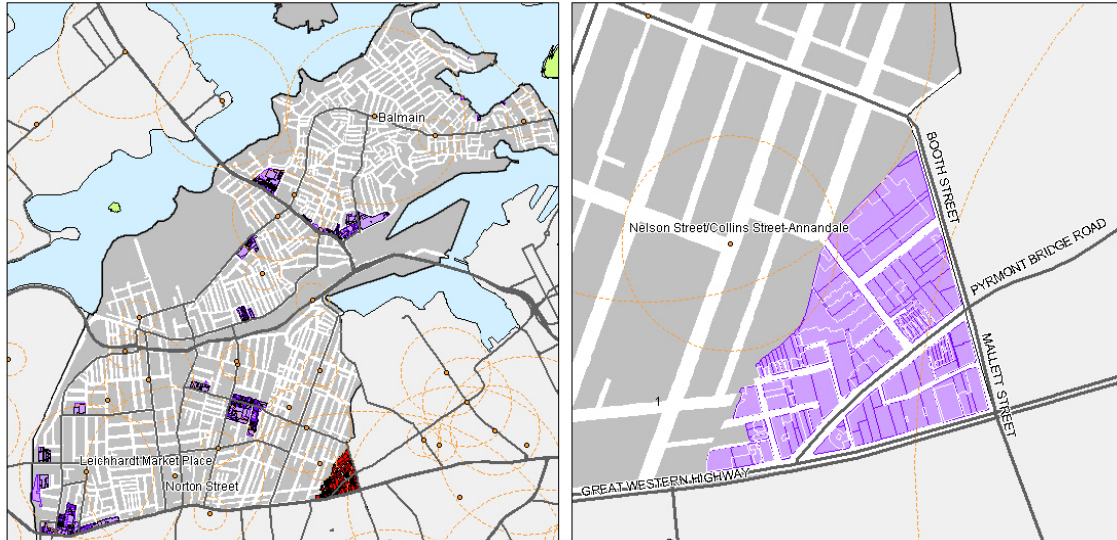


Legend		Broad Land Use Categories	
●	Metrix Centre		RES - Residential
---	Bus Route		AST - Short Term Accomodation
	Rail Corridor		AGM - Agriculture and Mining
---	Arterial Road		S - Special Activities
- - - -	Metrix Centre Buffer		US - Urban Services
	Precinct Boundary		D - Dispersed
			FL - Freight and Logistics
			BP - Business Park
			O - Office
			RM - Retail Main Street
			RBG - Retail Bulky Goods
			RB - Retail Big Box
			LL - Local Light
			ML - Manufacturing Light
			VBL - Vacant Building
			Vacant Site
			HS - Hardstand
			CP - Carpark

Source: SGS 2008.

Industrial Precincts

Camperdown



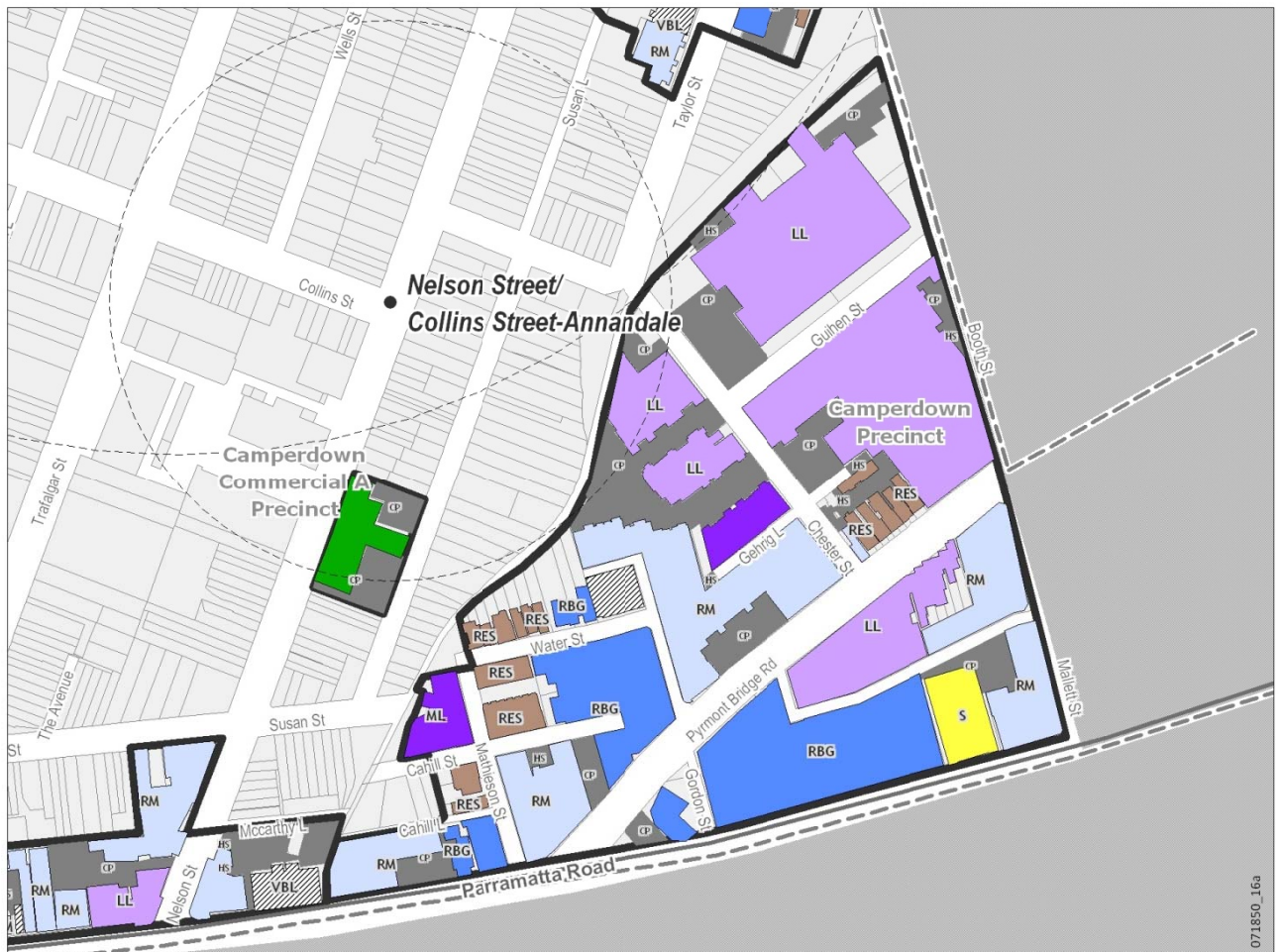
Businesses within this location include storage companies, a number of businesses using office space in converted warehouses, and retailing/showroom type uses along Parramatta Road .

Located on Parramatta Road, and dissected by Pyrmont Bridge Road, the precinct is easily accessible by road or public transport. The area has high visibility along Parramatta Road, which experiences 60,000 vehicle movements per day. The area is bounded by a canal and Parramatta Road, and is located adjacent to new high-density housing developments. Local retailing is located in Annandale centre, with higher order retailing available at Broadway Shopping Centre. A relatively high proportion of people employed within this precinct also live locally, this is reflected by a high proportion of employees who walked to work (8.8%).

This area is located in close proximity to Sydney University.

The draft Inner West Subregional Strategy classifies this employment land precinct as Category 1, to be retained for industrial land uses.

Figure 23. Camperdown Precinct Principal Land Use by Lot

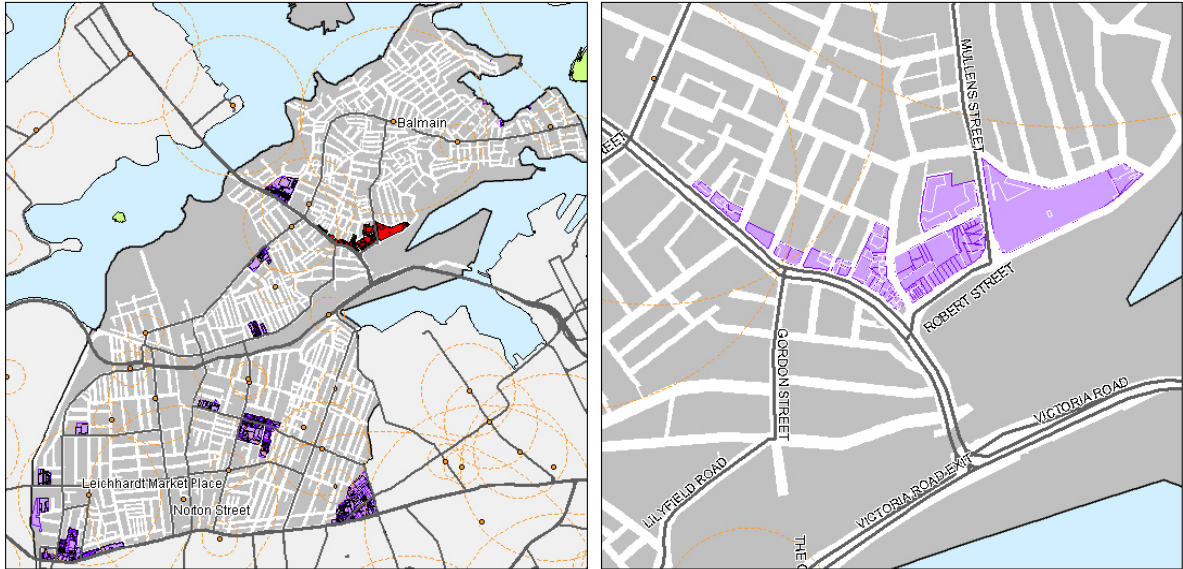


Source: SGS 2008.

Figure 24. Camperdown Precinct Character



White Bay



Businesses in this location are diverse and include a gym and film studio. There are numerous auto-repairers such as along Mullens Street, as well as show room type uses along Victoria Road, reflecting the high exposure provided by this location. At the time of Urbis' audit, this contained 'ironwork manufacture, timber and plaster warehouses, plumbing and building supplies, food warehousing, smash repairs, auto-traders, ship repairer, roofing supplies/contractor and less traditional uses such as the film/TV studios' as well as some commercial uses in terrace buildings fronting Robert Street.

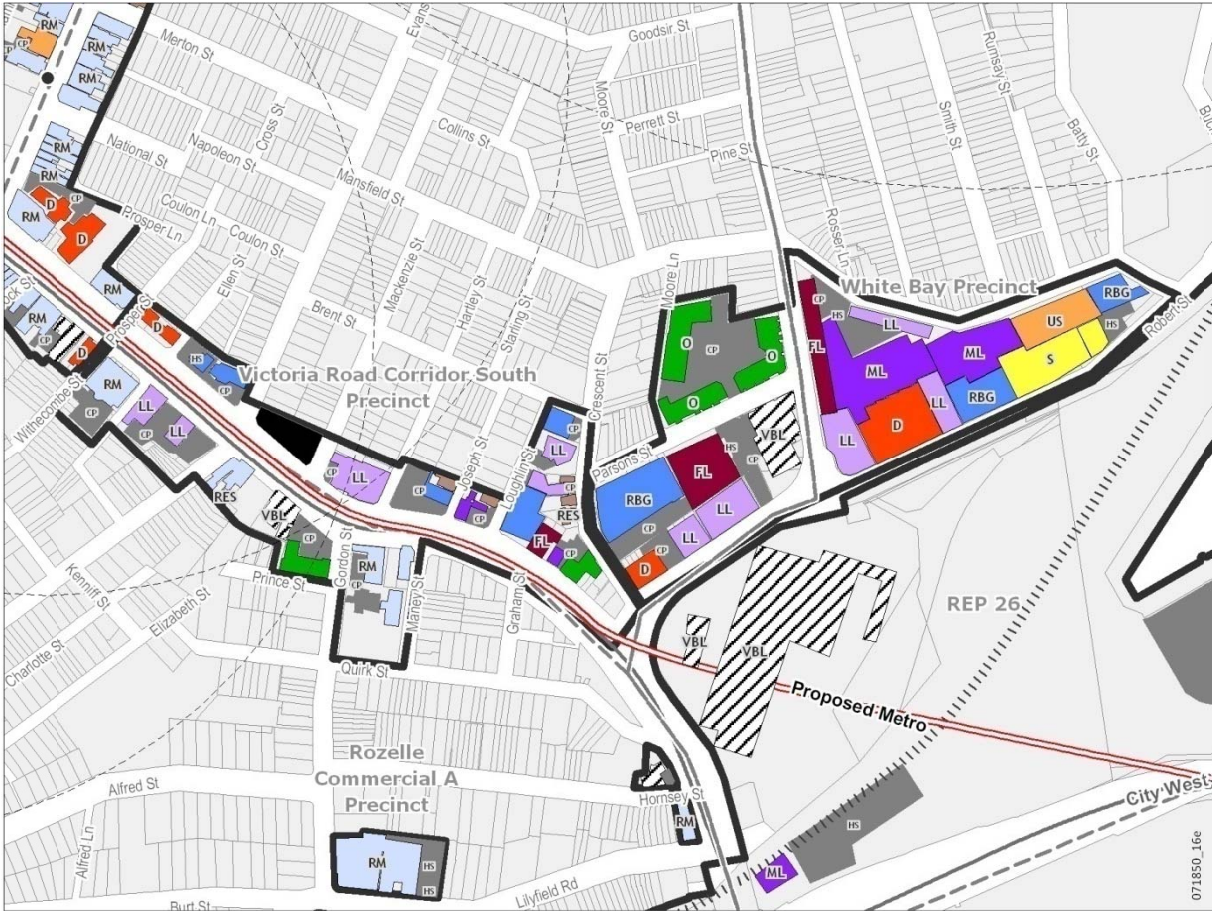
The area is located in close proximity to Sydney's CBD, accessible via the Anzac Bridge. The area as a whole can be accessed via Victoria Road, which is often congested particularly during peak hours. Bus Services operating along Victoria Road connect this area with the CBD and Ryde. In addition, a cycleway runs along the Anzac Bridge.

Port facilities at Glebe Island and White Bay are the primary adjacent land uses. Current and future operations at this location have the potential to impact upon amenity in the area, and previous proposals for widening the range of uses in this area have not been supported by State Government. Residential areas are located to the north and western of this employment land precinct.

The old White Bay Power Station is located in proximity to this precinct. It occupies 3.8 hectares, and is under the jurisdiction of the Sydney Harbour Foreshore Authority. The power station has not been in operation since 1983. A Conservation Management Plan was prepared in 2004, and the SHFA website states that an adaptive re-use of this location is being sought.

The draft Inner West Subregional Strategy classifies the Martin Bright Steel Works Site as Category 2, to be investigated for alternative employment generating uses, with the remainder of this employment precinct to be retained for industrial land uses.

Figure 25. White Bay and Victoria Road South Corridor

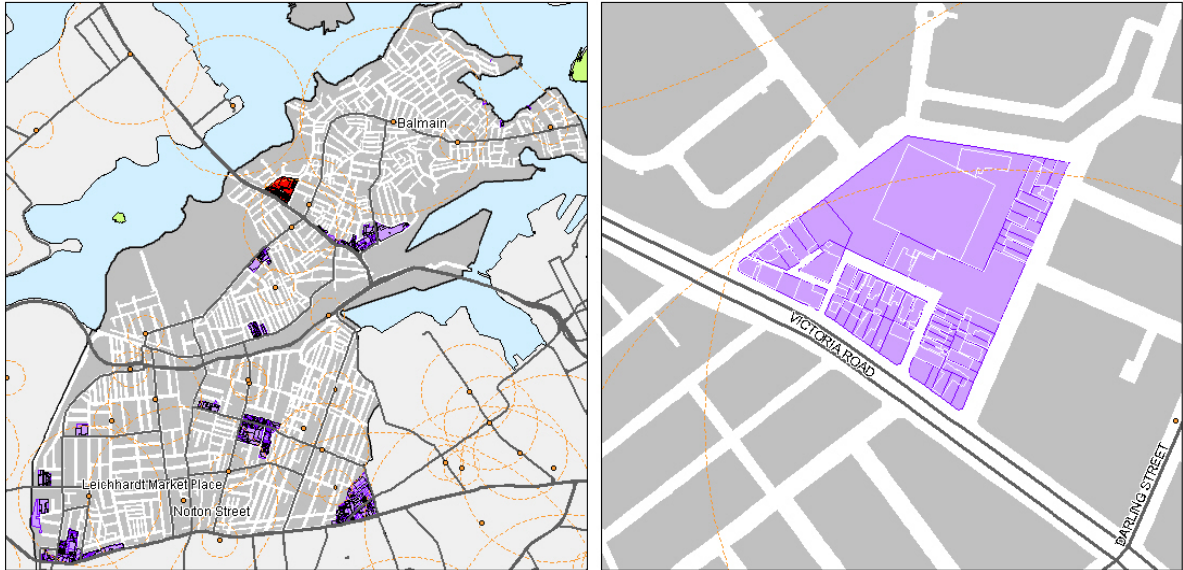


Source: SGS 2008.

Figure 26. White Bay and Victoria Rd Character



Terry St



A Land and Environment Court decision in 2007 has allowed for proposed new uses in this location, namely three bulky goods retailing tenancies and undercover parking together with the use of an existing three storey commercial building as a gymnasium.

The largest site within this precinct was previously occupied by Carrier Pty Ltd, suppliers of air-conditioning equipment. Multiplex have prepared a masterplan for this site, and the broader precinct, which proposes a retail development, accommodating 9,000sqm of retail floorspace, 4,400sqm of bulky goods/showroom, commercial floorspace including a gym (11,800 sqm) and residential development (equating to 33,600 sqm).

This area is reliant on access via Terry St and Victoria Rd. It is well serviced by buses along Victoria Road. A cycleway also runs along Victoria Road, connecting it westwards towards Drummoyne and eastwards towards the Anzac Bridge and Sydney's CBD. Retailing and service are accessible for employees, either along Darling St, or at Birkenhead Point, just outside the LGA. Relatively new medium to high density residential development is located to north and west of this precinct.

The draft Inner West Subregional Strategy classifies this employment land precinct as Category 2, to be investigated for alternative employment generating uses.



















Figure 27. Terry St Precinct Principal Land Use by Lot



Legend

- Metrix Centre
- - - Bus Route
- ||||| Rail Corridor
- Arterial Road
- - - Metrix Centre Buffer
- ▭ Precinct Boundary

Broad Land Use Categories

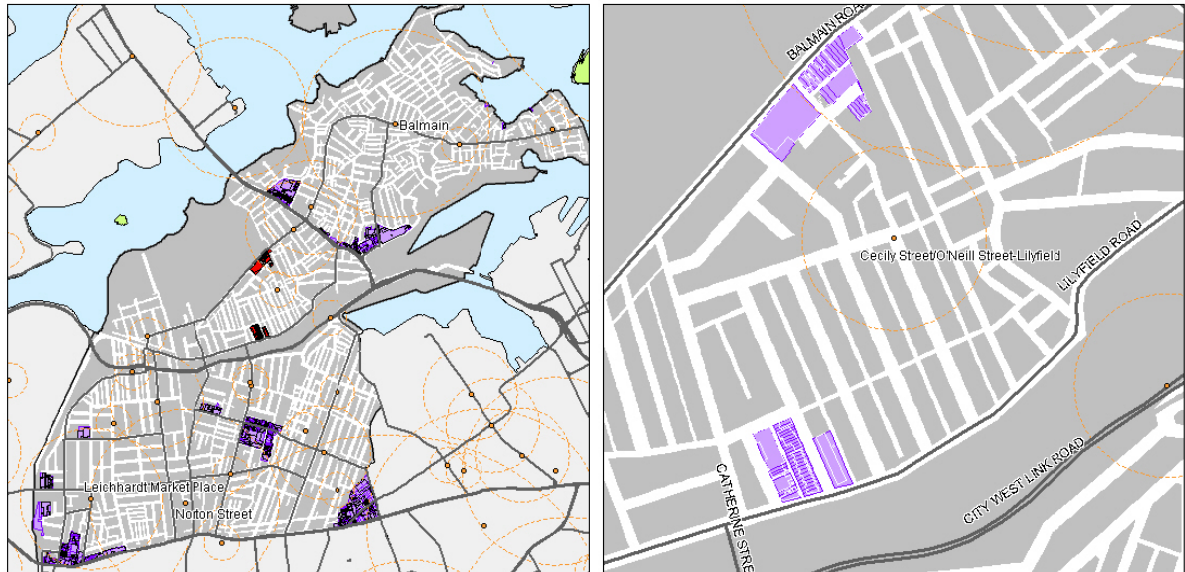
- | | | | |
|---|--------------------------------|---|--------------------------|
|  | RES - Residential |  | RM - Retail Main Street |
|  | AST - Short Term Accommodation |  | RBG - Retail Bulky Goods |
|  | AGM - Agriculture and Mining |  | RB - Retail Big Box |
|  | S - Special Activities |  | LL - Local Light |
|  | US - Urban Services |  | ML - Manufacturing Light |
|  | D - Dispersed |  | VBL - Vacant Building |
|  | FL - Freight and Logistics |  | Vacant Site |
|  | BP - Business Park |  | HS - Hardstand |
|  | O - Office |  | CP - Carpark |

Source: SGS 2008.

Figure 28. Terry St Precinct Character



Balmain Road and Lilyfield



The employment lands on Balmain Road are located opposite Callan Park and the College of Fine Arts. They are surrounded by low-scale residential areas and accessible via buses along Victoria Road. The area located along Lilyfield Road consists of live-work type spaces, opposite the Rozelle Marshalling yards but surrounded by a residential area. Tenant businesses located within these 'live-work' spaces are diverse. This area is accessible via light-rail.

Urbis describes the land in proximity to Balmain Road as follows: 'this area contains older one to three storey industrial buildings that accommodate furniture/cabinet makers, timber storage, supplies, window treatments. A component of cabinet making is designated for show room and sales. West of Cecily Street the development has parking and loading while the remainder has no parking but has formal loading areas.'

The draft Inner West Subregional Strategy classifies this employment land precinct as Category 1, to be retained for industrial land uses.

Figure 29. Balmain Road and Lilyfield Road Industrial Precincts Principal Land Use by Lot



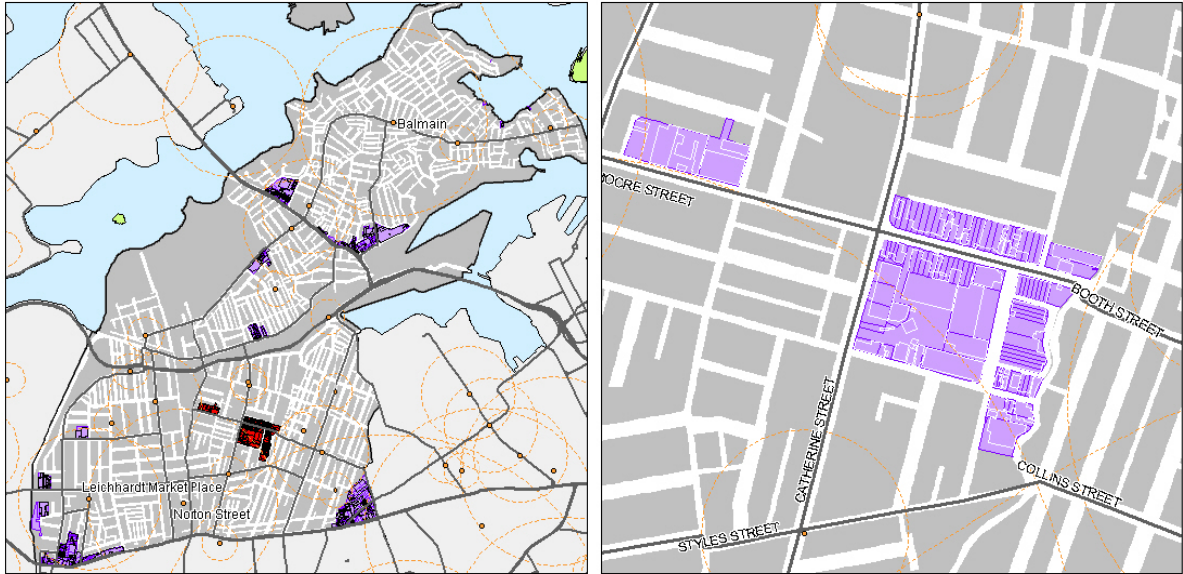
Legend		Broad Land Use Categories	
●	Metrix Centre	RES	RES - Residential
---	Bus Route	AST	AST - Short Term Accommodation
	Rail Corridor	AGM	AGM - Agriculture and Mining
—	Arterial Road	S	S - Special Activities
- - -	Metrix Centre Buffer	US	US - Urban Services
▭	Precinct Boundary	D	D - Dispersed
		FL	FL - Freight and Logistics
		BP	BP - Business Park
		O	O - Office
		RM	RM - Retail Main Street
		RBG	RBG - Retail Bulky Goods
		RB	RB - Retail Big Box
		LL	LL - Local Light
		ML	ML - Manufacturing Light
		VBL	VBL - Vacant Building
		□	Vacant Site
		HS	HS - Hardstand
		CP	CP - Carpark

Source: SGS 2008.

Figure 30. Balmain Rd and Lilyfield Precinct Character



Moore St



Urbis noted that at the time of their audit 'uses included trade suppliers, food manufacture and warehousing, handicraft, printers, air-conditioning repairs/manufacture, metal fabrication, truck and trailer repairs, fish bait and tackle warehouse, manufacture and warehouse of storage boxes, engineering, Council depot etc.'

The area is bounded by White's Creek to the east, a park is located on the corner of Catherine and Moore Street, and the remainder of the surrounding area consists of residential development. Some residential development has occurred within the industrial zoned area, on the northern side of Moore Street.

The draft Inner West Subregional Strategy classifies this employment land precinct as Category 1, to be retained for industrial land uses.

Figure 31. Moore St Precinct Principal Land Use by Lot



Legend

- Metrix Centre
- - - Bus Route
- ||||| Rail Corridor
- Arterial Road
- - - Metrix Centre Buffer
- ▭ Precinct Boundary

Broad Land Use Categories

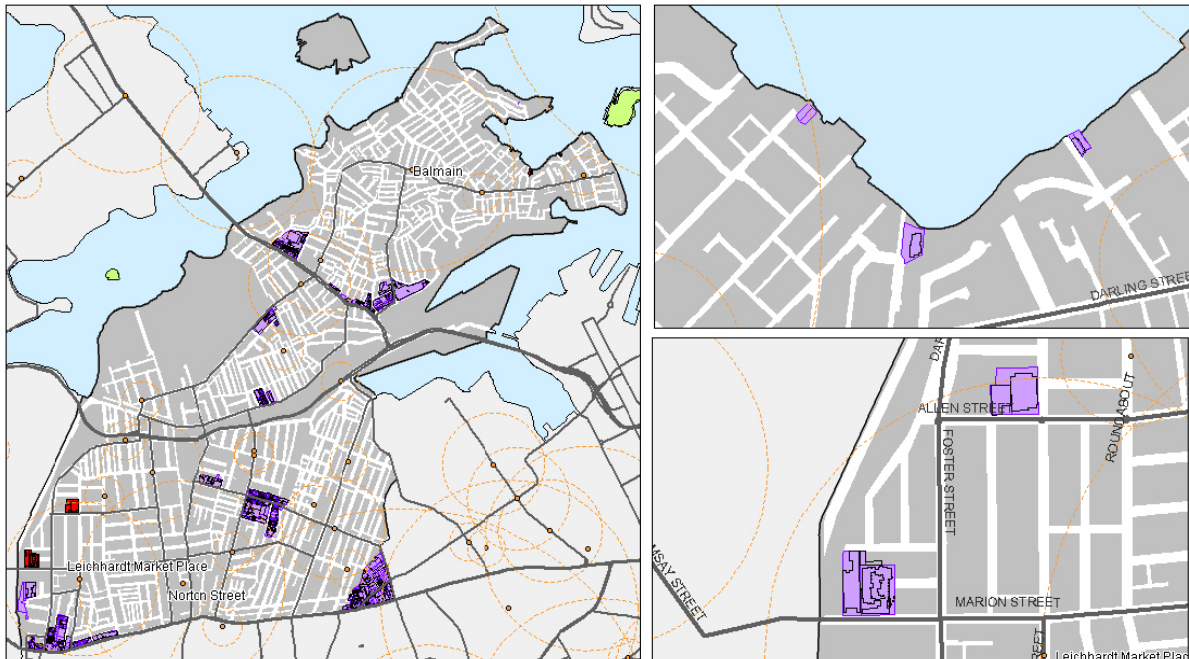
- | | |
|-------------------------------|--------------------------|
| RES - Residential | RM - Retail Main Street |
| AST - Short Term Accomodation | RBG - Retail Bulky Goods |
| AGM - Agriculture and Mining | RB - Retail Big Box |
| S - Special Activities | LL - Local Light |
| US - Urban Services | ML - Manufacturing Light |
| D - Dispersed | VBL - Vacant Building |
| FL - Freight and Logistics | Vacant Site |
| BP - Business Park | HS - Hardstand |
| O - Office | CP - Carpark |

Source: SGS 2008.

Figure 32. Moore St Precinct Character



Fragmented Industrial Parcels

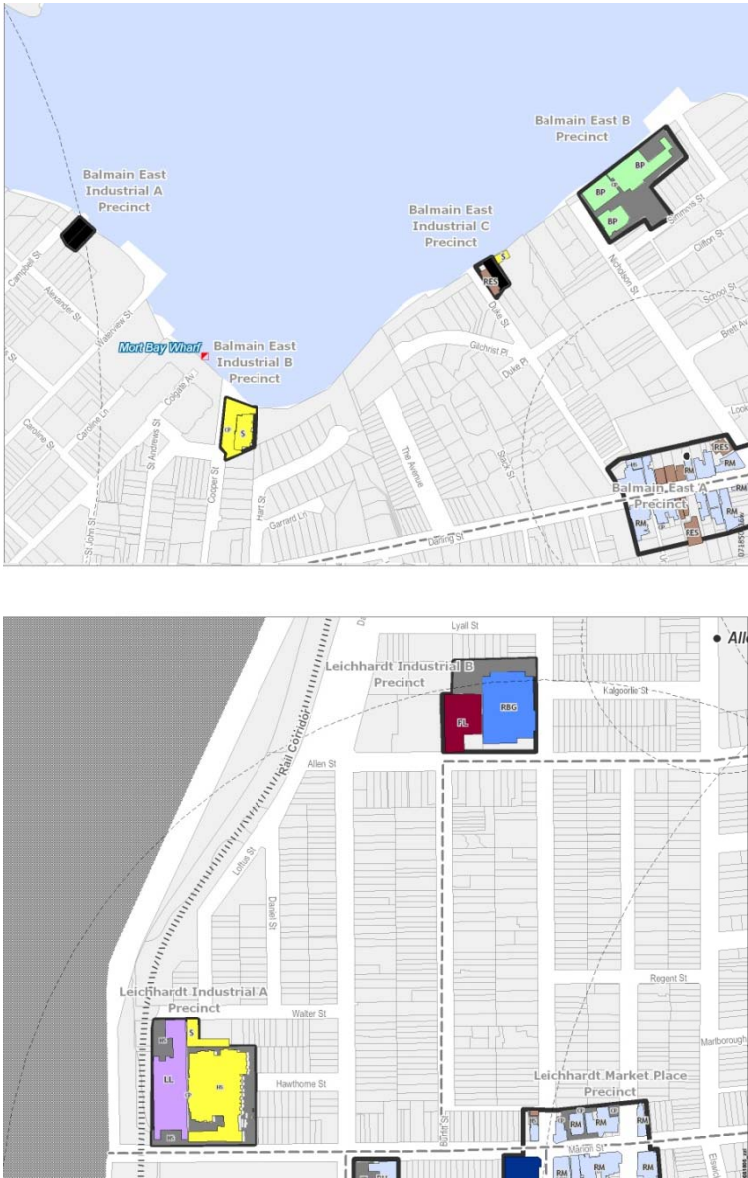


Employment lands located on Marion Street now accommodate an aged care facility, and at the time of the last site visit, one site appeared vacant. The parcels located on the corner of Allen and Flood Street, are currently occupied by wholesaling businesses. These sites are generally isolated from public transport access and other business locations.

The draft Inner West Subregional Strategy classifies Marion Street/Walter Street as Category 2, indicating potential for other employment generating uses. The parcels of employment land at Allen and Flood Street has been classified as Category 1, to be retained for industrial purposes.

Discussions with the Chamber of Commerce indicate that there are some interface issues at Allen/Flood St, particularly due to truck movements and the removal of rubbish.

Figure 33. Fragmented Industrial



Legend

- Metrix Centre
- - - Bus Route
- ||||| Rail Corridor
- Arterial Road
- - - - - Metrix Centre Buffer
- ▭ Precinct Boundary

Broad Land Use Categories

- | | | | |
|--|--------------------------------|--|--------------------------|
| | RES - Residential | | RM - Retail Main Street |
| | AST - Short Term Accommodation | | RBG - Retail Bulky Goods |
| | AGM - Agriculture and Mining | | RB - Retail Big Box |
| | S - Special Activities | | LL - Local Light |
| | US - Urban Services | | ML - Manufacturing Light |
| | D - Dispersed | | VBL - Vacant Building |
| | FL - Freight and Logistics | | Vacant Site |
| | BP - Business Park | | HS - Hardstand |
| | C - Office | | CP - Carpark |

Source: SGS 2008.

Figure 34. Fragmented Parcels Character

Glebe Island/ White Bay/ Rozelle Bay

Glebe Island and White Bay are currently under the jurisdiction of State Government. Facilities at this location previously catered for the transport of motor vehicles and dry bulk cargo (including cement, soda ash, gypsum and sugar), and operators such as Australian Amalgamated Terminals, Cement Australia, Sydney Ports Corporation, Gypsum Resources Australia, Penrice Soda Products, and Sugar Australia. The port facilities operated 24 hours, 7 days a week.

The Bays Precinct Taskforce was formed by the NSW Government to investigate future land use options for Glebe Island and White Bay, Rozelle Bay, Blackwattle Bay and Rozelle rail yard. The draft Inner West Subregional Strategy states that 'it is anticipated the Task Force will commence public consultation in mid 2008.'

However, the NSW Government has recently announced that masterplanning for the site is to commence with a view to long-term use of the land for residential and commercial activity rather than retention of port-related activities¹. However, in the short term the site will be used as a construction area for the CBD Metro Rail proposed in lieu of the indefinitely deferred North West Metro Rail².

The draft Inner West Subregional Strategy classifies this employment land precinct as Category 2 and notes that it is 'Under Investigation'.

¹ *Metro Plan to stall foreshore renewal*, SMH November 1, 2008.

² *NSW axes NW Metro, trims SW rail project*, SMH, October 31, 2008



















Figure 35. Glebe Island/White Bay Principal Land Use by Lot



Legend

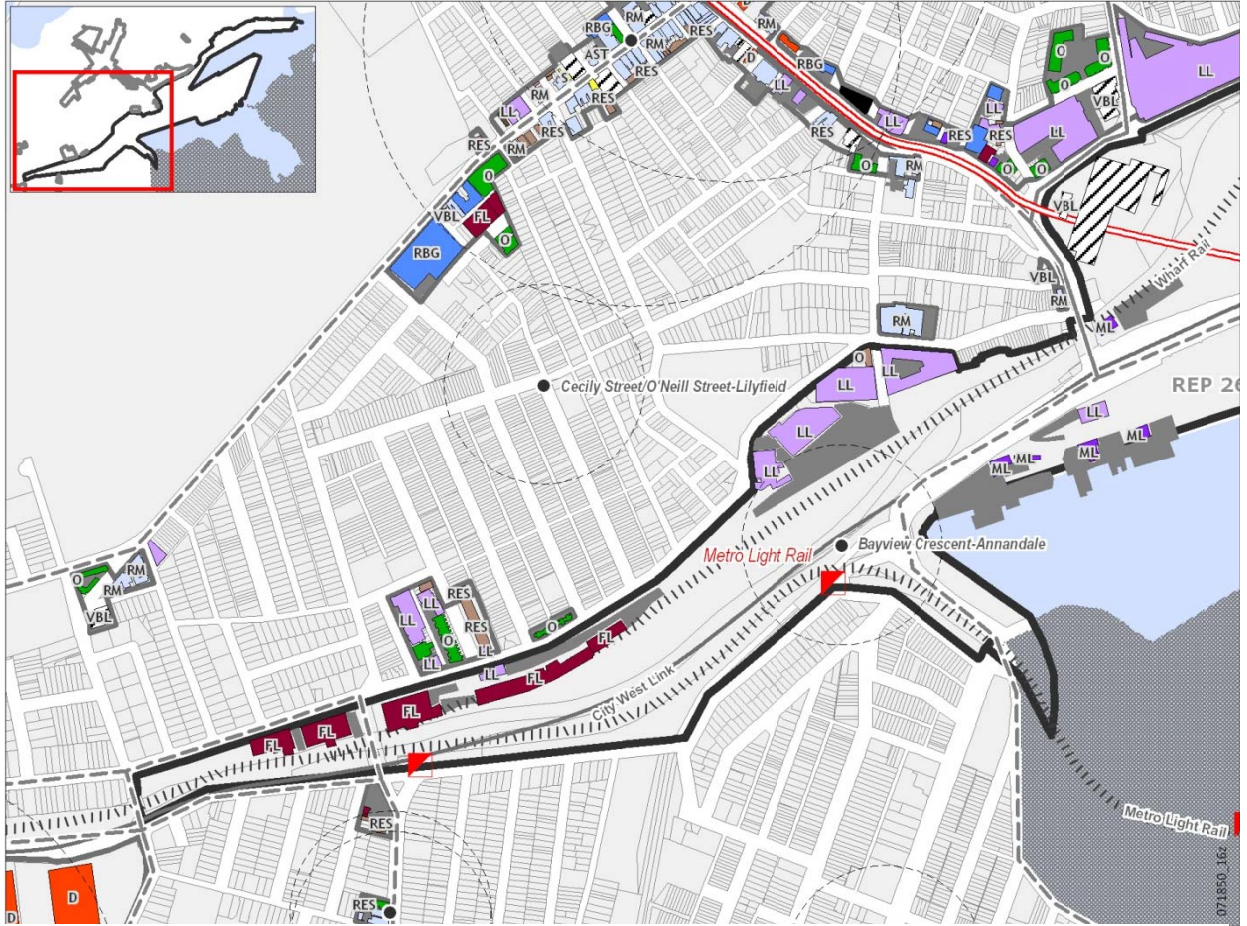
- Metrix Centre
- - - Bus Route
- ||||| Rail Corridor
- Arterial Road
- - - Metrix Centre Buffer
- ▭ Precinct Boundary

Broad Land Use Categories

- | | | | |
|---|--------------------------------|---|--------------------------|
|  | RES - Residential |  | RM - Retail Main Street |
|  | AST - Short Term Accommodation |  | RBG - Retail Bulky Goods |
|  | AGM - Agriculture and Mining |  | RB - Retail Big Box |
|  | S - Special Activities |  | LL - Local Light |
|  | US - Urban Services |  | ML - Manufacturing Light |
|  | D - Dispersed |  | VBL - Vacant Building |
|  | FL - Freight and Logistics |  | Vacant Site |
|  | BP - Business Park |  | HS - Hardstand |
|  | O - Office |  | CP - Carpark |

Source: SGS 2008.

Figure 36. Glebe Island/White Bay Principal Land Use by Lot



Legend

- Metrix Centre
- - - Bus Route
- ||||| Rail Corridor
- Arterial Road
- - - Metrix Centre Buffer
- ▭ Precinct Boundary

Broad Land Use Categories

- | | |
|----------------------------------|----------------------------|
| ■ RES - Residential | ■ RM - Retail Main Street |
| ■ AST - Short Term Accommodation | ■ RBG - Retail Bulky Goods |
| ■ AGM - Agriculture and Mining | ■ RB - Retail Big Box |
| ■ S - Special Activities | ■ LL - Local Light |
| ■ US - Urban Services | ■ ML - Manufacturing Light |
| ■ D - Dispersed | ■ VBL - Vacant Building |
| ■ FL - Freight and Logistics | ■ Vacant Site |
| ■ BP - Business Park | ■ HS - Hardstand |
| ■ O - Office | ■ CP - Carpark |

Source: SGS 2008.

Employment Uses within Residential Zoned Areas

Site visits have indicated that there are a number of locations where businesses use occur within residential zoned land. Two examples are shown in the photos overleaf. The previous Employment Lands Study undertaken by Urbis also notes that commercial and industrial uses were located along Mullens, Montague and Beattie Streets, as well as Barr Street, Balmain.

There is a greater potential for interfaces issues related to noise and parking where employment generating uses are dispersed within residential areas. However, these spaces do provide important alternative accommodation for businesses. Council should seek to carefully monitor any complaints received by residents.



Appendix 6 - Forecasting Approach

The employment land demand forecasting method employed by SGS is outlined in this section and makes use of the following key input data:

- 2009 Transport Data Centre (TDC) employment forecasts to 2031
- Employment land floorspace supply – gathered through the employment land audit

The method elements are described below.

Planning Horizon Employment Growth Rate

The TDC employment forecasts by ANZSIC 2006 category for the LGA were converted into forecasts by ANZSCI 1993 category to match the industry coding used in the land audit. Table 1 shows the employment forecast trend between 2006 and 2031. It does not include the expected growth in Bays Precinct.

Table 1. Growth Rates – Trend Based

Industry Sectors	Trend 2006-2031	Trend Growth rate
Agriculture, Forestry and Fishing	17	156%
Mining	0	0%
Manufacturing	-285	77%
Electricity, Gas and Water Supply	-46	17%
Construction	100	107%
Wholesale Trade	-60	93%
Retail Trade	1,130	142%
Accommodation, Cafes and Restaurants	418	124%
Transport and Storage	82	115%
Communication Services	-217	63%
Finance and Insurance	-186	60%
Property and Business Services	1,118	133%
Government Administration and Defence	150	108%
Education	555	139%
Health and Community Services	1,069	137%
Cultural and Recreational Services	-4	99%
Personal and Other Services	441	144%
Unclassified	357	149%
Total	4,640	122%

Source: TDC 2009; SGS 2010

The forecast trend shows that overall the LGA will gain 4,640 jobs to 2031 with the majority of this in the 'Retail trade' and 'Property and Business Services' sectors. The LGA will lose jobs in the 'Manufacturing', 'Communication Services' and 'Finance and Insurance' sectors.

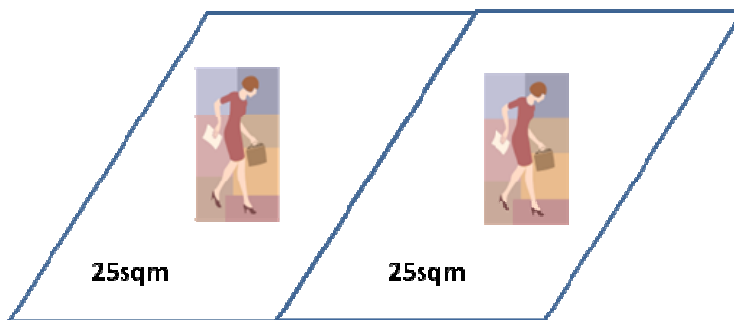
The trend based forecasts are used as the inputs under both BAU and policy adjusted scenarios to generating forecast floorspace demand.

Forecast Floorspace Demand

The floorspace demand has been generated by applying the **growth rates by industry sector** (as described above) to the **employment floorspace supply** from the employment land audit. This gives us a picture of the volume of floorspace demand to 2031.

There are some significant assumptions in the use of this method. These are that:

- The relationship between employment and land use remains constant.



For example, should an office floorspace of 25sqm be associated with 1 job, a doubling of the growth rate would indicate a doubling of the floorspace ($25\text{sqm} \times 2 = 50\text{sqm}$).

- **Demand based on observed activity.** This means the analysis may fall behind immediate trends which may not be captured in the trend data used in the analysis. It should be noted however that the TDC forecasts are sense checked with the following data sources³:
 - Official Population Projections
 - Metropolitan Development Program
 - TDC's Small Area (TZ) Population Forecasts
 - Previous JTW data
 - updated labour force participation and unemployment rate projections²
 - updated industry trend curves

SGS has grouped the 2031 floorspace into Broad Land Use Categories (BLCs) (as described in Appendix 4) by precinct. This provides the inputs for the supply demand analysis undertaken at the precinct level.

³ Ministry of Transport, Info Sheet, 2008

Scenario Testing

As part of the employment lands supply demand modelling, we have tested the implications of removing some land areas from the supply-side. This is intended to test the tolerance of the employment lands strategy to the rezoning of some areas currently zoned as industrial land.

Method

The demand forecast for 2031 is subtracted from the floorspace capacity for each employment precinct. Where there is insufficient capacity to accommodate the demand forecast, demand is redistributed to other precincts capable of accommodating it. Initially, all overflow demand is redistributed to comparable areas. In addition, to better match this 'overflow' demand with suitable precincts, floorspace by ANZSIC category is converted to Broad Land Use Categories (BLCs) – office, light industrial, special uses, etc. The ANZSIC to BLC conversion is based on land use audit data.

Summary of Outputs

Our analysis shows that as industrial sites are removed and supply deficits recorded in other industrial areas, the non industrial component (office, retail main street, etc) of overflow demand can be redistributed to commercial areas without resulting in supply deficits in these areas. Indeed, after the redistribution of overflow demand all surplus commercial precincts remained with surplus, albeit of smaller magnitude.

Table 2 shows the summary result after the redistribution of the overflow demand expected under each scenario. The deficit in commercial precincts is predominately driven by a large deficit in the Market Place precinct (approximately 30,000 sqm). Some of this deficit results from the use of residential zoned land for commercial purposes. This is misleading and skews the results. Thus, the headline figures for commercial precincts excluding Leichhardt Market Place precinct provide a more robust indication of underlying demand and supply imbalances.

Table 2. Employment Land Supply Demand Analysis

Type	Scenario 1	Scenario 2	Scenario 3	Scenario 4	Scenario 5	Scenario 6	Scenario 7	Scenario 8	Scenario 9	Scenario 10	Scenario 11
	Square meters										
Commercial (without Market Place)	20,592	16,609	15,887	14,502	16,609	14,502	15,887	17,164	16,443	17,164	16,443
Commercial	-9,225	-13,207	-13,929	-15,314	-13,207	-15,315	-13,929	-12,652	-13,374	-12,652	-13,374
Comidor	62,996	61,718	60,501	58,678	51,450	48,409	50,233	56,600	55,383	46,332	45,115
Industrial	7,274	4,669	3,282	620	4,669	623	3,282	3,732	2,345	3,732	2,345
Other	5,183	5,183	5,183	5,183	5,183	5,182	5,183	5,183	5,183	5,183	5,183
Total	66,228	58,363	55,037	49,167	48,095	38,899	44,769	52,863	49,537	42,595	39,269

Notably, by excluding the Market Place precinct, all the precinct types will be in surplus after accommodating the forecast demand in 2031 across all scenarios. The amount of the surplus in industrial precincts is more volatile across scenarios, reflecting substantive changes in the amount of employment land available across the LGA driven by the rezoning of Multiplex and Kolotex Sites (as shown in scenarios 4 and 6).

The figures reported are based on a redistribution of excess demand. Redistributing the non-industrial component of *total* additional demand for floorspace in industrial precincts could improve the magnitude of the surplus in industrial precincts, at the expense of reducing surpluses in commercial precincts.

Gap Analysis by BLC Category, Industrial Precincts

Taking account of the TDC driven floorspace demand forecast, several industrial precincts across the LGA have significant supply deficits. This is summarised in Table 3. Deficits in employment lands are particularly large in the Camperdown, Leichhardt Industrial A, Moore Street, Balmain Road Industrial, and White Bay industrial precincts.

Table 3. Employment Land Supply Demand Analysis

Type	Precinct	Total future floorspace demand (A)	Current employment floorspace (B)	Additional Floorspace Demand (C)	Potential total floorspace under current controls (D)	Potential floorspace minus current floorspace (E)	SUPPLY/DEMAND GAP (F)
Square Metres							
Industrial	Balmain East Industrial A	0	0	0	354	354	354
Industrial	Balmain East Industrial B	2,417	2,098	319	1,038	-1,059	-1,379
Industrial	Balmain East Industrial C	104	90	14	413	323	309
Industrial	Balmain Road Industrial Precinct	16,432	16,833	-401	11,030	-5,803	-5,403
Industrial	Camperdown	65,951	53,493	12,458	56,326	2,833	-9,625
Industrial	Leichhardt Industrial A	19,429	14,140	5,290	10,776	-3,364	-8,654
Industrial	Leichhardt Industrial B	8,054	8,640	-586	7,865	-775	-189
Industrial	Leichhardt North	0	0	0	2,903	2,903	2,903
Industrial	Lilyfield Road Industrial	8,075	6,705	1,371	8,393	1,688	317
Industrial	Moore Street	62,414	55,560	6,854	55,594	34	-6,820
Industrial	Tebbutt Street North	7,914	8,860	-946	8,502	-358	588
Industrial	White Bay Industrial Precinct	35,082	30,140	4,942	32,796	2,657	-2,286
	TOTAL	225,873	196,558	29,315	195,991	-568	-29,882

Redistribution of Industrial Precinct Deficits to Commercial Precincts in Surplus

Redistribution of industrial precinct deficits to commercial precincts in surplus could occur in two ways, by redistributing overflow demand, or redistributing additional demand. SGS has opted to redistribute excess demand which implicitly assumes current land use trends will continue until the lands available in these precincts reaches their capacity. This has the benefit of assuming no major changes in land use until forced by land availability.

Moreover, it is noted that the redistribution of additional demand could, assuming additional demand is greater than overflow demand, increase the magnitude of the surplus in industrial precincts at the expense of the surplus (excluding the Market Place precinct) expected in commercial precincts.

The BLC categories which were shown to be driving the employment land deficit in the industrial precincts, and which could be accommodated in commercial precincts include the Retail (Main Street), Retail (Bulky Goods), Special Activities, and Office BLC categories.

The amount of overflow demand which was redistributed under each scenario is shown in Table 4. The expected overflow demand in the BLC categories identified was redistributed on a pro-rata basis to surplus commercial precincts.

Table 4. Industrial Precincts Deficits Redistributed, by BLC (square metres)

	Office	Retail Bulky Goods	Retail Main Street	Special Activities	Total
Scenario 1	1,004	10,785	18,361	7,006	37,156
Scenario 2	1,477	13,275	18,542	7,607	40,901
Scenario 3	1,624	13,532	18,598	7,794	41,548
Scenario 4	1,907	14,025	18,707	8,152	42,792
Scenario 5	1,477	13,275	18,542	7,607	40,901
Scenario 6	1,907	14,025	18,707	8,152	42,792
Scenario 7	1,624	13,532	18,598	7,794	41,548
Scenario 8	2,476	11,592	18,602	7,607	40,277
Scenario 9	2,624	11,849	18,658	7,794	40,925
Scenario 10	2,476	11,592	18,602	7,607	40,277
Scenario 11	2,624	11,849	18,658	7,794	40,925

Table 5 outlines the key demand-side and supply-side assumptions under each of the scenarios considered.

Table 5. Future employment land supply and demand assumptions under each scenario

Scenario Name	Demand-side Assumptions	Supply-side Assumptions
Scenario 1	<ul style="list-style-type: none"> TDC-based employment growth rate No intensification of land use 	<ul style="list-style-type: none"> All available employment land can reach 80% of the maximum Floor Space Ratio (FSR) under the current controls.
Scenario 2	<ul style="list-style-type: none"> As assumed in Scenario 1 Displaced demand on Multiplex site distributed pro-rata to employment lands with similar features. 	<ul style="list-style-type: none"> Multiplex site removed from the pool of total employment land supply The rest of the employment land can reach 80% of the maximum FSR under the current controls.
Scenario 3	<ul style="list-style-type: none"> As assumed in Scenario 1 Displaced demand on Multiplex and Kolotex Residential sites distributed pro-rata to employment lands with similar features. 	<ul style="list-style-type: none"> Multiplex and Kolotex Residential sites removed from the pool of total employment land supply The rest of the employment land can reach 80% of the maximum FSR under the current controls.
Scenario 4	<ul style="list-style-type: none"> As assumed in Scenario 1 Displaced demand on Multiplex and, Kolotex Residential and Industrial sites distributed pro-rata to employment lands with similar features. 	<ul style="list-style-type: none"> Multiplex and, Kolotex Residential and Industrial sites removed from the pool of total employment land supply The rest of the employment land can reach 80% of the maximum FSR under the current controls.
Scenario 5	<ul style="list-style-type: none"> As assumed in Scenario 1 Displaced demand on Multiplex and Campbells sites distributed pro-rata to employment lands with the same zoning. 	<ul style="list-style-type: none"> Multiplex and Campbells sites removed from the pool of total employment land supply The rest of the employment land can reach 80% of the maximum FSR under the current controls.
Scenario 6	<ul style="list-style-type: none"> As assumed in Scenario 1 Displaced demand on Multiplex, Kolotex Residential and Industrial, and Campbells sites distributed pro-rata to employment lands with similar features. 	<ul style="list-style-type: none"> Multiplex, Kolotex Residential and Industrial, and Campbells sites removed from the pool of total employment land supply The rest of the employment land can reach 80% of the maximum FSR under the current controls.
Scenario 7	<ul style="list-style-type: none"> As assumed in Scenarios 3 and 5 	<ul style="list-style-type: none"> As assumed in Scenarios 3 and 5
Scenario 8	<ul style="list-style-type: none"> As assumed in Scenario 2 Displaced demand on site 7 which is distributed pro-rata to employment lands with similar features. 	<ul style="list-style-type: none"> As assumed in Scenario 2 Site 7 removed from the pool of total employment land supply
Scenario 9	<ul style="list-style-type: none"> As assumed in Scenario 3 Displaced demand on site 7 which is 	<ul style="list-style-type: none"> As assumed in Scenario 3 Site 7 removed from the pool of total

	distributed pro-rata to employment lands with similar features.	employment land supply
Scenario 10	<ul style="list-style-type: none"> As assumed in Scenario 5 Displaced demand on site 7 which is distributed pro-rata to employment lands with similar features. 	<ul style="list-style-type: none"> As assumed in Scenario 5 Site 7 removed from the pool of total employment land supply
Scenario 11	<ul style="list-style-type: none"> As assumed in Scenarios 3 and 5 Displaced demand on site 7 which is distributed pro-rata to employment lands with similar features. 	<ul style="list-style-type: none"> As assumed in Scenarios 3 and 5 Site 7 removed from the pool of total employment land supply

The implications of redistributing the excess demand in the industrial precinct under each of the scenarios described above are depicted in Table 6 to Table 16.

The tables show that the commercial precincts with surpluses are well placed to absorb this redistribution. Under all scenarios, the redistribution did not lead any of the surplus commercial precincts into deficit. However, these outcomes are based of redistributing total overflow demand for floorspace. Redistributing additional demand may adversely affect the prospects of the commercial precincts by decreasing the expected surplus (excluding the Market Place precinct).

The values and formulas underpinning the data found in Table 6 to Table 16 are described below:

- **A - Future floorspace.** This is the amount of floorspace demand to 2031 from the floorspace demand analysis.
- **B - Current employment floorspace.** This is the floorspace calculated from the employment land audit data.
- **C – Additional floorspace Demand (A minus B).** This is the value of subtracting A from B.
- **D - Potential floorspace under current controls.** This is the total floorspace potential under the current controls and applies the current FSRs to land appropriate for employment land uses. In this analysis, potential on lots with heritage items has been reduced.
- **E - Potential floorspace minus current floorspace (D minus B)**
- **F - SUPPLY/ DEMAND GAP (E minus C).**

Table 6. Employment Land Supply Demand Analysis – Scenario 1 (square metres)

Type	Precinct	Redistributi on of future floorspace demand	New future floorspace demand (A)	Current employment floorspace (B)	New additional Floorspace Demand (C)	Potential total floorspace under current controls (D)	Potential floorspace minus current floorspace (E)	NEW SUPPLY/DE MAND GAP (F)
Square Metres								
Commercial	Balmain Commercial	0	68,736	54,517	14,219	64,932	10,415	-3,804
Commercial	Balmain East A	1,560	6,060	3,403	2,657	7,133	3,730	1,073
Commercial	Balmain East B	1,651	3,977	2,168	1,809	5,113	2,945	1,136
Commercial	Balmain South	750	2,088	1,389	699	2,603	1,214	516
Commercial	Balmain West	4,478	11,833	6,823	5,011	14,913	8,090	3,079
Commercial	Booth Street	5,418	17,919	9,421	8,498	21,645	12,224	3,726
Commercial	Camperdown Commercial A	0	3,169	2,386	783	3,132	746	-37
Commercial	Leichhardt Market Place	0	61,905	49,635	12,270	32,089	-17,547	-29,816
Commercial	Lilyfield Commercial A	431	431	0	431	728	728	296
Commercial	Lilyfield Commercial B	337	703	338	365	935	597	232
Commercial	Lilyfield South A	545	2,114	1,153	961	2,489	1,336	375
Commercial	Lilyfield South B	1,498	1,761	228	1,533	2,791	2,563	1,030
Commercial	Norton Street	7,885	96,584	68,763	27,822	102,007	33,244	5,422
Commercial	Norton Street Commercial A	968	1,085	83	1,002	1,751	1,668	666
Commercial	Norton Street North	3,589	13,172	7,528	5,645	15,640	8,112	2,468
Commercial	Norton Street North Commercial A	0	1,089	804	285	1,066	282	-3
Commercial	Norton Street North Commercial B	770	1,170	280	889	1,700	1,419	530
Commercial	Norton Street North Commercial C	344	569	159	410	805	646	236
Commercial	Norton Street North Commercial D	122	5,108	3,816	1,292	5,191	1,376	84
Commercial	Rozelle	6,193	41,222	26,837	14,385	45,481	18,643	4,259
Commercial	Rozelle Commercial A	0	5,346	3,767	1,579	4,229	462	-1,117
Commercial	Rozelle Commercial B	187	845	464	381	974	510	129
Commercial	Rozelle Commercial C	323	323	0	323	545	545	222
Commercial	Rozelle Commercial D	110	386	211	175	462	251	76
Corridor	Norton Street (Parramatta Road Corridor)	0	7,424	5,477	1,946	9,571	4,093	2,147
Corridor	Parramatta Road East	0	41,877	33,609	8,268	65,289	31,680	23,412
Corridor	Parramatta Road West	0	12,690	9,499	3,191	24,223	14,723	11,532
Corridor	Rozelle Centre (Corridor Lots)	0	11,520	8,681	2,839	13,415	4,734	1,895
Corridor	Victoria Road (Terry Street)	0	4,991	3,517	1,474	11,383	7,867	6,392
Corridor	Victoria Road South	0	15,734	11,734	4,000	18,360	6,627	2,626
Corridor	Tebutt St/Parramatta Rd	0	42,728	40,246	2,482	41,936	1,689	-793
Corridor	Terry Street	0	6,553	5,659	894	22,337	16,677	15,784
Industrial	Balmain East Industrial A	0	0	0	0	354	354	354
Industrial	Balmain East Industrial B	-1,379	1,038	2,098	-1,059	1,038	-1,059	0
Industrial	Balmain East Industrial C	-104	0	90	-90	413	323	413
Industrial	Balmain Road Industrial Precinct	-3,644	12,788	16,833	-4,045	11,030	-5,803	-1,758
Industrial	Camperdown	-13,130	52,821	53,493	-672	56,326	2,833	3,505
Industrial	Leichhardt Industrial A	-2,549	16,880	14,140	2,740	10,776	-3,364	-6,104
Industrial	Leichhardt Industrial B	1,663	9,717	8,640	1,077	7,865	-775	-1,852
Industrial	Leichhardt North	0	0	0	0	2,903	2,903	2,903
Industrial	Lilyfield Road Industrial	855	8,930	6,705	2,225	8,393	1,688	-537
Industrial	Moore Street	-14,414	48,000	55,560	-7,560	55,594	34	7,594
Industrial	Tebutt Street North	0	7,914	8,860	-946	8,502	-358	588
Industrial	White Bay Industrial Precinct	-4,454	30,628	30,140	489	32,796	2,657	2,168
Other	Bus Depot	0	820	711	108	6,002	5,291	5,183
	TOTAL	0	680,651	559,866	120,785	746,879	187,013	66,228
	TOTAL (without Other)	0	679,831	559,155	120,677	740,876	181,722	61,045

Table 7. Employment Land Supply Demand Analysis – Scenario 2 (square metres)

Type	Precinct	Redistributi on of future floorspace demand	New future floorspace demand (A)	Current employment floorspace (B)	New additional Floorspace Demand (C)	Potential total floorspace under current controls (D)	Potential floorspace minus current floorspace (E)	NEW SUPPLY/DE MAND GAP (F)
Square Metres								
Commercial	Balmain Commercial	0	68,736	54,517	14,219	64,932	10,415	-3,804
Commercial	Balmain East A	1,717	6,218	3,403	2,815	7,133	3,730	915
Commercial	Balmain East B	1,818	4,144	2,168	1,976	5,113	2,945	969
Commercial	Balmain South	825	2,164	1,389	774	2,603	1,214	440
Commercial	Balmain West	4,930	12,285	6,823	5,463	14,913	8,090	2,627
Commercial	Booth Street	5,965	18,466	9,421	9,046	21,645	12,224	3,179
Commercial	Camperdown Commercial A	0	3,169	2,386	783	3,132	746	-37
Commercial	Leichhardt Market Place	0	61,905	49,635	12,270	32,089	-17,547	-29,816
Commercial	Lilyfield Commercial A	475	475	0	475	728	728	253
Commercial	Lilyfield Commercial B	371	737	338	399	935	597	198
Commercial	Lilyfield South A	600	2,169	1,153	1,016	2,489	1,336	320
Commercial	Lilyfield South B	1,642	1,916	228	1,688	2,791	2,563	875
Commercial	Norton Street	8,681	97,381	68,763	28,618	102,007	33,244	4,626
Commercial	Norton Street Commercial A	1,065	1,183	83	1,100	1,751	1,668	568
Commercial	Norton Street North	3,951	13,535	7,528	6,007	15,640	8,112	2,106
Commercial	Norton Street North Commercial A	0	1,089	804	285	1,086	282	-3
Commercial	Norton Street North Commercial B	848	1,248	280	967	1,700	1,419	452
Commercial	Norton Street North Commercial C	378	604	159	445	805	646	202
Commercial	Norton Street North Commercial D	134	5,120	3,816	1,304	5,191	1,376	71
Commercial	Rozelle	6,818	41,847	26,837	15,010	45,481	18,643	3,633
Commercial	Rozelle Commercial A	0	5,573	3,767	1,806	4,229	462	-1,344
Commercial	Rozelle Commercial B	206	864	464	400	974	510	110
Commercial	Rozelle Commercial C	355	355	0	355	545	545	189
Commercial	Rozelle Commercial D	121	397	211	186	462	251	65
Corridor	Norton Street (Parramatta Road	0	7,424	5,477	1,946	9,571	4,093	2,147
Corridor	Parramatta Road East	0	41,877	33,609	8,268	65,289	31,680	23,412
Corridor	Parramatta Road West	0	12,690	9,499	3,191	24,223	14,723	11,532
Corridor	Rozelle Centre (Corridor Lots)	0	11,520	8,681	2,839	13,415	4,734	1,895
Corridor	Victoria Road (Terry Street)	0	4,991	3,517	1,474	11,383	7,867	6,392
Corridor	Victoria Road South	0	15,734	11,734	4,000	18,360	6,627	2,626
Corridor	Tebutt St/Parramatta Rd	0	44,006	40,246	3,759	41,936	1,689	-2,070
Corridor	Terry Street	0	6,553	5,659	894	22,337	16,677	15,784
Industrial	Balmain East Industrial A	0	0	0	0	354	354	354
Industrial	Balmain East Industrial B	-1,481	1,038	2,098	-1,059	1,038	-1,059	0
Industrial	Balmain East Industrial C	-104	0	90	-90	413	323	413
Industrial	Balmain Road Industrial Precinct	-3,644	12,788	16,833	-4,045	11,030	-5,803	-1,758
Industrial	Camperdown	-13,172	53,845	53,493	352	56,326	2,833	2,481
Industrial	Leichhardt Industrial A	-2,937	17,317	14,140	3,177	10,776	-3,364	-6,542
Industrial	Leichhardt Industrial B	0	0	8,640	-8,640	0	-8,640	0
Industrial	Leichhardt North	0	0	0	0	2,903	2,903	2,903
Industrial	Lilyfield Road Industrial	792	9,210	6,705	2,505	8,393	1,688	-817
Industrial	Moore Street	-15,305	49,488	55,560	-6,072	55,594	34	6,106
Industrial	Tebutt Street North	0	8,250	8,860	-610	8,502	-358	253
Industrial	White Bay Industrial Precinct	-5,050	31,521	30,140	1,381	32,796	2,657	1,276
Other	Bus Depot	0	820	711	108	6,002	5,291	5,183
	TOTAL	0	680,651	559,866	120,785	739,013	179,148	58,363
	TOTAL (without Other)	0	679,831	559,155	120,677	733,011	173,856	53,180

Table 8. Employment Land Supply Demand Analysis – Scenario 3 (square metres)

Type	Precinct	Redistributi on of future floorspace demand	New future floorspace demand (A)	Current employment floorspace (B)	New additional Floorspace Demand (C)	Potential total floorspace under current controls (D)	Potential floorspace minus current floorspace (E)	NEW SUPPLY/DE MAND GAP (F)
Square Metres								
Commercial	Balmain Commercial	0	68,736	54,517	14,219	64,932	10,415	-3,804
Commercial	Balmain East A	1,744	6,245	3,403	2,842	7,133	3,730	888
Commercial	Balmain East B	1,847	4,173	2,168	2,005	5,113	2,945	940
Commercial	Balmain South	839	2,177	1,389	788	2,603	1,214	427
Commercial	Balmain West	5,008	12,364	6,823	5,541	14,913	8,090	2,549
Commercial	Booth Street	6,060	18,561	9,421	9,140	21,645	12,224	3,084
Commercial	Camperdown Commercial A	0	3,169	2,386	783	3,132	746	-37
Commercial	Leichhardt Market Place	0	61,905	49,635	12,270	32,089	-17,547	-29,816
Commercial	Lilyfield Commercial A	482	482	0	482	728	728	245
Commercial	Lilyfield Commercial B	377	743	338	405	935	597	192
Commercial	Lilyfield South A	610	2,179	1,153	1,025	2,489	1,336	310
Commercial	Lilyfield South B	1,666	1,943	228	1,715	2,791	2,563	848
Commercial	Norton Street	8,819	97,519	68,763	28,756	102,007	33,244	4,488
Commercial	Norton Street Commercial A	1,082	1,200	83	1,117	1,751	1,668	551
Commercial	Norton Street North	4,014	13,597	7,528	6,070	15,640	8,112	2,043
Commercial	Norton Street North Commercial A	0	1,089	804	285	1,086	282	-3
Commercial	Norton Street North Commercial B	862	1,261	280	981	1,700	1,419	439
Commercial	Norton Street North Commercial C	384	610	159	451	805	646	196
Commercial	Norton Street North Commercial D	136	5,122	3,816	1,307	5,191	1,376	69
Commercial	Rozelle	6,926	41,956	26,837	15,118	45,481	18,643	3,525
Commercial	Rozelle Commercial A	0	5,644	3,767	1,877	4,229	462	-1,415
Commercial	Rozelle Commercial B	209	867	464	404	974	510	106
Commercial	Rozelle Commercial C	361	361	0	361	545	545	184
Commercial	Rozelle Commercial D	123	399	211	188	462	251	63
Corridor	Norton Street (Parramatta Road	0	7,424	5,477	1,946	9,571	4,093	2,147
Corridor	Parramatta Road East	0	41,877	33,609	8,268	65,289	31,680	23,412
Corridor	Parramatta Road West	0	12,690	9,499	3,191	24,223	14,723	11,532
Corridor	Rozelle Centre (Corridor Lots)	0	11,520	8,681	2,839	13,415	4,734	1,895
Corridor	Victoria Road (Terry Street)	0	4,991	3,517	1,474	11,383	7,867	6,392
Corridor	Victoria Road South	0	15,734	11,734	4,000	18,360	6,627	2,626
Corridor	Tebutt St/Parramatta Rd	0	41,897	40,246	1,651	38,610	-1,637	-3,287
Corridor	Terry Street	0	6,553	5,659	894	22,337	16,677	15,784
Industrial	Balmain East Industrial A	0	0	0	0	354	354	354
Industrial	Balmain East Industrial B	-1,513	1,038	2,098	-1,059	1,038	-1,059	0
Industrial	Balmain East Industrial C	-104	0	90	-90	413	323	413
Industrial	Balmain Road Industrial Precinct	-3,644	12,788	16,833	-4,045	11,030	-5,803	-1,758
Industrial	Camperdown	-13,185	54,163	53,493	671	56,326	2,833	2,162
Industrial	Leichhardt Industrial A	-3,057	17,453	14,140	3,314	10,776	-3,364	-6,678
Industrial	Leichhardt Industrial B	0	0	8,640	-8,640	0	-8,640	0
Industrial	Leichhardt North	0	0	0	0	2,903	2,903	2,903
Industrial	Lilyfield Road Industrial	773	9,297	6,705	2,592	8,393	1,688	-904
Industrial	Moore Street	-15,582	49,951	55,560	-5,609	55,594	34	5,643
Industrial	Tebutt Street North	0	8,354	8,860	-506	8,502	-358	148
Industrial	White Bay Industrial Precinct	-5,235	31,799	30,140	1,659	32,796	2,657	998
Other	Bus Depot	0	820	711	108	6,002	5,291	5,183
	TOTAL	0	680,651	559,866	120,785	735,687	175,821	55,037
	TOTAL (without Other)	0	679,831	559,155	120,677	729,685	170,530	49,854

Table 9. Employment Land Supply Demand Analysis – Scenario 4 (square metres)

Type	Precinct	Redistributi on of future floorspace demand	New future floorspace demand (A)	Current employment floorspace (B)	New additional Floorspace Demand (C)	Potential total floorspace under current controls (D)	Potential floorspace minus current floorspace (E)	NEW SUPPLY/DE MAND GAP (F)
Square Metres								
Commercial	Balmain Commercial	0	68,736	54,517	14,219	64,932	10,415	-3,804
Commercial	Balmain East A	1,797	6,297	3,403	2,894	7,133	3,730	835
Commercial	Balmain East B	1,902	4,228	2,168	2,060	5,113	2,945	885
Commercial	Balmain South	864	2,202	1,389	813	2,603	1,214	402
Commercial	Balmain West	5,158	12,514	6,823	5,691	14,913	8,090	2,398
Commercial	Booth Street	6,242	18,743	9,421	9,322	21,645	12,224	2,902
Commercial	Camperdown Commercial A	0	3,169	2,386	783	3,132	746	-37
Commercial	Leichhardt Market Place	0	61,905	49,635	12,270	32,089	-17,547	-29,816
Commercial	Lilyfield Commercial A	497	497	0	497	728	728	231
Commercial	Lilyfield Commercial B	388	754	338	417	935	597	180
Commercial	Lilyfield South A	628	2,197	1,153	1,044	2,489	1,336	292
Commercial	Lilyfield South B	1,711	1,996	228	1,767	2,791	2,563	796
Commercial	Norton Street	9,084	97,783	68,763	29,021	102,007	33,244	4,223
Commercial	Norton Street Commercial A	1,115	1,232	83	1,150	1,751	1,668	518
Commercial	Norton Street North	4,134	13,718	7,528	6,190	15,640	8,112	1,922
Commercial	Norton Street North Commercial A	0	1,089	804	285	1,086	282	-3
Commercial	Norton Street North Commercial B	888	1,287	280	1,007	1,700	1,419	413
Commercial	Norton Street North Commercial C	396	621	159	462	805	646	184
Commercial	Norton Street North Commercial D	140	5,126	3,816	1,311	5,191	1,376	65
Commercial	Rozelle	7,134	42,164	26,837	15,326	45,481	18,643	3,317
Commercial	Rozelle Commercial A	0	5,779	3,767	2,012	4,229	462	-1,550
Commercial	Rozelle Commercial B	215	874	464	410	974	510	100
Commercial	Rozelle Commercial C	372	372	0	372	545	545	173
Commercial	Rozelle Commercial D	127	403	211	192	462	251	59
Corridor	Norton Street (Parramatta Road	0	7,424	5,477	1,946	9,571	4,093	2,147
Corridor	Parramatta Road East	0	41,877	33,609	8,268	65,289	31,680	23,412
Corridor	Parramatta Road West	0	12,690	9,499	3,191	24,223	14,723	11,532
Corridor	Rozelle Centre (Corridor Lots)	0	11,520	8,681	2,839	13,415	4,734	1,895
Corridor	Victoria Road (Terry Street)	0	4,991	3,517	1,474	11,383	7,867	6,392
Corridor	Victoria Road South	0	15,734	11,734	4,000	18,360	6,627	2,626
Corridor	Tebutt St/Parramatta Rd	0	37,850	40,246	-2,396	38,610	-1,637	759
Corridor	Terry Street	0	6,553	5,659	894	16,467	10,808	9,914
Industrial	Balmain East Industrial A	0	0	0	0	354	354	354
Industrial	Balmain East Industrial B	-1,574	1,038	2,098	-1,059	1,038	-1,059	0
Industrial	Balmain East Industrial C	-104	0	90	-90	413	323	413
Industrial	Balmain Road Industrial Precinct	-3,644	12,788	16,833	-4,045	11,030	-5,803	-1,758
Industrial	Camperdown	-13,211	54,775	53,493	1,282	56,326	2,833	1,551
Industrial	Leichhardt Industrial A	-3,288	17,715	14,140	3,575	10,776	-3,364	-6,939
Industrial	Leichhardt Industrial B	0	0	8,640	-8,640	0	-8,640	0
Industrial	Leichhardt North	0	0	0	0	2,903	2,903	2,903
Industrial	Lilyfield Road Industrial	735	9,465	6,705	2,760	8,393	1,688	-1,072
Industrial	Moore Street	-16,114	50,839	55,560	-4,721	55,594	34	4,755
Industrial	Tebutt Street North	0	8,555	8,860	-305	8,502	-358	-52
Industrial	White Bay Industrial Precinct	-5,591	32,331	30,140	2,192	32,796	2,657	465
Other	Bus Depot	0	820	711	108	6,002	5,291	5,183
	TOTAL	0	680,651	559,866	120,785	729,818	169,952	49,167
	TOTAL (without Other)	0	679,831	559,155	120,677	723,815	164,661	43,984

Table 10. Employment Land Supply Demand Analysis – Scenario 5 (square metres)

Type	Precinct	Redistributi on of future floorspace demand	New future floorspace demand (A)	Current employment floorspace (B)	New additional Floorspace Demand (C)	Potential total floorspace under current controls (D)	Potential floorspace minus current floorspace (E)	NEW SUPPLY/DE MAND GAP (F)
Square Metres								
Commercial	Balmain Commercial	0	68,736	54,517	14,219	64,932	10,415	-3,804
Commercial	Balmain East A	1,717	6,218	3,403	2,815	7,133	3,730	915
Commercial	Balmain East B	1,818	4,144	2,168	1,976	5,113	2,945	969
Commercial	Balmain South	825	2,164	1,389	774	2,603	1,214	440
Commercial	Balmain West	4,930	12,285	6,823	5,463	14,913	8,090	2,627
Commercial	Booth Street	5,965	18,466	9,421	9,046	21,645	12,224	3,179
Commercial	Camperdown Commercial A	0	3,169	2,386	783	3,132	746	-37
Commercial	Leichhardt Market Place	0	61,905	49,635	12,270	32,089	-17,547	-29,816
Commercial	Lilyfield Commercial A	475	475	0	475	728	728	253
Commercial	Lilyfield Commercial B	371	737	338	399	935	597	198
Commercial	Lilyfield South A	600	2,169	1,153	1,016	2,489	1,336	320
Commercial	Lilyfield South B	1,642	1,916	228	1,688	2,791	2,563	875
Commercial	Norton Street	8,681	97,381	68,763	28,618	102,007	33,244	4,626
Commercial	Norton Street Commercial A	1,065	1,183	83	1,100	1,751	1,668	568
Commercial	Norton Street North	3,951	13,535	7,528	6,007	15,640	8,112	2,106
Commercial	Norton Street North Commercial A	0	1,089	804	285	1,086	282	-3
Commercial	Norton Street North Commercial B	848	1,248	280	967	1,700	1,419	452
Commercial	Norton Street North Commercial C	378	604	159	445	805	646	202
Commercial	Norton Street North Commercial D	134	5,120	3,816	1,304	5,191	1,376	71
Commercial	Rozelle	6,818	41,847	26,837	15,010	45,481	18,643	3,633
Commercial	Rozelle Commercial A	0	5,573	3,767	1,806	4,229	462	-1,344
Commercial	Rozelle Commercial B	206	864	464	400	974	510	110
Commercial	Rozelle Commercial C	355	355	0	355	545	545	189
Commercial	Rozelle Commercial D	121	397	211	186	462	251	65
Corridor	Norton Street (Parramatta Road	0	7,424	5,477	1,946	9,571	4,093	2,147
Corridor	Parramatta Road East	0	41,877	33,609	8,268	65,289	31,680	23,412
Corridor	Parramatta Road West	0	12,690	9,499	3,191	24,223	14,723	11,532
Corridor	Rozelle Centre (Corridor Lots)	0	11,520	8,681	2,839	13,415	4,734	1,895
Corridor	Victoria Road (Terry Street)	0	4,991	3,517	1,474	11,383	7,867	6,392
Corridor	Victoria Road South	0	15,734	11,734	4,000	18,360	6,627	2,626
Corridor	Tebutt St/Parramatta Rd	0	44,006	40,246	3,759	41,936	1,689	-2,070
Corridor	Terry Street	0	6,553	5,659	894	12,069	6,409	5,516
Industrial	Balmain East Industrial A	0	0	0	0	354	354	354
Industrial	Balmain East Industrial B	-1,481	1,038	2,098	-1,059	1,038	-1,059	0
Industrial	Balmain East Industrial C	-104	0	90	-90	413	323	413
Industrial	Balmain Road Industrial Precinct	-3,644	12,788	16,833	-4,045	11,030	-5,803	-1,758
Industrial	Camperdown	-13,172	53,845	53,493	352	56,326	2,833	2,481
Industrial	Leichhardt Industrial A	-2,937	17,317	14,140	3,177	10,776	-3,364	-6,542
Industrial	Leichhardt Industrial B	0	0	8,640	-8,640	0	-8,640	0
Industrial	Leichhardt North	0	0	0	0	2,903	2,903	2,903
Industrial	Lilyfield Road Industrial	792	9,210	6,705	2,505	8,393	1,688	-817
Industrial	Moore Street	-15,305	49,488	55,560	-6,072	55,594	34	6,106
Industrial	Tebutt Street North	0	8,250	8,860	-610	8,502	-358	253
Industrial	White Bay Industrial Precinct	-5,050	31,521	30,140	1,381	32,796	2,657	1,276
Other	Bus Depot	0	820	711	108	6,002	5,291	5,183
	TOTAL	0	680,651	559,866	120,785	728,745	168,880	48,095
	TOTAL (without Other)	0	679,831	559,155	120,677	722,743	163,588	42,912

Table 11. Employment Land Supply Demand Analysis – Scenario 6 (square metres)

Type	Precinct	Redistributi on of future floorspace demand	New future floorspace demand (A)	Current employment floorspace (B)	New additional Floorspace Demand (C)	Potential total floorspace under current controls (D)	Potential floorspace minus current floorspace (E)	NEW SUPPLY/DE MAND GAP (F)
Square Metres								
Commercial	Balmain Commercial	0	68,736	54,517	14,219	64,932	10,415	-3,804
Commercial	Balmain East A	1,797	6,298	3,403	2,895	7,133	3,730	835
Commercial	Balmain East B	1,903	4,229	2,168	2,061	5,113	2,945	884
Commercial	Balmain South	864	2,202	1,389	813	2,603	1,214	401
Commercial	Balmain West	5,159	12,515	6,823	5,692	14,913	8,090	2,398
Commercial	Booth Street	6,242	18,743	9,421	9,322	21,645	12,224	2,902
Commercial	Camperdown Commercial A	0	3,169	2,386	783	3,132	746	-37
Commercial	Leichhardt Market Place	0	61,905	49,635	12,270	32,089	-17,547	-29,817
Commercial	Lilyfield Commercial A	497	497	0	497	728	728	231
Commercial	Lilyfield Commercial B	388	755	338	417	935	597	180
Commercial	Lilyfield South A	628	2,197	1,153	1,044	2,489	1,336	292
Commercial	Lilyfield South B	1,711	1,995	228	1,767	2,791	2,563	796
Commercial	Norton Street	9,084	97,784	68,763	29,021	102,007	33,244	4,223
Commercial	Norton Street Commercial A	1,115	1,232	83	1,149	1,751	1,668	519
Commercial	Norton Street North	4,134	13,718	7,528	6,190	15,640	8,112	1,922
Commercial	Norton Street North Commercial A	0	1,089	804	285	1,086	282	-3
Commercial	Norton Street North Commercial B	887	1,286	280	1,006	1,700	1,419	413
Commercial	Norton Street North Commercial C	396	622	159	463	805	646	183
Commercial	Norton Street North Commercial D	140	5,126	3,816	1,310	5,191	1,376	66
Commercial	Rozelle	7,134	42,163	26,837	15,326	45,481	18,643	3,317
Commercial	Rozelle Commercial A	0	5,779	3,767	2,012	4,229	462	-1,550
Commercial	Rozelle Commercial B	215	873	464	409	974	510	101
Commercial	Rozelle Commercial C	372	372	0	372	545	545	173
Commercial	Rozelle Commercial D	127	403	211	192	462	251	59
Corridor	Norton Street (Parramatta Road	0	7,424	5,477	1,947	9,571	4,093	2,146
Corridor	Parramatta Road East	0	41,877	33,609	8,268	65,289	31,680	23,412
Corridor	Parramatta Road West	0	12,690	9,499	3,191	24,223	14,723	11,532
Corridor	Rozelle Centre (Corridor Lots)	0	11,520	8,681	2,839	13,415	4,734	1,895
Corridor	Victoria Road (Terry Street)	0	4,991	3,517	1,474	11,383	7,867	6,393
Corridor	Victoria Road South	0	15,734	11,734	4,000	18,360	6,627	2,627
Corridor	Tebutt St/Parramatta Rd	0	37,850	40,246	-2,396	32,740	-7,507	-5,111
Corridor	Terry Street	0	6,553	5,659	894	12,069	6,409	5,515
Industrial	Balmain East Industrial A	0	0	0	0	354	354	354
Industrial	Balmain East Industrial B	-1,574	1,038	2,098	-1,060	1,038	-1,059	1
Industrial	Balmain East Industrial C	-104	0	90	-90	413	323	413
Industrial	Balmain Road Industrial Precinct	-3,644	12,788	16,833	-4,045	11,030	-5,803	-1,758
Industrial	Camperdown	-13,211	54,774	53,493	1,281	56,326	2,833	1,552
Industrial	Leichhardt Industrial A	-3,288	17,715	14,140	3,575	10,776	-3,364	-6,939
Industrial	Leichhardt Industrial B	0	0	8,640	-8,640	0	-8,640	0
Industrial	Leichhardt North	0	0	0	0	2,903	2,903	2,903
Industrial	Lilyfield Road Industrial	735	9,464	6,705	2,759	8,393	1,688	-1,071
Industrial	Moore Street	-16,114	50,839	55,560	-4,721	55,594	34	4,755
Industrial	Tebutt Street North	0	8,555	8,860	-305	8,502	-358	-53
Industrial	White Bay Industrial Precinct	-5,591	32,332	30,140	2,192	32,796	2,657	465
Other	Bus Depot	0	820	711	109	6,002	5,291	5,182
	TOTAL	0	680,650	559,865	120,785	719,551	159,684	38,899
	TOTAL (without Other)	0	679,830	559,154	120,676	713,549	154,393	33,717

Table 12. Employment Land Supply Demand Analysis – Scenario 7 (square metres)

Type	Precinct	Redistributi on of future floorspace demand	New future floorspace demand (A)	Current employment floorspace (B)	New additional Floorspace Demand (C)	Potential total floorspace under current controls (D)	Potential floorspace minus current floorspace (E)	NEW SUPPLY/DE MAND GAP (F)
Square Metres								
Commercial	Balmain Commercial	0	68,736	54,517	14,219	64,932	10,415	-3,804
Commercial	Balmain East A	1,744	6,245	3,403	2,842	7,133	3,730	888
Commercial	Balmain East B	1,847	4,173	2,168	2,005	5,113	2,945	940
Commercial	Balmain South	839	2,177	1,389	788	2,603	1,214	427
Commercial	Balmain West	5,008	12,364	6,823	5,541	14,913	8,090	2,549
Commercial	Booth Street	6,060	18,561	9,421	9,140	21,645	12,224	3,084
Commercial	Camperdown Commercial A	0	3,169	2,386	783	3,132	746	-37
Commercial	Leichhardt Market Place	0	61,905	49,635	12,270	32,089	-17,547	-29,816
Commercial	Lilyfield Commercial A	482	482	0	482	728	728	245
Commercial	Lilyfield Commercial B	377	743	338	405	935	597	192
Commercial	Lilyfield South A	610	2,179	1,153	1,025	2,489	1,336	310
Commercial	Lilyfield South B	1,666	1,943	228	1,715	2,791	2,563	848
Commercial	Norton Street	8,819	97,519	68,763	28,756	102,007	33,244	4,488
Commercial	Norton Street Commercial A	1,082	1,200	83	1,117	1,751	1,668	551
Commercial	Norton Street North	4,014	13,597	7,528	6,070	15,640	8,112	2,043
Commercial	Norton Street North Commercial A	0	1,089	804	285	1,086	282	-3
Commercial	Norton Street North Commercial B	862	1,261	280	981	1,700	1,419	439
Commercial	Norton Street North Commercial C	384	610	159	451	805	646	196
Commercial	Norton Street North Commercial D	136	5,122	3,816	1,307	5,191	1,376	69
Commercial	Rozelle	6,926	41,956	26,837	15,118	45,481	18,643	3,525
Commercial	Rozelle Commercial A	0	5,644	3,767	1,877	4,229	462	-1,415
Commercial	Rozelle Commercial B	209	867	464	404	974	510	106
Commercial	Rozelle Commercial C	361	361	0	361	545	545	184
Commercial	Rozelle Commercial D	123	399	211	188	462	251	63
Corridor	Norton Street (Parramatta Road	0	7,424	5,477	1,946	9,571	4,093	2,147
Corridor	Parramatta Road East	0	41,877	33,609	8,268	65,289	31,680	23,412
Corridor	Parramatta Road West	0	12,690	9,499	3,191	24,223	14,723	11,532
Corridor	Rozelle Centre (Corridor Lots)	0	11,520	8,681	2,839	13,415	4,734	1,895
Corridor	Victoria Road (Terry Street)	0	4,991	3,517	1,474	11,383	7,867	6,392
Corridor	Victoria Road South	0	15,734	11,734	4,000	18,360	6,627	2,626
Corridor	Tebutt St/Parramatta Rd	0	41,897	40,246	1,651	38,610	-1,637	-3,287
Corridor	Terry Street	0	6,553	5,659	894	12,069	6,409	5,516
Industrial	Balmain East Industrial A	0	0	0	0	354	354	354
Industrial	Balmain East Industrial B	-1,513	1,038	2,098	-1,059	1,038	-1,059	0
Industrial	Balmain East Industrial C	-104	0	90	-90	413	323	413
Industrial	Balmain Road Industrial Precinct	-3,644	12,788	16,833	-4,045	11,030	-5,803	-1,758
Industrial	Camperdown	-13,185	54,163	53,493	671	56,326	2,833	2,162
Industrial	Leichhardt Industrial A	-3,057	17,453	14,140	3,314	10,776	-3,364	-6,678
Industrial	Leichhardt Industrial B	0	0	8,640	-8,640	0	-8,640	0
Industrial	Leichhardt North	0	0	0	0	2,903	2,903	2,903
Industrial	Lilyfield Road Industrial	773	9,297	6,705	2,592	8,393	1,688	-904
Industrial	Moore Street	-15,582	49,951	55,560	-5,609	55,594	34	5,643
Industrial	Tebutt Street North	0	8,354	8,860	-506	8,502	-358	148
Industrial	White Bay Industrial Precinct	-5,235	31,799	30,140	1,659	32,796	2,657	998
Other	Bus Depot	0	820	711	108	6,002	5,291	5,183
	TOTAL	0	680,651	559,866	120,785	725,419	165,554	44,769
	TOTAL (without Other)	0	679,831	559,155	120,677	719,417	160,262	39,586

Table 13. Employment Land Supply Demand Analysis – Scenario 8 (square metres)

Type	Precinct	Redistributi on of future floorspace demand	New future floorspace demand (A)	Current employment floorspace (B)	New additional Floorspace Demand (C)	Potential total floorspace under current controls (D)	Potential floorspace minus current floorspace (E)	NEW SUPPLY/DE MAND GAP (F)
Square Metres								
Commercial	Balmain Commercial	0	68,736	54,517	14,219	64,932	10,415	-3,804
Commercial	Balmain East A	1,693	6,193	3,403	2,790	7,133	3,730	939
Commercial	Balmain East B	1,792	4,118	2,168	1,950	5,113	2,945	995
Commercial	Balmain South	814	2,152	1,389	763	2,603	1,214	452
Commercial	Balmain West	4,860	12,216	6,823	5,393	14,913	8,090	2,697
Commercial	Booth Street	5,880	18,382	9,421	8,961	21,645	12,224	3,263
Commercial	Camperdown Commercial A	0	3,169	2,386	783	3,132	746	-37
Commercial	Leichhardt Market Place	0	61,905	49,635	12,270	32,089	-17,547	-29,816
Commercial	Lilyfield Commercial A	468	468	0	468	728	728	260
Commercial	Lilyfield Commercial B	365	732	338	394	935	597	203
Commercial	Lilyfield South A	592	2,161	1,153	1,007	2,489	1,336	328
Commercial	Lilyfield South B	1,619	1,893	228	1,665	2,791	2,563	898
Commercial	Norton Street	8,558	97,258	68,763	28,495	102,007	33,244	4,749
Commercial	Norton Street Commercial A	1,050	1,168	83	1,085	1,751	1,668	583
Commercial	Norton Street North	3,895	13,479	7,528	5,951	15,640	8,112	2,161
Commercial	Norton Street North Commercial A	0	1,089	804	285	1,086	282	-3
Commercial	Norton Street North Commercial B	836	1,236	280	955	1,700	1,419	464
Commercial	Norton Street North Commercial C	373	598	159	439	805	646	207
Commercial	Norton Street North Commercial D	132	5,118	3,816	1,303	5,191	1,376	73
Commercial	Rozelle	6,721	41,751	26,837	14,914	45,481	18,643	3,730
Commercial	Rozelle Commercial A	0	5,573	3,767	1,806	4,229	462	-1,344
Commercial	Rozelle Commercial B	203	861	464	397	974	510	113
Commercial	Rozelle Commercial C	350	350	0	350	545	545	194
Commercial	Rozelle Commercial D	76	420	211	209	462	251	42
Corridor	Norton Street (Parramatta Road	0	7,424	5,477	1,946	9,571	4,093	2,147
Corridor	Parramatta Road East	0	41,877	33,609	8,268	65,289	31,680	23,412
Corridor	Parramatta Road West	0	12,690	9,499	3,191	24,223	14,723	11,532
Corridor	Rozelle Centre (Corridor Lots)	0	11,520	8,681	2,839	13,415	4,734	1,895
Corridor	Victoria Road (Terry Street)	0	6,223	3,517	2,707	11,383	7,867	5,160
Corridor	Victoria Road South	0	19,620	11,734	7,886	18,360	6,627	-1,259
Corridor	Tebutt St/Parramatta Rd	0	44,006	40,246	3,759	41,936	1,689	-2,070
Corridor	Terry Street	0	6,553	5,659	894	22,337	16,677	15,784
Industrial	Balmain East Industrial A	0	0	0	0	354	354	354
Industrial	Balmain East Industrial B	-1,481	1,038	2,098	-1,059	1,038	-1,059	0
Industrial	Balmain East Industrial C	-104	0	90	-90	413	323	413
Industrial	Balmain Road Industrial Precinct	-3,021	8,226	16,833	-8,607	5,530	-11,303	-2,695
Industrial	Camperdown	-13,172	53,845	53,493	352	56,326	2,833	2,481
Industrial	Leichhardt Industrial A	-2,937	17,317	14,140	3,177	10,776	-3,364	-6,542
Industrial	Leichhardt Industrial B	0	0	8,640	-8,640	0	-8,640	0
Industrial	Leichhardt North	0	0	0	0	2,903	2,903	2,903
Industrial	Lilyfield Road Industrial	792	9,210	6,705	2,505	8,393	1,688	-817
Industrial	Moore Street	-15,305	49,488	55,560	-6,072	55,594	34	6,106
Industrial	Tebutt Street North	0	8,250	8,860	-610	8,502	-358	253
Industrial	White Bay Industrial Precinct	-5,050	31,521	30,140	1,381	32,796	2,657	1,276
Other	Bus Depot	0	820	711	108	6,002	5,291	5,183
	TOTAL	0	680,651	559,866	120,785	733,514	173,648	52,863
	TOTAL (without Other)	0	679,831	559,155	120,677	727,512	168,357	47,680

Table 14. Employment Land Supply Demand Analysis – Scenario 9 (square metres)

Type	Precinct	Redistributi on of future floorspace demand	New future floorspace demand (A)	Current employment floorspace (B)	New additional Floorspace Demand (C)	Potential total floorspace under current controls (D)	Potential floorspace minus current floorspace (E)	NEW SUPPLY/DE MAND GAP (F)
Square Metres								
Commercial	Balmain Commercial	0	68,736	54,517	14,219	64,932	10,415	-3,804
Commercial	Balmain East A	1,720	6,221	3,403	2,818	7,133	3,730	912
Commercial	Balmain East B	1,821	4,147	2,168	1,979	5,113	2,945	966
Commercial	Balmain South	827	2,165	1,389	776	2,603	1,214	438
Commercial	Balmain West	4,938	12,294	6,823	5,471	14,913	8,090	2,619
Commercial	Booth Street	5,975	18,477	9,421	9,056	21,645	12,224	3,168
Commercial	Camperdown Commercial A	0	3,169	2,386	783	3,132	746	-37
Commercial	Leichhardt Market Place	0	61,905	49,635	12,270	32,089	-17,547	-29,816
Commercial	Lilyfield Commercial A	475	475	0	475	728	728	252
Commercial	Lilyfield Commercial B	371	738	338	400	935	597	197
Commercial	Lilyfield South A	601	2,170	1,153	1,017	2,489	1,336	319
Commercial	Lilyfield South B	1,643	1,920	228	1,692	2,791	2,563	871
Commercial	Norton Street	8,696	97,396	68,763	28,633	102,007	33,244	4,611
Commercial	Norton Street Commercial A	1,067	1,185	83	1,102	1,751	1,668	566
Commercial	Norton Street North	3,958	13,542	7,528	6,014	15,640	8,112	2,099
Commercial	Norton Street North Commercial A	0	1,089	804	285	1,086	282	-3
Commercial	Norton Street North Commercial B	850	1,249	280	969	1,700	1,419	451
Commercial	Norton Street North Commercial C	379	604	159	445	805	646	201
Commercial	Norton Street North Commercial D	134	5,120	3,816	1,305	5,191	1,376	71
Commercial	Rozelle	6,830	41,859	26,837	15,022	45,481	18,643	3,621
Commercial	Rozelle Commercial A	0	5,644	3,767	1,877	4,229	462	-1,415
Commercial	Rozelle Commercial B	206	865	464	401	974	510	109
Commercial	Rozelle Commercial C	356	356	0	356	545	545	189
Commercial	Rozelle Commercial D	77	421	211	210	462	251	41
Corridor	Norton Street (Parramatta Road	0	7,424	5,477	1,946	9,571	4,093	2,147
Corridor	Parramatta Road East	0	41,877	33,609	8,268	65,289	31,680	23,412
Corridor	Parramatta Road West	0	12,690	9,499	3,191	24,223	14,723	11,532
Corridor	Rozelle Centre (Corridor Lots)	0	11,520	8,681	2,839	13,415	4,734	1,895
Corridor	Victoria Road (Terry Street)	0	6,223	3,517	2,707	11,383	7,867	5,160
Corridor	Victoria Road South	0	19,620	11,734	7,886	18,360	6,627	-1,259
Corridor	Tebutt St/Parramatta Rd	0	41,897	40,246	1,651	38,610	-1,637	-3,287
Corridor	Terry Street	0	6,553	5,659	894	22,337	16,677	15,784
Industrial	Balmain East Industrial A	0	0	0	0	354	354	354
Industrial	Balmain East Industrial B	-1,513	1,038	2,098	-1,059	1,038	-1,059	0
Industrial	Balmain East Industrial C	-104	0	90	-90	413	323	413
Industrial	Balmain Road Industrial Precinct	-3,021	8,226	16,833	-8,607	5,530	-11,303	-2,695
Industrial	Camperdown	-13,185	54,163	53,493	671	56,326	2,833	2,162
Industrial	Leichhardt Industrial A	-3,057	17,453	14,140	3,314	10,776	-3,364	-6,678
Industrial	Leichhardt Industrial B	0	0	8,640	-8,640	0	-8,640	0
Industrial	Leichhardt North	0	0	0	0	2,903	2,903	2,903
Industrial	Lilyfield Road Industrial	773	9,297	6,705	2,592	8,393	1,688	-904
Industrial	Moore Street	-15,582	49,951	55,560	-5,609	55,594	34	5,643
Industrial	Tebutt Street North	0	8,354	8,860	-506	8,502	-358	148
Industrial	White Bay Industrial Precinct	-5,235	31,799	30,140	1,659	32,796	2,657	998
Other	Bus Depot	0	820	711	108	6,002	5,291	5,183
	TOTAL	0	680,651	559,866	120,785	730,188	170,322	49,537
	TOTAL (without Other)	0	679,831	559,155	120,677	724,186	165,031	44,354

Table 15. Employment Land Supply Demand Analysis – Scenario 10 (square metres)

Type	Precinct	Redistributi on of future floorspace demand	New future floorspace demand (A)	Current employment floorspace (B)	New additional Floorspace Demand (C)	Potential total floorspace under current controls (D)	Potential floorsapce minus current floorsapce (E)	NEW SUPPLY/DE MAND GAP (F)
Square Metres								
Commercial	Balmain Commercial	0	68,736	54,517	14,219	64,932	10,415	-3,804
Commercial	Balmain East A	1,693	6,193	3,403	2,790	7,133	3,730	939
Commercial	Balmain East B	1,792	4,118	2,168	1,950	5,113	2,945	995
Commercial	Balmain South	814	2,152	1,389	763	2,603	1,214	452
Commercial	Balmain West	4,860	12,216	6,823	5,393	14,913	8,090	2,697
Commercial	Booth Street	5,880	18,382	9,421	8,961	21,645	12,224	3,263
Commercial	Camperdown Commercial A	0	3,169	2,386	783	3,132	746	-37
Commercial	Leichhardt Market Place	0	61,905	49,635	12,270	32,089	-17,547	-29,816
Commercial	Lilyfield Commercial A	468	468	0	468	728	728	260
Commercial	Lilyfield Commercial B	365	732	338	394	935	597	203
Commercial	Lilyfield South A	592	2,161	1,153	1,007	2,489	1,336	328
Commercial	Lilyfield South B	1,619	1,893	228	1,665	2,791	2,563	898
Commercial	Norton Street	8,558	97,258	68,763	28,495	102,007	33,244	4,749
Commercial	Norton Street Commercial A	1,050	1,168	83	1,085	1,751	1,668	583
Commercial	Norton Street North	3,895	13,479	7,528	5,951	15,640	8,112	2,161
Commercial	Norton Street North Commercial A	0	1,089	804	285	1,086	282	-3
Commercial	Norton Street North Commercial B	836	1,236	280	955	1,700	1,419	464
Commercial	Norton Street North Commercial C	373	598	159	439	805	646	207
Commercial	Norton Street North Commercial D	132	5,118	3,816	1,303	5,191	1,376	73
Commercial	Rozelle	6,721	41,751	26,837	14,914	45,481	18,643	3,730
Commercial	Rozelle Commercial A	0	5,573	3,767	1,806	4,229	462	-1,344
Commercial	Rozelle Commercial B	203	861	464	397	974	510	113
Commercial	Rozelle Commercial C	350	350	0	350	545	545	194
Commercial	Rozelle Commercial D	76	420	211	209	462	251	42
Corridor	Norton Street (Parramatta Road Corridor Lots)	0	7,424	5,477	1,946	9,571	4,093	2,147
Corridor	Parramatta Road East	0	41,877	33,609	8,268	65,289	31,680	23,412
Corridor	Parramatta Road West	0	12,690	9,499	3,191	24,223	14,723	11,532
Corridor	Rozelle Centre (Corridor Lots)	0	11,520	8,681	2,839	13,415	4,734	1,895
Corridor	Victoria Road (Terry Street)	0	6,223	3,517	2,707	11,383	7,867	5,160
Corridor	Victoria Road South	0	19,620	11,734	7,886	18,360	6,627	-1,259
Corridor	Tebutt St/Parramatta Rd	0	44,006	40,246	3,759	41,936	1,689	-2,070
Corridor	Terry Street	0	6,553	5,659	894	12,069	6,409	5,516
Industrial	Balmain East Industrial A	0	0	0	0	354	354	354
Industrial	Balmain East Industrial B	-1,481	1,038	2,098	-1,059	1,038	-1,059	0
Industrial	Balmain East Industrial C	-104	0	90	-90	413	323	413
Industrial	Balmain Road Industrial Precinct	-3,021	8,226	16,833	-8,607	5,530	-11,303	-2,695
Industrial	Camperdown	-13,172	53,845	53,493	352	56,326	2,833	2,481
Industrial	Leichhardt Industrial A	-2,937	17,317	14,140	3,177	10,776	-3,364	-6,542
Industrial	Leichhardt Industrial B	0	0	8,640	-8,640	0	-8,640	0
Industrial	Leichhardt North	0	0	0	0	2,903	2,903	2,903
Industrial	Lilyfield Road Industrial	792	9,210	6,705	2,505	8,393	1,688	-817
Industrial	Moore Street	-15,305	49,488	55,560	-6,072	55,594	34	6,106
Industrial	Tebutt Street North	0	8,250	8,860	-610	8,502	-358	253
Industrial	White Bay Industrial Precinct	-5,050	31,521	30,140	1,381	32,796	2,657	1,276
Other	Bus Depot	0	820	711	108	6,002	5,291	5,183
	TOTAL	0	680,651	559,866	120,785	723,246	163,380	42,595
	TOTAL (without Other)	0	679,831	559,155	120,677	717,244	158,089	37,412

Table 16. Employment Land Supply Demand Analysis – Scenario 11 (square metres)

Type	Precinct	Redistributi on of future floorspace demand	New future floorspace demand (A)	Current employment floorspace (B)	New additional Floorspace Demand (C)	Potential total floorspace under current controls (D)	Potential floorspace minus current floorspace (E)	NEW SUPPLY/DE MAND GAP (F)
Square Metres								
Commercial	Balmain Commercial	0	68,736	54,517	14,219	64,932	10,415	-3,804
Commercial	Balmain East A	1,720	6,221	3,403	2,818	7,133	3,730	912
Commercial	Balmain East B	1,821	4,147	2,168	1,979	5,113	2,945	966
Commercial	Balmain South	827	2,165	1,389	776	2,603	1,214	438
Commercial	Balmain West	4,938	12,294	6,823	5,471	14,913	8,090	2,619
Commercial	Booth Street	5,975	18,477	9,421	9,056	21,645	12,224	3,168
Commercial	Camperdown Commercial A	0	3,169	2,386	783	3,132	746	-37
Commercial	Leichhardt Market Place	0	61,905	49,635	12,270	32,089	-17,547	-29,816
Commercial	Lilyfield Commercial A	475	475	0	475	728	728	252
Commercial	Lilyfield Commercial B	371	738	338	400	935	597	197
Commercial	Lilyfield South A	601	2,170	1,153	1,017	2,489	1,336	319
Commercial	Lilyfield South B	1,643	1,920	228	1,692	2,791	2,563	871
Commercial	Norton Street	8,696	97,396	68,763	28,633	102,007	33,244	4,611
Commercial	Norton Street Commercial A	1,067	1,185	83	1,102	1,751	1,668	566
Commercial	Norton Street North	3,958	13,542	7,528	6,014	15,640	8,112	2,099
Commercial	Norton Street North Commercial A	0	1,089	804	285	1,086	282	-3
Commercial	Norton Street North Commercial B	850	1,249	280	969	1,700	1,419	451
Commercial	Norton Street North Commercial C	379	604	159	445	805	646	201
Commercial	Norton Street North Commercial D	134	5,120	3,816	1,305	5,191	1,376	71
Commercial	Rozelle	6,830	41,859	26,837	15,022	45,481	18,643	3,621
Commercial	Rozelle Commercial A	0	5,644	3,767	1,877	4,229	462	-1,415
Commercial	Rozelle Commercial B	206	865	464	401	974	510	109
Commercial	Rozelle Commercial C	356	356	0	356	545	545	189
Commercial	Rozelle Commercial D	77	421	211	210	462	251	41
Corridor	Norton Street (Parramatta Road Corridor Lots)	0	7,424	5,477	1,946	9,571	4,093	2,147
Corridor	Parramatta Road East	0	41,877	33,609	8,268	65,289	31,680	23,412
Corridor	Parramatta Road West	0	12,690	9,499	3,191	24,223	14,723	11,532
Corridor	Rozelle Centre (Corridor Lots)	0	11,520	8,681	2,839	13,415	4,734	1,895
Corridor	Victoria Road (Terry Street)	0	6,223	3,517	2,707	11,383	7,867	5,160
Corridor	Victoria Road South	0	19,620	11,734	7,886	18,360	6,627	-1,259
Corridor	Tebutt St/Parramatta Rd	0	41,897	40,246	1,651	38,610	-1,637	-3,287
Corridor	Terry Street	0	6,553	5,659	894	12,069	6,409	5,516
Industrial	Balmain East Industrial A	0	0	0	0	354	354	354
Industrial	Balmain East Industrial B	-1,513	1,038	2,098	-1,059	1,038	-1,059	0
Industrial	Balmain East Industrial C	-104	0	90	-90	413	323	413
Industrial	Balmain Road Industrial Precinct	-3,021	8,226	16,833	-8,607	5,530	-11,303	-2,695
Industrial	Camperdown	-13,185	54,163	53,493	671	56,326	2,833	2,162
Industrial	Leichhardt Industrial A	-3,057	17,453	14,140	3,314	10,776	-3,364	-6,678
Industrial	Leichhardt Industrial B	0	0	8,640	-8,640	0	-8,640	0
Industrial	Leichhardt North	0	0	0	0	2,903	2,903	2,903
Industrial	Lilyfield Road Industrial	773	9,297	6,705	2,592	8,393	1,688	-904
Industrial	Moore Street	-15,582	49,951	55,560	-5,609	55,594	34	5,643
Industrial	Tebutt Street North	0	8,354	8,860	-506	8,502	-358	148
Industrial	White Bay Industrial Precinct	-5,235	31,799	30,140	1,659	32,796	2,657	998
Other	Bus Depot	0	820	711	108	6,002	5,291	5,183
	TOTAL	0	680,651	559,866	120,785	719,920	160,054	39,269
	TOTAL (without Other)	0	679,831	559,155	120,677	713,918	154,763	34,086

Employment lands modelling – next steps

Employment lands modelling completed to date is focused on assessing the capacity of the LGAs employment lands to accommodate demand forecasts at a *strategic level*. While this gives sufficient information to address the scope of work for this study, Council will likely require more detailed analysis at a local level when considering rezoning applications for specific sites.

TDC employment forecasts have been used as the base data. Floorspace forecasts have been produced by using data from a land use audit that describes land use by industry category (ANZSIC) and broad land use category. Gaps between floorspace forecasts and capacity at a precinct level have been documented. We have assessed the effects of removing some land areas from the supply-side (i.e. the effect of rezoning these from employment land to something else). Once removed, we have redistributed floorspace demand to other comparable employment precincts. In the last round of work we also examined the potential for some of this floorspace to be redistributed to commercial areas. At a high level we have aligned employment areas (industrial land, corridors, commercial centres) and land uses on the basis of broad land use categories (main street retail, light manufacturing, etc) and have examined the resulting supply-demand gaps. If some industrial land areas are rezoned questions to be answered that go beyond the modelling are:

- What are the characteristics of the land being considered for rezoning?
 - o Access arrangements - proximity to transport nodes/ arterials
 - o Building age and condition
 - o Land and property values
 - o What current function does the land perform in the employment lands market
 - o What is the land's future potential as employment land

- What are the operational requirements of the affected businesses?
 - o Cost of land/ property
 - o Access
 - o Neighbouring uses/ buffering
 - o Site and floor areas

- What alternative locations satisfy these requirements?
 - o What is the character of identified alternatives in terms of access, cost, neighbouring uses, site and floor areas
 - o What capacity exists in these areas in existing buildings and on vacant sites (this has been assessed in the modeling for sites within the LGA)

To answer these questions, researchers will need to explore the specific conditions/ requirements for the areas/ businesses affected. This will likely require some level of consultation and on-site assessment.

Appendix 7 - Floorspace Analysis Tables

Future Employment Floorspace Demand by BLC by Precinct – BAU

Precinct	AGM	AST	BP	D	FL	LL	ML	O	RB	RBG	RM	S	US	Total
Balmain Commercial	-	1,799	-	4,784	-	444	-	12,965	-	-	45,629	1,088	2,028	68,736
Balmain East A	-	-	-	-	-	-	-	-	-	-	4,501	-	-	4,501
Balmain East B	-	-	2,326	-	-	-	-	-	-	-	-	-	-	2,326
Balmain South	-	-	-	-	-	-	-	1,338	-	-	-	-	-	1,338
Balmain West	-	-	-	-	4,017	-	-	3,339	-	-	-	-	-	7,356
Booth Street	-	-	-	-	-	476	-	166	-	1,057	10,698	104	-	12,501
Camperdown Commercial A	-	-	-	-	-	-	-	3,169	-	-	-	-	-	3,169
Leichhardt Market Place	-	-	-	-	-	-	-	-	50,709	2,988	8,208	-	-	61,905
Lilyfield Commercial A	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Lilyfield Commercial B	-	-	-	-	-	-	-	367	-	-	-	-	-	367
Lilyfield South A	-	-	-	-	-	-	-	193	-	-	1,376	-	-	1,569
Lilyfield South B	-	-	-	-	263	-	-	-	-	-	-	-	-	263
Norton Street	-	-	-	5,164	-	-	-	4,682	-	-	78,853	-	-	88,700
Norton Street Commercial A	-	-	-	-	-	-	-	-	-	-	117	-	-	117
Norton Street North	-	-	-	-	-	1,487	-	195	-	451	7,451	-	-	9,584
Norton Street North Commercial A	-	-	-	-	-	-	-	795	-	-	294	-	-	1,089
Norton Street North Commercial B	-	-	-	-	-	-	-	-	-	-	399	-	-	399
Norton Street North Commercial C	-	-	-	-	-	-	-	-	-	-	226	-	-	226
Norton Street North Commercial D	-	-	-	-	-	656	-	2,005	-	-	2,325	-	-	4,986
Rozelle	-	681	-	-	-	1,264	-	1,236	-	1,100	30,043	448	257	35,029

Rozelle Commercial A	-	-	-	-	-	-	-	-	-	-	5,346	-	-	5,346
Rozelle Commercial B	-	-	-	-	-	-	-	-	-	-	658	-	-	658
Rozelle Commercial C	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Rozelle Commercial D	-	-	-	-	-	-	-	276	-	-	-	-	-	276
Norton Street (Parramatta Road Corridor Lots)	-	-	-	-	-	-	98	326	-	-	7,000	-	-	7,424
Parramatta Road East	-	-	-	-	299	2,814	770	7,863	-	254	29,607	-	269	41,877
Parramatta Road West	-	-	-	-	-	747	-	2,196	-	4,096	5,652	-	-	12,690
Rozelle Centre (Corridor Lots)	-	-	-	2,967	-	-	-	-	-	-	5,096	3,457	-	11,520
Victoria Road (Terry Street)	-	-	-	-	-	1,902	-	-	-	1,412	1,677	-	-	4,991
Victoria Road South	-	-	-	717	840	3,541	277	1,178	-	4,691	4,491	-	-	15,734
Tebutt St/Parramatta Rd	-	-	-	-	3,050	16,446	7,969	1,344	-	12,615	1,304	-	-	42,728
Terry Street	-	-	-	-	-	4,967	570	758	-	-	258	-	-	6,553
Balmain East Industrial A	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Balmain East Industrial B	-	-	-	-	-	-	-	-	-	-	-	2,417	-	2,417
Balmain East Industrial C	-	-	-	-	-	-	-	-	-	-	-	104	-	104
Balmain Road Industrial Precinct	-	-	-	-	3,795	-	-	4,047	-	8,348	243	-	-	16,432
Camperdown	-	-	-	-	-	26,035	3,741	-	-	13,898	20,565	1,712	-	65,951
Leichhardt Industrial A	-	-	-	-	-	10,306	-	-	-	-	-	9,124	-	19,429
Leichhardt Industrial B	-	-	-	-	4,086	-	-	-	-	3,968	-	-	-	8,054
Leichhardt North	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Lilyfield Road Industrial	-	-	-	-	-	6,605	-	1,471	-	-	-	-	-	8,075
Moore Street	449	-	-	4,360	2,829	22,730	4,690	3,073	-	13,783	10,499	-	-	62,414
Tebutt Street North	-	-	-	-	-	7,914	-	-	-	-	-	-	-	7,914
White Bay Industrial Precinct	-	-	-	3,339	3,522	5,991	6,034	6,614	-	4,822	-	2,614	2,146	35,082
Bus Depot	-	-	-	820	-	-	-	-	-	-	-	-	-	820

<i>TOTAL</i>	449	2,479	2,326	22,152	22,700	114,324	24,148	59,596	50,709	73,483	282,517	21,068	4,700	680,651
TOTAL (without Other)	449	2,479	2,326	21,332	22,700	114,324	24,148	59,596	50,709	73,483	282,517	21,068	4,700	679,831

Source: SGS 2010

Future Floorspace Demand by BLC by Precinct – Adjustment Scenario

Precinct	AGM	AST	BP	D	FL	LL	ML	O	RB	RBG	RM	S	US	Total
Balmain Commercial	-	351	-	920	-	131	-	1,562	-	-	-	10,798	300	14,219
Balmain East A	-	-	-	-	-	-	-	-	-	-	-	1,098	-	1,098
Balmain East B	-	-	158	-	-	-	-	-	-	-	-	-	-	158
Balmain South	-	-	-	-	-	-	-	51	-	-	-	-	-	51
Balmain West	-	-	-	-	292	-	-	825	-	-	-	-	-	533
Booth Street	-	-	-	-	-	141	-	41	-	312	-	2,588	1	3,081
Camperdown Commercial A	-	-	-	-	-	-	-	783	-	-	-	-	-	783
Leichhardt Market Place	-	-	-	-	-	-	-	-	9,708	869	-	1,693	-	12,270
Lilyfield Commercial A	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Lilyfield Commercial B	-	-	-	-	-	-	-	29	-	-	-	-	-	29
Lilyfield South A	-	-	-	-	-	-	-	52	-	-	-	363	-	416
Lilyfield South B	-	-	-	-	49	-	-	-	-	-	-	-	-	49
Norton Street	-	-	-	1,485	-	-	-	652	-	-	-	17,800	-	19,937
Norton Street Commercial A	-	-	-	-	-	-	-	-	-	-	-	35	-	35
Norton Street North	-	-	-	-	-	405	-	48	-	33	-	1,636	-	2,056
Norton Street North Commercial A	-	-	-	-	-	-	-	197	-	-	-	88	-	285
Norton Street North Commercial B	-	-	-	-	-	-	-	-	-	-	-	119	-	119
Norton Street North Commercial C	-	-	-	-	-	-	-	-	-	-	-	67	-	67
Norton Street North Commercial D	-	-	-	-	-	194	-	496	-	-	-	481	-	1,171
Rozelle	-	156	-	-	-	373	-	318	-	325	-	7,043	126	8,192
Rozelle Commercial A	-	-	-	-	-	-	-	-	-	-	-	1,877	-	1,877
Rozelle Commercial B	-	-	-	-	-	-	-	-	-	-	-	194	-	194

Rozelle Commercial C	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Rozelle Commercial D	-	-	-	-	-	-	-	133	-	-	-	-	-	133
Norton Street (Parramatta Road Corridor Lots)	-	-	-	-	-	-	-	29	81	-	-	-	1,895	1,946
Parramatta Road East	-	-	-	-	22	831	229	773	-	75	-	6,760	-	8,268
Parramatta Road West	-	-	-	-	-	221	-	558	-	1,153	21	1,259	-	3,191
Rozelle Centre (Corridor Lots)	-	-	-	899	-	-	-	-	-	-	-	1,266	674	2,839
Victoria Road (Terry Street)	-	-	-	-	-	1,032	-	-	-	766	-	909	-	2,707
Victoria Road South	-	-	-	397	318	1,827	-	14	537	-	2,481	-	2,340	7,886
Tebutt St/Parramatta Rd	-	-	-	-	573	1,160	-	3,426	12	-	3,005	-	327	1,651
Terry Street	-	-	-	-	-	797	-	170	187	-	-	-	79	894
Balmain East Industrial A	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Balmain East Industrial B	-	-	-	-	-	-	-	-	-	-	-	-	454	454
Balmain East Industrial C	-	-	-	-	-	-	-	-	-	-	-	-	14	14
Balmain Road Industrial Precinct	-	-	-	-	661	-	-	1,410	-	7,789	-	132	-	5,586
Camperdown	-	-	-	-	-	4,450	-	96	-	3,229	-	6,112	160	13,856
Leichhardt Industrial A	-	-	-	-	-	3,379	-	-	-	-	-	-	2,992	6,371
Leichhardt Industrial B	-	-	-	-	4,383	-	-	-	-	4,257	-	-	-	8,640
Leichhardt North	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Lilyfield Road Industrial	-	-	-	-	-	1,581	-	239	-	-	-	-	-	1,820
Moore Street	187	-	-	1,348	48	3,703	-	852	414	-	2,933	-	2,289	9,973
Tebutt Street North	-	-	-	-	-	506	-	-	-	-	-	-	-	506
White Bay Industrial Precinct	-	-	-	659	635	1,939	-	733	1,970	-	83	-	377	6,894
Bus Depot	-	-	-	108	-	-	-	-	-	-	-	-	-	108
TOTAL	187	507	158	5,815	2,510	21,658	4,084	11,266	9,708	2,987	21	69,247	5,096	120,785
TOTAL (without Other)	187	507	158	5,707	2,510	21,658	4,084	11,266	9,708	2,987	21	69,247	5,096	120,677

Source: SGS 2010