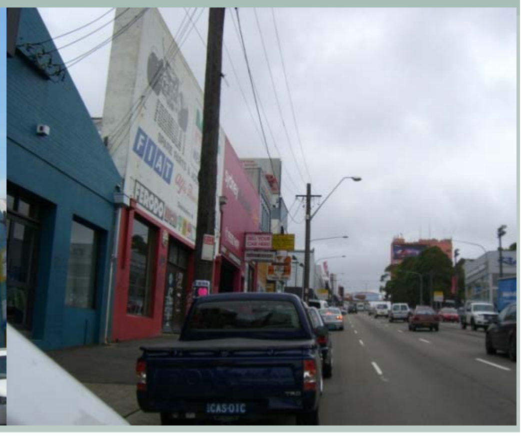
# Leichhardt Employment Lands Study

## Final Report

**Leichhardt Council** JANUARY 2011

SGS
Economics & Planning

SGS
Economics & Planning

ACN 007 437 729
Suite 12/50 Reservoir St
Surry Hills NSW 2010
phone: 61 2 8307 0121
fax: 61 2 8307 0126
email: sgsnsw@sgsep.com.au
web: www.sgsep.com.au

## Tables



## Figures

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# 1 Introduction

## 1.1 Background

Leichhardt Local Government Area (LGA) covers an area of 1,003 hectares[1] and is located very close to Sydney's CBD. Figure 1 below shows the proximity of the Balmain Peninsula to the Sydney CBD. The LGA has 17km of shoreline bounded by Sydney Harbour and the Parramatta River.

In 2006, the Census recorded approximately 48,800 residents and 17,800 jobs within Leichhardt LGA. In 2009, the population of Leichhardt was estimated to be 54,500, with an average annual growth rate of 1.3% over the 5 years previous.. Historically, the area was 'working class' with a large amount of industrial employment and workers' housing. However over the past 30 years, Leichhardt has evolved and undergone a process of gentrification. Many older industrial sites have been rezoned to residential and some fragmented employment lands remain.  Located in the Inner West Subregion (Figure 2), Leichhardt is expected to accommodate 2,000 new homes and 500 new jobs to 2031. The Employment Lands Action Plan for Sydney identified 118 employment lands within the LGA[2].

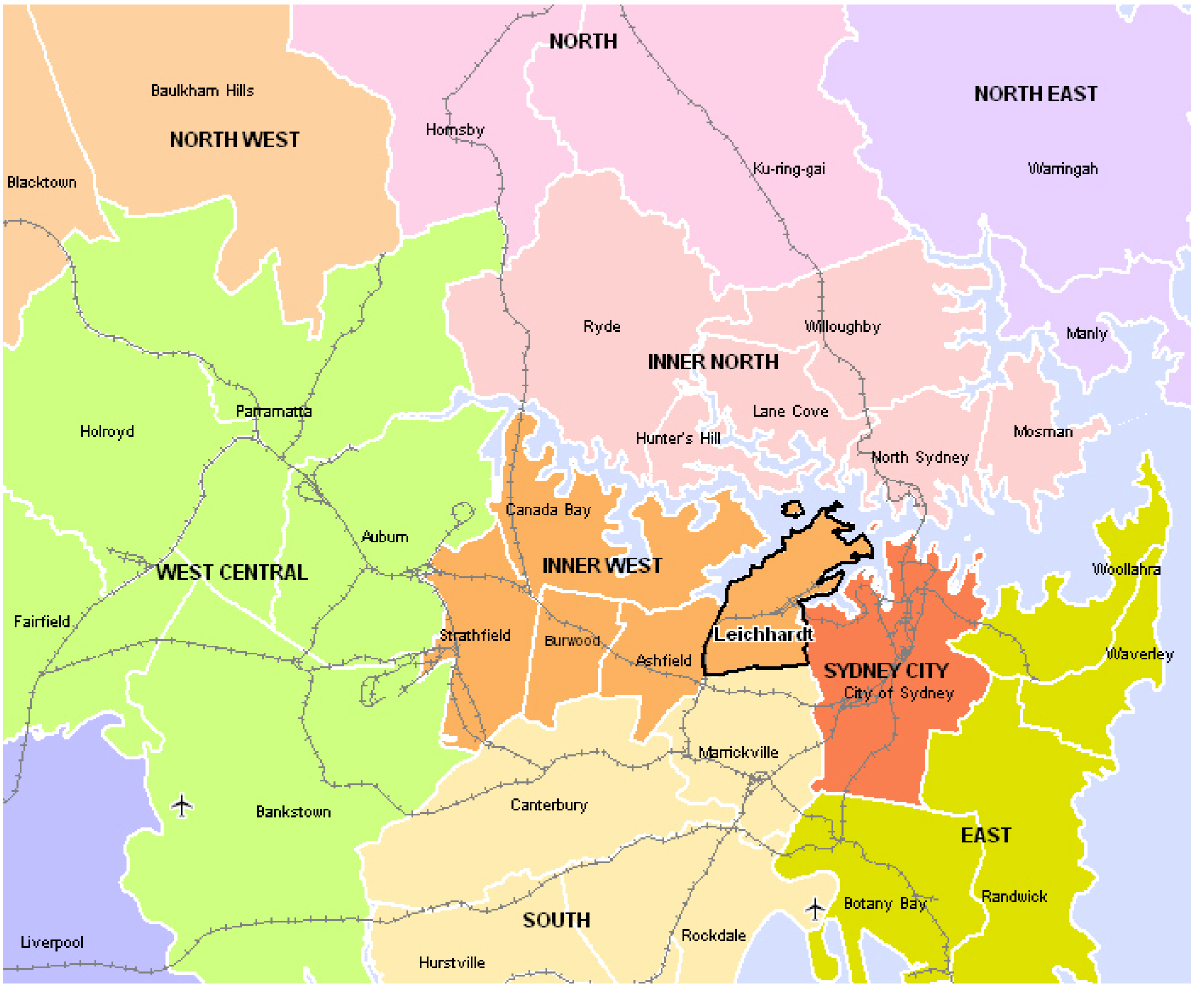
**Figure 1.** Balmain Peninsula, in close proximity to Sydney CBD

Source: SGS 2007.

[1] www.lmc.nsw.gov.au

[2] Note: This includes Glebe, which due to boundary changes, is now within the City of Sydney LGA.

Figure 2. Leichhardt Location Map




Source: SGS 2007.

## 1.2 Scope of Study

SGS has been commissioned by Leichhardt Council to undertake an employment lands study. SGS will:

- Provide guidance to Council and **identify and protect strategically important employment lands** as part of its development of a new principal local environmental plan
- Establish an **appropriate role for key corridors** within the Municipality including Parramatta Road, Victoria Road and City West Link
- Ensure sufficient land is zoned to **accommodate** existing and potential **growth** across a range of employment types including where expansion of employment related zones might be required
- Provide Council with an informed position on how to:
  - Capture more professionals to locate into the local government area
  - Identify and attract enterprise industries that could be located within the local government area

  - Facilitate and support services for a range of industries/ business
  - Support long term **economic viability and retail diversity** within local centres
- Inform opportunities for **regenerating underutilised or redundant employment lands** and approaches to regenerate employment lands that encourage new employment activities and realise potential impacts of such development (e.g. capacity to manage additional traffic to a locality)
- Facilitate **informed discussion on employment lands** including **skills sets** in Leichhardt and Inner Western Sydney based on 2006 Census data
- Establish a role for employment lands within the local government area based on opportunities to be made available through the Leichhardt place based strategy
- Identify an appropriate suite of **zones for employment lands and corridors** based on the Department of Planning's (DoP) model template
- Produce clear and concise recommendations concerning **policy and operational approaches** to manage employment lands across the local government area

It should be noted that the term employment land has a very specific meaning in the Metropolitan Strategy and Subregional Strategy planning framework. It refers to traditional industrial areas and business and technology parks for higher order employment. These lands incorporate light industries, heavy industry manufacturing, urban services, warehousing and logistics and high-tech based activities.

Employment located on business or special uses zoned land, within this framework is considered part of activity within designated centres.

The study area includes industrial, business and special uses zoned land though the type of analysis varies according to the drivers of employment on those lands. All of these lands are referred to as employment land for the purposes of this study.

## 1.3 Employment Land Use

Employment lands serve a range of catchments from regional to local needs. The ability of employment land to address business requirements is an important aspect of local land use planning.

SGS has developed a set of typical Broad Land Use Categories which generally occur in most LGAs or across regions. The land audit has categorised all employment land in the LGA according to these BLCs and by the specific type of activity occurring within these categories. The BLCs and typical development are described in 0 below.

## Table 1. Broad Land Use Categories (BLCs)

| Land Use Category | Description |
|---|---|
| **Freight and Logistics (FL)** | • 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.<br>• 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)** | • Car service and repair; joinery, construction and building supplies; and domestic storage.<br>• 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)** | • Large scale production activity. Likely to be characterised by high noise emission; emission stacks; use of heavy machinery; and frequency of large trucks.<br>• 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)** | • Clothing manufacturing, boat building and electrical equipment manufacturing<br>• Small scale production with lower noise and emission levels than heavy manufacturing. |
| **Urban Services (US)** | • Concrete batching, waste recycling and transfer, construction and local and state government depots, sewerage, water supply, electricity construction yards.<br>• 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)** | • Administration, clerical, business services, research.<br>• 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)** | • Integrated warehouse, storage, R&D, 'back-room' management and administration with up to 40% office component. |
| **Retail - Main Street (RM)** | • 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)** | • Large shopping complexes, including Westfield. |
| **Retail Bulky Goods (RBG)** | • Typically large, one-story buildings surrounded by car-parking, usually located out of centre and in high exposure (main road) locations. |
| **Special Activities (S)** | • Tertiary level education, health, and community services. Typically require strategic locations and needed in each sub-region. |
| **Dispersed Activities (D)** | • Primary and secondary education, lower level health, social and community services, trades construction, other 'nomads'. |
| **Residential (R)** | • Residential development. |
| **Accommodation (Short Term) (AST)** | • Hotels and Motels (not including pubs), backpacker establishments. |
| **Carpark (CP)** | • Stand-alone Car Parking stations |

Source: SGS 2009

The employment land audit also records vacant land, vacant buildings, vacant floorspace within buildings and car parking areas.

# 2 Economic & Policy Context

## 2.1 Demographic Context

Leichhardt has a population of 48,778 according to the 2006 census. In 2009, ABS estimated that the population of the LGA was around 54,500. Population projections suggest that the LGA will grow by less than 1 per cent each year to 2036[3]. This is much lower than the projections for growth for the Sydney region of 38 per cent to 2036[4]. The LGA generally follows the population trend for the Sydney statistical division. However, the LGA has higher proportions of people aged between 30 and 39 years of age (25 per cent) compared to the Sydney statistical division (16 per cent). There are also lower proportions of children aged between five and 19 years of age (11 per cent) compared to the Sydney Statistical Division (20 per cent).

The Leichhardt labour force is comprised of 67 per cent of the population with 2 per cent unemployed and 24 per cent not in the labour force[5]. The analysis of resident employment found the following important findings:

- **High labour participation rates.** Leichhardt was home to approximately 41,800 people (86%) over the age of 15 years in 2006. In comparison, 62% of the total population of Sydney Statistical District (SD)D was over 15 years. In 2006 Leichhardt had 29,350 residents participating in the labour force. This translates into a participation rate of 70.3 per cent, which is significantly higher than the Sydney SD participation rate of 61%.
- **Low unemployment rates.** Generally Leichhardt residents are more likely to be employed than Sydney SD residents. Two exceptions are the 15-19 years and the 65-74 years age categories which demonstrated unemployment rates which were fractionally higher than Sydney SD in 2006. More recently, DEEWR estimated local unemployment to be 2.6% in June 2010, compared to 5.6% for Sydney SD.
- **High proportion of Professional and Managers.** In terms of occupation Leichhardt residents are most likely to be employed as Managers or Professionals. The share of these occupations is higher than for the Inner West subregion and Sydney SD. SGS analysis finds that managers and professionals are predominately employed in the industries of Information Media & Telecommunications, Professional, Scientific & Technical Services, Education & Training, Arts & Recreation Services and Health Care & Social Assistance. Mining is identified as an industry that has a high proportion of professionals, however it must be noted that the base of mining jobs is small.
- **Residents leave the LGA for work opportunities.** Analysis of origin-destination employment data for growing industry sectors finds that much of Leichardt's resident workforce travels outside the LGA to access employment. As a global City, Sydney CBD naturally attracts workers in most industry categories. The north west sector also attracts a

[3] Transport and Population Data Centre (TPDC) NSW SLA Population Projections, 2006 to 2036, 2009 Release.

[4] Department of Planning, New South Wales State and Regional Population Projections: 2008 Release, © Crown Copyright 2008

[5] ABS 2006 Census data; Place of usual residence.

significant proportion of Leichhardt residents particularly in the retail and business services sectors. Mapping by industry sector is provided at Figure 3 to Figure 8 The darker colour indicates a higher proportion of Leichhardt residents in those LGAs.

- **Professionals and managers leave the LGA to access work opportunities.** Analysis of origin-destination employment data for occupation type shows that again, as a global City, Sydney CBD attracts high skilled workers away from the LGA. Interestingly, after the CBD there is an even spread of professionals and managers across the Sydney metropolitan areas, more so for professionals. Mapping by occupation sector is provided at Figure 9 to Figure 16. The darker colour indicates a higher proportion of Leichhardt residents in those LGAs.

**Figure 3.** Retail Trade

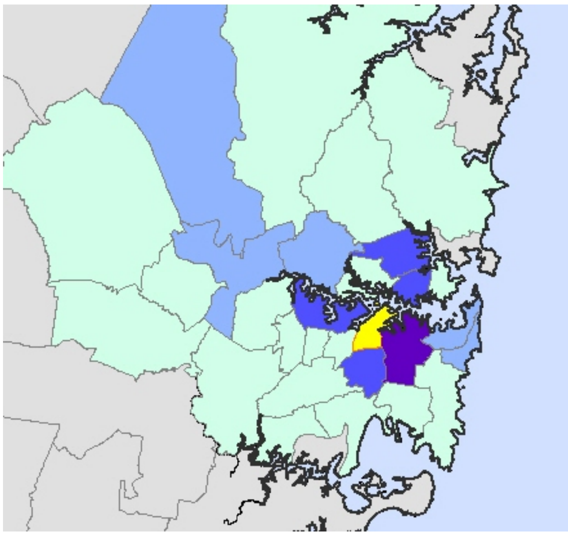


**Figure 4.** Accommodation and Food Services Employment Distribution

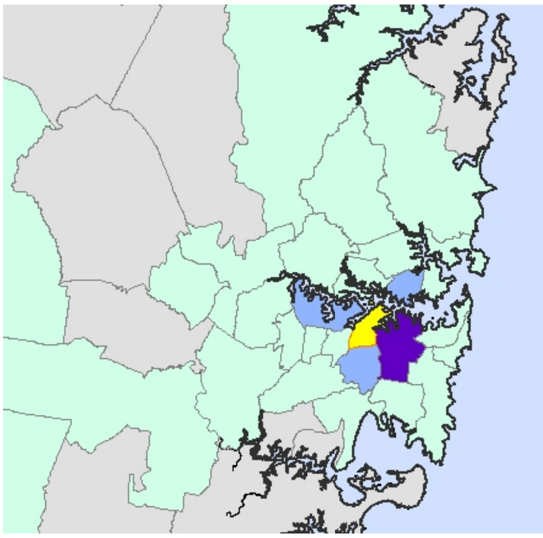


**Figure 5.** Rental, Hiring and Real Estate Services Employment Distribution

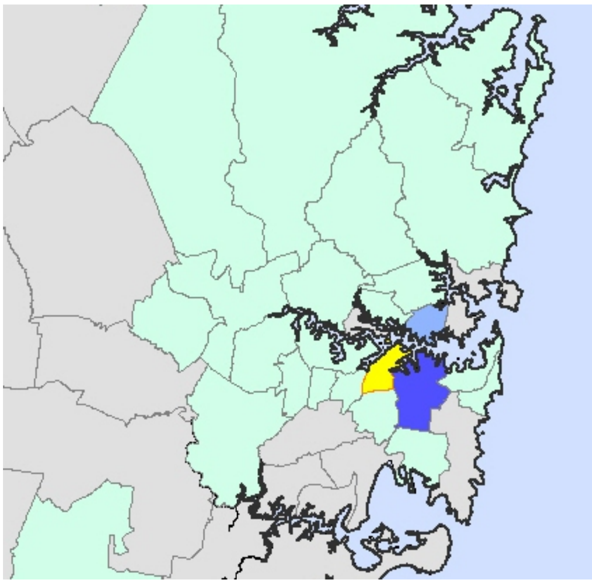
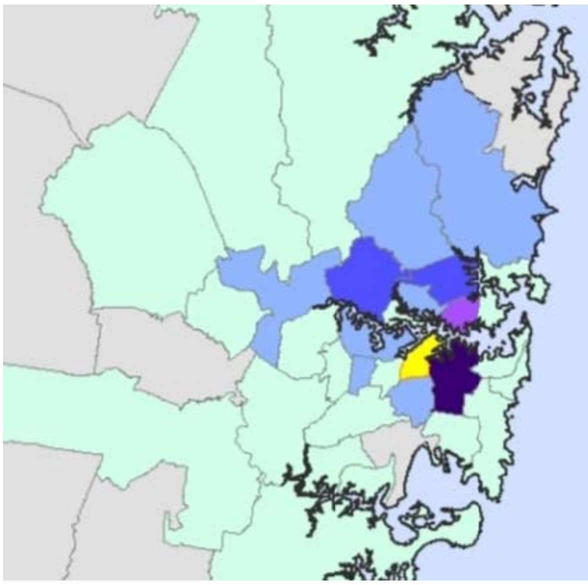
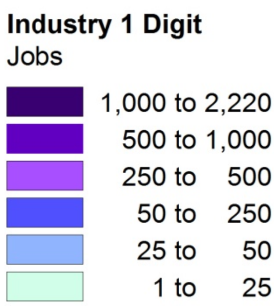


**Figure 6.** Professional, Scientific and Technical Services Employment Distribution






Source: TDC, 2006

**Figure 7.** Administrative and Support Services Employment Distribution

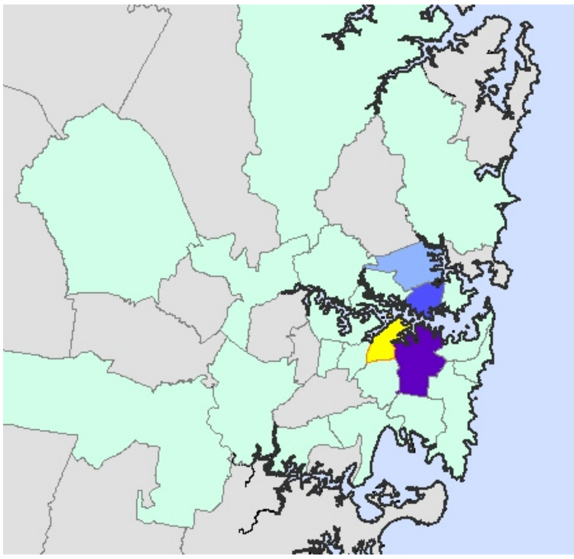
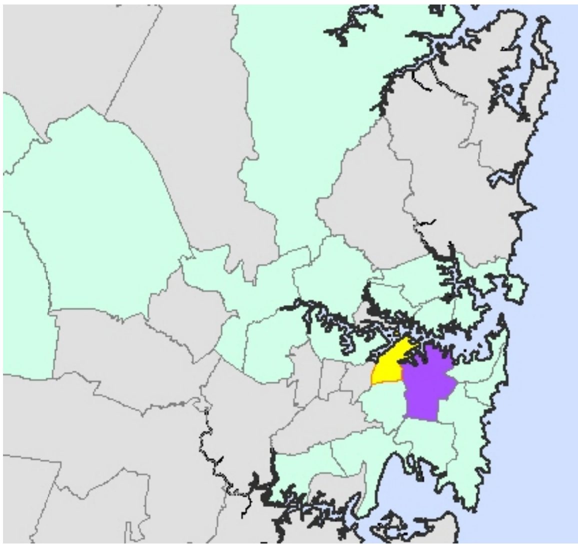


**Figure 8.** Arts and Recreation Services Employment Distribution



**Industry 1 Digit**
Jobs

| | |
|---|---|
| | 1,000 to 2,220 |
| | 500 to 1,000 |
| | 250 to 500 |
| | 50 to 250 |
| | 25 to 50 |
| | 1 to 25 |

Source: TDC 2006

**Figure 9.** Managers Employment Distribution

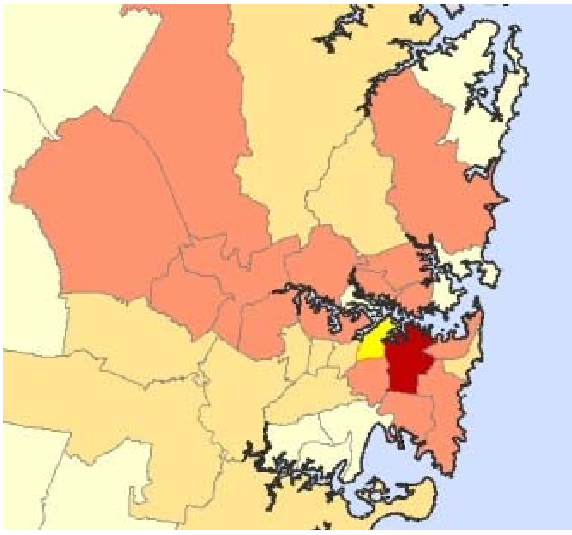


**Figure 10.** Professionals Employment Distribution

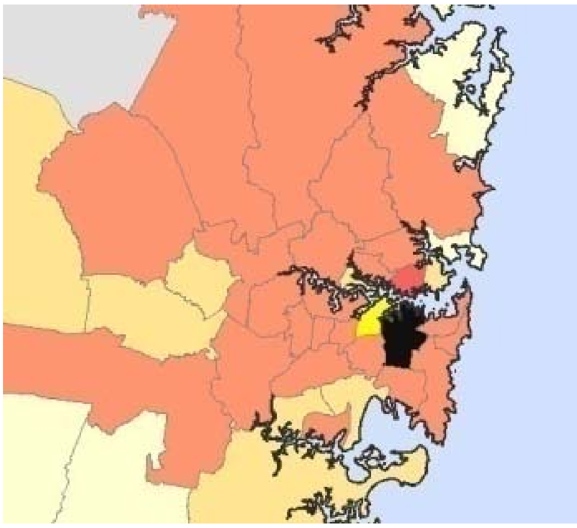


**Figure 11.** Technicians and Trades Workers Employment Distribution

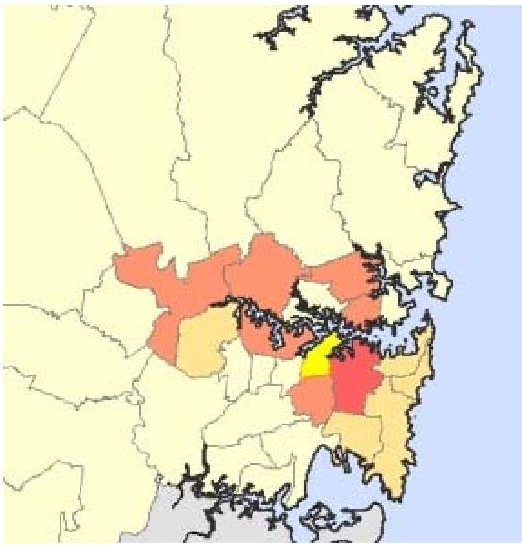
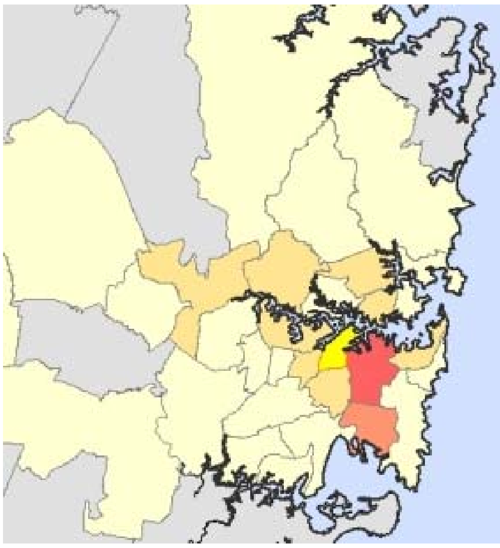
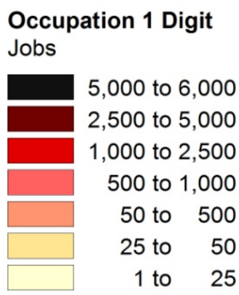


**Figure 12.** Community and Personal Service Workers Employment Distribution






Source: TDC, 2006

**Figure 13.** Clerical and Administrative Workers Employment Distribution

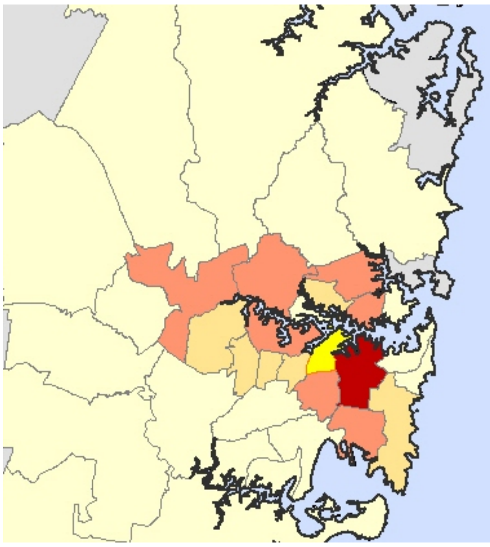


**Figure 14.** Sales Workers Employment Distribution

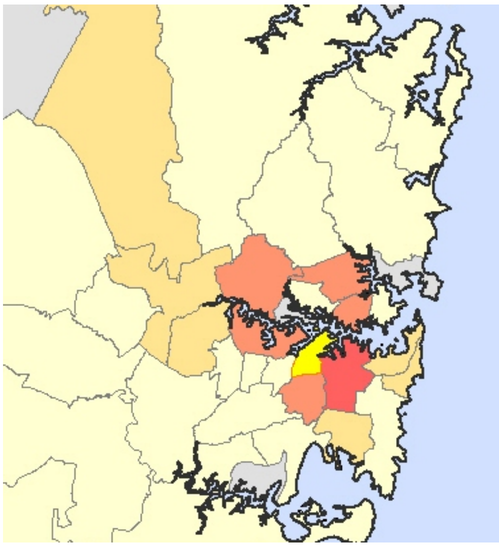
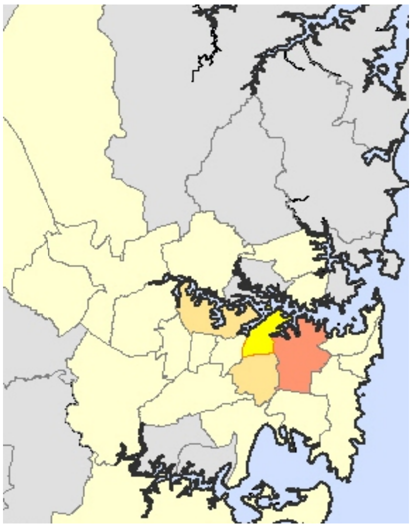


**Figure 15.** Machinery Operators and Drivers Employment Distribution

**Figure 16.** Labourers Employment Distribution



**Occupation 1 Digit**
Jobs

5,000 to 6,000
2,500 to 5,000
1,000 to 2,500
500 to 1,000
50 to 500
25 to 50
1 to 25

Source: TDC 2006

## 2.2 Economic Context

**Globalisation**

Globalisation has been marked by a rapid increase in global trade in goods and services and in particular capital flows. This has been facilitated by technological innovation in transport and communications, the promotion of deregulation in particular industry sectors, the removal of trade restrictions and exchange controls and innovation in the management and pricing of transaction risks such as insurance, hedging and partnership formation.

Globalisation will continue to see the separation between the 'thinking' part of the value chain (design, brokerage, marketing, strategy formulation), and the 'making' (manufacturing) and 'distribution' (transport, logistics, after sales service) aspects. Key services within the thinking part of the value adding process are showing increasing tendencies to centralise within one or two centres in advanced countries. This is evident in Australia, with Sydney being the pre-eminent national dispenser of advanced business services.[6]

More countries are opening up their economies and seizing the opportunities that come from closer integration into the global economy. China and India, as well as other countries such as Russia, Brazil and Mexico, are growing rapidly. Further, as communication and technology continue to improve, global production networks are becoming increasingly flexible, specialised and dispersed across continents. In an era where resources, technology and ideas can be moved rapidly to the most productive location, no economy can rely on its past strengths or traditional expertise.

These trends have significant implications for the developed world. Under the globalisation paradigm, the current and future economic context is one of increased global competition, albeit also one of increasing interdependence of national and urban economies. For Australia the specific implications include:

- Increased competition in lower order tertiary sectors of the economy, this has particular implications for Leichhardt given that a number of sites within the LGA were previously used for manufacturing
- Opportunities for increased trade (namely in resources, advanced manufacturing and sophisticated services)

On the other hand, the burgeoning middle classes in developing countries like China and India are providing new markets for very high quality manufactured goods from the developed world. For example, high end fashion and footwear manufacturers in Italy are now targeting high income customers in key locations such Shanghai and Beijing.

[6] Spiller, M. (2004) Urban Agglomeration of Advanced Business Services in Australia – Some Policy Implications, State of Australian Cities Conference, Sydney, December 2003

## Cities

In the absence of trade barriers, the underlying characteristics and resources of nations have come to determine the activities in which they specialise. In general, more labour-intensive, lower-technology production is taking place in countries with an abundance of low-cost labour, whilst advanced economies with higher labour costs, and more developed skills and physical capital, concentrate on the production of high-value, knowledge-based goods and services. Importantly, these knowledge driven sectors rely on productivity and innovation for their competitive advantage.

High-value, knowledge based jobs have an acute preference for locating in cities. This is because cities provide the most productive business environment and enhance firms' propensity to innovate as a result of agglomeration economies. Cities are now being increasingly recognised for the benefits simply arising from workers and firms being located close together.

However, cities themselves develop their own specialities in global high value supply chains, and not all cities have benefitted equally from the recent era of globalisation. Sydney, for example, contains Australia's critical global gateway infrastructure (Sydney airport and port), and has carved out a competitive role in the global trade network providing financial services to the Australian commodity trade (metals, mining etc), financial brokerage in the NZ/Pacific region and financial brokerage into the Australian consumption economy.

The attraction and retention of high-value, knowledge based sectors are crucial to long-term prosperity. Successful national economies are increasingly measured by their capacity to generate wealth through innovation and productivity, and to attract the labour and capital to support an innovation based economy. Because these functions are concentrated in cities, the efficiency, amenity and quality of life available in cities is an increasingly important factor in economic success.

High value jobs are likely to be concentrated within Global Sydney, and to some extent within Major Centres. Leichhardt can consider opportunities to support the growth in nearby Global Sydney by providing opportunities for complementary services.

## Competitiveness

An indicative list for assessing 'local' competitiveness includes the following:

- Enabling infrastructure, 'hard' infrastructure such as transport systems, but also 'soft' infrastructure including R&D institutions, governance frameworks for economic development and peak body representation;
- Education and health, which underpins a productive workforce and a lifelong learning and well-being agenda;
- Adequate labour pool, within a reasonable geographic reach (which has implications for transport connections and adequacy);
- Business sophistication, which relates to the quality of business leadership and management, which also includes maximising performance from sound locational decisions where clustering and agglomeration economies can be maximised;

- Innovation and technological readiness, which refers to the ability of the economy to develop new technologies or 'cutting-edge' products in order to grow and maintain a competitive advantage, and/or adapt to existing technologies to enhance the productivity of its industries;
- Sustainability, which will become increasingly relevant in 'competitiveness' judgements; and,
- Quality of life, covering lifestyle, amenities, access to recreation and quality residential offerings.

While not necessarily definitive the variables do display clear linkages, strengthening the assertion that competitiveness is the product of a range of interlocking factors. The competitive strengths and weaknesses of Leichhardt LGA will be considered in relation to these factors.

Sydney is considered globally competitive against most of these indicators. It ranked equal 9th with Bern in Switzerland on Mercer's 2007 Quality of Living index, and 14th on MasterCard's World Centres of Commerce aggregate index. It would rank at around 5th against American cities such as Boston and Seattle on Richard Florida's Creativity Index. However, on MasterCard's ranking it does not fair so well on the individual criterion of knowledge and information flow which is some cause for concern given the importance of this 'competitiveness' element in the modern global economy.

### Sustainability

Climate change, combined with peak oil, will have impacts on transportation, health, food security, the economy and other sectors in the Greater Metropolitan Region. Increased costs for outer urban activities and households may lead to an enhanced economic role for established areas. Good transport and established centres can be the basis for resilience in both the 'mitigation' and 'adaptation' phases of confronting climate change.

In planning for a carbon constrained future, Leichhardt must reinforce local centres by concentrating activity. Reliance on car travel can be reduced by providing opportunities for walking and cycling.

### Sydney's Economic Geography: Trends and Drivers

In recent years, rapid growth has been experienced in the advanced property services sectors and office and property markets in Central Sydney and 'satellite' locations in the global economic corridor. Office employment has tended to concentrate in these areas. As some firms have integrated their operations across administration, research and development and warehousing there has been some suburbanisation.

In older industrial areas where the employment profile has shifted toward white collar occupations, the component of floor area that is used for office activities has increased. This has implications for the nature of land use within Leichhardt's existing employment lands.

With the growth in logistics and warehousing the amount of land consumed per employee has increased and this has accelerated demand for large lots on the urban fringe.

Growing demand for employment lands in the outer subregions of Sydney has also been the result of numerous 'push' and 'pull' factors. These factors are as follows:

- Push Factors (from inner areas):
  - Increasing rents and outgoings
  - Lack of appropriately zoned industrial land
  - Small lot sizes
- Pull Factors (to outer areas):
  - Release of SEPP 59 lands (designated employment lands located in and around Erskine Park and Eastern Creek)
  - Availability of serviced land
  - Improved transport opportunities and infrastructure
  - Lower rents and cheaper land
  - Growing population and customer base

These factors have reshaped Metropolitan Sydney's industrial structure, in particular the traditional inner city industrial areas which are now characterised by new types of commercial and industrial development, or have been converted for residential usage. This has been evidenced by the rezoning of approximately 40 hectares of employment lands within Leichhardt LGA over the past 20 years[7]. Major sites which have been rezoned in recent years include Ballast Point and the Balmain Power Station site. Access to the city and views of the harbour have been key factors increasing the attractiveness of residential development with Leichhardt LGA.

## 2.3 Employment Distribution, Trends and Forecast Change

Analysis of jobs located in the LGA (its job offer to the LGA and wider catchment) finds the following:

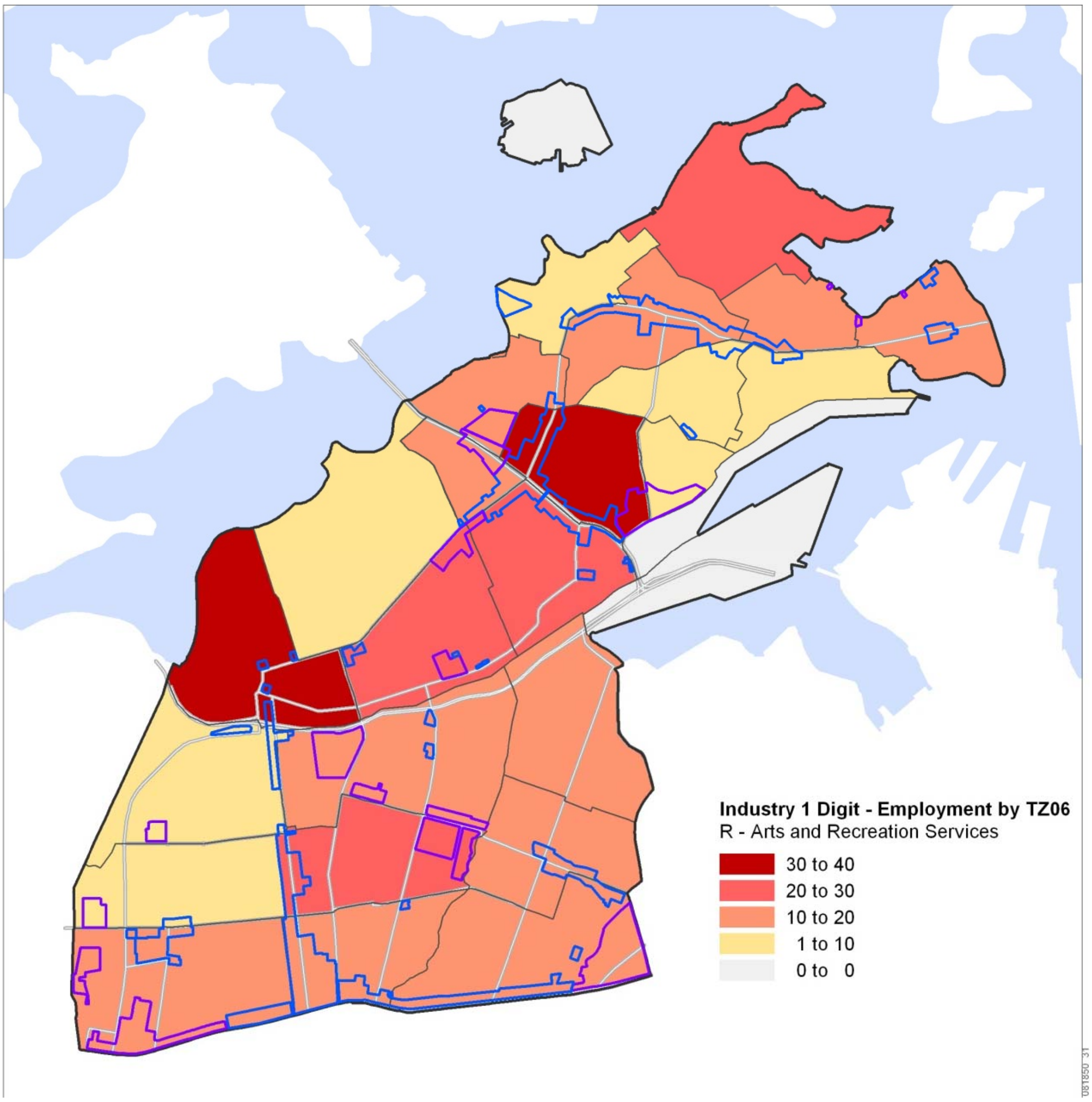
- **LGA hosts a small percentage of all metropolitan jobs.** In 2006, Leichhardt LGA hosted approximately 21,300 jobs which comprised approximately 1 per cent of all jobs in the Sydney SD[8]. The concentration of jobs is highest in the southern part of the LGA along Parramatta Road. This area contains parts of Norton Street as well as significant commercial and industrial landuses along Parramatta Road. Other significant employment areas include the Sydney College of the Arts area and the areas around the Rozelle and Balmain centres.
- **Higher professional industry jobs than metropolitan region.** In comparison with Sydney SD, Leichhardt contains a significant proportion of jobs within Property and Business Services, Health and Community Services, and the Retail Trade. For most industries, change in employment in Leichhardt LGA was counter to the trend across Sydney SD. Exceptions are Government Administration and Defence, Education, Health and Community Services, and Personal and Other Services, which demonstrated change in Leichhardt LGA. This was comparable to average change across Sydney SD. Agriculture and Mining jobs are from a small base which explains the skewed graphical results.

[7] NSW Government (2007) Employment Lands for Sydney: Action Plan

[8] Adjusted ABS JTW data 2006 used for these values.

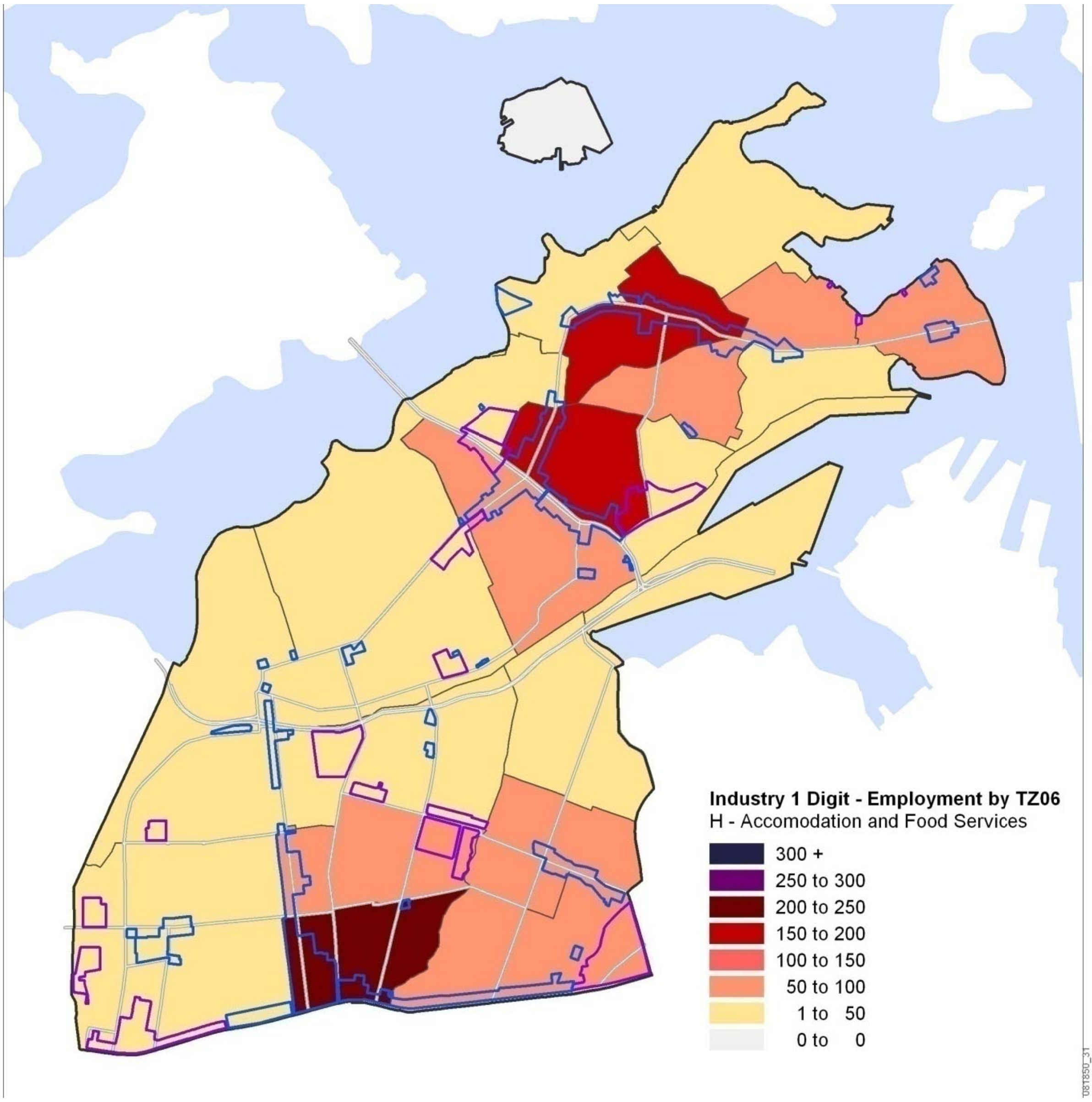
- **Industry Specialisations in business, hospitality and arts sectors.** For Leichhardt, when benchmarked against employment in Sydney, broad industry specialisations and the current location of these sectors in the LGA (0 to Figure 21) was found:
  - Cultural and Recreational Sectors - The LGA has a relative concentration of employment in creative employment including Services to the Arts, and Film and Video Services. These are shown dispersed throughout the LGA. It should be noted however, that these jobs currently comprise only 2 per cent of the total jobs in the LGA.
  - Accommodation, Cafes and Restaurants. - Hospitality employees are highly concentrated with Pubs, Taverns and Bars and Cafes and Restaurant. These jobs are located in the commercial centres with a high concentration of jobs in the Norton Street centre. These jobs comprise eight per cent of all LGA jobs.
  - Property and Business Services - some concentration of jobs in business and technical industries particularly Marketing and Business Management Services. These sectors comprise 20 per cent of employment in the LGA with the highest share being professional service sectors (14 per cent).

**Figure 17.** Arts and Culture Sectors




Source: SGS 2009; TDC 2006

**Figure 18.** Accomodation, cafes and Restaurants




Source: SGS 2009; TDC 2006

**Figure 19.** Rental, Hiring and Real estate

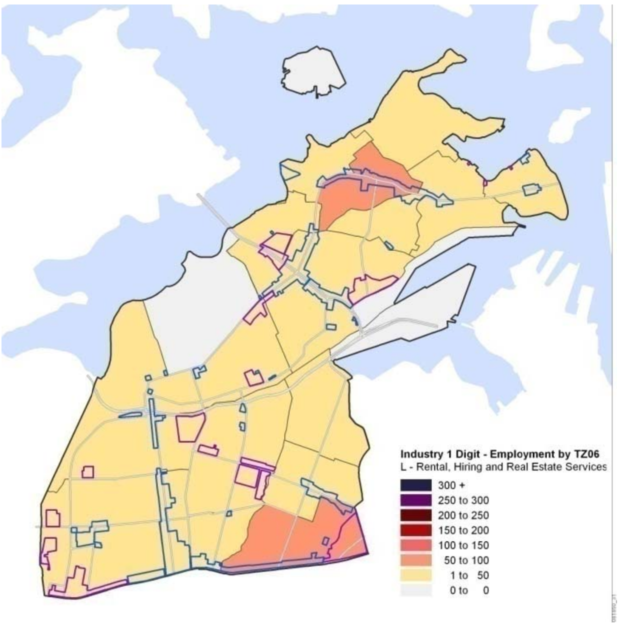



**Figure 20.** Professional, Scientific and Technical

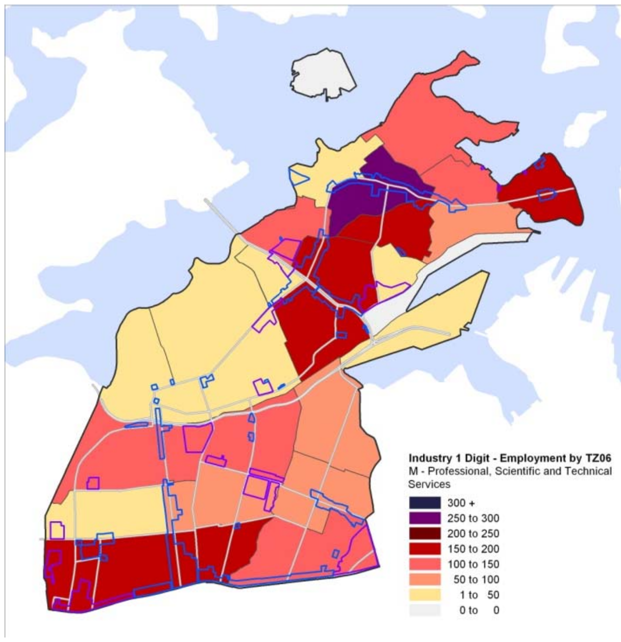
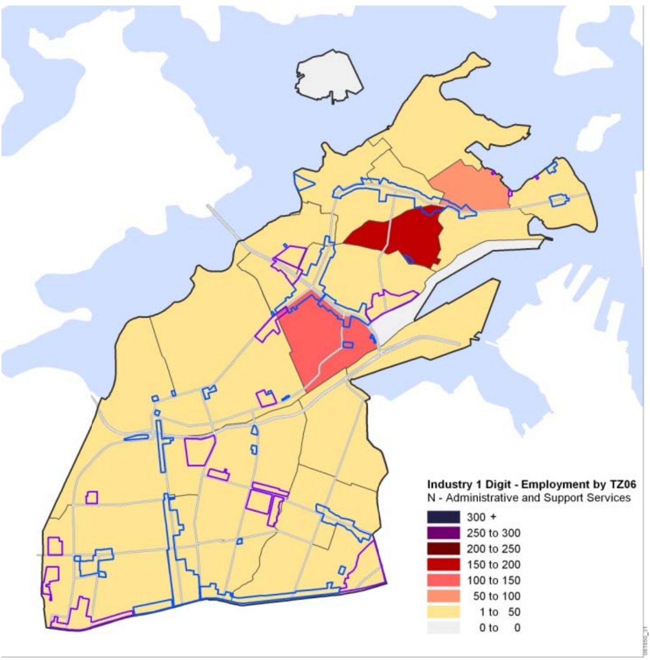



**Figure 21.** Administrative and Support Services




Source: SGS 2009; TDC 2006

**Legend**

300 +
250 to 300
200 to 250
150 to 200
100 to 150
50 to 100
1 to 50
0 to 0

**Forecast Industry Sector Change**

Employment forecasts to 2036 show the projected change in employment by industry sector (Table 2).

**Table 2.** Employment Projections to 2031, Leichhardt LGA.

| Industry | 2006 - 2011 | 2011 - 2016 | 2016 - 2021 | 2021 - 2026 | 2026 - 2031 | 2031 - 2036 | Total Change | % Change |
|---|---|---|---|---|---|---|---|---|
| Agriculture, Forestry and Fishing | -1 | 4 | 5 | 4 | 4 | 4 | 21 | 70% |
| Mining | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Food Product Manufacturing | -23 | -6 | 1 | -4 | -4 | -1 | -37 | -18% |
| Beverage and Tobacco Product Manufacturing | -4 | -1 | -1 | -1 | -1 | -0 | -7 | -99% |
| Textile, Leather, Clothing and Footwear Manufacturing | 5 | -41 | -32 | -28 | -21 | -15 | -132 | -85% |
| Wood Product Manufacturing | -9 | -6 | -4 | -4 | -3 | -2 | -27 | -83% |
| Pulp Paper and Converted Paper Product Manufacturing | -5 | -8 | -4 | -3 | -2 | -1 | -23 | -85% |
| Printing, including the Reproduction of Recorded Media | 24 | 1 | 12 | 4 | 4 | 8 | 54 | 26% |
| Petroleum and Coal Product Manufacturing | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0% |
| Basic Chemical and Chemical Product Manufacturing | -7 | -3 | -2 | -2 | -2 | -1 | -17 | -58% |
| Polymer Product and Rubber Product Manufacturing | -2 | -4 | -3 | -5 | -3 | -2 | -19 | -43% |
| Non-Metallic Mineral Product Manufacturing | -10 | -3 | -3 | -2 | -2 | -1 | -22 | -57% |
| Primary Metal and Metal Product Manufacturing | 9 | 3 | -1 | -2 | -2 | -1 | 6 | 34% |
| Fabricated Metal Product Manufacturing | 5 | -7 | -5 | -5 | -4 | -3 | -20 | -71% |
| Transport Equipment Manufacturing | 27 | -1 | -10 | -11 | -10 | -7 | -11 | -12% |
| Machinery and Equipment Manufacturing | 21 | 0 | -6 | -10 | -9 | -5 | -10 | -11% |
| Furniture and Other Manufacturing | 10 | -4 | 0 | -9 | -9 | -7 | -18 | -6% |
| Electricity, Gas, Water and Waste Services | -8 | -15 | -10 | -8 | -6 | -3 | -49 | -88% |
| Construction | 145 | 23 | 53 | -18 | -11 | 15 | 207 | 14% |
| Wholesale Trade | -38 | 34 | 14 | -31 | -31 | -30 | -83 | -9% |
| Retail Trade | 287 | 294 | 315 | 122 | 124 | 161 | 1,303 | 48% |
| Accommodation and Food Services | -56 | 165 | 156 | 78 | 84 | 110 | 537 | 31% |
| Transport, Postal and Warehousing | 137 | 54 | 37 | -2 | 7 | 24 | 257 | 43% |
| Information Media and Telecommunications | -61 | -30 | -26 | -49 | -50 | -43 | -259 | -44% |
| Financial and Insurance Services | -88 | -30 | -12 | -30 | -25 | -11 | -196 | -42% |
| Rental, Hiring and Real Estate Services | -30 | 50 | 47 | 25 | 26 | 34 | 152 | 30% |
| Professional, Scientific and Technical Services | 619 | 263 | 17 | 71 | 62 | 74 | 1,106 | 38% |
| Administrative and Support Services | -67 | 12 | -35 | -25 | -24 | -8 | -148 | -16% |
| Public Administration and Safety | 393 | 283 | 188 | 78 | 85 | 105 | 1,132 | 106% |
| Education and Training | 102 | 135 | 145 | 82 | 91 | 106 | 661 | 46% |
| Health Care and Social Assistance | 215 | 232 | 315 | 154 | 153 | 176 | 1,245 | 44% |
| Arts and Recreation Services | -9 | 4 | 13 | -9 | -4 | 8 | 4 | 1% |
| Other Services | 194 | 75 | 101 | 36 | 36 | 43 | 485 | 48% |
| Unclassified | 164 | 92 | 77 | 26 | 25 | 25 | 409 | 55% |
| **Total Employment** | **1,939** | **1,564** | **1,342** | **422** | **479** | **753** | **6,500** | **30%** |

Source: TDC Employment projections, 2009

Employment growth forecasts to 2036 show that growth sectors in the LGA will be Retail Trade (48 per cent or 1,303 jobs), Health Care and Social Assisstance (44% or 1,245 jobs), Public Administration and Safety (106% or 1,132 jobs) and Professional, Scientific and Technical Services (38% or 1,106 jobs).

Industries in which decline is expected include Information Media and Telecommunications (-44% or -259 jobs) Financial and Insurance Services (-42% or -196 jobs) Administrative and Support

Services (-16% or -148 jobs) and Textile, Leather, Clothing and Footwear Manufacturing(-85% or -132 jobs).

### Home-based Work

The Labour Force Survey, undertaken by ABS in November 2008, indicated that there were 10.1 million people participating in the labour force, of which 24% did at least some work at their own home[9]. At the same time, some 576,400 people were multiple jobholders and of these 34% usually worked at their own home in their second job.

The prvious survey in 2005 indicated that reasons for working at home were diverse. Reasons for working at home included catching up on work (35%) or working in a home office which was established because of low overheads (23%). People who worked at home only, or for the majority of time, in their first or second job, were more likely to be women (55%), over 35 years of age (79%) and to have children under 15 years of age (15%). Men or women who worked any hours at home are most likely to be professionals (31% and 38% respectively).

The attraction of home based work can be increased flexibility, the avoidance of a commuting or opportunities to improve the balance of work and family life. The incidence of home based work is often high in areas that are distant from employment centres typically in 'sea change' or 'tree change' locations. Additionally, working from home or home based work can be high in areas which offer high amenity, where home-based workers can grab a coffee or go for a swim at lunch.

Defining home-based business can be difficult. A spectrum exists between those who work at home on occasion, through to those who operate a business full-time from home. The motivation for full-time home-based business workers are likely to differ from those who are occasionally working from home. Home-based business owners may be starting a new business, and taking advantage of low initial overheads, or may be approaching retirement and scaling-back an existing business.

It is important to note that home based work is more suited to some types of work than others. The nature of businesses range from domestic services (such as ironing, dressmaking and child care services, through to professional services). SGS's report Sydney's Economic Geography: Trends and Drivers indicates that home-based work is increasing rapidly across most industry sectors, and across all sub-regions in Sydney. This trend is driven by more flexible modes of working, which characterise the 'new economy'. In addition, labour market participation rates have increased over the past decades, as more women enter the workforce. Accompanying this trend has been the rapid increase in part-time employment. Part of this increase in part time work and hours worked by women is home-based work.

Increases in home-based work, particularly in business services, reflect shifts in the economy, as well as changes in technology (such as improving telecommunications and affordability of computers). These factors allow for professional service providers to work from home, though while full-time home based workers in this sector is growing, it is still relatively small. The

[9] ABS Catalogue Number 6275.0: Locations of Work, Australia, November 2008.

importance of face to face interaction, within a company and with clients and other businesses as well as and social interaction with fellow workers, should not be underestimated.

Supplementing the household income is another driving factor of home-based businesses. This may be demonstrated by the relatively higher proportion of women working part-time from home. These 'spare cash' operators tend to rise and fall with general economic conditions.

## 2.4 State Policy Environment

### The State Plan 2010: Investing in a better future

The NSW State Plan set priorities and target for service delivery in NSW. Priorities and targets are grouped within seven chapters:

- Better Transport and Liveable Cities
- Supporting Business and Jobs
- Clever State
- Healthy Communities
- Green State
- Stronger Communities
- Keeping People Safe

These chapters are linked to detailed implementation plans. Of relevance is the Metropolitan Strategy and Metropolitan Transport Plan which are aligned with the first chapter and Investing in a Better Future: NSW Government response to the NSW Jobs Summit which aligns with the second. The relationship between the State Plan and the State Infrastructure Strategy is not self-evident.

Within the goal of 'Better Transport and Livebale cities', priorities include 'Jobs Closer to Home' which picks up on a key aspiration from the Metropolitan Strategy. This will be implemented through the subregional strategies which seek to ensure there is sufficient appropriately zoned land to accommodate forecast employment growth and change within each of the subregions.

### State Infrastructure Strategy 2008/09 – 2017/18

The Revised State Infrastructure Strategy (SIS), produced by the NSW Government in 2008, provided a 10 year plan that is designed to meet the growing needs for infrastructure within each of the six broad regions of NSW. While the NSW Tresury's website states that the State Infrastructure Strategy is updated every 2 years, a 2010 version has not yet been released. However, the subsequent Metropolitan Transport Plan (see below) includes a list of transport projects with a '10 year funding guarantee'.

The SIS aims to offer private and public sector agencies, as well as the community, an ability to contribute to decisions about the timing of major projects. Project funding is also a key factor of the Strategy.

The SIS recognises the strategic importance of specialised centres, major centres, employment lands, and renewal corridors, as key sites able to provide significant input for future employment, accounting for 50% of new jobs in the next 25 years. In particular, the Strategy wishes to establish Sydney as a 'strong global economic corridor', with connected centres and the ability for people to have access to housing, jobs and services.

Of particular relevance, is the Strategy's emphasis on public transport infrastructure investment (in the form of improved rail and bus networks) as opposed to focusing on road improvements. This stems from an assertion that as the population grows (particularly in Sydney) rail and bus network use will increase significantly thus placing greater demand on services. Population increases will also increase the volume of freight movement across NSW further strengthening the role of a strategic rail network.

Key capital works within Leichhardt LGA, as outlined in the SIS, include Leichhardt Bus Depot development. No mention is made of the Bays Precinct, which was listed in the previous SIS.

Significantly the SIS states that planning will continue for an M4 Extension. This is a softening of the previous SIS which stated that an M4 East extension is likely to be completed within a decade.

The Iron Cove Bridge Duplication was earmarked within the document, and as of Noevember 2010 is partially constructed .

**Figure 22.** Rozelle Bay

Source: SGS 2007.

#### The Metropolitan Strategy and Draft Subregional Strategy: Inner West Subregion

The Metropolitan Strategy is a broad framework to guide Sydney's growth to 2031. It seeks to maintain Sydney's place within the global economy, while meeting the needs of local communities. It aspires to provide sufficient land for employment growth, and includes employment capacity targets for Sydney's subregions, as well as for strategic centres and employment land precincts.

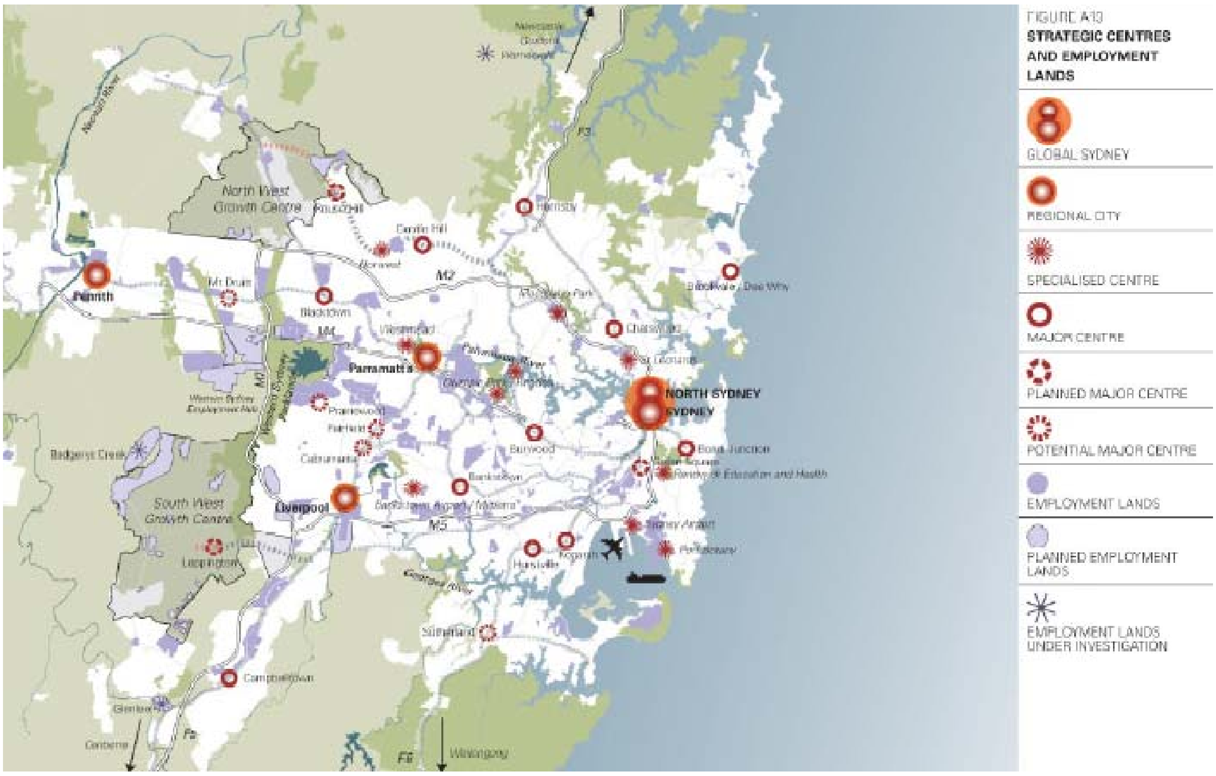
An analysis of trends and directions in employment lands is included in the Strategy, and this recognises that changes in the way businesses are operating are increasing the 'white collar' component of employment in employment land areas. Older style industrial areas, for heavier industry types, are diminishing. Factors affecting employment land provision across the Greater Metropolitan Region are identified as[10]:

[10] see pages 53-54 of the *Metropolitan Strategy* supporting information document

- Increasing 'export and import' business activity requiring proximity or good access to the airport and port
- The role of innovation which is driving industry clusters, and the need for proximity to quality services and education activities
- The need for some activities, such as concrete batching and waste services, to have a good distribution across the metropolitan area
- The need for lower cost locations for 'start-up' businesses

The Metropolitan Strategy will be 'rolled out' through subregional plans that provide a manageable area of consideration and have attempted to group together LGAs with similar issues and challenges. Leichhardt (along with Ashfield, Burwood, Canada Bay and Strathfield) is located within the Inner West Subregion. This subregion adjoins the Sydney City subregion, South and West Central Subregions. An important feature is Parramatta Road which traverses the Inner West subregion. It is a key arterial road for east/west traffic movement.

**Figure 23.** Metropolitan Strategy, Strategic Centres and Employment Lands Map




Source: Metropolitan Strategy supporting information document 2005, p.53.

The Metropolitan Strategy expected that an additional 30,000 new dwellings and 10,000 new jobs would need to be accommodated within the subregion by 2031. The employment capacity target has since been revised to 12,500 additional jobs (an increase of 2,500) for the draft Inner West Subregional Strategy. Leichhardt's housing target, as stated in the draft Subregional Strategy, is 2,000 extra dwellings which is 7 per cent of the total dwelling target for the Inner West subregion.

The LGA has an employment capacity target of an additional 500 jobs, which is 4 per cent of the subregions capacity.

The draft Subregional Strategy identifies key directions and actions for the Inner West subregion, and these are summarised in Table 3. Several actions specifically relate to Leichhardt, particularly in terms of Parramatta Road and the Bays Precinct.

**Table 3.** Inner West Subregional Strategy Key Directions and Actions

| Key Directions | Actions |
|---|---|
| Support and Differentiate the Role of Strategic Centres | • Incorporate the centre types into land use and infrastructure planning and Local Environmental Plans (LEPs). (IW B1.1.1)<br>• Use employment capacity targets to plan for sufficient commercial floor space within Strategic Centres. (IW B1.2.1)<br>• Finalise and implement a new LEP for the Burwood Major Centre through the Burwood Independent Panel. (IW B3.4.2) |
| Protect Employment Lands & Working Harbour | • Explore opportunities to revitalise Strategic Employment Lands. (IW A1.9.1)<br>• Protect Employment Land in strategic sites such as Enfield Marshalling Yards to support clustering of logistic and freight activities. (IW A1.2.2)<br>• Prepare a strategic vision for the Bays Precinct (Glebe Island–White Bay, Rozelle and Blackwattle Bays). (IW A1.2.1) |
| Promote Parramatta Road As An Enterprise Corridor | • Investigate the use of the Enterprise Corridor Zone for Parramatta Road and other busy roads. (IW B7.2.1)<br>• Prepare best practice guidelines for planning along transport corridors, such as Parramatta Road. (IW B7.2.1) |
| Improve Housing Choice | • Use METRI X to assist councils in undertaking housing market analysis as part of their LEPs. (IW C2.3.1)<br>• Develop options for improving housing affordability. (IW C4.1.1)<br>• Apply the Standard Instrument to achieve a mix of zones and dwelling forms in Councils' Principal LEP. (IW C2.3.2)<br>• Plan for an ageing population when developing comprehensive LEPs, including provisions for seniors housing in areas of good accessibility and local services. (IW C2.2.1) |
| Manage Traffic Growth And Local Travel Demand | • Coordinate the planning and implementation of the North West Metro. (IW D1.1.1)<br>• Investigate options to improve pedestrian and cycleways linkages across the subregion. (IW D3.1.1)<br>• Implement road traffic improvements on Victoria Road and Parramatta Road including duplication of Iron Cove Bridge. (IW D1.2.4)<br>• Examine options to improve transport links between Port Botany and Western Sydney. (IW D1.3.1)<br>• Increase the share of freight moved by rail through the subregion, including the planned intermodal logistics centre at Enfield. (IW D5.2.1) |
| Protect And Promote Recreational Activity And Environmental Assets | • Investigate options to enhance regional open space. (IW F1.2.1)<br>• Improve access to the harbour through the Sharing Sydney Harbour Access Program (SSHAP). (IW D3.1.4)<br>• Improve access to waterways, and links between bushland, parks and centres. (IW F1.3.1) |

| Key Directions | Actions |
|---|---|
| Celebrate Cultural Diversity | • Identify and promote heritage assets. (IW E6.3.1)<br>• Investigate potential for cultural heritage tourism. (IW E6.3.2)<br>• Plan for sufficient space for arts and cultural activities, including low rent tenancies, such as along Parramatta Road. (IW F4.1.2) |

Source: Draft Inner West Subregional Strategy 2007

Specific actions relevant to the current study include:

- **IW A1.1.1** Inner West local councils to prepare Principal Local Environmental Plans (LEPs) which will provide sufficient zoned commercial and Employment Land to meet their employment capacity targets.
- **IW A1.2.1** The NSW Government to develop a strategic vision for the Bays Precinct.
- **IW A1.2.3** Council to ensure retention of sufficient small Employment Lands parcels to support local service industries.
- **IW A1.2.4** The Department of Planning, through the Employment Lands Development Program, to investigate the influence of a potential M4 Motorway extension on demand for Employment Lands within this subregion.
- **IW A1.4.1** The Department of Planning to complete a metropolitan and subregional review of Employment Lands, prior to considering any significant rezoning of Employment Lands to non–employment uses within the Inner West Subregion.
- **IW A1.9.1** Local government to explore opportunities to revitalise strategic Employment Lands.
- **IW A1.9.2** The Department of Planning to work with councils in identifying and implementing measures to manage interface issues between industrial and residential land uses.
- **IW A3.3.1** Local government to investigate strategies to ensure sufficient zoned land to enable the provision of comparatively low cost premises for start–up businesses.
- **IW B7.2.1** The Department of Planning and Inner West councils to consider application of Enterprise Corridor zoning for sections of arterial roads within the subregion, through their Principal LEPs.
- **IW B7.2.2** Councils to consider the guidelines for development along busy roads when planning for future housing near any road with an Annual Average Daily Traffic (AA DT) volume of more than 20,000 vehicles.

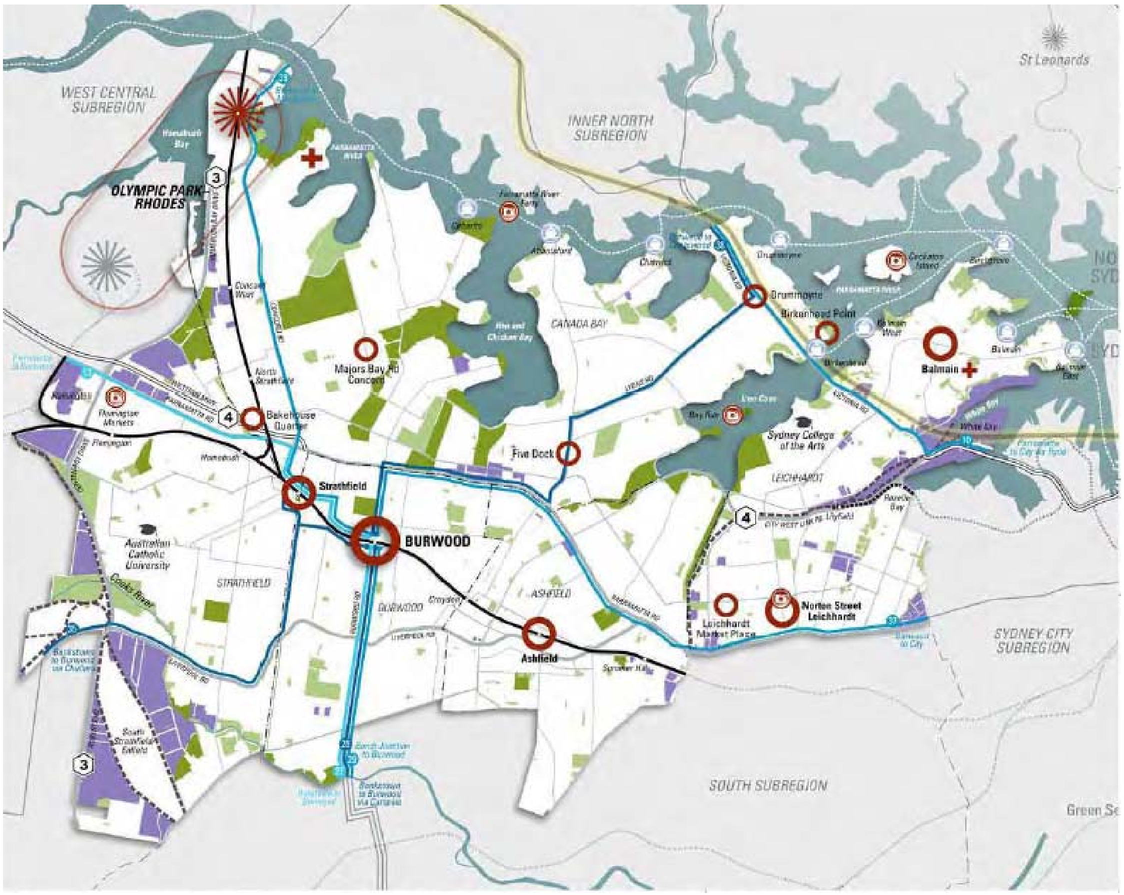
The Inner West Subregional Strategy considers employment lands at a finer grain. Employment lands across the LGA are considered as 13 precincts. Each precinct has been assigned a category:

- Category 1 – Land to be retained for industrial purposes
- Category 2 – Land for potential to allow for a wider range of employment uses
- Category 3 – Land that could be investigated for alternative uses

Within Leichhardt the majority of employment lands have been classified as Category 1. No Category 3 employment lands have been identified within the LGA. The following employment land precincts have been classified as Category 2, indicating potential for alternate employment uses:

- Bays Precinct: Glebe Island and White Bay (75.8 hectares)
- Marion Street/Walter Street (1.3 hectares)
- Victoria Road/Terry Street/Wellington Street (Carrier Site, 3.2 hectares)
- Victoria Road/Robert Street (Former Martin Bright Steel Works Site, 2.2 hectares)

**Figure 24.** Draft Inner West Subregional Strategy, Strategic Centres and Employment Lands Map




Source: Draft Inner West Subregional Strategy 2007.

Centres Hierarchy within Inner West Subregion

The draft Subregional Strategy identifies the following centres hierarchy within the subregion as follows:

- One Major Centre – Burwood
- One Specialised Centre –Olympic Park-Rhodes
- Four Town Centres – Ashfield, Balmain, Norton Street and Strathfield
- Six Villages – Birkenhead Point, Five Dock, Concord, Drummoyne, Leichhardt Market Place, Bakehouse Quarter
- Small Villages and Neighbourhood Centres make the sum of the key remaining centres in the LGAs

The Strategic Centres for the Inner West Subregion, Burwood and Olympic Park-Rhodes, are expected to increase employment, by 3,500 jobs in Burwood and by 6,000 jobs in Rhodes, excluding Olympic Park. The draft Inner West Subregional Strategy does not identify any Potential Enterprise Corridors but notes that Enterprise Corridor zoning may be appropriate along some sections of Parramatta Road, Liverpool Road and Victoria Road.

Department fo Planning is currently preparing an updated Metropolitan Stratgy. A discussion paper was released for public comment. The paper addressed:

- Planning for a growing population
- Making Sydney climate change ready
- Integrating land use with transport
- More jobs in the Sydney Region
- Growing Sydney's value
- Strengthening a City of Cities
- Meeting changing housing needs
- Balancing land uses on the city fringe
- Achieving renewal
- Implementation.

Public submissions were received and an summary report of submission was released. It is expected that the revised strategy will be made public later in 2010.

### Employment Lands for Sydney Action Plan

The Employment Lands Sydney Action Plan addresses issues raised by a high–level task force of industry and government, who sought to advise the NSW Government on the current situation in regards to employment lands in NSW.

The plan provides 18 key recommendations and five actions, of which the main objectives are to provide suitable employment lands sites in strategic locations, increase innovation and skills development, and improve opportunities and access to jobs for disadvantaged communities.

The Employment Lands Development Program is to be established to focus on the release of more employment lands, regeneration of brownfield sites, provide more efficient processes for zoning and developing of sites, and have enhanced co-ordination across government levels and with the community.

The Action Plan identifies approximately 118 hectares of employment lands within Leichhardt LGA, with no additions to the employment lands stock and 39.8 hectares rezoned for other purposes in the last 20 years. Given the developed nature of the LGA, there is no capacity for future employment lands expansion.

### Metropolitan Transport Plan

Released in early 2010, the Metropolitan Transport Plan has significant implications for Leichhardt LGA. Firstly, it signaled the State government's abandonment of the contentious CBD Metro line, in favour of heavy rail investments. This is to be in the form of Western Sydney Express and City Relief Line. In relation to the Western Express the document states:

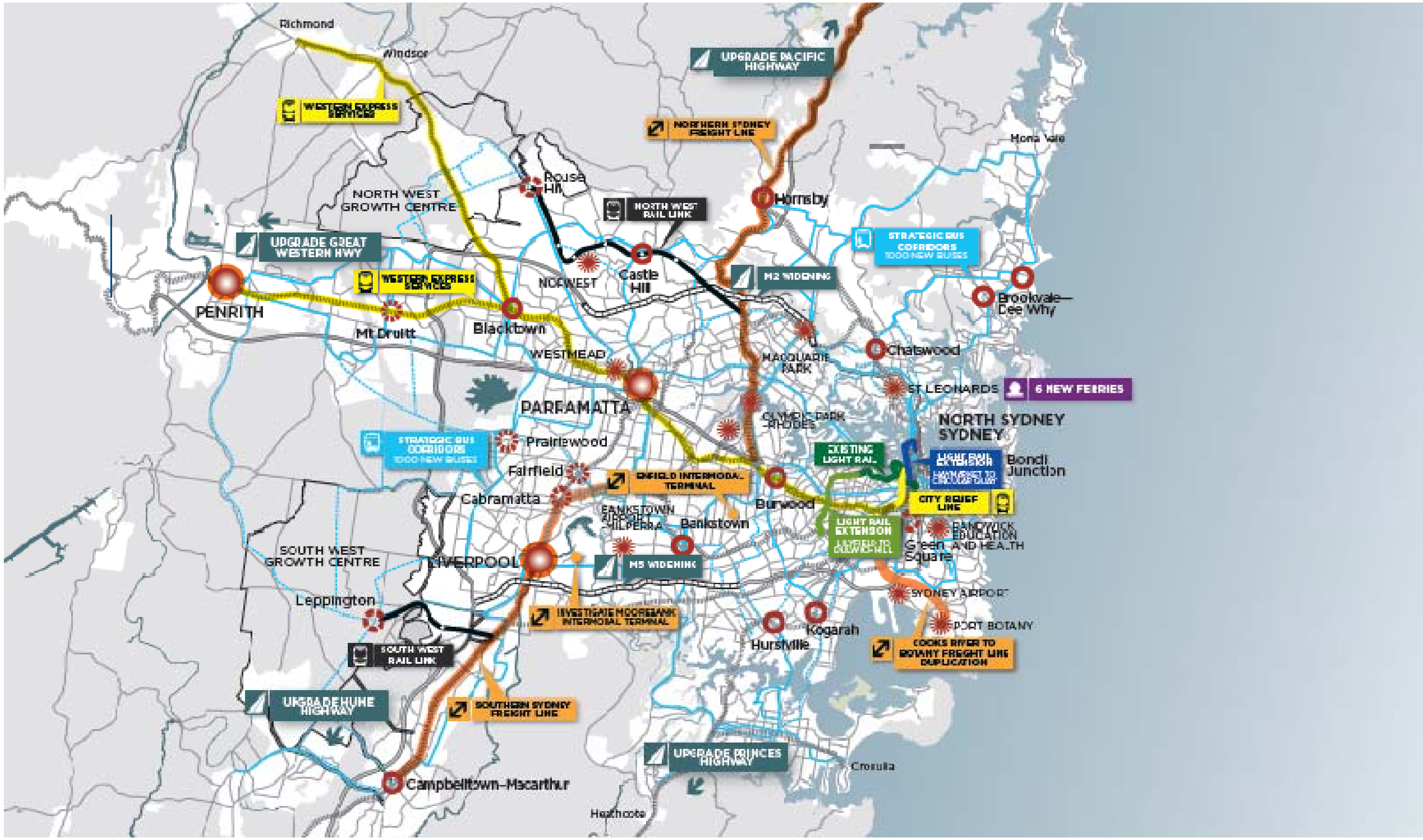
'The Western Express Project will see the Main West tracks, which currently terminate at Central, extended via new track from Eveleigh into new underground platforms at Redfern, Railway Square (near Central), City West (near Town Hall) and Wynyard. This will eliminate the need for Western trains to merge with suburban tracks before reaching the CBD, also addressing the fundamental capacity bottleneck of Illawarra Junction, which currently limits our ability to run extra services on the North, South and Inner West lines.'

Further the plan flags light rail investments within Leichardt LGA, with the extension of the existing light rail line from Lilyfield to Dulwich hill. A further extension of the light rail system is proposed to connect Central Station with Circular Quay.

Construction of the Enfield Intermodal Terminal, as had been flagged previously in the SIS, may have positive flow on effects for the LGA, marginally reducing heavy vehicle traffic along Parramatta Rd.

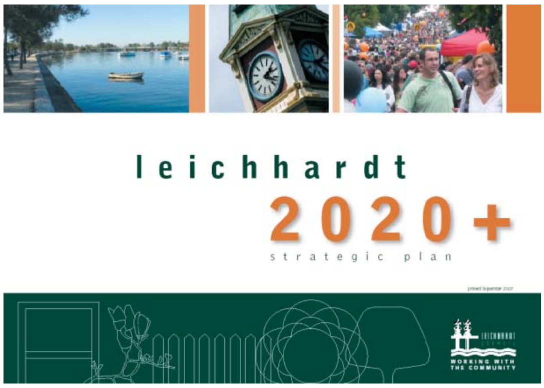
Figure 25 provides an illustration of the projects as listed within the plan.

**Figure 25.** Metropolitan Transport Plan Map



## 2.5 Local Policy Environment

**Leichhardt 2020+ Strategic Plan**




Leichhardt's Strategic Plan, published in September 2007, seeks to establish 'a clear direction and framework to guide the community, councillors and staff to build a 'sustainable and liveable community'. This will be achieved by providing 'concrete directions for the most significant issues and a vision of the community and council of the future.' It is to act as a framework for the resolution of complex issues.

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

The plan consists of three key values and six service areas. 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.

Goals for each of the service areas are listed below.

- 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 and 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 Local Environmental Plan 2000

The following key provisions affect the use of employment land in Leichhardt LGA:

- Floor Space Ratio provisions:
    - Industrial development – maximum 1.0:1
    - Commercial Development – maximum 1.5:1
- Home based work provisions:
    - Home based work requires development consent.
- Key prohibited development: Commercial premises in industrial zones.

#### Integrated Transport Strategy

Council is currently preparing a new Integrated Transport Strategy. The aim is to set the framework for integrating land use and transport over the next 10 years. Two public workshops have been held and community views are being collected through an online survey.

#### Callan Park Masterplan

A masterplan is currently being prepared for Callan Park McGregor Coxall.

## 2.6 Infrastructure and Land: some ‘Unknowns’

There are a number of possible land use changes, as well as infrastructure developments which will exert a strong influence on land use planning within Leichhardt LGA. These proposed projects have the potential to influence the volume, nature and distribution of employment lands within the LGA. The year in which the projects are proposed to be completed may also influence potential timing of demand.

#### M4 East

The 2008 State Infrastructure Strategy (SIS) states that planning for the M4 East will continue. This reflects a slight softening of the State Government’s position, as the previous SIS claimed that the M4 East Extension would be completed within a decade. The Metropolitan Transport Plan states:

*‘Projects that are currently beyond the 10 year funding guarantee that could be brought forward if additional funding becomes available include the M5 duplication, the M4 East extension, the Parramatta to Epping rail link, the F3 to M2 link, further enhancement to the dedicated freight network and the commencement of Sydney’s Metro network.’*

### Glebe Island and White Bay

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 (Figure 26). The draft Inner West Subregional Strategy states that 'it is anticipated the Task Force will commence public consultation in mid 2008.'

Consultation was completed in mid-2009. Councils submission lists a series of principles which it recommends to be used in preparation of the Masterplan. The points raised by Council included encouraging federal involvement in planning for the precinct, planning for 'climate positive' development, protecting views and view corridors, integrating development with public transport, considering opportunities for additional open space and adaptive reuse of heritage items.

**Figure 26.** Glebe Island and White Bay

Source: SGS 2007.

### Changes to Local Land Uses

Planning does not occur in a static environment. Changes in land uses, which will influence the structure and distribution of employment lands within Leichhardt, are occurring all the time. At present Council is assessing a development application for a Woolworth Supermarket, as part of a mixed use development at 69 Parramatta Road Annandale. This entails:

*'Demolition of all structures and construction of a mixed-use development comprising; two-level supermarket, ten (10) one-bedroom residential dwellings on the 1st and 2nd [mezzanine] levels, customer/resident parking within two basement levels, ground level loading dock/ staff car park area with vehicle access via Trafalgar Street, strata subdivision and site remediation. Trading hours of the supermarket are 7am - Midnight, 7 days with after hours Midnight - 7am, 7 days for staff packing and stocking shelves.'*

## 2.7 Implications for the Employment Lands Study

- The key challenge arising from globalisation for Sydney and Australia is to build links with global supply chains. Leichhardt's proximity to clusters of high value business services concentrated in Global Sydney may provide potential business opportunities, particularly for businesses which provide service to those located in Global Sydney.
- State Government recognises the constrained nature of employment land in the Inner West subregion. Zoning and current land use will need to be examined to assess the capacity of the existing lands to accommodate likely changes in employment.
- Competition between cities is evolving. The efficiency, amenity and quality of life available in cities will be critical. Leichhardt LGA is a high-quality locality which is attractive to business owners and managers.
- The Employment Lands Action Plan reinforces the Metropolitan Strategy policy aspirations with the same implications for Leichhardt. Renewal in some industrial areas (to maximise the use of the existing land resource) will be anticipated. The plan recognises that there is no capacity for new employment lands in the Inner West subregion. Reconfiguration of Industrial land is required.
- Leichhardt's housing target, as stated in the draft Subregional Strategy, is 2,000 extra dwellings which is 7 per cent of the total dwelling target for the Inner West subregion. The LGA has an employment capacity target of an additional 500 jobs, which is 4 per cent of the Inner West subregion's capacity.
- The draft Subregional Strategy identifies the following employment land precincts as Category 2, indicating potential for alternate employment uses:
  - Bays Precinct: Glebe Island and White Bay (75.8 hectares)
  - Marion Street/Walter Street (1.3 hectares)
  - Victoria Road/Terry Street/Wellington Street (Carrier Site, 3.2 hectares)
  - Victoria Road/Robert Street (Former Martin Bright Steel Works Site, 2.2 hectares)
- Recent NSW Government decisions have changed the infrastructure and employment futures of the Inner West subregion and Leichhardt. These include:
  - Callan Park has been returned to Council ownership. The preparation of a masterplan is underway.
  - Cancellation of the CBD Metro project. However, accessibility within the LGA will be improved with the extension of the existing light rail from Lilyfield to Dulwich Hill.

- Uncertainty regarding M4 East Tunnel, proposed to remove freight from city roads, has implications for the ability to improve amenity and accessibility to employment land along key corridors such as Parramatta Road.
- Leichhardt LGA has specialisations in Cultural and Recreational Services; Accommodation, Cafes and Restaurants; and Property and Business Services sectors which should be supported and enhanced through targeted strategies.
- Leichhardt has a large proportion of professionals and managers leaving the LGA to take up employment opportunities not found in the LGA. Strategies to retain these workers should be developed.

# 3 Infrastructure and Assets

There is a diverse range of infrastructure, both hard and soft, which influences the extent to which a place is competitive. Table 4 provides a list of the types of infrastructure within Leichhardt, and this is illustrated in Figure 27.

**Table 4.** Infrastructure and Assets

| Assets | Details |
|---|---|
| **Key visitor attractions and recreation facilities** | • Cafes, pubs and restaurants, along Darling Street in Balmain and along Norton Street in Leichhardt, attract visitors to the local area.<br>• Dawn Fraser Baths<br>• Leichhardt Park Aquatic Centre<br>• The Bay Run is located along part of the LGAs foreshore<br>• Over 70 parks including extensive open space along the foreshore such as Mort Bay Park, Birchgrove Park and Callan Park<br>• Festivals and events include Viva Leichhardt, the Norton Street Festival and Accoustica Music Festival. |
| **Educational Institutions** | • Sydney College of the Arts<br>• Sydney Community College<br>• Sydney University, UTS and TAFE are located outside, but close to the LGA |
| **Health or Medical activities** | • Balmain Hospital - specialises in aged care, rehabilitation and general medicine<br>• RPA Hospital is located in close proximity to Leichhardt LGA |
| **Community Facilities** | • Leichhardt Town Hall<br>• Leichhardt Library Meeting Room<br>• Balmain Town Hall<br>• Balmain Town Hall Meeting Room<br>• Annandale Town Hall<br>• Annandale Neighbourhood Centre<br>• Hannaford Seniors Centre<br>• Clontarf Cottage<br>• Market Place Community Room<br>• Lilyfield Community Centre |
| **Council Libraries** | • Leichhardt Library<br>• Balmain Library |
| **Clubs** | • Tigers' Leagues Club<br>• Balmain Bowling Club |
| **Arterial Road Infrastructure** | • Victoria Road<br>• Parramatta Road<br>• City West Link |
| **Ferries** | • Wharves are located at Balmain East, Balmain, Birchgrove and Balmain West |
| **Light Rail Stations** | • Lilyfield |
| **Bus Routes** | • Strategic Bus Corridors - Parramatta to City via Ryde (Route 10) and Burwood to City (Route 37) |

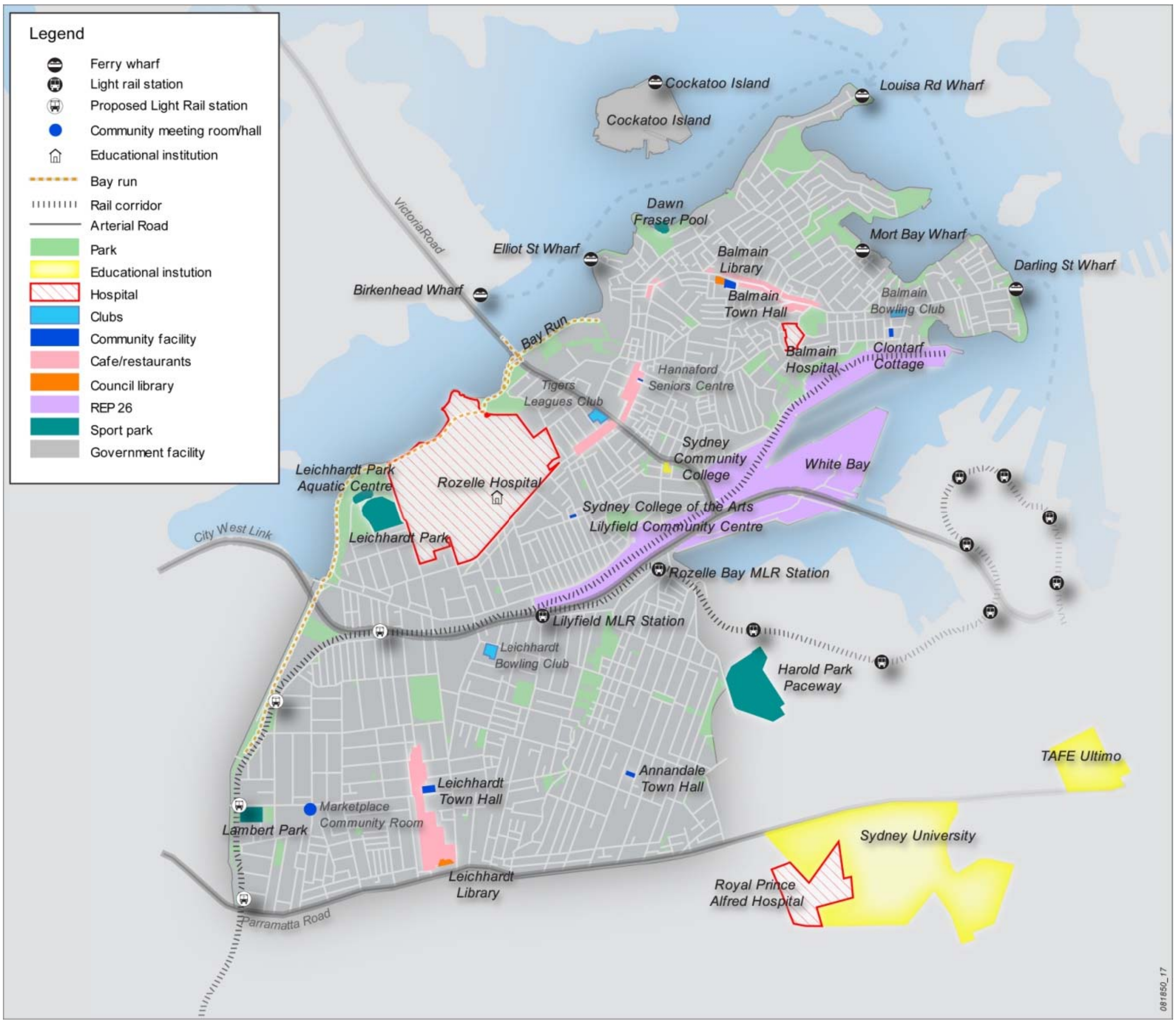
A survey of Leichhardt businesses was distributed by Council (see Appendix 1).

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

Almost half of the businesses surveyed used the M2 freeway to deliver services and supplies and for employee or client travel. The M4 is used by 47 per cent of businesses for employee or client travel and 40% for delivering services and supplies.

**Figure 27.** Infrastructure and Assets in Leichhardt LGA




Source: SGS 2008.

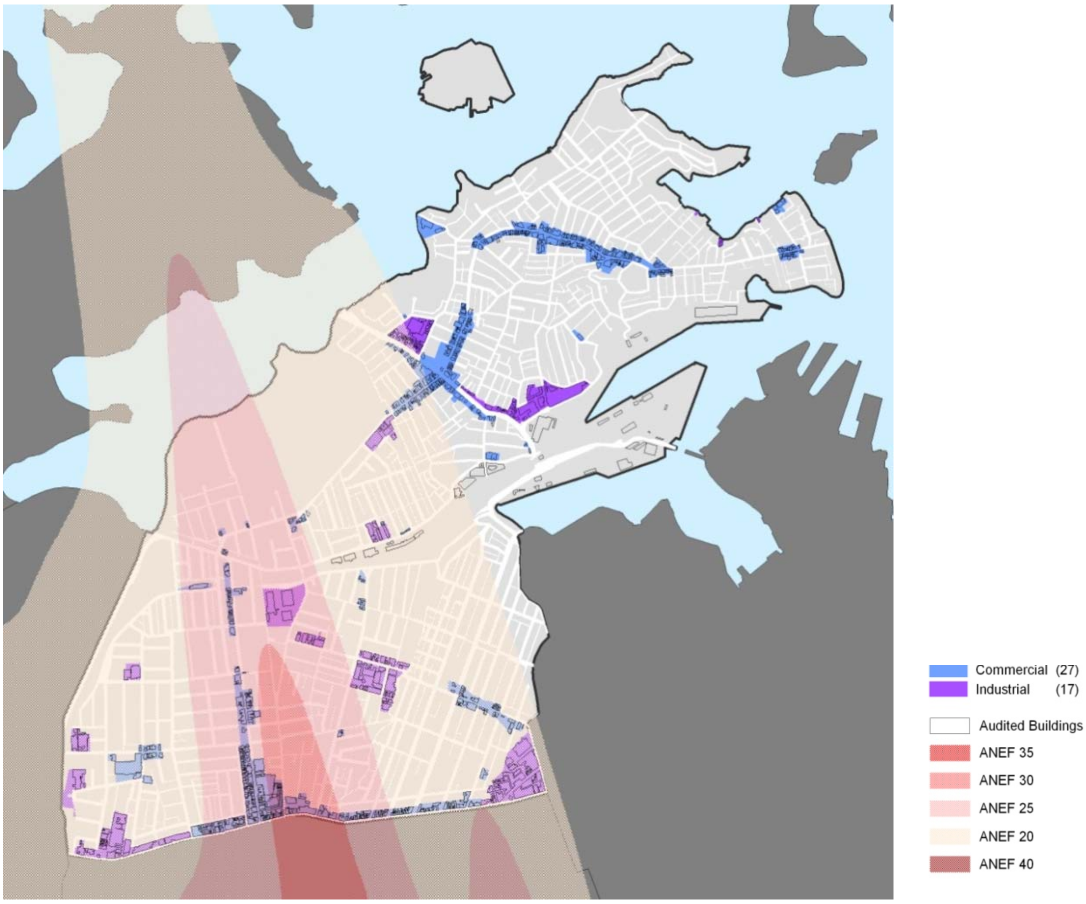
# 4 Development Constraints

The key development constraints in the LGA are development requirements due to high aircraft noise impact and provisions to conserve heritage conservation areas and items. Leichhardt also experiences high traffic volumes on its major arterials such as Parramatta Road, Victoria Road. These issues are discussed in further detail below.

### Aircraft Noise Impacts

Aircraft noise impacts affect most of the southern part of the LGA with the Balmain peninsula being outside areas of high aircraft noise. Higher aircraft noise impact areas affect most of Norton Street and Norton Street North.

**Figure 28.** Aircraft Noise Impact Area Map




Source: SGS 2009

Aircraft noise impacts are identified by Aircraft Noise Exposure Forecast (ANEF) contours that are prepared by the Sydney Airport Corporation Limited (SACL) as part of their masterplanning process. Development guidance is provided through Australian Standard (AS) 2021-2000 - Acoustics - Aircraft Noise Intrusions— Building Siting and Construction.

The Standard guides various environmental planning and building construction sectors as to the location and construction quality of new buildings and on the acoustic adequacy of existing buildings in areas near airports. The Standard indicates that residential development in areas of ANEF 25 contour and higher are considered 'unacceptable' (Table 5).

**Table 5.** ANEF Levels of Acceptability

| Building Type | ANEF zone of site | | |
|---|---|---|---|
| | Acceptable | Conditional | Unacceptable |
| House, home unit, flat, caravan park | Less than 20 ANEF (Note 1) | 20 to 25 ANEF (Note 2) | Greater than 25 ANEF |
| Hotel, motel, hostel | Less than 25 ANEF | 25-30 ANEF | Greater than 30 ANEF |
| School, university | Less than 20 ANEF (Note 1) | 20 to 25 ANEF (Note 2) | Greater than 25 ANEF |
| Hospital, nursing home | Less than 20 ANEF (Note 1) | 20 to 25 ANEF | Greater than 25 ANEF |
| Public building | Less than 20 ANEF (Note 1) | 20 to 30 ANEF | Greater than 30 ANEF |
| Commercial building | Less than 25 ANEF | 25 to 35 ANEF | Greater than 35 ANEF |
| Light industrial | Less than 30 ANEF | 30 to 40 ANEF | Greater than 40 ANEF |
| Other industrial | Acceptable in all ANEF zones | | |

Source: Extract from AS2021-2000

The standards advise that development at the boundary of 25-35 ANEF (and higher) contours should be considered in a similar way. Development in these areas is permissible with 'Council discretion'.

Sydney Airport has recently released a review of its Masterplan. The report indicates that new generation aircraft introduced over the next 20 years will be 'quieter, larger, cleaner and more fuel efficient'[11]. As such the draft plan considers that the 'noise footprint' forecast in 2029 (relative to the existing footprint under the existing Master Plan 03/04) will be reduced. The plan also considers that larger planes will also address the forecast increase in passenger travel to 78.9

[11] Sydney Airport Master Plan 2009: Preliminary Draft, Sydney Airport Corporation Limited, 2004.

million trips by 2029 (up from 29 million passengers in 2004/5)15[12] and movement of freight tonnage to 1,077,000 tonnes (up from 550,000 tonnes in 2004/516)[13].

The Aircraft Noise Exposure Forecast contours have changed based on this assumption. These will need to be reviewed as part of Council's LEP work. This may have positive implications for the centre as areas now under high aircraft noise exposure areas (ANEF) may change. However, the previously described new planes will be more expensive to build and given the impacts of the economic downturn, their widespread use may be delayed. The impacts of aircraft noise may not change for some time.

### Provisions for Conservation of Heritage Value

Leichhardt has significant areas of heritage value and protects these through Heritage Conservation Area designation and the heritage listing of certain properties and spaces in the LEP. Figure 29 shows the LGAs Heritage Conservation Areas, heritage listed items and the LGAs business and industrial employment lands.

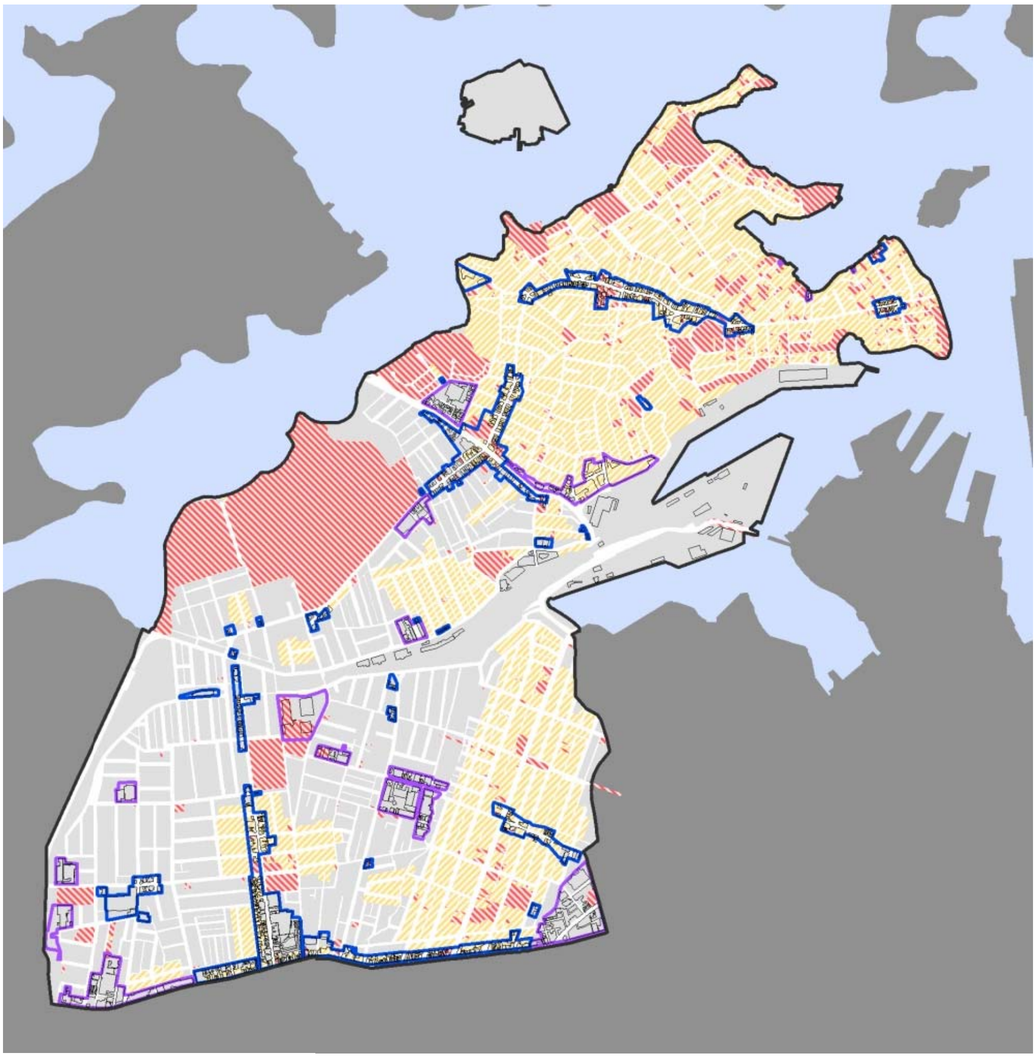
Local planning provisions generally require that heritage value be assessed before any development occurs. For properties within Heritage Conservational Areas, the assessment must be firstly of the contribution the property (or place) makes to the conservation area and the compatibility of the proposed development with the conservation area.

The *Non-Residential Development* Development Control Plan (DCP) states that applicants must present justification that a building should be identified 'contributory' or otherwise in a Heritage Conservation Area. This would include the 'contribution' of a building to a streetscape or area. This justification may be more easily provided by larger developers who can fund the heritage studies required to formulate such a response. This requirement may place a significant financial burden on smaller developers and lead to poor justification for alterations and additions to heritage items.

[12] Sydney Airport Master plan 2003/4. Sydney Airport Corporation Limited, 2008.

[13] ibid

**Figure 29.** Heritage Conservation Areas and Items, Leichhardt LGA



Precincts

- Commercial
- Industrial
- Audited Buildings
- Heritage Items Areas
- Heritage Conservation Areas

Source: SGS 2009

### Transport Corridor Impacts

Detailed transport analysis is outside the scope of this study. However, traffic impacts are a key environmental constraint for employment lands due to:

- The impacts of traffic generating activities on the local street network
- The reduced amenity in high volume traffic corridors such as Parramatta Road and the impacts on land values and business attraction
- Increasing demand for higher quality urban environments for residential development

Traffic impacts are a complex planning issue for Council. The LGA contains areas with traffic volumes above 40,000 AADT[14] particularly on Parramatta Road and Victoria Road. These roads are important regional roads and so decreasing traffic volumes is unlikely to occur. Public transport provision is also limited to bus services which must operate on these busy roads.

The Department of Planning has prepared an interim guideline for development near rail corridors and busy roads. These guidelines seek to distill environmental quality objectives found in various state policies. This work highlights the increasing concern with the impacts of high volume transport corridors and the need for active mitigation of the impacts for sensitive land uses.

[14] AADT. Annual Average Daily Traffic. Complied by the RTA, this data is an average of all traffic movements on a road averaged out over 365 days. 2005 released data used.

# 5 Commercial Centres

This section analyses the LGAs commercial centres. The LGA has considerable retail and commercial floorspace with 267,500 square metres of existing floorspace. This section provides a summary of research findings, opportunities and constraints that were identified and a proposed vision for the future of the commercial centres. It should be noted that housing capacity analysis has not been completed as part of this study. Land audit maps referred to in this section are provided in Appendix 5.

Town Centres are described in the Draft Inner West Subregional Strategy as follows:

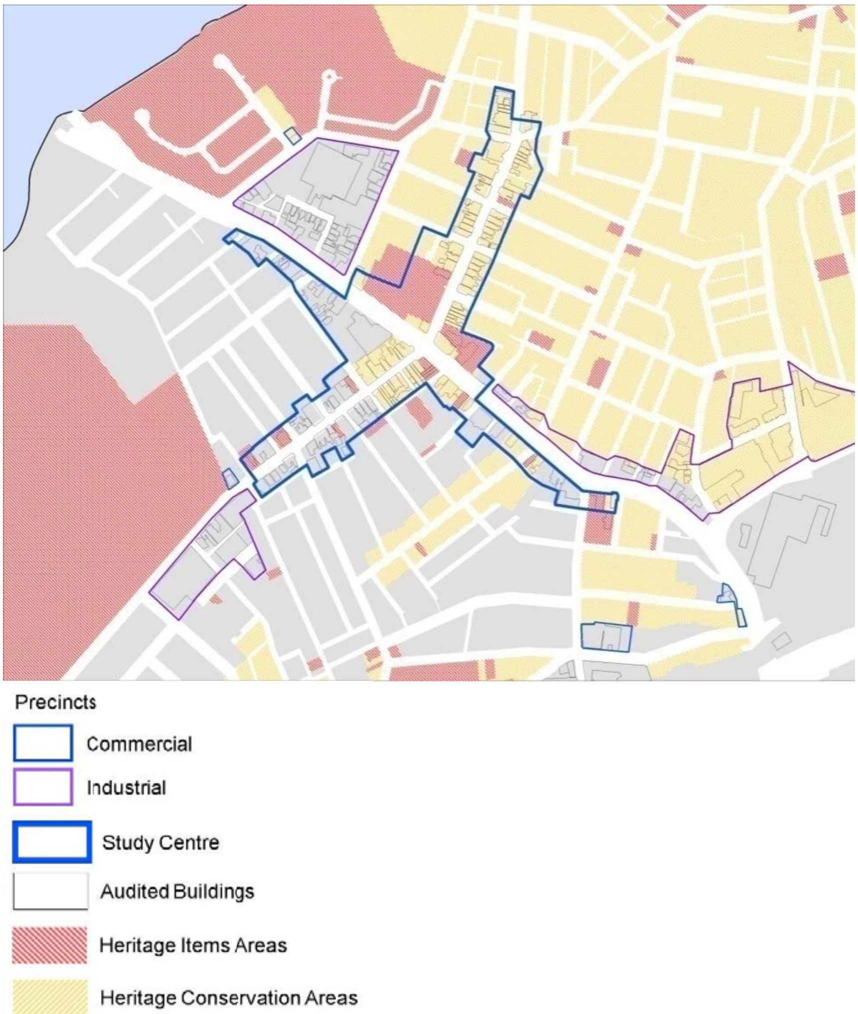
- Large group of more than 50 retail and services with one or two supermarkets, sometimes a small shopping mall.
- Approximate radius 800 metres.
- More a medium or high density residential origin location than employment destination.
- Have some community facilities, specialist medical care, schools and restaurants.
- Typical dwelling range 4,500 to 9,500.
- Medium and high density housing mixed within the commercial centre and within walking distance of shops, services and transport.
- Heavy rail and/or strategic bus and local bus networks and some with ferry services.
- Need to balance parking, service vehicles and through–traffic with making a pleasant residential and pedestrian environment.
- Town square, Main Street, library, sports facilities, reasonable access to parkland.
- Governance body: local government.

Given the outputs of this study, Norton Street and Balmain Centres' town centre status is not challenged. Findings presented in the following sections are the basis from which strategies, objectives and actions have been developed.

## 5.1 Rozelle

Rozelle is focused on properties fronting Darling Street and the southern side of Victoria Road. Victoria Road is an Arterial Road linking the CBD with West and North West.

**Figure 30.** Population Density, 2006




Source: SGS Economics and Planning 2009

Darling Street is the main arterial road through Leichhardt LGA. There are significant traffic volumes along Victoria Road with 78,000 Annual Average Daily Traffic movements recorded at Darling Street/Victoria Road in 2002[15]. Victoria Road provides access to the City West Link. Traffic volumes onto the City West link from Balmain Road/Lilyfield Road were in the order of 62,000 AADT movements in 2002 increasing to 64,000 AADT movements in 2005[16]. Traffic volumes along Balmain Road are smaller with 18,000 AADT movements recorded in 2005[17].

[15] RTA AADT 2002 Data. All trips to and from this intersection averaged out across days each year.

[16] RTA AADT 2002 Data. All trips to and from this intersection averaged out across days each year.

[17] Ibid.

Industrial Precincts on the fringe of the Rozelle commercial lands are the Terry Street, White Bay/Victoria Road and Lilyfield (North) Industrial Precincts. The draft Inner West Subregional Strategy classifies White Bay/Victoria Road and Lilyfield (North) Industrial Precincts as Category 1 Employment Land (to be retained for industrial purposes) and Terry Street as Category 2 Employment land (to be investigated for alternative employment generating uses).

The HCAs take in part of Darling Street south of Victoria Road and some parts of Victoria Road. Heritage items are located in the mainstreet around the intersection of Victoria Road and Darling Street and include Rozelle Public School and various commercial and civic buildings.

Rozelle is not significantly affected by aircraft noise impacts being outside the higher ANEF contours.

In terms of Broad Land Use Category (BLCs), the land audit found the following:

- **Rozelle Precinct.** The precinct is comprised of Retail Mainstreet land uses with older-style buildings on small lots of predominantly two storeys. The lots with frontage to Victoria Road are more varied in land use and include Local Light, Retail Bulky Goods, and Office development. Dwellings around the mainstreets are predominantly older and detached with higher densities located in the vicinity of Iron Cove Bridge.
- **White Bay/Victoria Road Industrial Precinct.** Victoria Road has mixture of Local Light, Freight and Logistics, Retail Bulky Goods and Dispersed activities. Crescent Street and Parsons Street include Office land uses while Roberts Street is comprised of Local Light including creative industries in large-span warehouses. Most of this precinct is within a Heritage Conservation Area.
- **Terry Street Industrial Precinct.** Mostly vacant. The occupied properties contain Local Light Industry, Manufacturing Light and two Office land uses. The largest site within the centre of 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.This 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).
- **Balmain Road Industrial Precinct.** This precinct is has a mixture of Retail Bulky Goods, Office and Freight and Logistics land uses.

The key environmental constraints in the Balmain peninsula are extensive areas of heritage conservation and heritage items (which includes buildings, parks and other heritage spaces). Terry Street precinct and some land west of Victoria Road are not affected by Heritage provisions.

The profile of Rozelle in terms of retail and commerical industry groupings[18] categories is shown in Table 6.

[18] SGS groupings.

## Table 6. Rozelle Activity Profile, 2008

| Rozelle | Floorspace ( square metres) | % of total |
|---|---|---|
| Pubs, Taverns and Bars | 6,524 | 15% |
| Personal and Household Goods | 4,650 | 11% |
| Cafes and Restaurants | 4,195 | 10% |
| Professionals Services | 3,135 | 7% |
| Personal Services | 2,774 | 6% |
| Food Retail | 2,405 | 6% |
| Clothing and Footwear | 2,321 | 5% |
| Recreation retail | 2,230 | 5% |
| Motor Vehicle Retail | 2,165 | 5% |
| Supermarket | 1,608 | 4% |
| Health | 1,470 | 3% |
| Arts and Culture Services | 854 | 2% |
| Finance and Insurance | 745 | 2% |
| Property Services | 595 | 1% |
| Logistics | 406 | 1% |
| Building | 247 | 1% |
| Veterinary | 201 | 0% |
| Building Services | 149 | 0% |
| Accommodation | 135 | 0% |
| Other | 1,091 | 2% |
| Vacant | 5,752 | 13% |
| **TOTALS** | 43,652 | 100% |

Source: SGS 2009

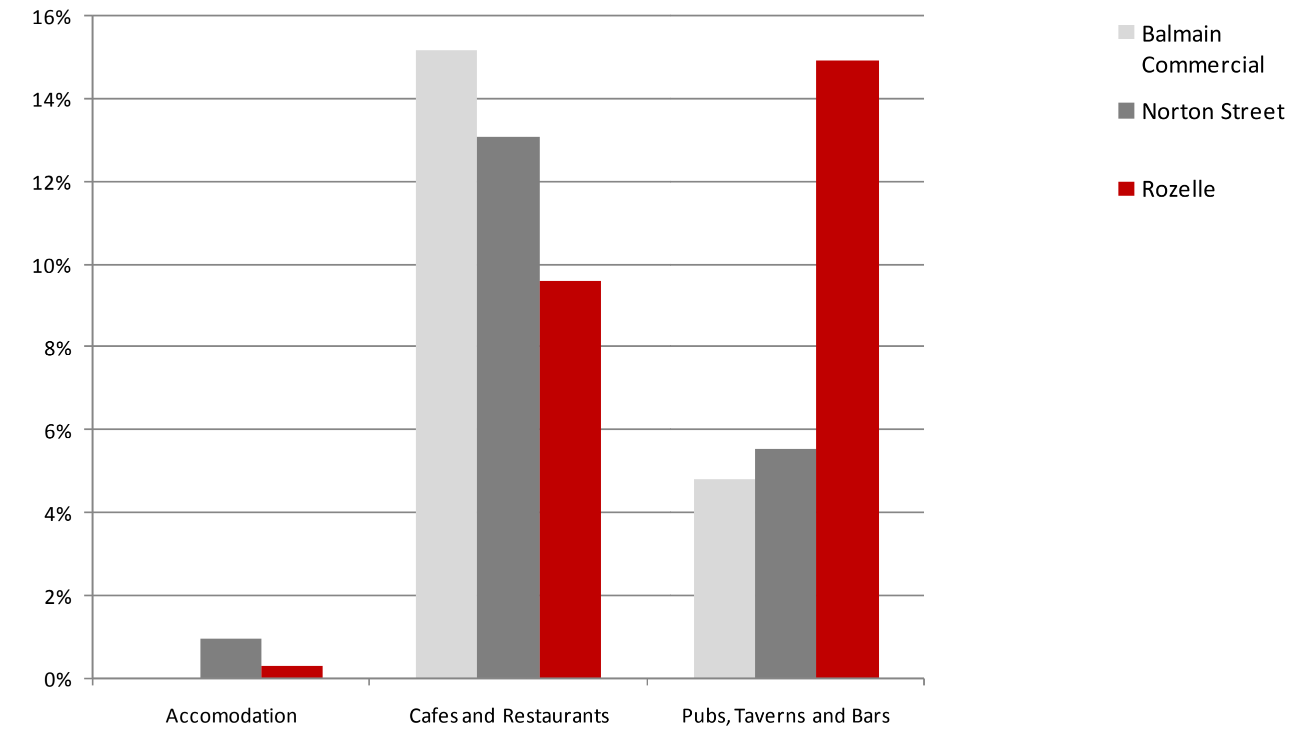
Rozelle has a high proportion of vacant floorspace (vacant space within developed buildings) of 13 per cent and a small share of non-retail and commercial related floorspace (identified as 'Other' in the table). Vacant sites (not included in tabled above) have a total land area of 4,400 square metres and include the 'Carrier Site' (in Terry Street Precinct) and dispersed properties on Darling Street and Victoria Road.

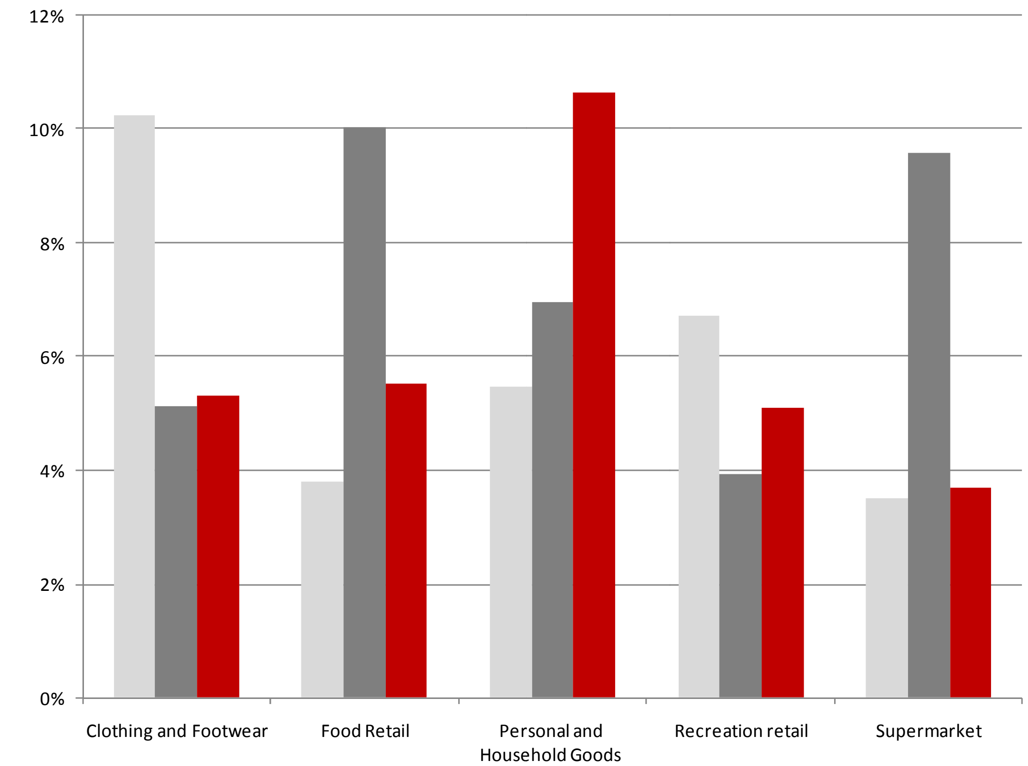
Rozelle has significant food and entertainment floorspace that accounts for 36 per cent of the total floorspace in the centre. Activity areas are:

- Pubs, Taverns and Bars
- Personal and Household Goods
- Cafes and Restaurants

The following charts show Rozelle centre benchmarked against Norton Street and Balmain.

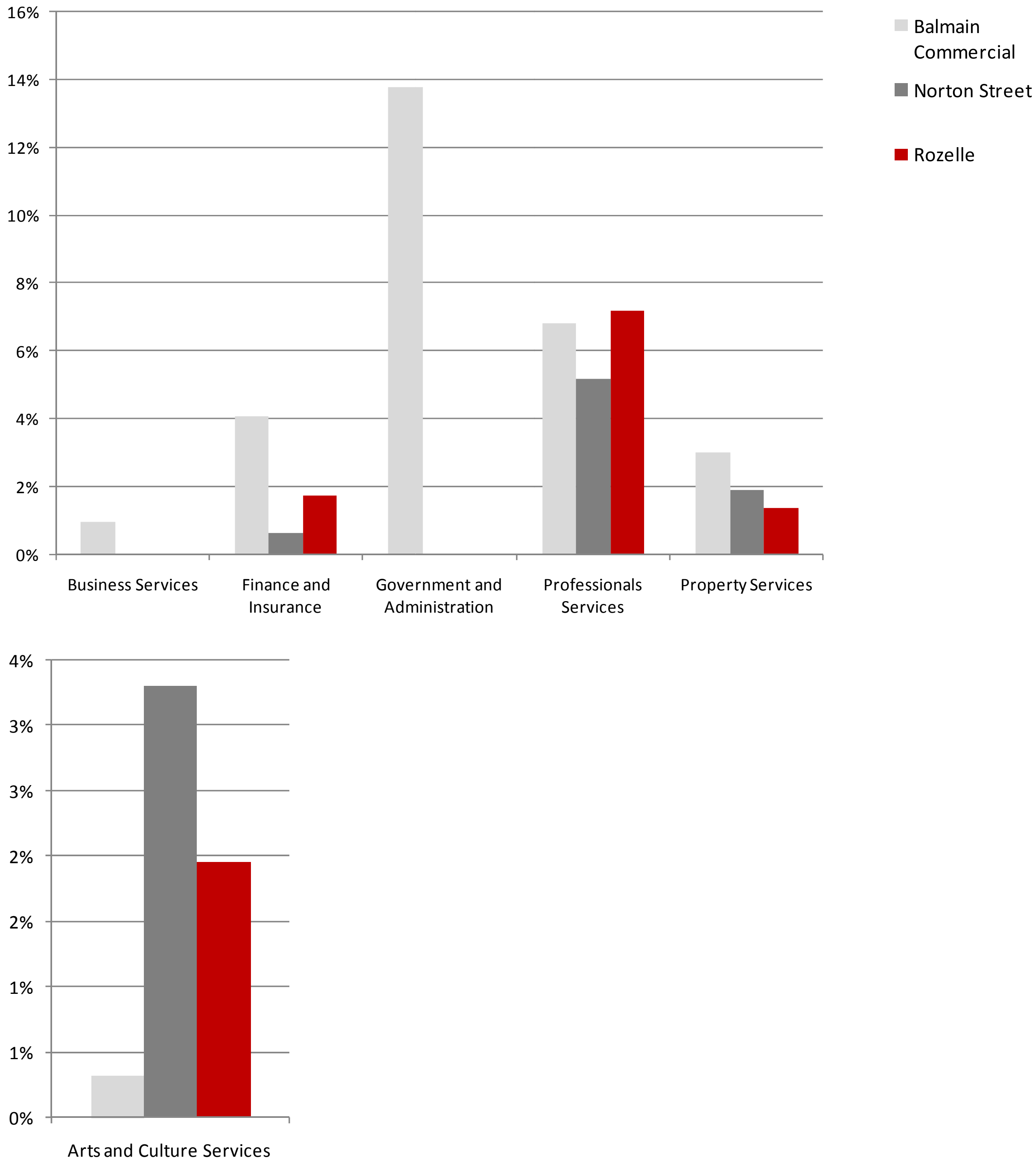
**Figure 31.** Benchmark centres – Balmain, Norton Street, Rozelle




Source: SGS 2009

**Figure 32.** Benchmark centres – Balmain, Norton Street, Rozelle




Source: SGS 2009

In comparison to the benchmark centres in the LGA (Balmain and Norton Street), Rozelle has the following profile:

- Higher proportions of Pubs, Clubs and Taverns floorspace but lower proportions of Cafes and Accomodation floorspace.
- Higher proportions of Professional Services floorspace. However, it has minimal presence of Finance and Insurance, Business Services and Government Administration floorspace.
- Higher proportions of Personal and Household Goods retail than the benchmark centres. It has comparable proportions of Clothing and Footwear Retail and Recreation Retail floorspace with Norton Street centre. It has comparable floorspace with Balmain for supermarket floorspace which both have significantly less supermarket floorspace compared to Norton Street.
- Lower proportion of Arts and Culture floorspace than Norton Street but higher than Balmain. Given the location in proximity to the Sydney College of Fine Arts, this appears low.

The following opportunities and constraints are found for the Rozelle centre:

**Major Sydney Harbour redevelopment site in the LGA but timeframes are uncertain**

NSW Government considers Glebe Island/White Bay appropriate for residential and commercial activity. However, planning is still underway for this location.

**The LGA has a key education institution which could generate economic activity**

Rozelle centre is east of Sydney College of Fine Arts, a faculty of the University of Sydney. However, it has a lower proportion of services to the arts than Norton Street. Associated retail and services should be investigated and strategies developed to attract these land uses to the Rozelle Centre.

**There is a high level of bus service provision but main roads are congested**

Public transport to the Rozelle Centre is provided by various bus services connecting the centre to the following destinations:

- CBD (Route 440, L40) – operates between Rozelle and CBD using Balmain Road, Norton Street and Parramatta Road.
- Haberfield (Route L39) – operates between Rozelle and Haberfield using Marion Street, Norton Street and Balmain Road.
- CBD and Millers Point (Routes 432, 433, and 434) – operate along Glebe Point Road.
- Canterbury and Balmain (Route 445) – operates along New Canterbury Road, Norton Street and Darling Street.
- CBD and West Ryde Station (Route 501) – operate along Victoria Road.

**Minimal business floorspace demand to 2031 under Business as Usual Scenario**

The 'Business as Usual[19]' (BAU) commercial floorspace gap analysis found that there will be minimal additional commercial floorspace required to 2031. This is a function of:

- Growth in retail and business sectors to 2031 (between 30 and 40 per cent) is offset by the decline in sectors such as finance and insurance (40 per cent decline is expected).
- Current development is lower than that permissible under the current controls (0.3:1 average). This is due to the predominantly older, period buildings which are mostly mixed use. These have small shops at street level with residential on the upper floors. In many cases there is also residential to the rear of the shop. These properties often have large yard areas which further cuts down on the shop/office area.

**The night time and cultural economy generates significant activity but also exacerbates parking issues**

Night time economy activities (such as restaurants, cafes, bars) attract a significant share of patrons from outside the LGA. Weekly markets held on the grounds of Rozelle Public School also attract patrons from other parts of Sydney. These are positive attributes of the local economy.

However, given the constrained road network, parking provision can be a significant issue. Parking on Darling Street is metered with an option for 15 minute free parking. Side Streets are generally unmetered. Parking restrictions are strongly enforced in the LGA.

There may be opportunities to improve transport links from areas outside the LGA however, this would require further investigation.

**Commercially zoned land on Victoria Road offers opportunities for support services to the Centre**

The high traffic volumes on Victoria Road make the corridor unattractive to mainstreet retail activites. Darling Street is preferred as higher quality mainstreet in many respects.

**Heritage provisions affect most of the Centre**

Most of the Centre is affected by a heritage conservation area. Council should consider completing a comprehensive heritage study for the centre.The Study would identify contributory buildings to provide certainty to the development community. This would also allow development controls to be developed to reduce the impacts on these identified properties.

[19] Business As Usual – where the current share of land uses do not significantly change.

**Develop economic development strategies to desired businesses**

Rozelle has the potential to accommodate a higher proportion of business services. Target industries within the business services category could be identified through value chain analysis. This should form part of any economic development strategy.

Rozelle has lower proportions of supermarket floorspace compared to Norton Street Centre. Appropriate sites for additional supermarket activity should be investigated given the potential for growth for the Rozelle Centre. Such sites should be located in proximity to public transport and other retail and services.

### Rozelle Centre Vision and Strategies

The future role for Rozelle is as a retail and services centre with expended arts and culture activity. The *night time economy-* activities such as dining, restaurants and bars will also continue to be an important part of the centre's role.

It is envisaged that over time, Rozelle will accommodate a volume of retail and commercial floorspace which is comparable with other town centres in the LGA.

The key strategies to achieve this vision include:

- Maintaining Darling Street as the core mainstreet – this area has lower traffic volumes than Victoria Road, though still high, and has a highly valued pedestrian-scale mainstreet.
- Preserving the intersection of Victoria Road and Rozelle for Centre Core activity
- Enhance and increase the links between the COFA facility and business activity (such as support services to the Arts).
- Enhance the existing night time economy activities. Utilising main street lands in highly affected areas as support land for the Rozelle centre (Victoria Road)
- Reviewing transport management in the centre
- Improving local traffic management and investigating parking demand issues.
- Explore opportunities for residential intensification which considers the impacts of traffic and aircraft noise on residential amenity and heritage values.

A Village designation is considered appropriate for Rozelle centre. This reflects the desired future role and function of the centre.

## 5.2 Norton Street

Norton Street plays a vital role in the LGAs economy. It is recognised in the Inner West Subregional Strategy as a Town Centre. The character varies along street, with the sites between Marion Street and Parramatta Road being a mixture of older-style commercial building, and new commercial built form including two malls (Norton Street Plaza and the Forum). Residential development is in the form of single detached dwellings with some mixed use residential.

**Figure 33.** Norton Street


Source: SGS Economics and Planning 2009

The area between Marion Street and Leichhardt has older–style commercial shopfronts with some modern redevelopments of the same scale. The intersection of Marion Street and Norton Street operates through the civic hub with the Town Hall building, Leichhardt Public School and All Souls Church. Leichhardt Council is located near this intersection, off Wetherill Street. Access to the rear of the Norton Street shops is limited to laneway access along Renwick Street and a few driveways off Norton Street.

Commercial land on Parramatta Road has been split into precincts east and west of Norton Street. These precincts have a distinctly different character to Norton Street as they are located on a Regional Road with high traffic volumes. These precincts are identified in detail in Section 6.1.

The land immediately east of Norton Street is affected by high aircraft noise. This area takes in the rear of The Forum development and mainstreet properties on Parramatta Road (approximately between Balmain Road and Macquarie Street).

Heritage provisions affect parts of the Norton Street Precinct in different ways. Norton Street (North) is almost completely within a Heritage Conservation Area (except for some mainstreet properties south of Macauley Street). This has allowed a comprehensive approach to the preservation of heritage value. However, there are some recent redevelopments which do not retain the streetscape built form, including 172 Norton Street, which includes a balcony over the footpath.

Norton Street (South) has some areas within a heritage conservation area. These are predominantly on the western side of Norton Street. These include mainstreet properties between Cary Street and Marion Street, a group of lots across from Norton Street Plaza and all residential properties with frontage to Renwick Street. The commercial properties on Parramatta Road near Norton Street are also located within a Heritage Conservation Area.

The streetscape in Norton Street (South) varies considerably, with older one and two storey commercial buildings and later redevelopments. More recent redevelopments include the Norton Street Plaza, Palace Cinema, Berkolouw Bookstore and the high density mixed-use 'The Forum' development.

In terms of BLCs, the precinct profiles are as follows:

- Norton Street (South) - Between Marion Street and Parramatta Road. Predominantly Retail Mainstreet (comprised of fashion, arts and culture retail) and Dispersed land uses (comprised of health and health related consultancies). Some office land uses.
- Norton Street (North) - North of Marion Street to Leichhardt Park. Completely Retail Mainstreet land uses comprised of restaurants, cafes, bars and some fashion and culture retail.
- Parramatta Road - (in vicinity of Norton Street between Renwick Street and Balmain Road). Retail Mainstreet land uses comprised of restaurants, fashion and speciality retail (wedding gowns, adult shops). Some vacant shops in this area.

The profile of Norton Street in terms of retail and commercial industry groupings[20] categories is shown below.

Norton Street has approximately 85,000 square metres of activity floorspace with a relatively low proportion of vacant floorspace (within developed buildings) but a high share of 'Other' floorspace (comprised of residential and religious organisations floorspace). Vacant sites (not included in table above) have a total land area of 2,500 square metres and is comprised of dispersed properties in the southern part of the Centre and Parramatta Road. The activity share shows that Norton Street has high share of food related retail, personal and household retail and health related floorspace that comprises 46 per cent of the total floorspace in the centre. Activity areas are:

- Cafes and Restaurants
- Food Retail
- Supermarket
- Personal and Household Goods

[20] SGS groupings.

- Health

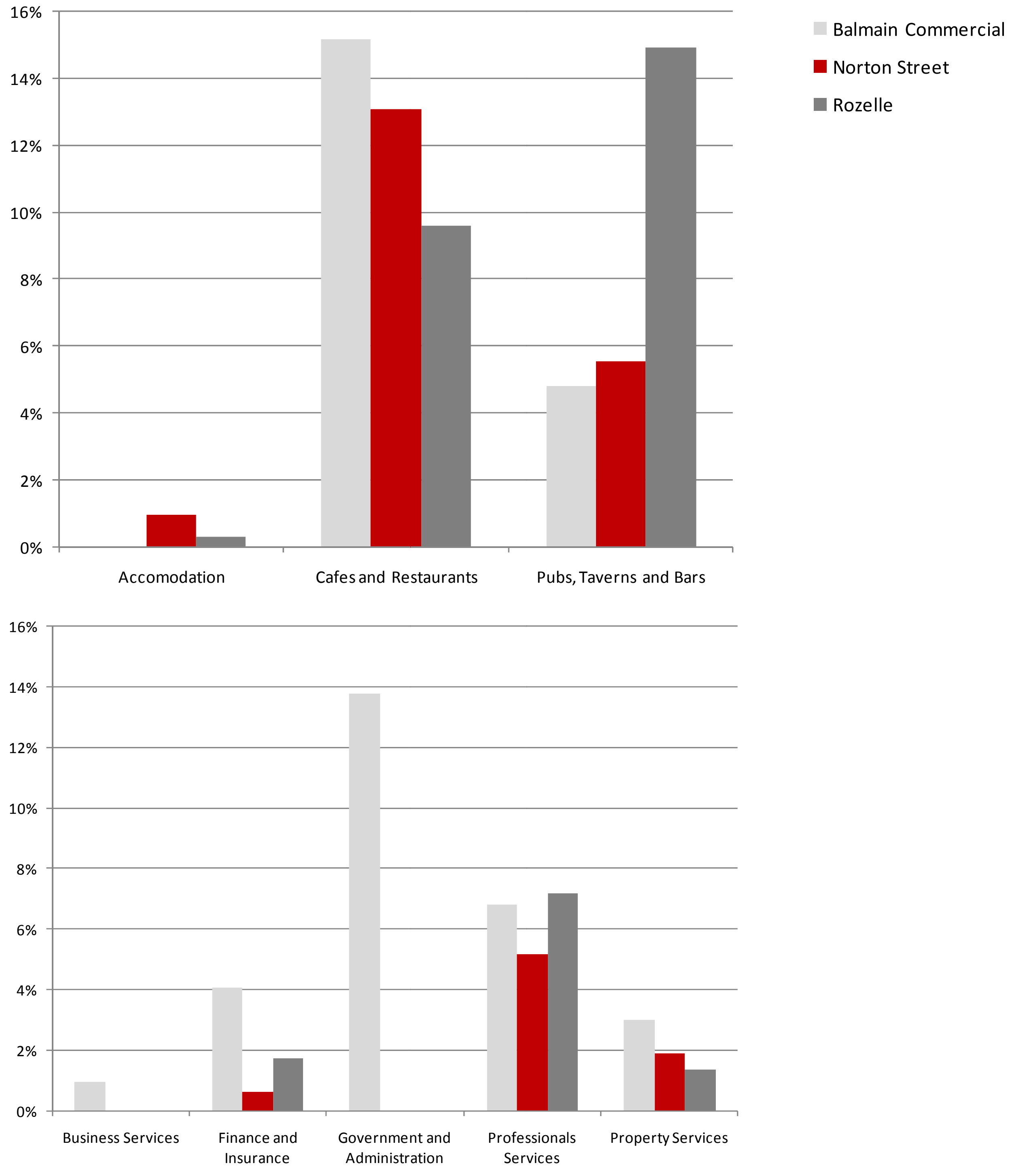
The following charts compare floorspace in the centre Norton Street centre with Rozelle and Balmain centres.

**Table 7.** Norton Street Activity Profile, 2008

| Norton Street Activity | Floorspace ( square metres) | % of total |
|---|---|---|
| Cafes and Restaurants | 11,104 | 13% |
| Food Retail | 8,513 | 10% |
| Supermarket | 8,128 | 10% |
| Personal and Household Goods | 5,902 | 7% |
| Health | 5,001 | 6% |
| Pubs, Taverns and Bars | 4,714 | 6% |
| Professionals Services | 4,401 | 5% |
| Clothing and Footwear | 4,347 | 5% |
| Personal Services | 4,234 | 5% |
| Recreation retail | 3,339 | 4% |
| Arts and Culture Services | 2,801 | 3% |
| Community Services | 2,065 | 2% |
| Property Services | 1,600 | 2% |
| Accommodation | 850 | 1% |
| Finance and Insurance | 527 | 1% |
| Other | 10,971 | 13% |
| Vacant | 6,336 | 7% |
| TOTALS | 84,832 | 100% |

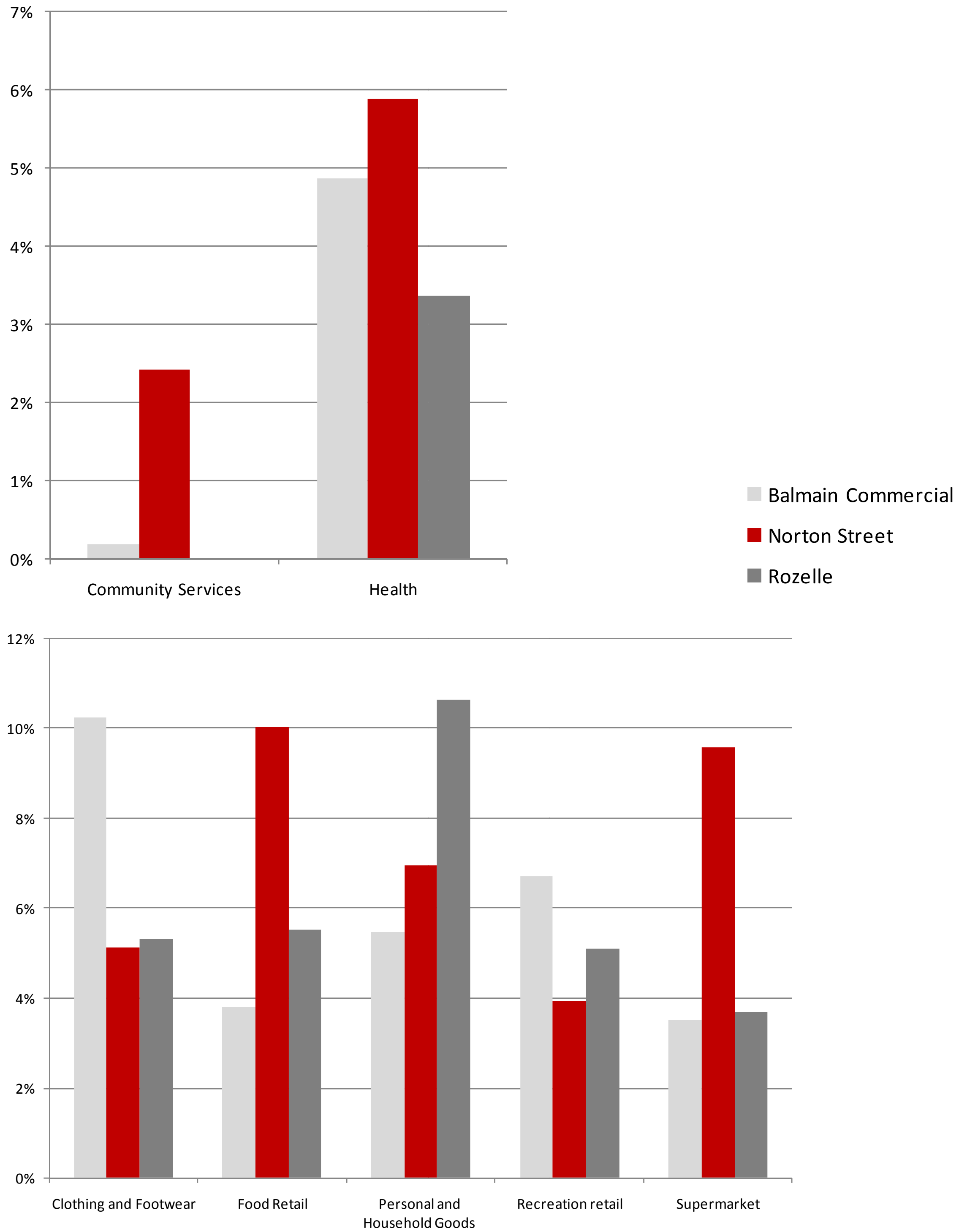
Source: SGS 2009

Figure 34. Benchmark centres – Balmain, Norton Street, Rozelle



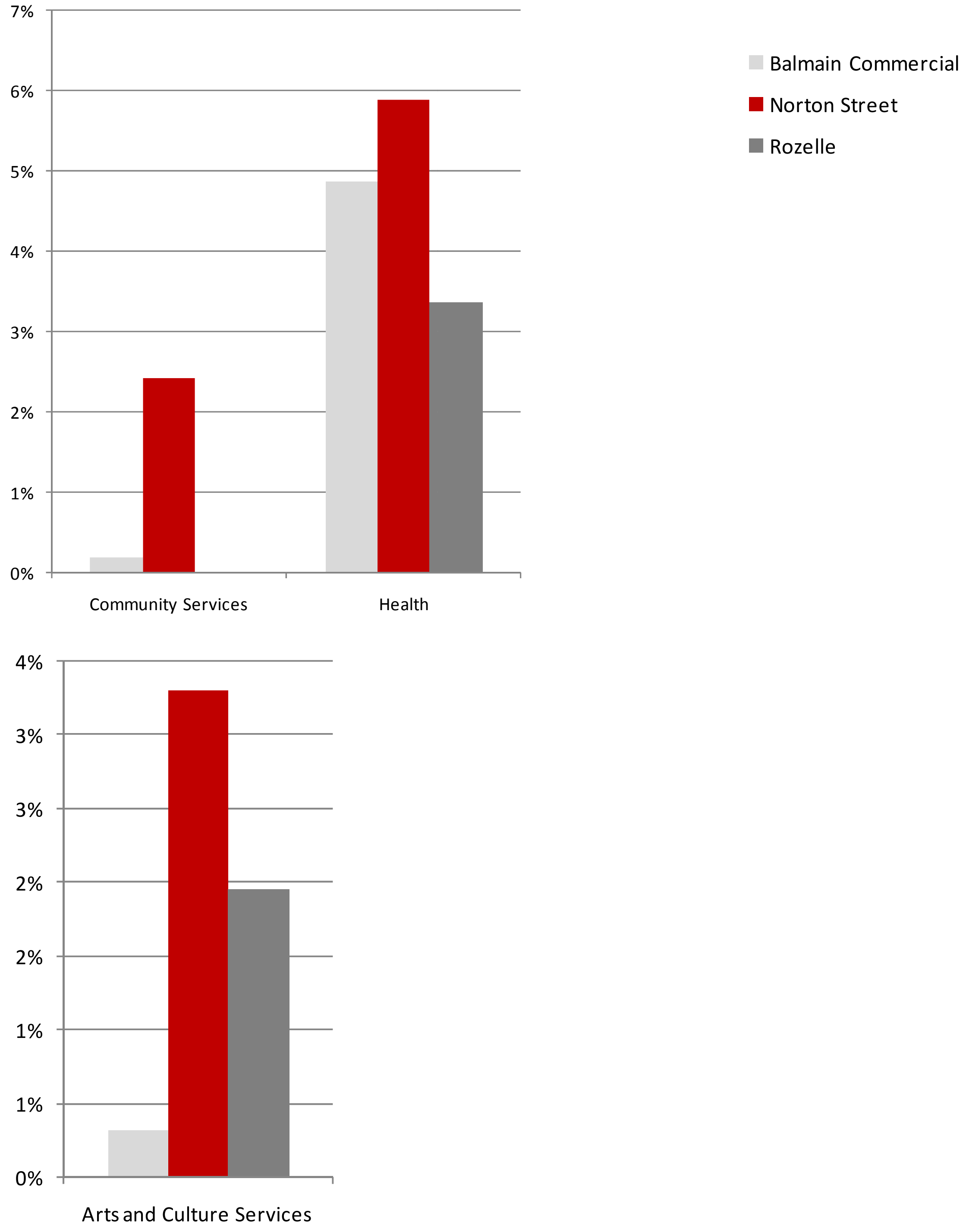

Source: SGS 2009.

Figure 35. Benchmark centres – Balmain, Norton Street, Rozelle




Source: SGS 2009.

Figure 36. Benchmark centres – Balmain, Norton Street, Rozelle




Source: SGS 2009.

The benchmarking finds that Norton Street performs as follows:

- Norton Street has higher proportions of Accommodation, Cafes and Restaurants and Pubs, Taverns and Bars than Rozelle and Balmain have smaller total floorspace values (52,000 square metres and 44,000 square metres) .
- Higher proportions of Accomodation floorspace than Rozelle and Balmain. It has comparable proportions of Cafes and Restaurant floorspace with the benchmark centres. It also has lower proportions of Pubs, Taverns and Bars compared to Rozelle but comparable to Balmain centre.
- Slightly lower proportion of Professional Services, and Property Services floorspace than the benchmark centres. It also has substantially lower proportions of Finance Services and no representation of Government and Administration and Business Services. These are areas which can be explored for increased activity augmentation given that they are growth areas in the employment projections for the LGA.
- Highest proportion of Arts and Culture floorspace in the LGA.
- Significantly higher proportions of Food Retail and Supermarket floorspace. It has comparable proportions of Clothing and Footwear and Recreation Retail but a lower proportions of Personal and Household Goods Retail when compared with the Rozelle centre.
- Significantly higher proportions of Community Services and Health floorspace, than the benchmark centres with Rozelle having no community services floorspace.

### Opportunities and Constraints

#### High level of bus service provision but main roads are congested

Public transport to Norton Street is provided by various bus services. Norton Street (South) is served by the following bus routes which connect this part of the centre to:

- CBD (Routes L40, 440, 436,437,438)
- Rozelle (Routes L40,440)
- Balmain (Route 445)
- Canterbury (Route 445)
- Centres in the adjoining Canada Bay LGA of Five Dock, Chiswick and Abbotsford (Routes 436,437,438)

Norton Street (North) is connected to the following centres:

- Rozelle (Routes L40,440)
- Balmain (Route 445)
- Canterbury (Route 445)
- Railway Square and Coogee (Route 370)

Most buses operate along Parramatta Road. This road is a heavily congested with 67,000 Annual Average Traffic Vehicle (AADT) movements at the intersection of Parramatta Road and Norton Street[21].

[21] RTA AADT 2005 Data. All trips to and from this intersection averaged out across days each year.

**Heritage provisions which vary across the Centre**

Norton Street (North) is the traditional mainstreet area and this is reflected in the predominately period buildings

Norton Street (South) has a more inconsistent streetscape . Inconsistent application of heritage protection has created some impacts on heritage items such as bulk and scale impacts. This is especially the case for large new developments adjacent to one and two storey heritage items. Signage is also an issue. Some heritage items are being hidden behind excessive signage.

Council should investigate a heritage study which designates buildings as 'contributory' to provide certainty to the development community. This would also allow development controls to reduce the impacts on these identified properties.

**Significant traffic impacts on Norton Street**

There are significant traffic volumes along Norton Street with approximately 28,000 Annual Average Traffic Vehicle (AADT) movements at the intersection of Norton Street and Marion Street[22].

Most of the traffic impacts appear to occur on the Norton Street (South) part of the Centre with no less than seven bus routes using Norton Street. On-street parking is limited and metered with some private parking provided by the plaza developments of Norton Street Plaza and The Forum.

Investigation of measures to address parking demand should be undertaken at the LGA level with particular emphasis on parking issues in Norton Street and other large commercial centres.

**Robust night time economy generates significant activity**

Night time economy activities (such as restaurants, cafes, bars) and entertainment attractions such as the Palace Cinema attract a significant number of patrons from the metropolitan area. This has been reflected in State Policy which identifies Norton Street as a 'Metropolitan Attractor'. However, given the constrained road network, parking provision is a significant issue.

Parking on Norton Street is metered with private parking provided by the Norton Plaza and Forum establishments. Parking restrictions are strongly enforced in the LGA. There may be opportunities to improve transport links from areas outside the LGA however there would require further investigation.

[22] AADT. Annual Average Daily Traffic. Complied by the RTA, this data is an average of all traffic movements on a road averaged out over 365 days. 2005 released data used.

**High quality public domain features on the main street should be extended and the gateway improved**

There have been considerable public domain works which provide high quality streetscape features in Norton Street (North) including street plantings and railings around crossings and some outdoor dining areas. These reflect the historical associations with the Italian community using the Italian playing card images on tiles in the centre of railing structures.

These features should be extended to Norton Street (South) which has a more inconsistent public domain streetscape with some features provided as part of major redevelopments such as the Norton Street Plaza and Berkolouw Bookstore areas.

The gateway to the Centre at Parramatta Road and Norton Street should also be improved. Opportunities exist for appropriate mixed used redevelopment taking into account the heritage values and aircraft noise considerations.

**Develop economic development strategies to attract desired businesses**

Norton Street has the potential to accommodate a higher proportion of business services. Target industries  within the business services category could be identified through value chain analysis. This should form part of any economic development strategy.

### Norton Street Centre Vision

Norton Street should continue to be the primary retail, services and entertainment centre of the LGA. The centre character of the different precincts should be preserved and enhanced.  In this study, the particular characteristics of the main street to the north and south of Marion Street are recognised as:

- Norton Street (South) has allowed newer development forms and design and as such has a mixed streetscape with heritage and non-heritage built forms
- Norton Street (North) is the traditional mainstreet area due to its economic function and heritage status.

Strategies to achieve this vision  include:

- Preserving the character of the traditional main street area in Norton Street (North)
- Allowing modern development forms in Norton Street (South) and improving pedestrian amenity
- Increasing office floorspace - The centre has limited office floorspace and increasing this provision could assist in attracting other services to the Centre.
- Increasing supermarket floorspace in Norton Street (North) – there is potential for a small supermarket with a shop front presence to the street in Norton Street (North) to service this part of the Centre.
- Improving local traffic management and investigating parking demand issues.
- Explore opportunities for residential intensification which considers the impacts traffic and aircraft noise on residential amenity.

A Town Centre designation is considered appropriate for this centre as it reflects the desired future role.

## 5.3 Balmain

Balmain Centre is located on Darling Street which follows the ridgeline towards Mort Bay. The mainstreet is comprised of retail and commercial properties on Darling Street between Elliot Street and Ann Street and measures approximately 1 km. The centre is located north of Rozelle. While the mainstreet area is extensive, there is low dwelling density in this centre.

**Figure 37.** Balmain


Source: SGS Economics and Planning 2009

The centre is within a Heritage Conservation Area. There are heritage items located on the main street including civic buildings such as the Town Hall and local Churches. The street has retained most of the features of the original commercial buildings with some newer redevelopment of shopfronts.

The land audit found the following broad land uses occurring in the precinct. Land uses on the mainstreet are predominantly retail businesses with some limited office development.

The profile of Balmain Centre in terms of retail and commercial industry groupings[23] categories is shown in Table 8.

**Table 8.** Balmain Activity Profile, 2008

| Balmain Commercial Activity | Floorspace ( square metres) | % of total |
|---|---|---|
| Cafes and Restaurants | 7,888 | 15% |
| Government and Administration | 7,170 | 14% |
| Clothing and Footwear | 5,325 | 10% |
| Personal Services | 4,154 | 8% |
| Professionals Services | 3,532 | 7% |
| Recreation retail | 3,493 | 7% |
| Personal and Household Goods | 2,847 | 5% |
| Health | 2,531 | 5% |
| Pubs, Taverns and Bars | 2,505 | 5% |
| Finance and Insurance | 2,115 | 4% |
| Food Retail | 1,975 | 4% |
| Supermarket | 1,823 | 4% |
| Property Services | 1,557 | 3% |
| Business Services | 482 | 1% |
| Motor Vehicle Retail | 313 | 1% |
| Building | 294 | 1% |
| Arts and Culture Services | 166 | 0% |
| Veterinary | 146 | 0% |
| Community Services | 101 | 0% |
| Other | 2,108 | 4% |
| Vacant | 1,452 | 3% |
| **TOTALS** | **51,976** | **100%** |

Source: SGS 2009

Balmain has 52,000 square metres of exitsing floorspace. Balmain centre has a relatively low proportion of vacant floorspace (within developed buildings) and 'Other' floorspace (comprised of construction sites and services to transport floorspace). Vacant sites (not included in tabled above) have a total land area of 3,500 square metres and is comprised of a few vacant properties on Darling Street.

The activity share shows that Balmain has high share of food related retail, personal and household retail and health related floorspace that comprises 54 per cent of the total floorspace in the centre. Activity areas are:

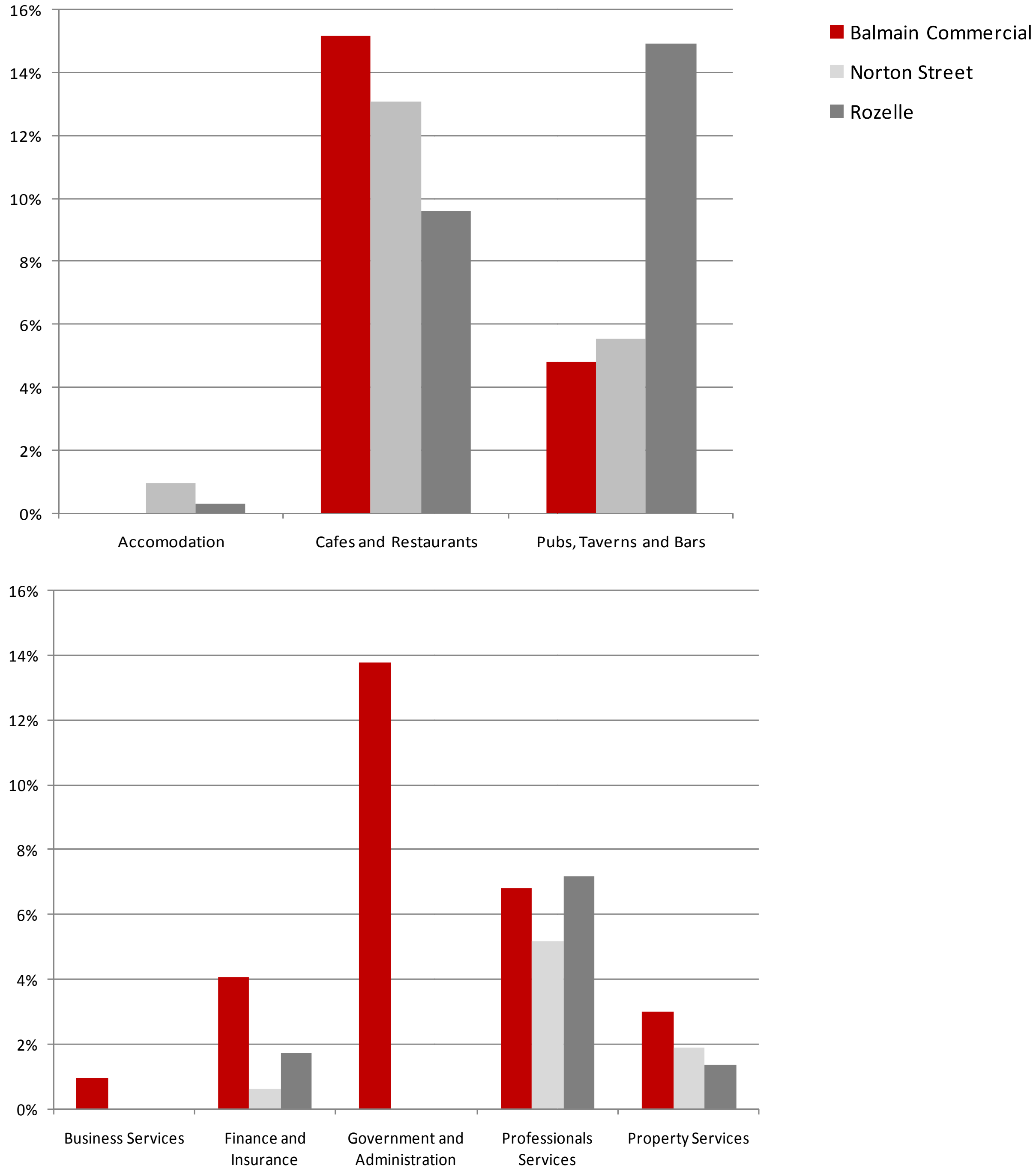
[23] SGS groupings.

- Cafes and Restaurants
- Government and Administration (Council Offices)
- Clothing and Footwear
- Personal Services
- Professionals Services

The Balmain centre activity was benchmarked against the Rozelle and Norton Street centres (Figure 38). The benchmarking finds that Balmain has the following profile compared to the benchmark centres:

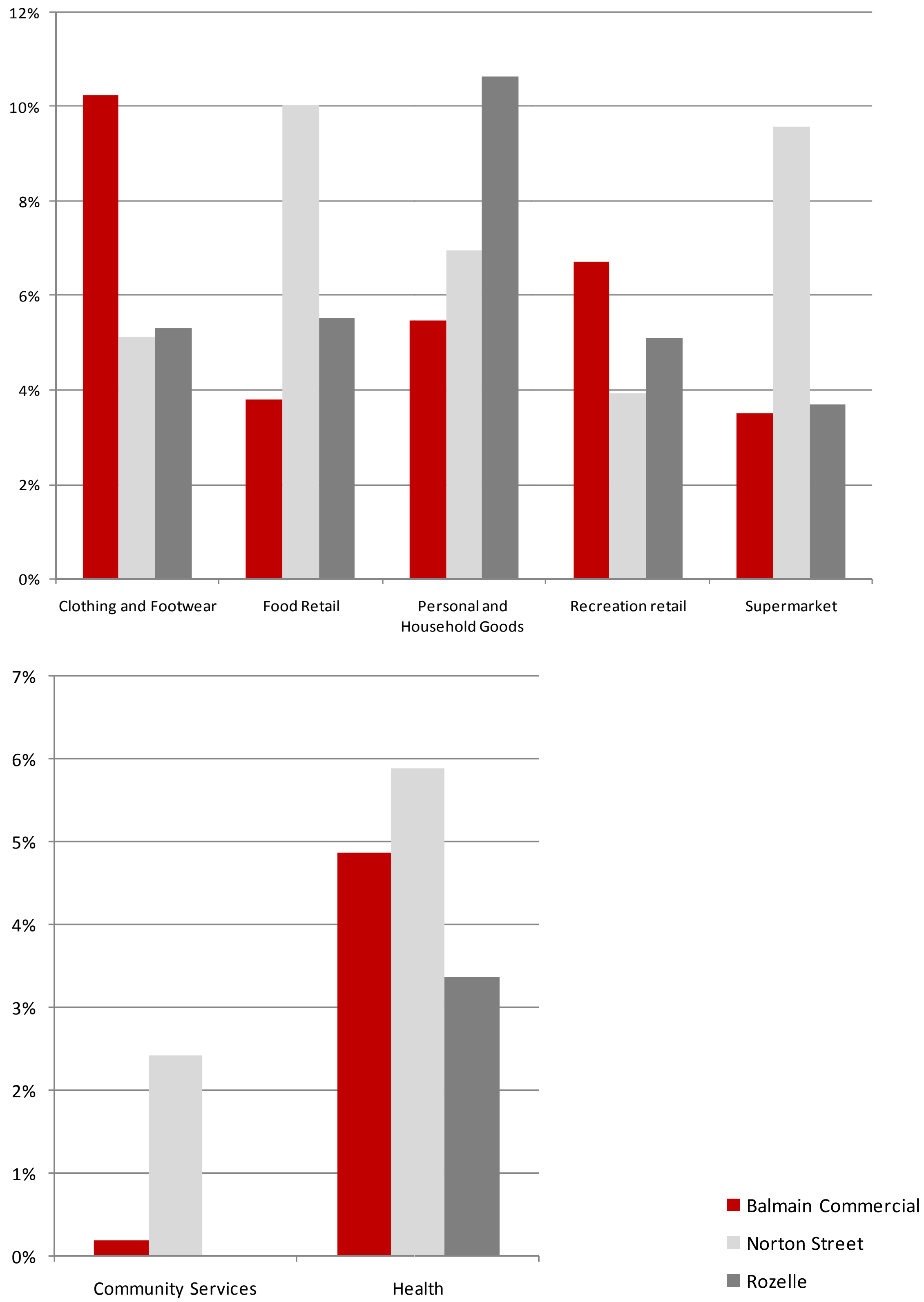
- Higher proportions of Cafes and Restaurant floorspace than the benchmark centres but less floorspace for Pubs, Taverns and Bars. Accommodation floorspace was not recorded in the Balmain centre.
- Significantly higher proportion of Finance and Insurance and Property Services than the benchmark centres. It is the only centre with recorded Government and Administration floorspace (due to the location of the Council Offices in the mainstreet) and Business Services floorspace.
- Higher proportion of Clothing and Footwear retail and recreation retail compared to the benchmark centres. It has a comparably lower proportion of supermarket floorspace with Rozelle centre and lower proportion of personal and household good retailing compared to the benchmark centres.
- Higher proportion of health related floorspace than Rozelle centre but lower than Norton Street. It also has minimal community services floorspace.
- Lowest proportion of Arts and Culture floorspace in the LGA.

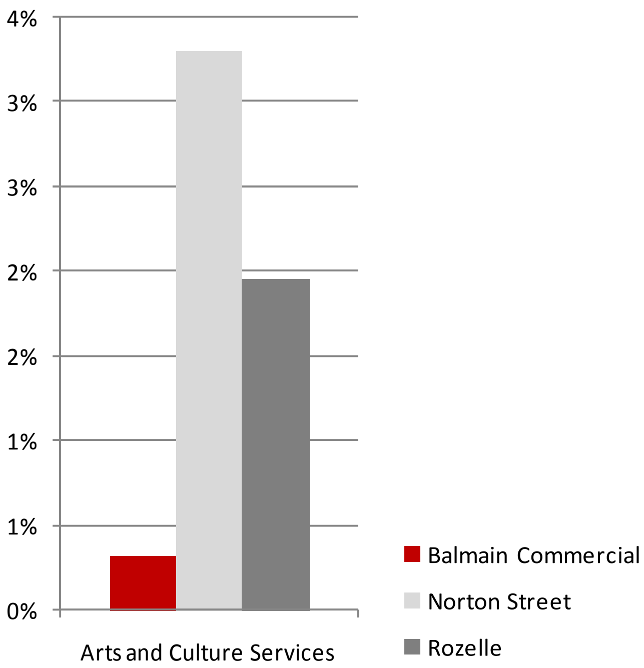
**Figure 38.** Benchmark centres – Balmain, Norton Street, Rozelle




Source: SGS 2009

**Figure 39.** Benchmark centres – Balmain, Norton Street, Rozelle






Source: SGS 2009

### Opportunities and Constraints

**Limited bus service provision and congested roads**

Public transport to the Balmain Centre is limited to three bus services which connect the centre to:

- CBD and Millers Point (Routes 433 and 434) – operates along Glebe Point Road.
- Canterbury (Route 445) – operates along Parramatta Road, Norton Street and Darling Street.

**Night time and culture economy that generates significant activity**

Weekly markets held on the ground of St Andrews Church (on the south part of the mainstreet) also attract patrons from other parts of Sydney. These are positive attributes of the local economy. The night time economy and associated activities including restaurants, cafes and bars. It also attracts a high share of patrons from outside the LGA.

However, given the constrained road network, parking provision is a significant issue. Parking on Balmain Road is metered with an option for 15 minute free parking. Side Streets are generally unmetered and allow up to 2 hours parking. Private parking is provided in the Woolworth's car park. Parking restrictions are strongly enforced in the LGA.

There may be opportunities to improve transport links from areas outside the LGA however this would require further investigation.

**High quality public domain with high heritage value**

Balmain has a superior amenity due to the consistent, and well-maintained, heritage character of the mainstreet. The mainstreet and the surrounding residential area is comprehensively preserved, being located within a Heritage Conservation Area. The built form is predominately two storey. Most restaurants have outdoor dining areas attached.

Council should investigate a heritage study that designates buildings as 'contributory' to provide certainty to the development community. This would also allow development of controls to reduce the impacts on identified properties.

### Balmain Centre Vision and Strategies

Balmain centre should strengthen maintain its role as a local retail and services centre with high quality specialist food, dining and night time economy activities. A consistent heritage streetscape and high quality pedestrian amenity should be preserved. These attributes attract patrons from a wider area stimulating the local economy.

Strategies to achieve this vision are:

- Preserving the traditional character of the main street area through appropriate development provisions and heritage protection.
- Increasing office floorspace - The centre has limited office floorspace and slightly increasing this provision could assist providing floorspace for the office-based growth sectors.
- Improving local traffic management and investigating parking demand issues.

A Town Centre designation is considered appropriate for this centre given its size. However, this should be revised when a housing strategy is completed to assess the capacity of the centre to accommodate residential densities which reflect a town centre status. There may be limited opportunities for significant residential intensification.

## 5.4 Villages

The villages are smaller centres which provide some basic retail and services to a walking distance catchment. The DoP describes Villages as having the following essential criteria:

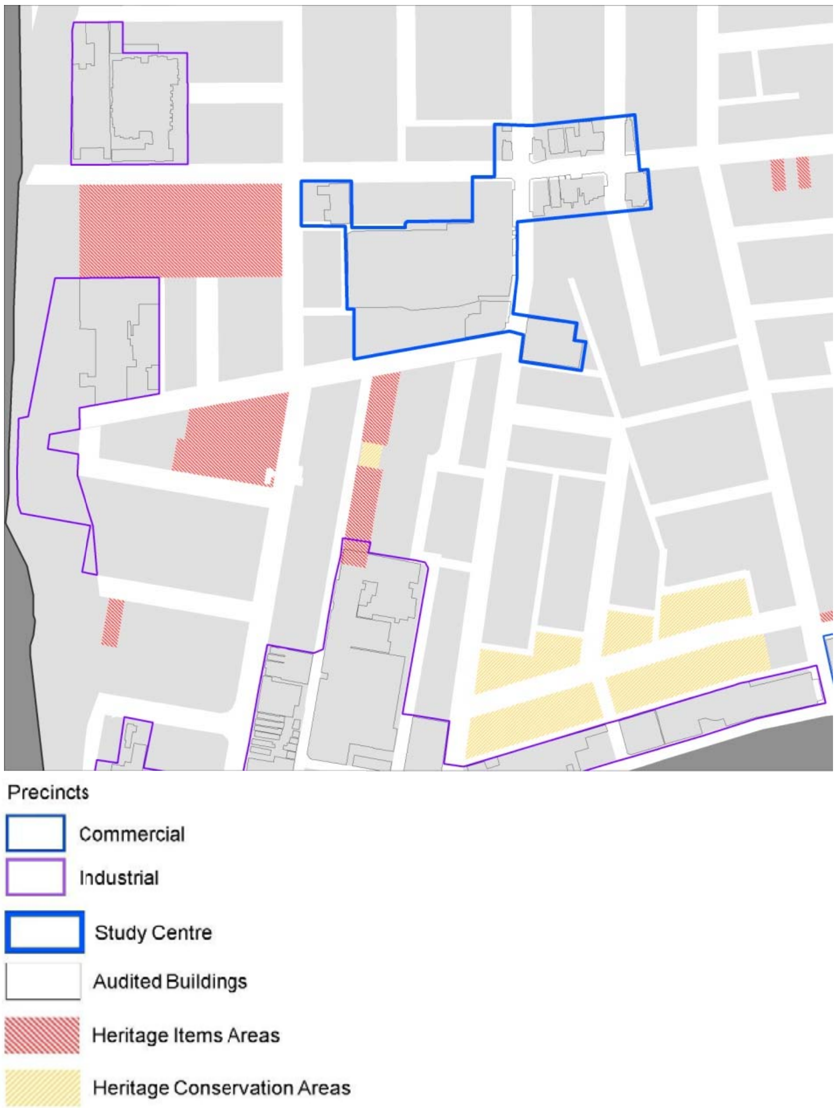
- 10 to 50 retail spaces.
- May include a butcher, bank, hairdresser, café, restaurants and take–away food and a supermarket.
- Child care centres, schools and other compatible activities in the immediate vicinity.
- Approximate radius 600 metres.
- Strip of shops and residential area within a five to 10 minute walk serving daily shopping needs.
- Typical dwelling range 2,100 to 5,500.
- Medium density housing in and around the main street.

- Strategic bus, local bus and sometimes ferry services.
- Villages need to develop an enjoyable public environment with a mix of uses and good physical links with the surrounding neighbourhood.
- Villages need to manage air quality and amenity by locating a block away from very busy roads/ enterprise corridors.
- Access to a local park, may have a market which shares space in school grounds out of school hours.
- Governance body: local government.

While the Villages meet most of the criteria related to the number of retail establishments and transport, most of Leichhardt's Villages do not have significant medium density housing in and around the centres. This can be addressed in housing studies to assess the capacity for additional housing.

### Leichhardt Market Place[24]

Figure 40. Leichardt Market Place




Source: SGS Economics and Planning 2009

Leichhardt Market Place centre is comprised of the MarketPlace shopping centre and retail businesses fronting Marion Street, Flood Street and Lord Road. MarketPlace Leichhardt provides pedestrian scale street level access on Marion Street and access to car parking from Lords Road at the rear. This creates poorer streetscapes at Flood Street and Lords Road where the shopping centre presents as a blank wall on Flood Street and car parking entrances to Lords Road.

[24] Leichhardt Market Place is the previous name of the MarketPlace Leichhardt Shopping Centre. The name of centre is Leichhardt Market Place (with a space between 'Market' and 'Place' to differentiate it from the shopping centre proper).

The centre is surrounded by low-density residential development of detached one to two storey dwellings. Landuses to the east include residential flat developments ranging from three to five storeys, detached one to two storey residential dwellings and the Norton Street Centre. While the centre is not located within a Heritage Conservation Area, there is a row of heritage-listed dwellings located between Lords Road and the Tebutt Street Industrial Precinct.

In terms of BLCs, the land audit that the centre floorspace is predominantly comprised Retail Mainstreet land uses. There is one instance of bulky goods retail floorspace at Flood Street in the vicinity of Lords Road (an Antique/Restored Furniture Retail). The profile of Leichhardt Market Place in terms of retail and commercial industry groupings[25] categories is shown in Table 9.

**Table 9.** Leichhardt Market Place Activity Profile, 2008

| Leichhardt Market Place Activity | Floorspace ( square metres) | % of total |
|---|---|---|
| Supermarket | 17,533 | 30% |
| Personal and Household Goods | 5,996 | 10% |
| Cafes and Restaurants | 5,108 | 9% |
| Clothing and Footwear | 4,217 | 7% |
| Finance and Insurance | 4,046 | 7% |
| Food Retail | 3,472 | 6% |
| Personal Services | 1,659 | 3% |
| Recreation retail | 1,503 | 3% |
| Telecommunications | 1,349 | 2% |
| Building | 716 | 1% |
| Pubs, Taverns and Bars | 619 | 1% |
| Health | 438 | 1% |
| Property Services | 405 | 1% |
| Arts and Culture Services | 154 | 0% |
| Motor Vehicle Retail | 104 | 0% |
| Other | 10,790 | 19% |
| Vacant | 154 | Less than 1% |
| TOTAL | 58,264 | 100% |

Source: SGS 2009

Leichhardt Market Place has approximately 58,300 square metres of activity floorspace with 93 per cent taken up by the shopping centre. The remaining floorspace relates to mainstreet properties along Marion Street, Foster Street and Flood Streets. These properties have a wide range of uses including Cafes and Restaurants, Building, Food Retail, Health, Arts and Culture Services, Recreation Retail, Personal and Household Goods , Personal Services, Clothing and Footwear, Property Services, Motor Vehicle Retail and Pubs, Taverns and Bars.

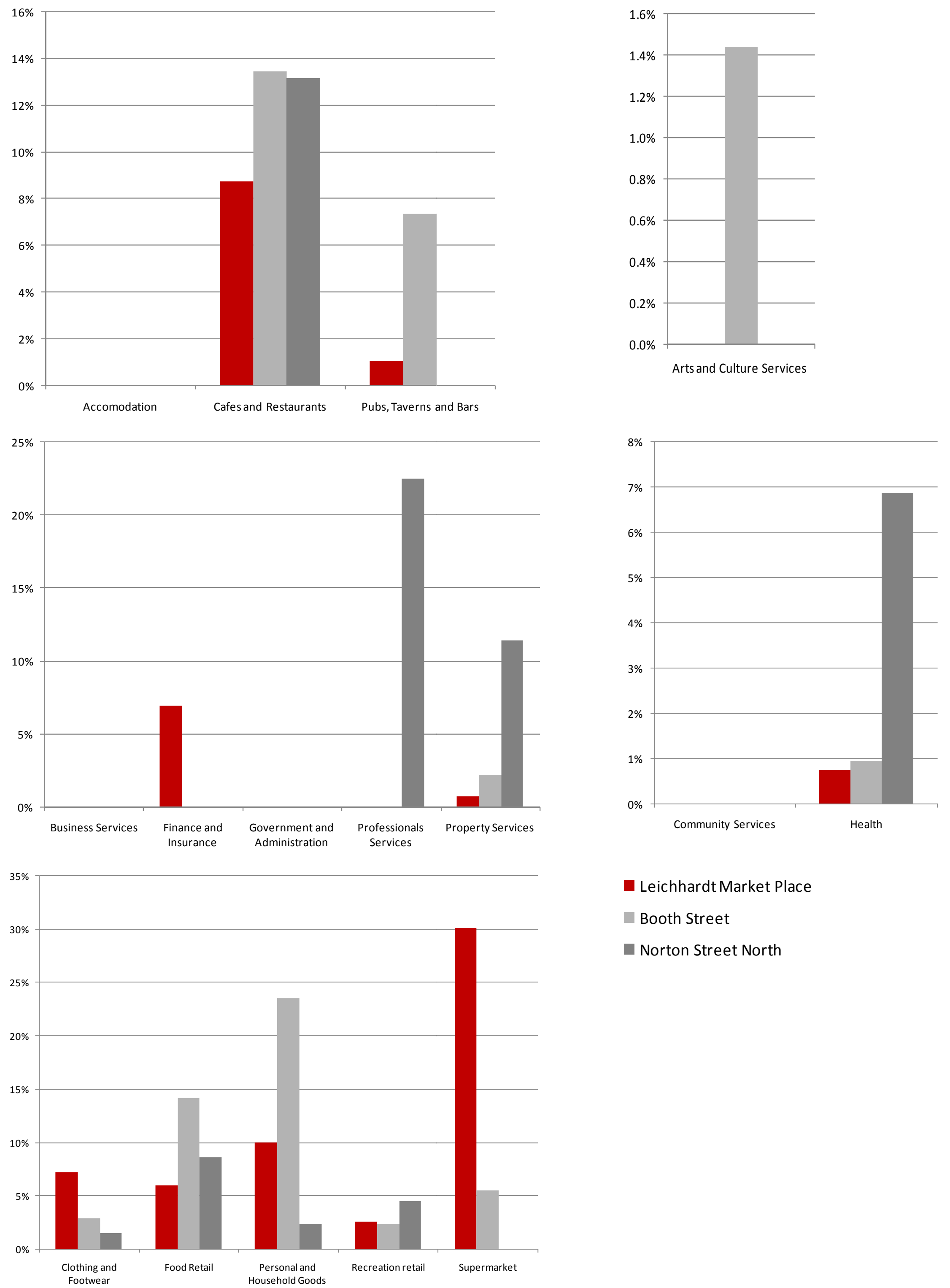
25 SGS groupings.

Leichhardt Market Place Centre has a relatively high proportion of 'Other' floorspace (comprised of car park area associated with the shopping centre) and minimal vacant floorspace (within developed buildings).

The following charts look at the proportions of Leichardt Market Place Centre floorspace in comparison with the smaller village centres of Norton Street North and Booth Street (Figure 41). A summary of the centres activity profile is provided below:

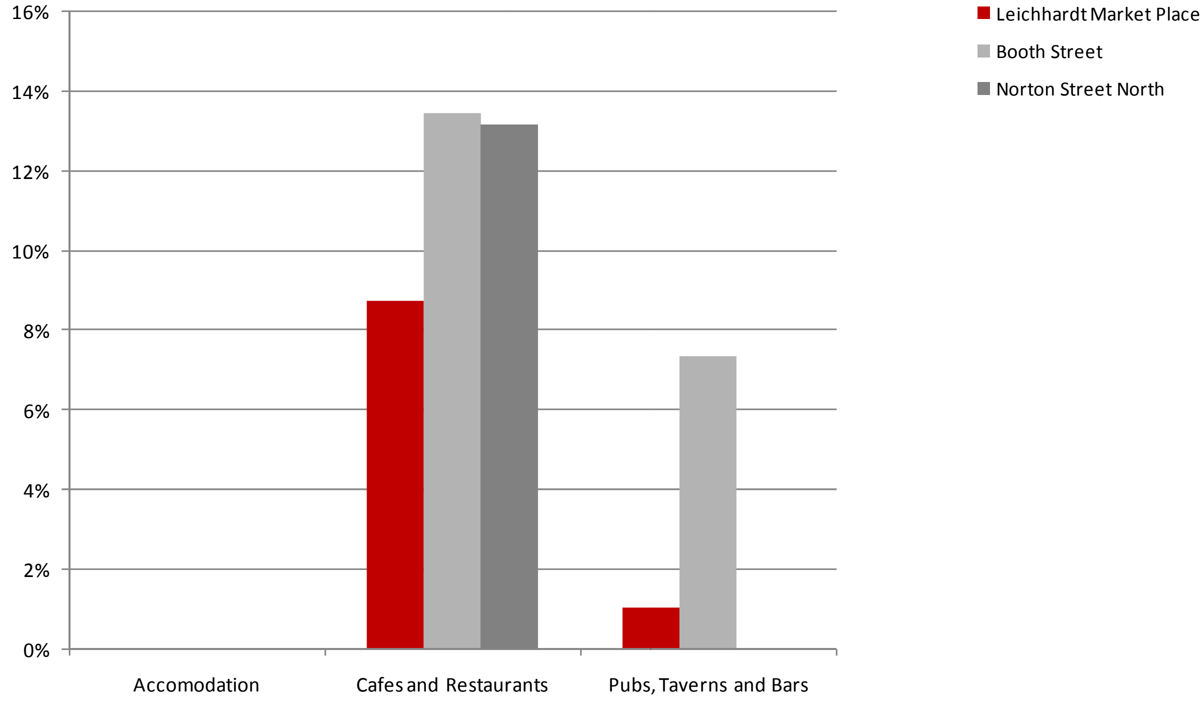
- Significantly higher proportion of Finance and Insurance than the benchmark centres.
- Higher proportion of Clothing and Footwear Retail and a significantly greater amount of Supermarket Retail floorspace compared to the benchmark centres. Lower proportions of Cafes and Restaurant floorspace and also lower Pubs, Taverns and Bar floorspace than Booth Street. Accommodation floorspace was not recorded in any of the above centres.
- Significantly lower proportion of Property Services than benchmark centres. None of the centres had recorded Business Services or Government and Administration floorspace.
- Lower proportion of Personal and Household Goods than Booth Street centre and a lower proportion of food retail compared to the benchmark centres.
- Only the benchmark centre of Norton Street North had a small proportion of Arts and Cultural Service Floorspace.
- Lower proportion of health related floorspace than benchmark centres. There are no Community Services within the centres.
- No representation of Arts and Cultural Service Floorspace.

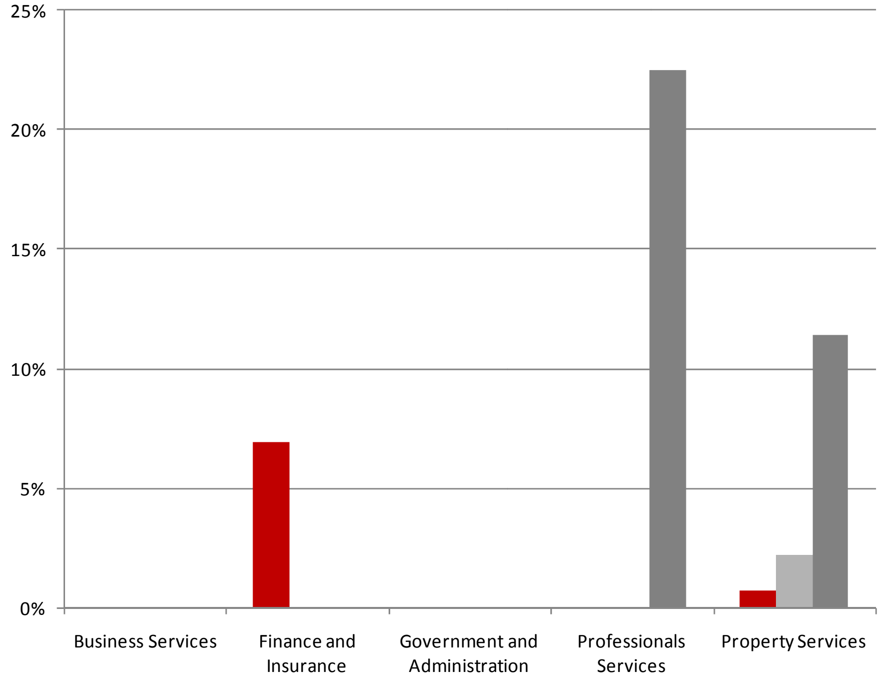
**Figure 41.** Benchmark centres – Leichhardt Market Place, Booth Street, Norton Street North




Source: SGS 2009

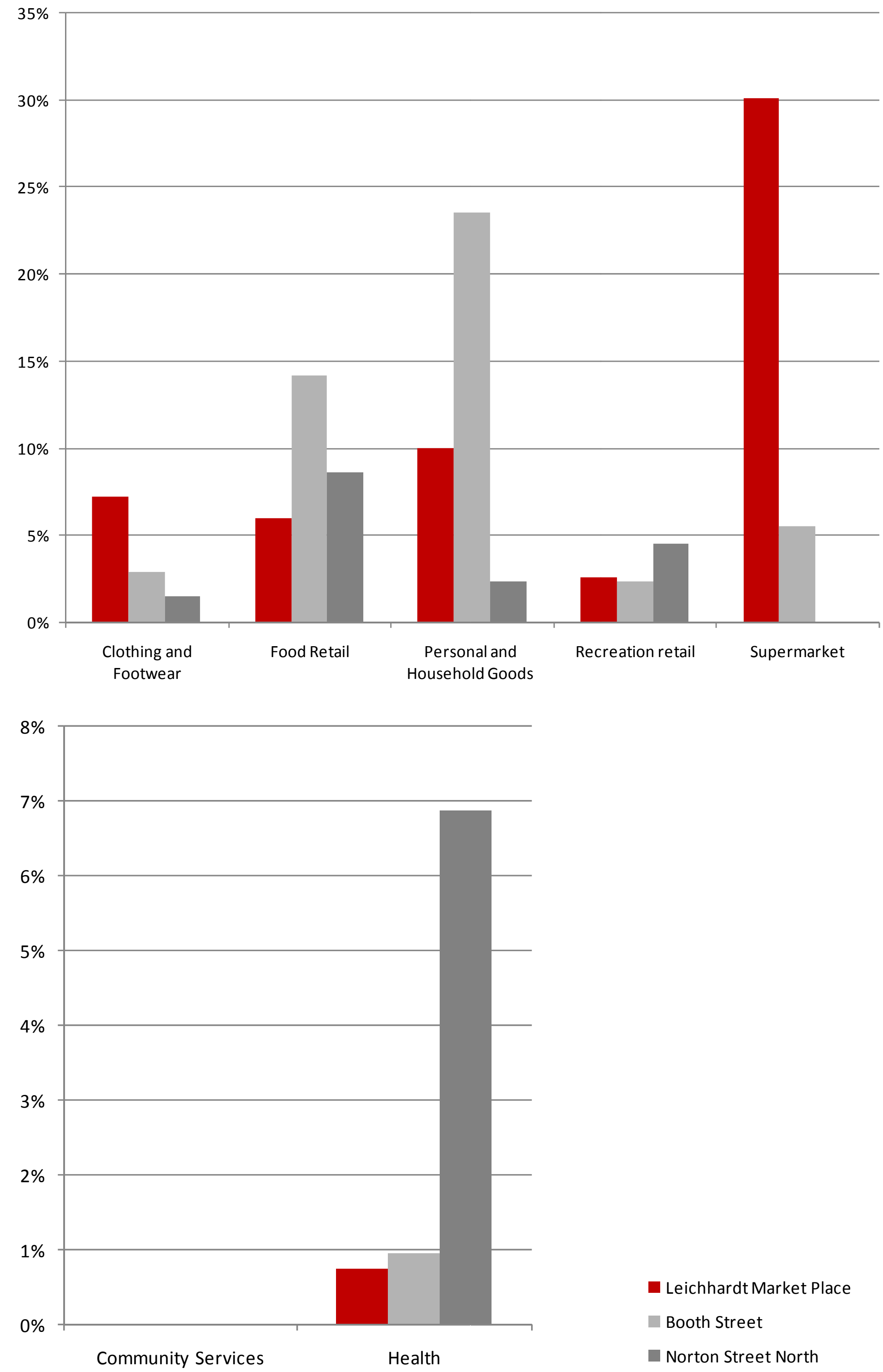
Figure 42. Benchmark centres – Leichhardt Market Place, Booth Street, Norton Street North




Source: SGS 2009

**Figure 43. Benchmark centres – Leichhardt Market Place, Booth Street, Norton Street North**




Source: SGS 2009

### Opportunities and Constraints

**A high level of bus service provision but on congested roads**

Public transport to the Leichhardt Market Place Centre is limited to four bus services that connect the centre to the following destinations:

- CBD and Canada Bay centres (Routes 436, 437, 438, L38) – operates between Five Dock, Chiswick and Abbotsford and the CBD using Parramatta Road and Marion Street.
- Canterbury and Balmain (Route 445) – operates between Canterbury and Balmain using New Canterbury Road, Norton Street and Balmain Road.
- CBD and Lilyfield (Route 470) – operates between MarketPlace Leichhardt, Lilyfield and CBD using Balmain Road, Moore Street, Pyrmont Bridge Road and Parramatta Road.

All of these roads experience high traffic volumes or connect to high traffic volume roads.

**The shopping centre has pedestrian scale street frontage but has poor rear and side frontages.**

MarketPlace Leichhardt provides good pedestrian amenity having an active street frontage to Marion Street. However the eastern and southern elevations provide poor street frontages being a blank wall and car parking entrances. Council should liaise with MarketPlace Leichhardt Centre Management to discuss ways to improve existing street frontages.

Foster Street shops have a large setback from the street which should also be reviewed.

**Opportunity for additional medium density development in the centre**

Medium density development is located on north east of the centre on Marion Street. Residential dwellings in the vicinity are predominantly detached one and two storey dwellings. Given the lack of heritage items and the high level of public transport services to this location, opportunities exist to increase residential density.

Council should explore opportunities for increased residential density at this location through a residential strategy.

### Leichhardt Market Place Centre Vision and Strategies

The future role for Leichhardt Market Place is to maintain and enhance its role as a district retail and services centre. However, this should not be at the expense of amenity for surrounding residents. The street frontage of the shopping centre needs to be improved to ensure the amenity of the local residents is enhanced. This is important should the centre be identified as an area for residential intensification.

The key strategies to achieve this vision include:

- Improving the street frontage of the shopping centre at all elevations.

- Improving local traffic management and investigating parking demand issues.
- Investigating opportunities for residential intensification.

A Village centre designation is considered appropriate for this centre. However, this should be revised when a housing strategy is undertaken and the capacity of the centre is better understood.

## 5.5 Small Villages

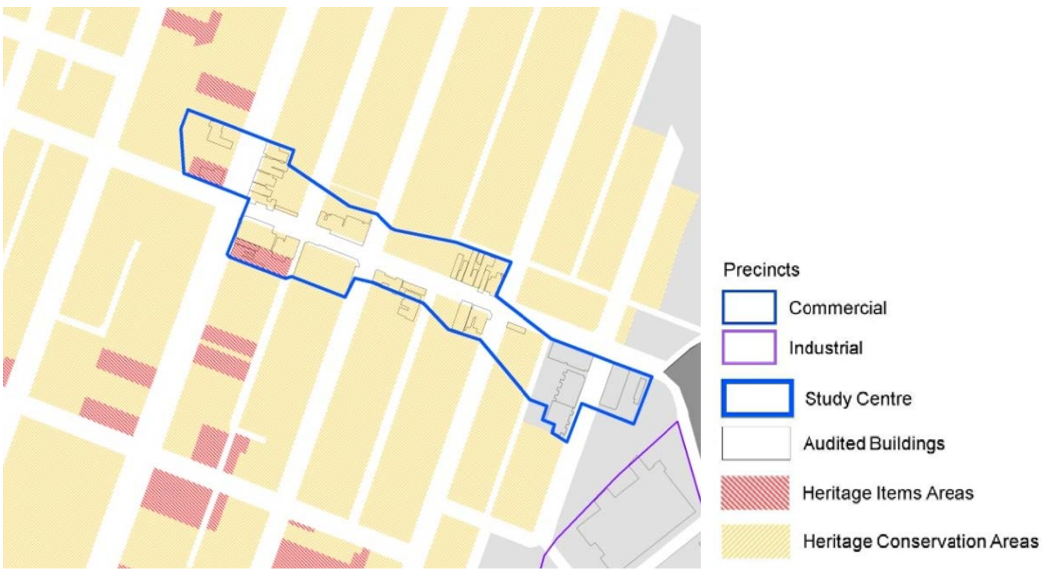
Small Villages are defined in the Draft Inner West Subregional Strategy as:

- 5 to 30 shops and services.
- Similar to village only smaller and without a supermarket.
- Approximate radius 400 metres.
- A small strip of shops and surrounding residential area within a five to 10 minute walk serving daily shopping needs.
- Typical dwelling range 800 to 2,700.
- Medium density housing, including shop–top dwellings in and around the main street.
- Local bus network.
- Access to pocket parks or small urban outdoor space.
- Governance body: local government.

The small villages in the LGA are Booth Street and Norton Street North centres.

### Booth Street

Figure 44. Booth Street




Source: SGS 2009

Booth Street Centre is located on Booth Street between Wigram Road and the area around the Booth Street/Johnston Street intersection. The centre is located immediately north of the Camperdown Industrial Precinct and east of the Moore Street Industrial Precinct. Surrounding dwellings are generally detached older style houses on tree-lined streets with medium density dwelling developments at the corner of Booth Street and Taylor Street and the corner of Booth Street and Wells Street.

The centre is located within a Heritage Conservation Area. There are heritage items located on Johnston Street of mainly commercial shop-top properties and the Post Office. The mainstreet has retained most of the features of the original commercial buildings with some newer commercial shops associated with the medium density developments and some modern refurbishments of the shopfronts.

In terms of BLCs, the land audit found the mainstreet is predominantly comprised of retail land uses with one instance of bulky goods retail (HOME Building Supplies store).

The profile of Booth Street centre in terms of retail and commercial industry groupings[26] categories is shown in Table 10.

**Table 10.** Booth Street Activity Profile, 2008

| Booth Street Activity | Floorspace ( square metres) | % of total |
|---|---|---|
| Personal and Household Goods | 2,693 | 24% |
| Food Retail | 1,622 | 14% |
| Cafes and Restaurants | 1,541 | 13% |
| Pubs, Taverns and Bars | 844 | 7% |
| Supermarket | 634 | 6% |
| Personal Services | 571 | 5% |
| Motor Vehicle Retail | 336 | 3% |
| Clothing and Footwear | 330 | 3% |
| Recreation retail | 263 | 2% |
| Property Services | 250 | 2% |
| Health | 109 | 1% |
| Vacant | 2,256 | 20% |
| TOTALS | 11,448 | 100% |

Source: SGS 2009

Booth Street Centre has approximately 11,500 square metres of existing floorspace. The Centre has a relatively high proportion of vacant floorspace (within developed buildings) of 20 per cent.

[26] SGS groupings.

The activity share shows that Booth Street has a high share of Personal & Household Goods, Food Retail and Cafe & Restaurants related floorspace that comprises 51 per cent of the total floorspace in the centre. Activity areas are:

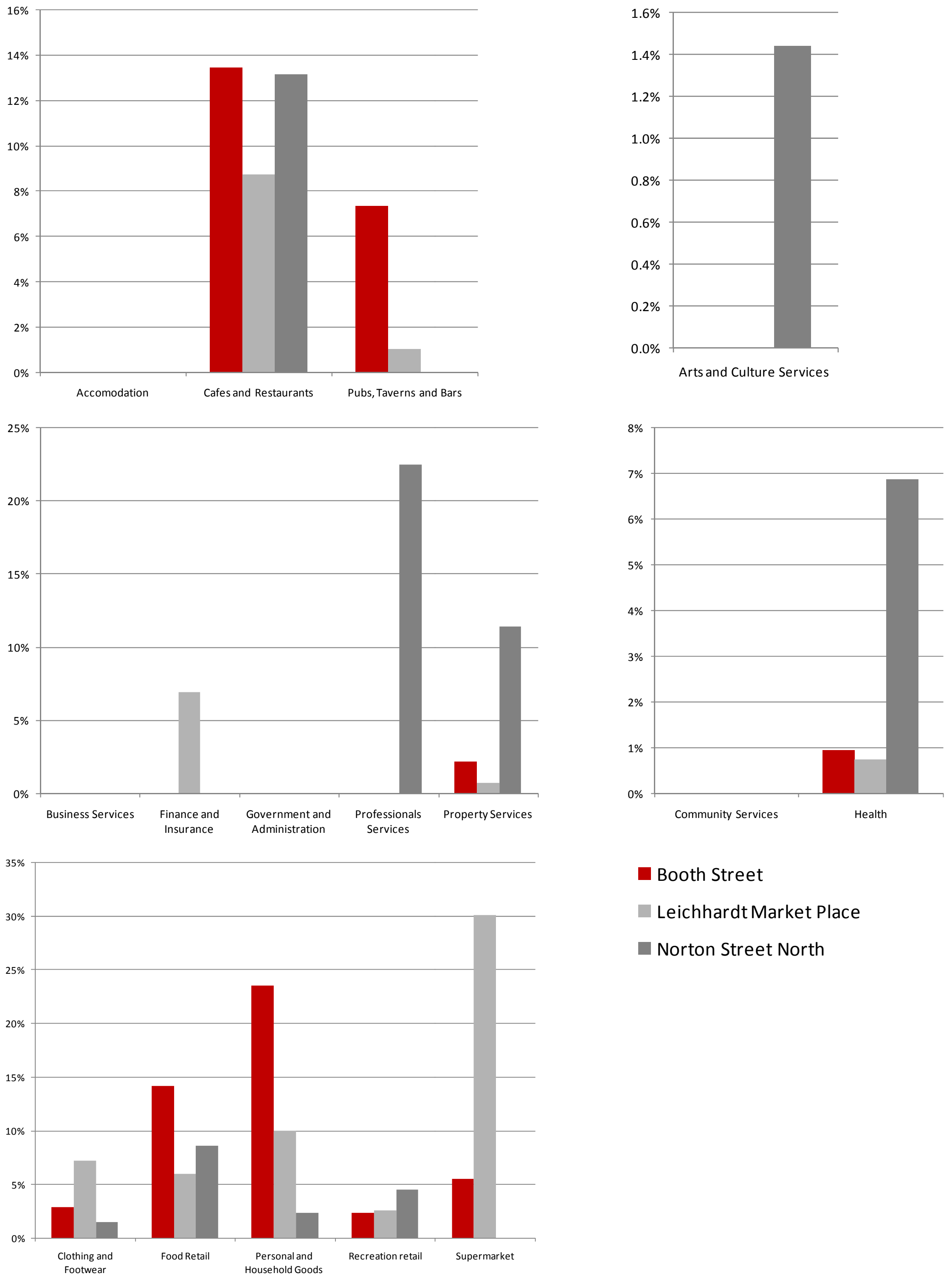
- Personal and Household Goods
- Food Retail
- Cafes and Restaurants

The proportions of floorspace in Booth Street were compared to the centres of Norton Street North and Leichardt Market Place (Figure 45).

The benchmarking analysis found that Booth Street has the following profile:

- Higher proportions of both Cafes and Restaurant floorspace and Pubs, Taverns and Bars floorspace. Accommodation floorspace was not recorded in any of the above centres.
- Higher proportion of Food Retail and significantly greater amount of Personal and Household Goods floorspace compared to the benchmark centres.
- Low proportions of floorspace attributed to Business Services. Overall, very few business services are provided in any of the compared centres.
- Lower proportion of Recreational Retail and comparably less supermarket floorspace than Leichhardt Market Place.
- lower proportion of health related floorspace than Norton Street North but is comparable to Leichhardt Market Place.
- There is no Community Services floorspace in the benchmark centres and only Norton Street North contains any Arts and Culture floorspace.

**Figure 45.** Benchmark centres – Booth Street, Norton Street North and Leichhardt Market Place




Source: SGS 2009

### Booth Street Opportunities and Constraints

**Limited bus service provision on congested roads**

Public transport to the Booth Street Centre is limited to two bus services which connect the centre to:

- CBD (Routes 470) – operates along Pyrmont Bridge Road.
- Railway Square/Coogee (Route 370) – operates along King Street/City Road to Coogee.

**High quality public domain with heritage value**

The Centre has a high quality amenity due to the well-maintained heritage properties on the mainstreet. The mainstreet and the surrounding residential area is comprehensively located within a Heritage Conservation Area. The commercial built form is also predominately two storey with newer mixed use development of three to five storeys.

Council should investigate a heritage study that designates buildings as 'contributory' to provide certainty to the development community. This would also allow the development of controls to reduce the impacts on these identified properties.

**Develop economic development strategies to attract business services to the centre**

There is an opportunity to investigate the type of business services, which are utilised by the professional services in the locality. Additionally, home based workers would also benefit from additional business services activity. Use of upper floors of traditional shop top commercial properties for live-work tenure could assist in providing space for small-scale business services and professional services.

**Good pedestrian-scale public domain with heritage value**

Booth Street is located within a Heritage Conservation Area. The mainstreet is predominately two storey with many intact period buildings. The surrounding residential dwellings have high heritage value and are located on good quality, tree-lined streets.

Council should investigate a heritage study that designates buildings as 'contributory' to provide certainty to the development community. This would also allow development of controls to reduce the impacts on identified properties.

### Booth Street Centre Vision and Strategies

Booth Street centre should be maintained as a local centre.

Strategies to achieve this include:

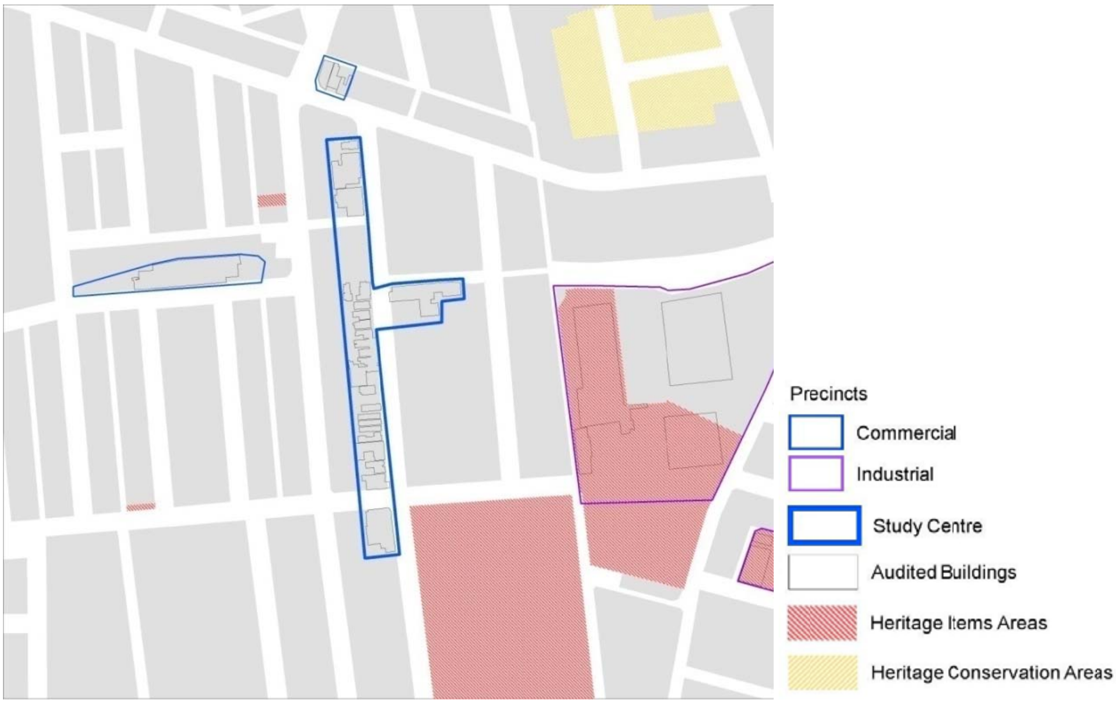
- Preserving the traditional character of the main street area through appropriate development provisions and heritage protection.
- Improving local traffic management and investigating parking demand issues.

A Small Village designation is considered appropriate for this centre and reflects the desired vision.

### Norton Street North

Norton Street North Centre is comprised of main street retail on the western side of Norton Street between Leichhardt Park and Lilyfield Road and one retail site on the eastern side of Norton Street. Most of the mainstreet activities are located south of the City West Link corridor. Other commercially zoned land near the centre is comprised of vacant land west of the centre (within City West Link corridor land). There are also smaller neighbourhood centres on Perry Street.

**Figure 46.** Norton Street North




Source: SGS Economics and Planning 2009

Residential dwellings near the centre are predominantly detached one and two storey dwellings. There are some examples of terrace-style medium density on the northern part of the street.

The centre is not part of a designated Heritage Conservation Area nor are there heritage items located on or near the mainstreet.

In terms of BLCs, the land audit found the land use character is mixed and includes retail and office land uses, detached residential dwellings, bulky good retail , Local Light Industrial land uses, and vacant sites.

The profile of Norton Street North in terms of retail and commerical industry groupings[27] categories is shown in Table 11.

**Table 11.** Norton Street North Activity Profile, 2008

| Norton Street North | Floorspace ( square metres) | % of total |
|---|---|---|
| Professionals Services | 1,878 | 23% |
| Cafes and Restaurants | 1,099 | 13% |
| Property Services | 950 | 11% |
| Food Retail | 718 | 9% |
| Motor Vehicle Retail | 601 | 7% |
| Health | 574 | 7% |
| Building | 484 | 6% |
| Wholesale | 462 | 6% |
| Recreation retail | 373 | 4% |
| Personal Services | 263 | 3% |
| Personal and Household Goods | 192 | 2% |
| Arts and Culture Services | 120 | 1% |
| Clothing and Footwear | 120 | 1% |
| Other | 153 | 2% |
| Vacant | 351 | 4% |
| TOTALS | 8,338 | 100% |

Source: SGS 2009

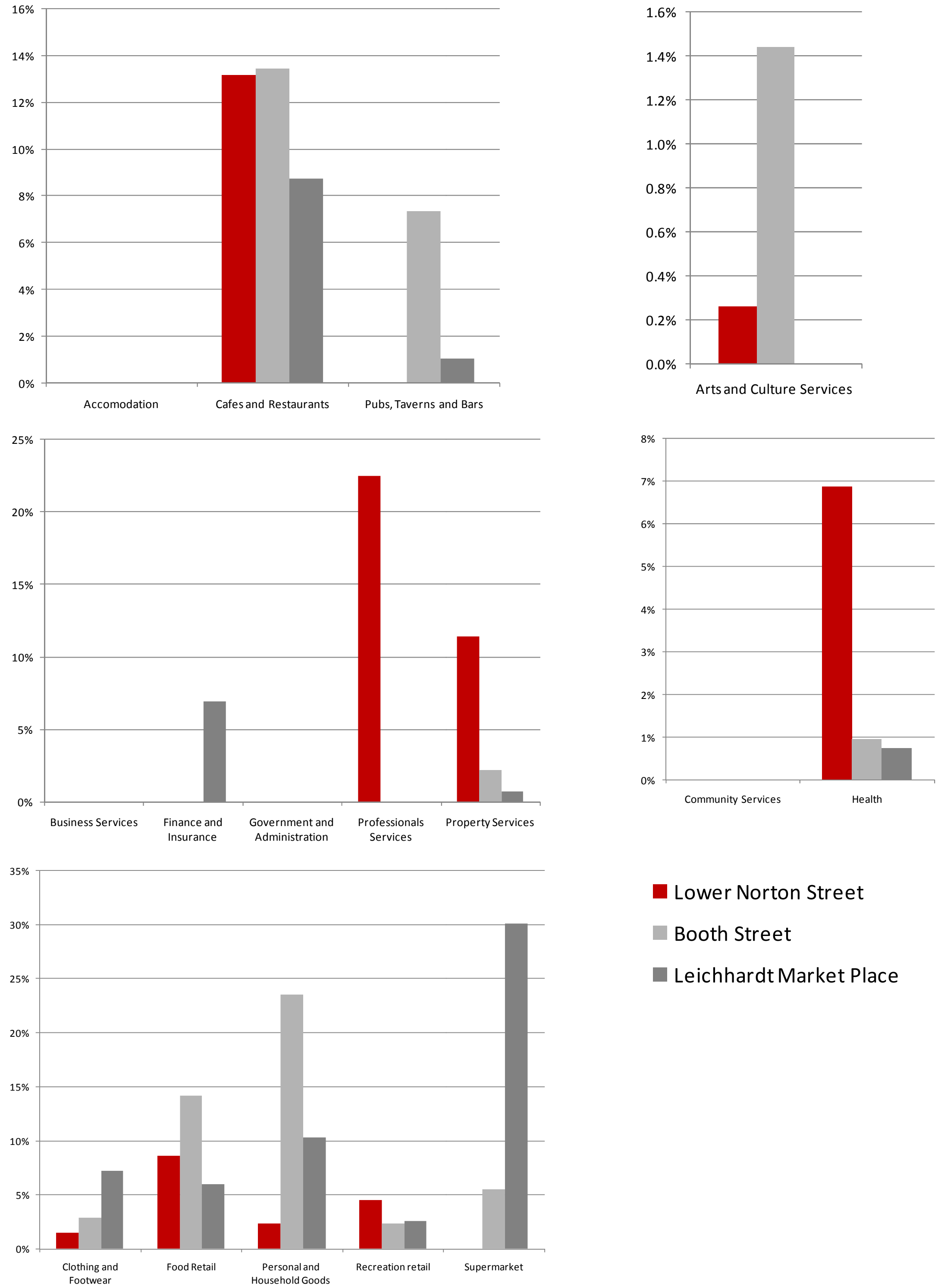
Norton Street North centre has approximately 8,300 square metres of existing floorspace. The centre has a low proportion of vacant floorspace (within developed buildings) of four per cent and 'Other' floorspace (under construction).

The activity share shows that Norton Street North has a high share of Professional Services, Cafes & Restaurants and Property Service related floorspace that makes up 47 per cent of the total floorspace in the centre.

The Norton Street North floorspace was compared to the centres of Booth Street and Leichhardt Market Place centres (Figure 47).

[27] SGS groupings.

**Figure 47.** Benchmark centres – Booth Street, Norton Street North and Leichhardt Market Place




Source: SGS 2009

The benchmark analysis found that Norton Street North has the following activity profile:

- Comparable proportions of Cafes and Restaurant floorspace to Booth Street with no floorspace attributed to either Accommodation or Pubs, Taverns and Bars.
- Significantly higher proportion of floorspace attributed to Business Services than benchmark centres. It has a very high proportion of Professional Services (23%) and comparably higher amount of Property Services than Booth Street and Leichhardt Market Place.
- Higher proportion of Recreational Retail and a relatively comparable amount of Food Retail.
- Lower proportion of Clothing and Footwear and Personal & Household Goods floorspace compared to the benchmark centres and no supermarket retail.
- Small proportion of Arts and Cultural Service Floorspace with no such floorspace in the benchmark centres.
- Significantly higher proportion of health related floorspace than the benchmark centres. There are no Community Services within the compared centres.

### Opportunities and Constraints

**Good level of bus service provision, but on congested roads**

Public transport to the Norton Street North Centre is limited to four bus services that connect the centre to the following destinations:

- CBD and Rozelle (Route 440, L40) – operates between Rozelle and CBD using Balmain Road, Norton Street and Parramatta Road.
- Canterbury and Balmain (Route 445) – operates between Canterbury and Balmain using New Canterbury Road, Norton Street and Balmain Road.
- Railway Square/Coogee (Route 370) – operates between Leichhardt Bus Depot (east of the centre) and Coogee.
- Haberfield and Rozelle (Route L39) – operates between Rozelle and Haberfield using Marion Street, Norton Street and Balmain Road.

All of these roads experience high traffic volumes or connect to or cross high traffic volume roads.

**Poor business mix and mainstreet amenity**

The mainstreet currently contains a mix of land uses including residential development, local light industrial (smash repair), office and retail mainstreet landuses. The mainstreet amenity is poor as a result of the wide mix of land uses and inconsistent setbacks and varied building elevations.

**Opportunity for additional medium density development in the centre**

Some medium density development is located in the centre. Residential dwellings immediately around the centre are predominantly detached one and two storey dwellings. Given the lack of heritage provisions and the high level of bus services to this location, opportunities to increase residential density should be investigated. This should be contingent however, on improved traffic management measures and business mix in the centre.

**Develop economic development strategies to provide business services for the local residents**

Though a smaller centre, there is an opportunity for the provision of business services to service local home businesses. Like Booth Street centre, there is an opportunity to investigate the type of business services utilised by the professional services in the vicinity.

### Norton Street North Centre Vision and Strategies

Norton Street North  should maintain its role as a local centre. Strategies to achieve this vision include:

- Increasing office floorspace - The centre has limited office floorspace and slightly increasing this provision could assist providing floorspace for the office-based growth sectors and home based workers.
- Improving local traffic management and investigating parking demand issues.
- Investigate opportunities for residential intensification in this centre area having regard to the impacts of traffic impacts of the adjoining City West Link corridor on residential amenity.

A Small Village designation is considered appropriate for this centre and reflects the desired vision. This should be revised once a housing strategy has been undertaken and the capacity for residential intensification assessed.

## 5.6 Neighbourhood Centres

The Neighbourhood Centres in the LGA are predominantly business zoned and some residential zoned areas on which historical commercial uses continue. The Draft Inner West Subregional Strategy states that neighbourhood centres should generally have the following characteristics:

- One to five shops and services. May include a milk bar, corner shop, petrol station/convenience
- store, café and/or a newsagent.
- Approximate radius 150 to 200 m.
- One or a cluster of shops and services supplying daily needs.
- Typical dwelling range 150 to 900.
- Some medium density housing e.g. townhouses and villas.
- Local bus network.
- Not necessarily located near open space or public space.
- Governance body: local government.

These neighbourhood centres in the LGA are:

- Balmain East Village
- Catherine Street (Lilyfield)
- Perry Street/Balmain Road
- Perry Street/James Street
- Glover Street/Perry Street
- Catherine/Styles Street

**Figure 48.** Balmain East

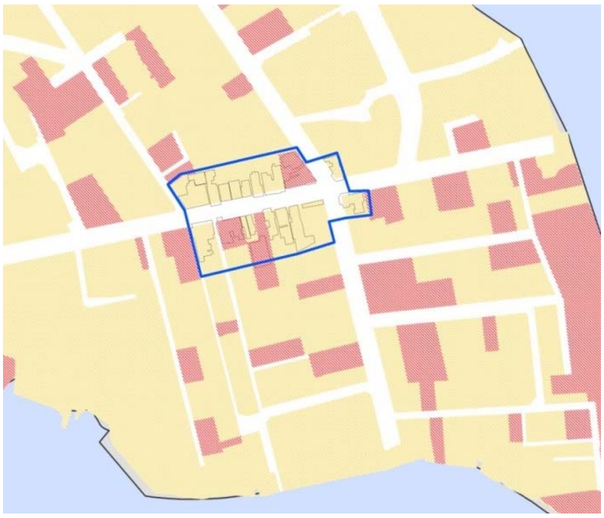
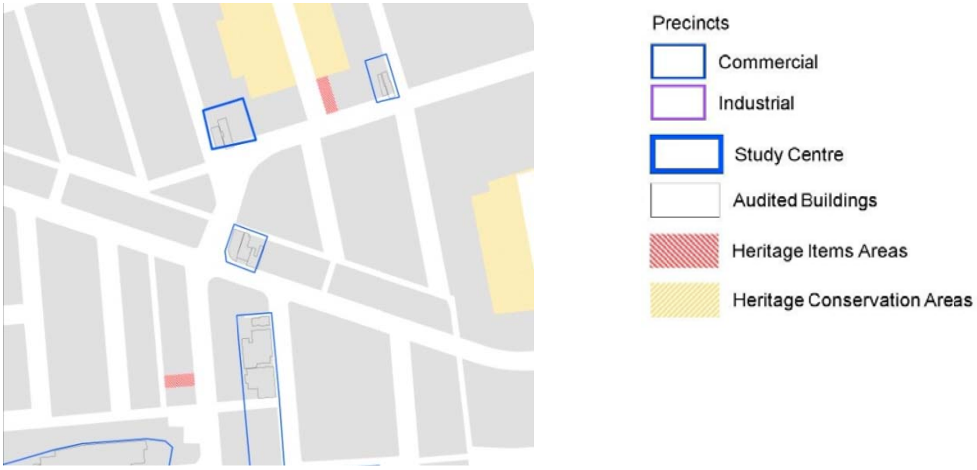


**Figure 49.** Catherine Street (Lilyfield)

**Figure 50.** Perry Street/Mary Street




Source: SGS 2009

**Figure 51.** Lilyfield Road/James Street

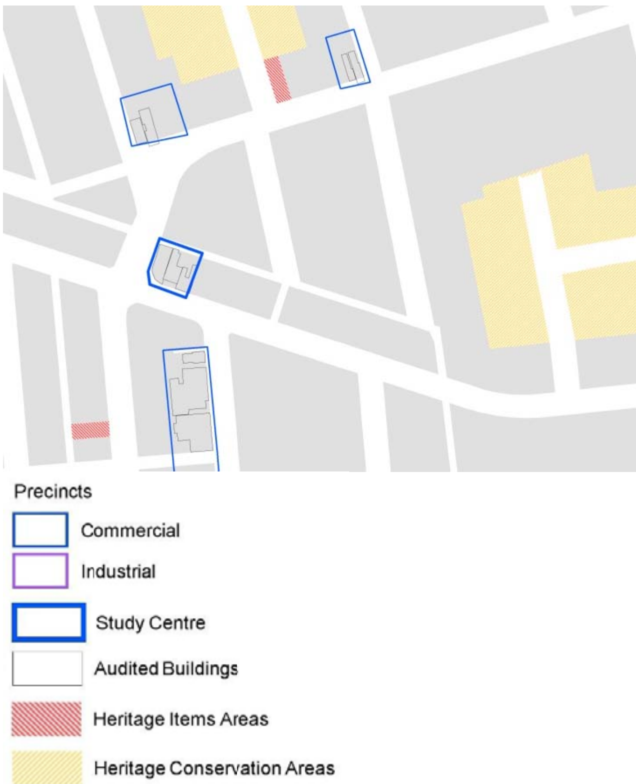



**Figure 52.** Glover Street/Perry Street

Source: SGS 2009

The Neighbourhood Centre activity is shown in Table 12.

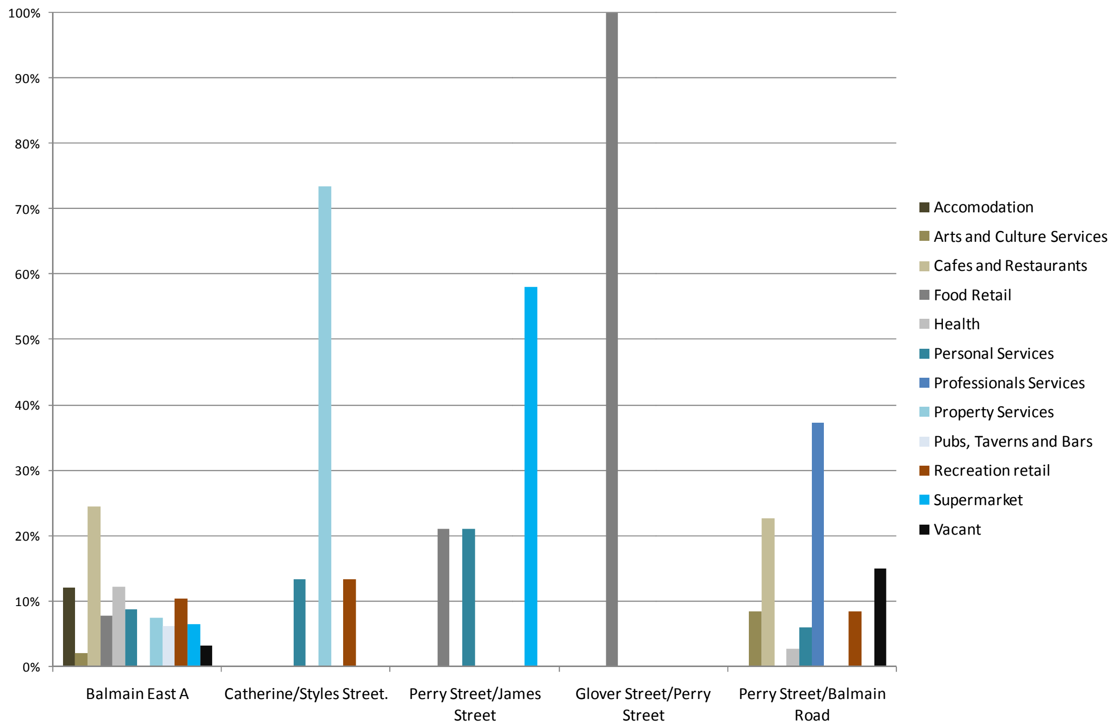
**Table 12.** Neighbourhood Centre Activity

| Centre Activity | Perry Street/Balmain Road | Balmain East A | Catherine/Styles Street. | Perry Street/James Street | Glover Street/Perry Street |
|---|---|---|---|---|---|
| Accomodation | - | 446 | - | - | - |
| Arts and Culture Services | 339 | 70 | - | - | - |
| Cafes and Restaurants | 918 | 903 | - | - | - |
| Food Retail | - | 285 | - | 62 | 167 |
| Health | 105 | 448 | - | - | - |
| Personal Services | 241 | 319 | 108 | 62 | - |
| Professionals Services | 1,510 | - | - | - | - |
| Property Services | - | 275 | 599 | - | - |
| Pubs, Taverns and Bars | - | 223 | - | - | - |
| Recreation retail | 339 | 380 | 108 | - | - |
| Supermarket | - | 235 | - | 171 | - |
| Vacant | 603 | 117 | - | - | - |
| TOTALS | 4,054 | 3,699 | 815 | 295 | 167 |

Source: SGS 2009

Perry Street/Balmain Road and Balmain East A have the highest floorspace with Catherine/Styles Street, Perry Street/James Street and Glover Street/Perry Street being small corner shops with one or two additional retail shops. The proportions of each activity type are shown below.

**Figure 53.** Neighbourhood Centres Activity Profiles.




Source: SGS 2009

Perry Street/Balmain Road and Balmain East A have a larger range of land uses being larger neighbourhood centres. Balmain East A has the broader range of land uses of the two centres.

### Vision for Neighbourhood Centres

The neighbourhood centres should continue to provide basic services for the local catchment. A neighbourhood centre designation is considered appropriate for these centres as it reflects the desired vision.

The neighbourhood centres of Balmain East and Perry Street/Balmain Road should be reviewed once a housing strategy has been completed to assess the potential for residential intensification. This is due to the wider range of retail and services provided. There may be opportunities to increase dwellings in the centres but heritage values must be retained in the Balmain East centre.

## 5.7 Fragmented Commercial Sites

There are various fragmented commercially zoned sites throughout the LGA as shown in Figure 54 to Figure 63.

**Figure 54.** Balmain West

**Figure 55.** Balmain South

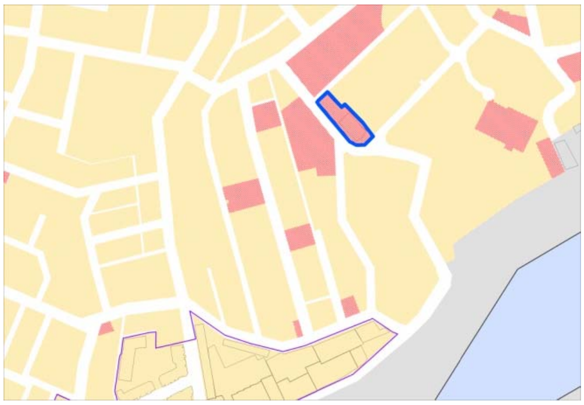


**Figure 56.** Balmain East B

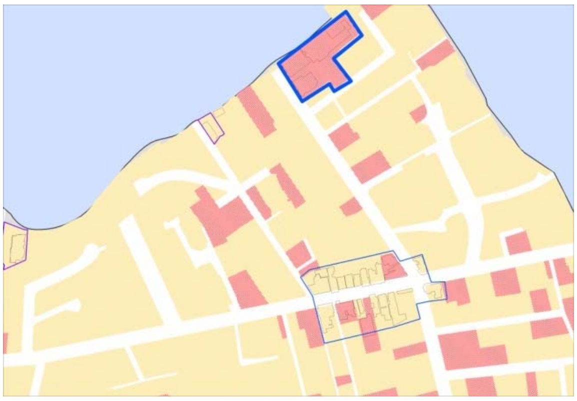


**Figure 57.** Rozelle Commercial A

**Figure 58.** Rozelle Commercial B


Source: SGS 2009

**Figure 59.** Rozelle Commercial C

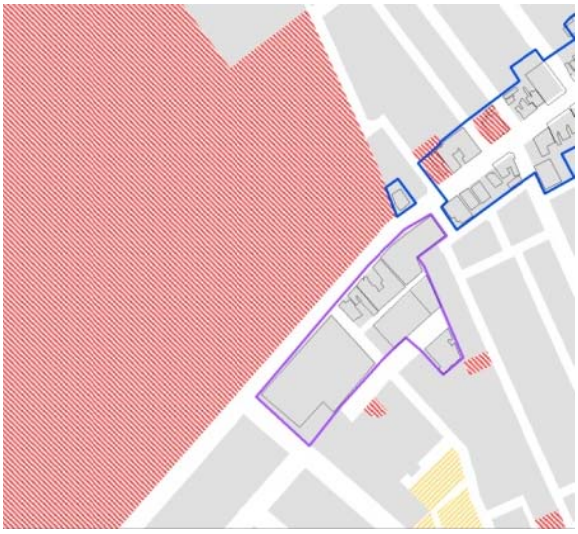


**Figure 60.** Rozelle Commercial D

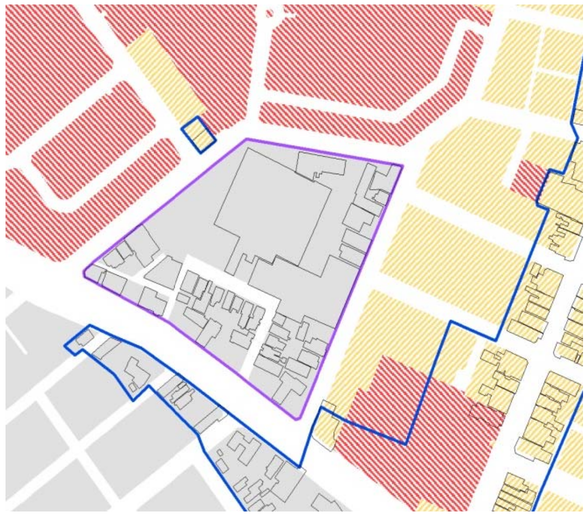


**Figure 61.** Camperdown Commercial A

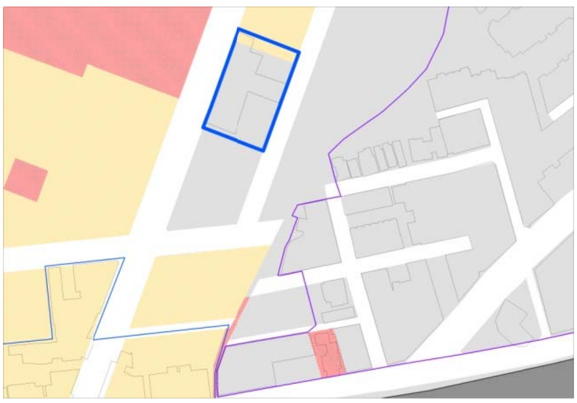


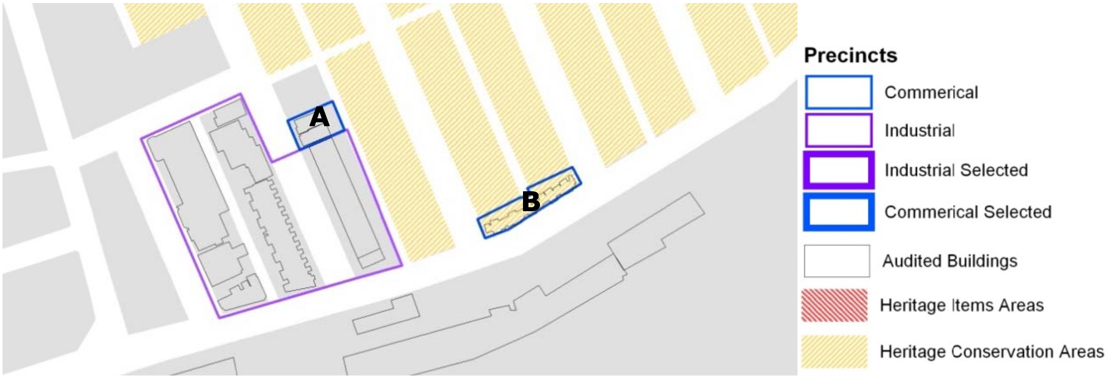
**Figure 62.** Leichhardt North

Source: SGS 2009



SGS Economics & Planning

**Figure 63.** Lilyfield Commercial A and B




Source: SGS 2009

In assessing the future role for these fragmented areas the following questions were asked:

- Is the site currently vacant or developed for non-industrial land uses?
- Is the existing current land use important to the economic future of the LGA?
- Is the site appropriate for other commercial land uses?
- Are their future improvements that may improve viability of this site for employment landuses?
- Is their sufficient floorspace in other commercial precincts to accommodate the land use on the sites?

Based on the responses to the above, the following findings are provided:

**Balmain West**

This site contains a waterfront office redevelopment north of the Balmain East centre which is an adaptive re-use of heritage wharf properties. While existing out-of-centre commercial activities are not ideal, they should be considered against attribute criteria so as to retain high quality and accessible sites. SGS has used the following to assess the existing out-of-centre office land uses:

- Proximity to public transport – the site is 200 metres from Balmain Road and buses that service this area and 400 metres from a ferry stop.
- Scale of use will not add significant additional traffic and other impacts to surrounding residential – the office development contains ample on-site parking and the office land uses do not cause significant environmental impacts.
- Any retail associated with these sites is ancillary only – the site is comprised of office land uses only.

This site should be retained for employment land uses.

**Balmain South**

This site contains an office redevelopment surrounded by residential land uses. When compared against the above criteria the site is found to be inappropriate due to the following:

- Proximity to public transport – the site is not located in proximity to public transport.
- Scale of use will not add significant additional traffic and other impacts to surrounding residential – parking for the site is minimal and as such will cause pressure on the local roads network.
- Any retail associated with these sites is ancillary only – the site comprised of office land uses only.

On balance it is considered that an employment land use is inappropriate in this context.

**Balmain East B**

This site is a waterfront site which currently contains inappropriate uses freight and logistics land use which require heavy vehicles to navigate through narrow local streets. When assessed against the criteria the site provides opportunity for appropriate employment landuses given its location at a public transport stop (ferry).

- Proximity to public transport – Located at a ferry stop
- Scale of use will not add significant additional traffic and other impacts to surrounding residential – the large site can be utilised for non-impact landuses.
- Any retail associated with these sites is ancillary only – ancillary retail could be provided to capitalise on the ferry stop location.

This site should be retained for employment land uses.

**Rozelle Commercial A**

This large site currently contains a furniture auction establishment and is located adjacent to industrial development on the Rozelle Goods line corridor. The location has the following implications for future land uses:

- The site is currently inappropriate for residential development given the proximity to the Rozelle Goods line corridor.
- Additional retail and commercial landuses are also problematic given the identified need to strengthen the Norton Street North centre.

It may be appropriate to investigate the site for an industrial land use in the short term. This would reduce inappropriate commercial form locating here (ie. traffic generating retail).

**Rozelle Commercial B, C and D**

These site are located on the fringe of centres (Rozelle Commercial C), within enterprise corridors (Rozelle Commercial B) and within residential areas (Rozelle Commercial D). These locations guide the future land use as follows:

- Rozelle Commercial C. While currently used for residential development, this site should be retained for commercial land uses to support Rozelle centre.
- Rozelle Commercial B. This site is part of the Victoria Road Corridor (discussed in section 6.2) and is identified as appropriate for enterprise corridor activity.
- Rozelle Commercial D. This site is surrounded by residential lands and is adjacent to the Terry Street precinct are identified for investigated for residential purposes.

**Camperdown Commercial A**

This site is a re-use of former industrial buildings for office-based activity. When compared against the above criteria the site is found to be inappropriate:

- Proximity to public transport – the site it is 200 metres from Parramatta Road.
- Scale of use will not add significant additional traffic and other impacts to surrounding residential – the office development contains ample on-site parking and the office land uses do not cause significant environmental impacts to surrounding residents.
- Any retail associated with these sites is ancillary only – the site comprised of office land uses only.

This site should be retained for employment landuses.

**Lilyfield Commercial A and B**

These sites are located adjacent to the Lilyfield Road Industrial precinct which is discussed in section 6.6. Lilyfield Road Commercial A is currently utilised for residential development and should be rezoned for this purpose given the lack of demand for additional commercial land, particularly in out-of-centre locations.

Liliyfield Commercial B is located on Liliyfield Road and is a recent live/work development at 77-79 Liliyfield Road which has approximately five residences with attached office floorspace . The suite is currently used for professional services (financial advisor, legal) and arts and culture (film and television production services). The site should be retained as a live/work location due to the following:

- Proximity to public transport – Located on bus routes to CBD and Balmain.
- Scale of use will not add significant additional traffic and other impacts to surrounding residential – the employment landuses will not create significant impacts.
- Any retail associated with these sites is ancillary only – This development is a live/work development which ideally seeks to provide floorspace for professionals and sole traders.

**Leichhardt North**

This large site is currently vacant adjacent to the Rozelle Goods line corridor with residential development to the south. The location has the following implications for future land uses:

- The site is currently inappropriate for residential development given the proximity to the Rozelle Goods line corridor.
- Additional retail and commercial landuses are also problematic given the identified need to strengthen the Norton Street North centre.

The site should be retained for light industrial land uses (IN2) in the short term. This would reduce inappropriate commercial form locating here (i.e. traffic generating retail).

## 5.8 Future Retail and Commercial Floorspace Demand

The employment land demand forecasting method used by SGS is summarised below and is decsribed in detail in Appendix 6. The employment demand forecast method contains the following key elements:

- **Planning horizon employment growth rate**. The 2009 TDC employment forecasts by industry sector for the LGA were used to assess the level of change over the planning horizon (2006 – 2031). The employment growth forecast in the Bays Precinct was excluded when the growth rate by industry was estimated.
- **Floorspace demand calculation**. The growth rate by industry sector was applied to the recorded employment land audit floorspace and then reclassified into BLC floorspace by precinct.

The floorspace demand has been generated by applying the **growth rates by industry sector** to the **employment floorspace supply** from the employment land audit. This gives us a picture of the volume of floorspace demand to 2031. The assumptions made in the method are that:

- The relationship between employment and land use remains constant over the forecast period (i.e. there is no intensification of use)
- Future employment land and floorspace demand is based on employment trends rather than observed activity. In this sense the forecast is based on the underlying demand for land and floorspace.

While **observed demand** (e.g. sales data or take up rates) can be used instead, this would tie the forecast to the profile of existing activity. This may not be appropriate when creating a strategy for the future as perpetuating current or past trends may not be the best outcome.

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

The supply demand gap examines the potential floorspace in each precinct and compares this to the demand for floorspace under the following scenarios:

- **Business as Usual Scenario** – Current employment trends by industry sector continue (as discussed in Section 2.3). All available employment land can reach 80% of the maximum Floor Space Ratio (FSR) under the current controls.

Through the land use audit we have seen that some uses in existing industrial areas have, at face value, the potential to exist in other areas (such as transport corridors or commercial centres). This includes land uses in the main street retail, bulky goods retail and office categories. To test the implications of this, we have examined the effects of redistributing demand in these categories in industrial precints once capacity has been reached.

- **Redistribution of Excess Demand Scenario –** Where industrial precincts have insufficient capacity to accommodate the forecast demand, the 'excess' demand is redistributed to other appropriate employment areas. For example, Bulky Goods retail demand is redistributed to corridor areas and commercial centres. All available employment land can reach 80% of the maximum Floor Space Ratio (FSR) under the current controls.

- **Sites Removal Scenario –** In addition to the redistribution of excess demand described above, specific sites were removed from the pool of total employment land supply. This tests the tolerance of the system to accommodate forecast demand if specific sites are removed from the supply side through rezoning to other uses. Displaced demand is distributed pro-rata to employment lands with similar features (this scenario aligns with scenario 11 in Appendix 6); All available employment land can reach 80% of the maximum Floor Space Ratio (FSR) under the current controls. Sites removed include Multiplex residential site, Kolotex residential site, Campbells site and Site 7 (within the Balmain Road Industrial Precinct).

This modelling 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. Notes on questions to be answered at a local level are provided in Appendix 6.

A summary of results for these scenarios is provided in Table 13 to Table 15.

The values and formulas are described below. All values are in square metres:

- **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 80% of the maximum 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).**

The BAU analysis finds that there would be a surplus of **28,000 square metres** with most of this being in the Town Centres and Villages.

The redistribution of excess demand scenario shows there would be a theoretical deficit of **9,200 square metres.** This deficit in commercial precincts is predominately driven by a large deficit in the Market Place precinct (approximately 30,000 sqm) where some residential zoned land is used for commercial purposes. This idtorts the results. After excluding Leichhardt Market Place precinct, the commercial precincts in Leichhardt LGA would have a surplus of **20,600 square metres** under the redistribution of excess demand scenario.

Likewise, the sites removal scenario finds that there would be a surplus of **16,400 square metres** across all commercial precincts excluding Leichhardt Market Place.

These results show that the commercial precincts in the LGA are well placed to accommodate the future demand for the current land uses as well as the overflows of the non-industrial employment land demand in industrial precincts. The commercial precincts are also found to have the capacity to absorb the impacts of removing the specific sites from the future employment land supply.

**Table 13.** Commercial Supply Demand Analysis – **Business as Usual Scenario** (square metres)

| | | A | B | C=A-B | D | E=D-B | F=E-C |
|---|---|---|---|---|---|---|---|
| Centre Type | Precinct | Total future floorspace demand | Current employment floorspace | Additional Floorspace Demand | Potential total floorspace under current controls | Potential floorsapce minus current floorsapce | SUPPLY/DEMAND GAP |
| TC | Balmain Commercial | 68,736 | 54,517 | 14,219 | 64,932 | 10,415 | -3,804 |
| TC | Norton Street | 88,700 | 68,763 | 19,937 | 102,007 | 33,244 | 13,307 |
| TC | Rozelle | 35,029 | 26,837 | 8,192 | 45,481 | 18,643 | 10,451 |
| V | Leichhardt Market Place | 61,905 | 49,635 | 12,270 | 32,089 | -17,547 | -29,816[28] |
| SV | Booth Street | 12,501 | 9,421 | 3,081 | 21,645 | 12,224 | 9,144 |
| SV | Norton Street North | 9,584 | 7,528 | 2,056 | 15,640 | 8,112 | 6,056 |
| NC | Norton Street North Commercial A | 1,089 | 804 | 285 | 1,086 | 282 | -3 |
| NC | Norton Street North Commercial B | 399 | 280 | 119 | 1,700 | 1,419 | 1,300 |
| NC | Norton Street North Commercial C | 226 | 159 | 67 | 805 | 646 | 580 |
| NC | Norton Street North Commercial D | 4,986 | 3,816 | 1,171 | 5,191 | 1,376 | 205 |
| F | Balmain East A | 4,501 | 3,403 | 1,098 | 7,133 | 3,730 | 2,632 |
| F | Balmain East B | 2,326 | 2,168 | 158 | 5,113 | 2,945 | 2,787 |
| F | Balmain South | 1,338 | 1,389 | -51 | 2,603 | 1,214 | 1,265 |
| F | Balmain West | 7,356 | 6,823 | 533 | 14,913 | 8,090 | 7,557 |
| F | Camperdown Commercial A | 3,169 | 2,386 | 783 | 3,132 | 746 | -37 |
| F | Lilyfield Commercial A | 0 | 0 | 0 | 728 | 728 | 728 |
| F | Lilyfield Commercial B | 367 | 338 | 29 | 935 | 597 | 568 |
| F | Lilyfield South A | 1,569 | 1,153 | 416 | 2,489 | 1,336 | 920 |

[28] It is because the existing development form exceeds the maximum allowable FSRs under current control.

| | | A | B | C=A-B | D | E=D-B | F=E-C |
|---|---|---|---|---|---|---|---|
| **Centre Type** | **Precinct** | **Total future floorspace demand** | **Current employment floorspace** | **Additional Floorspace Demand** | **Potential total floorspace under current controls** | **Potential floorsapce minus current floorsapce** | **SUPPLY/DEMAND GAP** |
| F | Lilyfield South B | 263 | 228 | 35 | 2,791 | 2,563 | 2,528 |
| F | Norton Street Commercial A | 117 | 83 | 35 | 1,751 | 1,668 | 1,633 |
| F | Rozelle Commercial A | 5,346 | 3,767 | 1,579 | 4,229 | 462 | -1,117 |
| F | Rozelle Commercial B | 658 | 464 | 194 | 974 | 510 | 315 |
| F | Rozelle Commercial C | 0 | 0 | 0 | 545 | 545 | 545 |
| F | Rozelle Commercial D | 276 | 211 | 65 | 462 | 251 | 186 |
| | **TOTAL** | **310,441** | **244,173** | **66,268** | **338,372** | **94,199** | **27,932** |
| | **TOTAL-** Excluding Leichhardt Market Place | **248,536** | **194,538** | **53,998** | **306,283** | **111,746** | **57,748** |

Source: SGS 2010

Note: TC = Town Centre; V= Village; SV = Small Village, NC = Neighbourhood Centre; F = Fragmented

**Table 14.** Commercial Supply Demand Analysis – **Redistribution of Excess Demand Scenario** (square metres)

| Centre Type | Precinct | A<br>Total future floorspace demand | B<br>Current employment floorspace | C=A-B<br>Additional Floorspace Demand | D<br>Potential total floorspace under current controls | E=D-B<br>Potential floorsapce minus current floorsapce | F=E-C<br>SUPPLY/DEMAND GAP |
|---|---|---|---|---|---|---|---|
| TC | Balmain Commercial | 68,736 | 54,517 | 14,219 | 64,932 | 10,415 | -3,804 |
| TC | Norton Street | 96,584 | 68,763 | 27,822 | 102,007 | 33,244 | 5,422 |
| TC | Rozelle | 41,222 | 26,837 | 14,385 | 45,481 | 18,643 | 4,259 |
| V | Leichhardt Market Place | 61,905 | 49,635 | 12,270 | 32,089 | -17,547 | -29,816[29] |
| SV | Booth Street | 17,919 | 9,421 | 8,498 | 21,645 | 12,224 | 3,726 |
| SV | Norton Street North | 13,172 | 7,528 | 5,645 | 15,640 | 8,112 | 2,468 |
| NC | Norton Street North Commercial A | 1,089 | 804 | 285 | 1,086 | 282 | -3 |
| NC | Norton Street North Commercial B | 1,170 | 280 | 889 | 1,700 | 1,419 | 530 |
| NC | Norton Street North Commercial C | 569 | 159 | 410 | 805 | 646 | 236 |
| NC | Norton Street North Commercial D | 5,108 | 3,816 | 1,292 | 5,191 | 1,376 | 84 |
| F | Balmain East A | 6,060 | 3,403 | 2,657 | 7,133 | 3,730 | 1,073 |
| F | Balmain East B | 3,977 | 2,168 | 1,809 | 5,113 | 2,945 | 1,136 |
| F | Balmain South | 2,088 | 1,389 | 699 | 2,603 | 1,214 | 516 |
| F | Balmain West | 11,833 | 6,823 | 5,011 | 14,913 | 8,090 | 3,079 |
| F | Camperdown Commercial A | 3,169 | 2,386 | 783 | 3,132 | 746 | -37 |
| F | Lilyfield Commercial A | 431 | 0 | 431 | 728 | 728 | 296 |
| F | Lilyfield Commercial B | 703 | 338 | 365 | 935 | 597 | 232 |
| F | Lilyfield South A | 2,114 | 1,153 | 961 | 2,489 | 1,336 | 375 |
| F | Lilyfield South B | 1,761 | 228 | 1,533 | 2,791 | 2,563 | 1,030 |

[29] It is because the existing development form exceeds the maximum allowable FSRs under current control.

| | | A | B | C=A-B | D | E=D-B | F=E-C |
|---|---|---|---|---|---|---|---|
| **Centre Type** | **Precinct** | **Total future floorspace demand** | **Current employment floorspace** | **Additional Floorspace Demand** | **Potential total floorspace under current controls** | **Potential floorsapce minus current floorsapce** | **SUPPLY/DEMAND GAP** |
| F | Norton Street Commercial A | 1,085 | 83 | 1,002 | 1,751 | 1,668 | 666 |
| F | Rozelle Commercial A | 5,346 | 3,767 | 1,579 | 4,229 | 462 | -1,117 |
| F | Rozelle Commercial B | 845 | 464 | 381 | 974 | 510 | 129 |
| F | Rozelle Commercial C | 323 | 0 | 323 | 545 | 545 | 222 |
| F | Rozelle Commercial D | 386 | 211 | 175 | 462 | 251 | 76 |
| | **TOTAL** | **347,595** | **244,173** | **103,424** | **338,374** | **94,199** | **-9,222** |
| | **TOTAL**- Excluding Leichhardt Market Place | **285,690** | **194,538** | **91,154** | **306,285** | **111,746** | **20,594** |

Source: SGS 2010

Note: TC = Town Centre; V= Village; SV = Small Village, NC = Neighbourhood Centre; F = Fragmented

**Table 15.** Commercial Supply Demand Analysis – **Sites Removal Scenario** (square metres)

| Centre Type | Precinct | A<br>Total future floorspace demand | B<br>Current employment floorspace | C=A-B<br>Additional Floorspace Demand | D<br>Potential total floorspace under current controls | E=D-B<br>Potential floorsapce minus current floorsapce | F=E-C<br>SUPPLY/DEMAND GAP |
|---|---|---|---|---|---|---|---|
| TC | Balmain Commercial | 68,736 | 54,517 | 14,219 | 64,932 | 10,415 | -3,804 |
| TC | Norton Street | 97,396 | 68,763 | 28,633 | 102,007 | 33,244 | 4,611 |
| TC | Rozelle | 41,859 | 26,837 | 15,022 | 45,481 | 18,643 | 3,621 |
| V | Leichhardt Market Place | 61,905 | 49,635 | 12,270 | 32,089 | -17,547 | -29,816[30] |
| SV | Booth Street | 18,477 | 9,421 | 9,056 | 21,645 | 12,224 | 3,168 |
| SV | Norton Street North | 13,542 | 7,528 | 6,014 | 15,640 | 8,112 | 2,099 |
| NC | Norton Street North Commercial A | 1,089 | 804 | 285 | 1,086 | 282 | -3 |
| NC | Norton Street North Commercial B | 1,249 | 280 | 969 | 1,700 | 1,419 | 451 |
| NC | Norton Street North Commercial C | 604 | 159 | 445 | 805 | 646 | 201 |
| NC | Norton Street North Commercial D | 5,120 | 3,816 | 1,305 | 5,191 | 1,376 | 71 |
| F | Balmain East A | 6,221 | 3,403 | 2,818 | 7,133 | 3,730 | 912 |
| F | Balmain East B | 4,147 | 2,168 | 1,979 | 5,113 | 2,945 | 966 |
| F | Balmain South | 2,165 | 1,389 | 776 | 2,603 | 1,214 | 438 |
| F | Balmain West | 12,294 | 6,823 | 5,471 | 14,913 | 8,090 | 2,619 |
| F | Camperdown Commercial A | 3,169 | 2,386 | 783 | 3,132 | 746 | -37 |
| F | Lilyfield Commercial A | 475 | 0 | 475 | 728 | 728 | 252 |
| F | Lilyfield Commercial B | 738 | 338 | 400 | 935 | 597 | 197 |
| F | Lilyfield South A | 2,170 | 1,153 | 1,017 | 2,489 | 1,336 | 319 |

[30] It is because the existing development form exceeds the maximum allowable FSRs under current control.

| Centre Type | Precinct | A<br>Total future floorspace demand | B<br>Current employment floorspace | C=A-B<br>Additional Floorspace Demand | D<br>Potential total floorspace under current controls | E=D-B<br>Potential floorsapce minus current floorsapce | F=E-C<br>SUPPLY/DEMAND GAP |
|---|---|---|---|---|---|---|---|
| F | Lilyfield South B | 1,920 | 228 | 1,692 | 2,791 | 2,563 | 871 |
| F | Norton Street Commercial A | 1,185 | 83 | 1,102 | 1,751 | 1,668 | 566 |
| F | Rozelle Commercial A | 5,644 | 3,767 | 1,877 | 4,229 | 462 | -1,415 |
| F | Rozelle Commercial B | 865 | 464 | 401 | 974 | 510 | 109 |
| F | Rozelle Commercial C | 356 | 0 | 356 | 545 | 545 | 189 |
| F | Rozelle Commercial D | 421 | 211 | 210 | 462 | 251 | 41 |
| | **TOTAL** | **351,747** | **244,173** | **107,575** | **338,374** | **94,199** | **-13,374** |
| | **TOTAL**- Excluding Leichhardt Market Place | **289,842** | **194,538** | **95,305** | **306,285** | **111,746** | **16,442** |

Source: SGS 2010

Note: TC = Town Centre; V= Village; SV = Small Village, NC = Neighbourhood Centre; F = Fragmented

The theoretical supply demand gap must be assessed in light of the potential to access, or 'unlock' this potential. Most of the commercial centres have some form of heritage provision with built form being predominantly one to two storeys in Rozelle and Balmain. This keeps the rate of development below 1:1 while Norton Street has a higher average due to the higher intensity of commercial development.

An important component of achieving the future roles will be allowing some form of increased development potential in the centres identified for growth while addressing heritage and environmental impacts in these locations.

# 6 Corridors and Industrial Precincts

The development of visions for the Parramatta Road Corridor and the LGA's industrial precincts considered the following:

- policy considerations related to future uses for industrial land
- the appropriateness of existing industrial land uses in this location
- the potential for redundant industrial land to be considered for alternative employment land uses
- opportunities and constraints findings

An LGA-wide floorspace demand analysis distributed BLC floorspace according to these visions for the employment land centres and precincts. For the Parramatta Road corridor and the industrial precincts, the distribution of BLC floorspace essentially removed inappropriate BLCs and increased or added BLC floorspace to achieve the desired BLC profile. The results of this floorspace demand analysis was another input into the strategy development.

## 6.1 Parramatta Road Corridor

The Parramatta Road Corridor is comprised of Parramatta Road frontage properties on the northern side of Parramatta Road between Brown Street to the east and the Camperdown Industrial Precinct to the west. The southern side of Parramatta Road falls within the Marrickville LGA. This corridor has been the subject of significant investigation but attracting investment is complex given the significant environmental constraints that affect most of the corridor. These include aircraft noise impacts and traffic impacts (see Section 4)[31].

This 3 km corridor has been split into precincts for ease of analysis based on areas of similar lot configurations, employment activity and built form character. The precincts are:

- Tebutt Street/Parramatta Road Precinct
- Parramatta Road East Precinct
- Parramatta Road frontage lots within the Norton Street Precinct
- Parramatta Road West Precinct

The locality and character of the areas are provided below.

### Tebutt Street/Parramatta Road Precinct

The precinct comprises the eastern bookend of the Parramatta Road corridor and contains street frontage properties to Parramatta Road and properties with frontage to Tebbutt Street. The precinct is surrounded by residential areas to the north and some residential development has occurred within the industrial zoned area.

[31] Environmental Assessment of impacts has not been undertaken as part of this study

Unlike the remainder of the corridor, this precinct is not affected by a heritage conservation overlay nor does it contain any heritage items. There is however, a heritage conservation area to the north of some of the Parramatta Road frontage properties.

Tebbutt Street provides access to the Parramatta Road overpass located in this area and as such there are significant traffic movements generated[32].

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

**Figure 64.** Tebutt Street/Parramatta Road Precinct


Source: SGS 2009

## Parramatta Road West Precinct

This precinct is bound by Jarret Street, Renwick Street, Elswick Street and Parramatta Road. Key through roads off Parramatta Road are Elswick and Rolfe Streets accessible from east-bound lanes only. Rolfe Street provides side-street food retail activity. Rear access is provided via Jarret Street and private entrances in the vicinity of Rolf Street.

There are significant traffic impacts in this precinct. Traffic volume data (AADT) shows there were 58,000 AADT movements[33] in the vicinity of Cardigan Street (west bound traffic) in 2005.

The precinct is affected by a heritage conservation overlay with the exception of the large lot at the corner of Parramatta Road and Elswick Street.

[32] There was no 2005 AADT data for this area in the RTA.

[33] Annual Average Daily Traffic. Complied by the RTA, this data is an average of all traffic movements on a road averaged out over 365 days. 2005 released data used were available.

**Figure 65.** Parramatta Road West Precinct


Source: SGS 2009

## Norton Street Precinct – Parramatta Road frontage lots

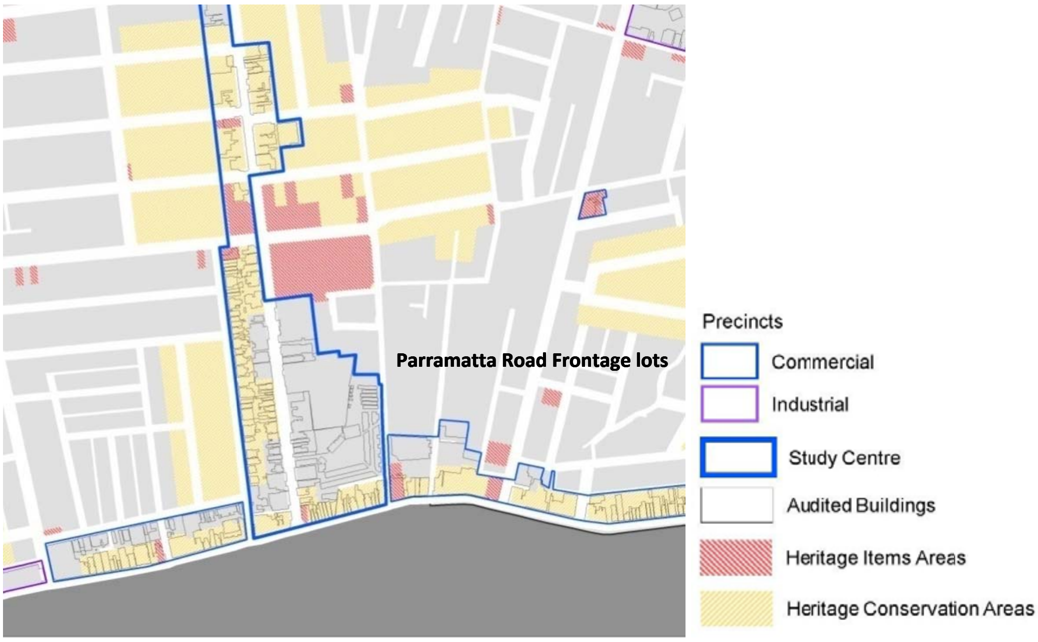
This sub-precinct is comprised of the properties with frontage to Parramatta Road between Renwick and Balmain Road.  This intersection is an important gateway to Norton Street Centre and the northern centres of Rozelle and Balmain. The built form includes older period shops and redeveloped mixed use properties.

There are significant traffic impacts in this precinct. Traffic volume data (AADT) shows there were 67,000 AADT movements[34] in the vicnity of Norton Street (north bound traffic) in 2005. As discussed in Section 4, there are also high aircraft noise impacts in this area (>ANEF 35). This makes residential development problematic for mixed use development.

The properties are also affected by a heritage conservation area. A licensed pub on the corner of Norton Street and Parramatta Road (Norton's on Norton) is a heritage listed item.

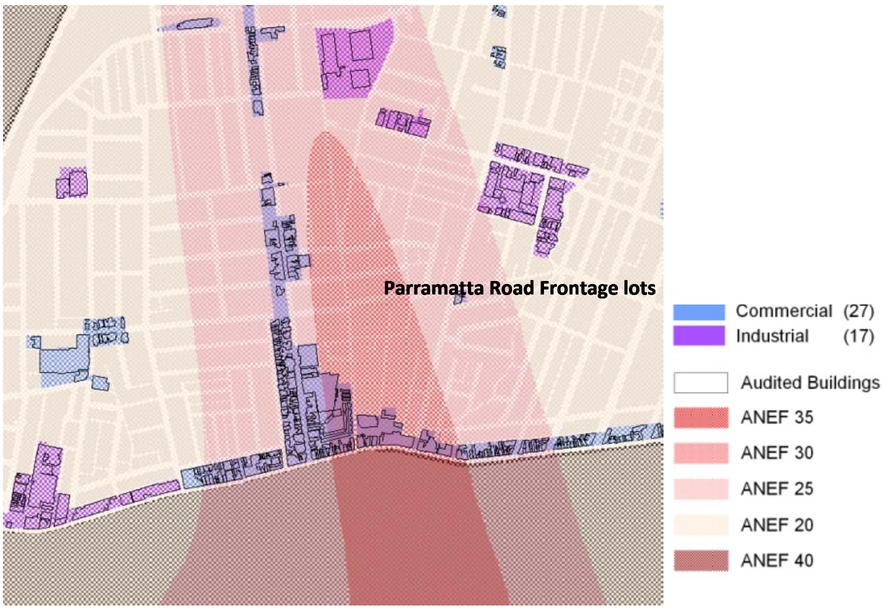
[34] Annual Average Daily Traffic. Complied by the RTA, this data is an average of all traffic movements on a road averaged out over 365 days. 2005 released data used.

Figure 66. Norton Street (Parramatta Road frontage lots) – Heritage




Source: SGS 2009

Figure 67. Norton Street (Parramatta Road frontage lots) - ANEF




Source: SGS 2009

### Parramatta Road East Precinct

The landuses along this stretch of Parramatta Road are predominantly retail mainstreet uses. Built form is of generally older-style narrow 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 Local Light uses at Trafalgar and Nelson Streets.

There are significant traffic impacts in this precinct. Traffic volume data (AADT) shows there were 67,000 AADT movements in the vicinity of Elswick Street (east bound traffic) in 2005[35]. The five sets of traffic lights within this stretch of Parramatta Road at Balmain, Catherine, Young, Johnston and Nelson Streets slows traffic significantly.

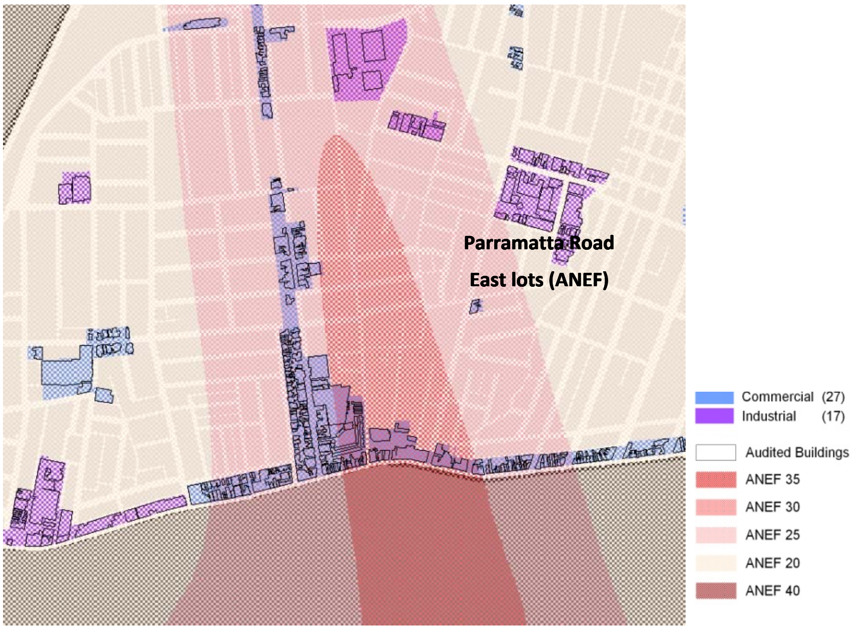
This precinct is affected by a heritage conservation area overlay.

**Figure 68.** Parramatta Road East Precinct


Source: SGS 2009

[35] Annual Average Daily Traffic. Complied by the RTA, this data is an average of all traffic movements on a road averaged out over 365 days. 2005 released data used.

**Figure 69.** Parramatta Road East - ANEF

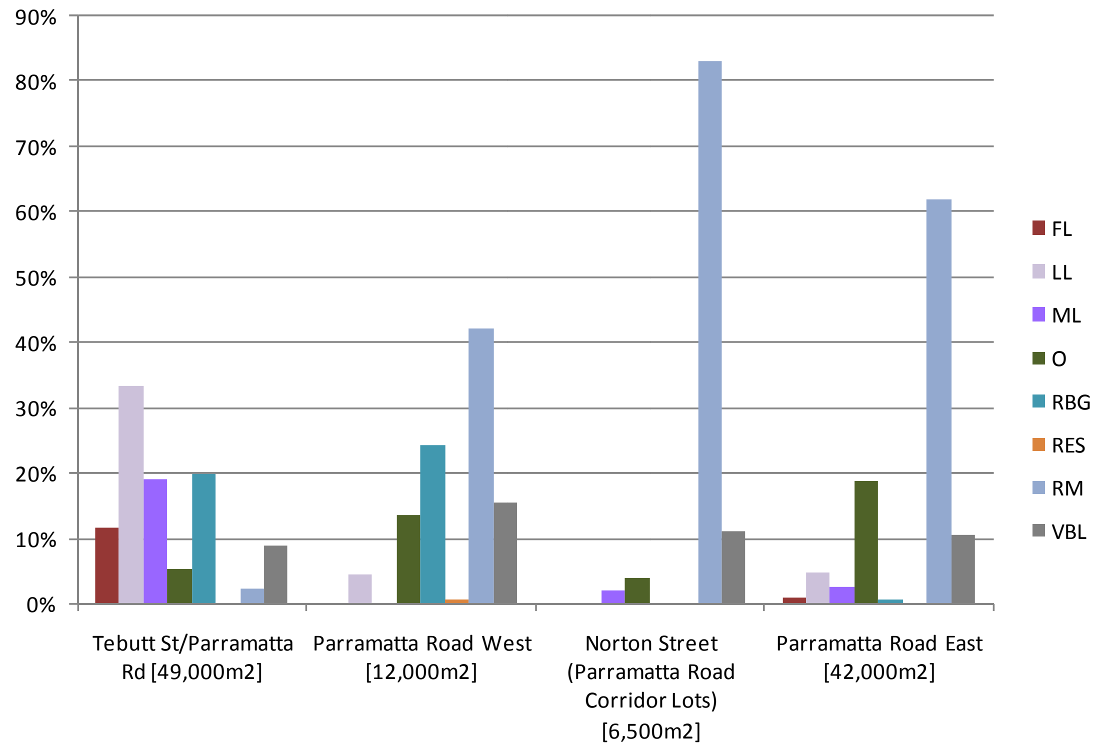



Source: SGS 2009

### Land Use and Activity Analysis

The corridor currently contains 109,284 square metres of floorspace with most of this in Parramatta Road East and Tebbutt Street Precinct. Analysis of activity floorspace shows that within these BLCs there are distinctive activity profiles for each precinct. Figure 70 is a summary of the BLC profile within each corridor precinct.

**Figure 70.** Parramatta Road Corridor Precinct BLCs




Source: SGS 2009

The graph highlights the changing BLC profile of the corridor from west to east. The precincts have the following BLC profile:

- **Tebbutt Street/Parramatta Road.** Tebbutt Street provides access to Hathern Street, an overpass across Parramatta Road. The low amenity explains the concentration of industrial land uses which include FL, LL and ML. Retail land uses are located further east (between Flood and Elswick Street). There is one vacant building amongst the retail land uses (corner of National Street).
- **Parramatta Road East.** This precinct shows signs of improving amenity with some retail and office land uses however there are still some industrial land uses (LL). The properties are accessed via laneways off Jarret Street to the rear. There are more vacancies in this precinct with frontage to Parramatta Road and Jarret Street. The vacant Parramatta road properties are small shops.
- **Parramatta Road (Norton Street).** This precinct contains predominantly retail land uses and some office. Most of the vacant shops have frontage to Parramatta Road.
- **Parramatta Road East.** This precinct contains approximately eight blocks between Norton Street precinct and Camperdown Industrial precinct. Larger shops and establishments are located between Balmain Road and Macquarie Street (three blocks). The remaining five blocks contain narrow lots with a a high portion of vacant shops interspersed with predominantly

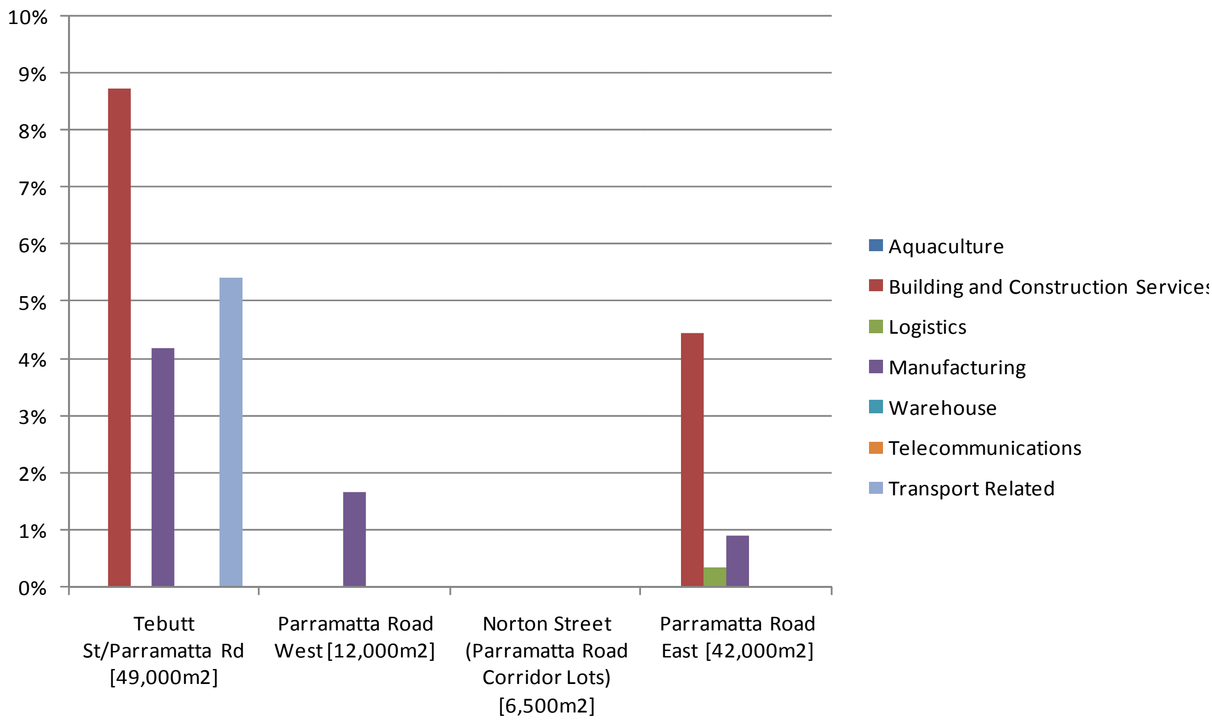
retail land uses and some office. Industrial land uses occur closer to the Campderdown industrial precinct. The core concentration of vacant shops occurs in these remaining 5 blocks.

Vacancies make up around 10 per cent of precinct floorspace. This is a significant issue for the larger precincts in the corridor such as Parramatta Road East. Vacant sites generally occur near intersections where highest traffic impacts occur (Norton Street and Parramatta Road, Parramatta Road and Pyrmont Bridge Road, Tebbut Street and Parramatta Road) and in areas of predominantly narrow lots.

An analysis of the specific activities within these BLCs provides a clearer picture of the character of the corridor precincts. In this analysis we have assessed the activity of each precinct in relation to broad classes of activity as follows:

- **Industrial activity.** Industrial floorspace comprises less than 10 per cent of precinct floorspace. Traditional manufacturing concentrated in Tebutt Street/Parramatta Road precinct along with warehousing and building and construction services. Certain manufacturing sectors are highly susceptible to relocation off-shore. These uses are likely to decline in line with the trend for the Sydney metropolitan region. There are no industrial land uses in the Norton Street areas of the corridor.

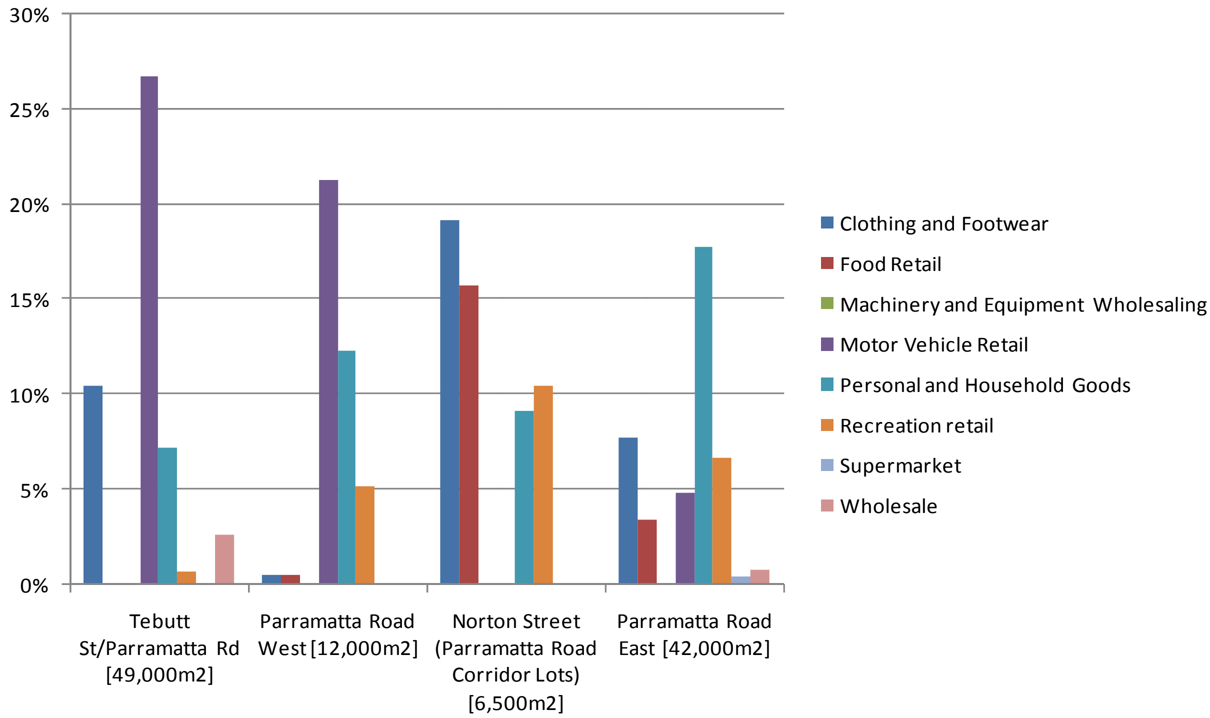
**Figure 71.** Parramatta Road Corridor - Industrial Activities




Source: SGS 2009

- **Retail activity.** The retail activity comprises up to 25 per cent of precinct floorspace and includes activities one would generally expect in an enterprise corridor such as bulky goods retail (personal and household goods, recreation retail, motor vehicle retail). There is a high proportion of food retail reflecting the strong cafe and dining offer of the Norton Street centre.

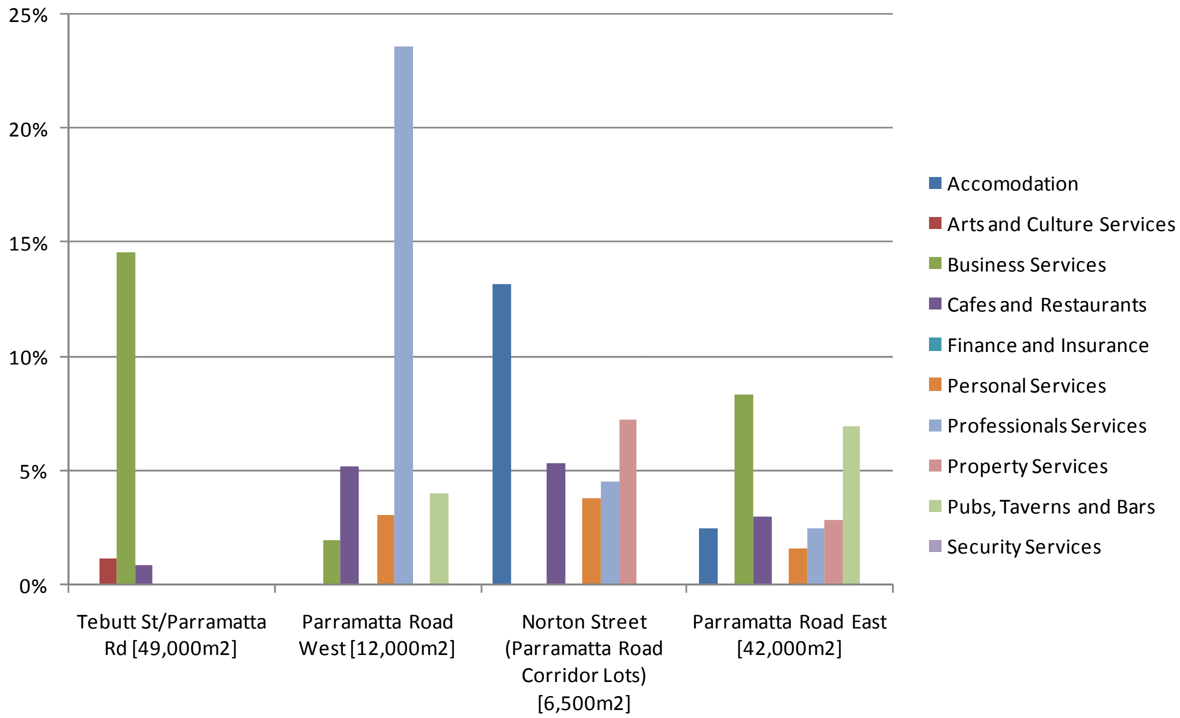
**Figure 72.** Parramatta Road Corridor - Retail Activity




Source: SGS 2009

- **Office-based activity.** Office-based activities comprise between 10 and 25 per cent of precinct floorspace. The precincts are contain a good mix of support services such as cafes, restaurants, and business services.

**Figure 73.** Office-based activity




Source: SGS 2009

The corridor currently exhibits the elements of an enterprise corridor providing affordable office floorspace (due to lower amenity from traffic and aircraft impacts), bulky goods retailing and some industrial land uses. The high vacancies highlight the difficulty in maintaining economic activity on such an extensive corridor.

## Opportunities and Constraints

### High level of public transport provision but on congested roads

Public transport along Parramatta Road is comprised of four bus routes which connect the corridor other centres as follows:

- Canada Bay centres, Norton Street centre and CBD (Routes 436,437,438,L38) – operates along Parramatta Road and Norton Street.
- Campsie and CBD (Route 413) – operates along Parramatta Road and Junction Street.
- Burwood, Strathfield and CBD (Route 461,480,483) – operates along Parramatta Road to Burwood (Route 461) and along Hume Highway to Strathfield area.
- Rozelle, Norton Street centre and CBD (Route 435,440,L440) – operates along Parramatta Road and Norton Street to Leichhardt Town Hall (Route 435) and along Hume Highway to along Balmain Road to Rozelle (Routes 440, L440).

While the provision of bus services is an attribute, the highly congested Parramatta Road adds considerably to travel times.

**Extensive corridor with poor quality public domain**

The corridor measures approximately three kilometres. Maintaining economic activity along the length of this corridor is a significant task. The corridor generally has poor quality public domain due to:

- Large concentrations of vacant shops in Parramatta Road East precinct[36].
- High traffic volumes, including heavy vehicle traffic, along Parramatta Road.
- Aircraft noise impacts in the vicinity of Norton Street.

Strategies to enhance the amenity of the corridor must have regard to the type of uses that would be located in such a highly impacted area.

Given the length of the corridor, it is appropriate to plan for the corridor in precincts targeting areas that require the most improvements with higher order structure planning investigations.

**The corridor has extensive heritage conservation area status and many heritage items**

A heritage conservation area overlay affects the entire corridor with the exception of the Tebbut Street/Parramatta Road precinct. The implications for land use are that developers must assess the contribution that their property makes to the streetscape and justify alterations, or demolition, proposed. This can add significant costs to development particularly for smaller developers. Given the poor streetscape in many parts of the corridor, it may also cause significant heritage value aspects to be unduly disregarded.

**Corridor provides floorspace for large format retail and businesses start-ups**

The corridor plays an important role in the provision of affordable corridor floorspace for various large-format retailers (motor vehicle retailers, furniture stores, party hire equipment). These activities require large showroom/shop floor areas and significant passing trade making mainstreet retail and commercial floorspace unsuitable.

**Potential Strategic site at Tebbutt Street Industrial Precinct.**

The current use for the goods line is related to the construction of the CBD Metro. Once this has been completed the future of the corridor may be investigated given the decommissioning of the corridor for freight rail activities. Discussions with DoP indicate that a public transport corridor is among many futures being considered. A public transport corridor would make proximate sites , such as Tebutt Street strategically important.

[36] However, recent site visits indicate a the sale of a group of old properties in the vicinity of bridge road which may indicate renewal development.

The site also has poor amenity for other employment landuses due to the Parramatta Road overpass access. An industrial land uses is appropriate to retain the land for future strategic land use and to provide a buffer for residential in the short to medium term.

**Parramatta Road Corridor Vision and Strategies**

The Parramatta Road Corridor be retained as the principle enterprise corridor in the LGA but with improved amenity.

The key strategies to achieve the enterprise corridor vision are to:

- Undertake a corridor heritage study to identify properties of high heritage value and those which may be altered or which can be removed. This provides the development community with some level of certainty and assists in moving forward renewal planning.
- Undertake further investigation of the corridors precincts with detailed structure planning for the Parramatta Road East precinct to facilitate renewal of the precinct. Such structure planning will seek to investigate the potential to :
  - Extend retail and commercial activity into side streets.
  - Introduce laneways and streets within blocks to provide retail and commercial frontages to rear streets and lanes.
  - Develop appropriate mixed-use built form typologies that addressed aircraft and traffic noise impacts for residential components.
  - Investigate public domain improvements as part of renewal activities.
- Retain industrial land use at Tebbut Street.
- Improve local traffic management and investigate parking demand issues for enterprise corridor and creative industry activities.

An enterprise corridor designation under the standard template is considered appropriate for most for the corridor with a light industrial zone for the Tebbutt Street Precinct

## 6.2 Victoria Road Corridor

The Victoria Road corridor is comprised of Victoria Road frontage properties between Roberts Street and Terry Street. This one kilometre corridor has been split into precincts for ease of analysis based on areas of similar lot configurations, employment activity and built form character. The precincts are:

- Victoria Road South
- Rozelle Centre (Victoria Road frontage properties)
- Victoria Road North (including Terry Street precinct)

The locality and character of the areas are provided below.

## Victoria Road South

This precinct refers to the corridor between Roberts Road and Prosper Street and some properties with frontage to The Crescent. The precinct contains a mix of uses typical to a corridor with high traffic volumes[37] including bulky goods retail, light industrial, and some retail mainstreet land uses. The zoning of the corridor is split with a business zone applied to properties on the southern side of Victoria Road and an industrial zone to properties on the northern side of Victoria Road. The setbacks along the corridor vary with some establishments having car parking in the front setback while others are built to the street.

**Figure 74.** White Bay/Victoria Road


Source: SGS, 2009

A heritage conservation area overlay affects some parts of the corridor with heritage items located at the corner of Gordon Street and Victoria Road.

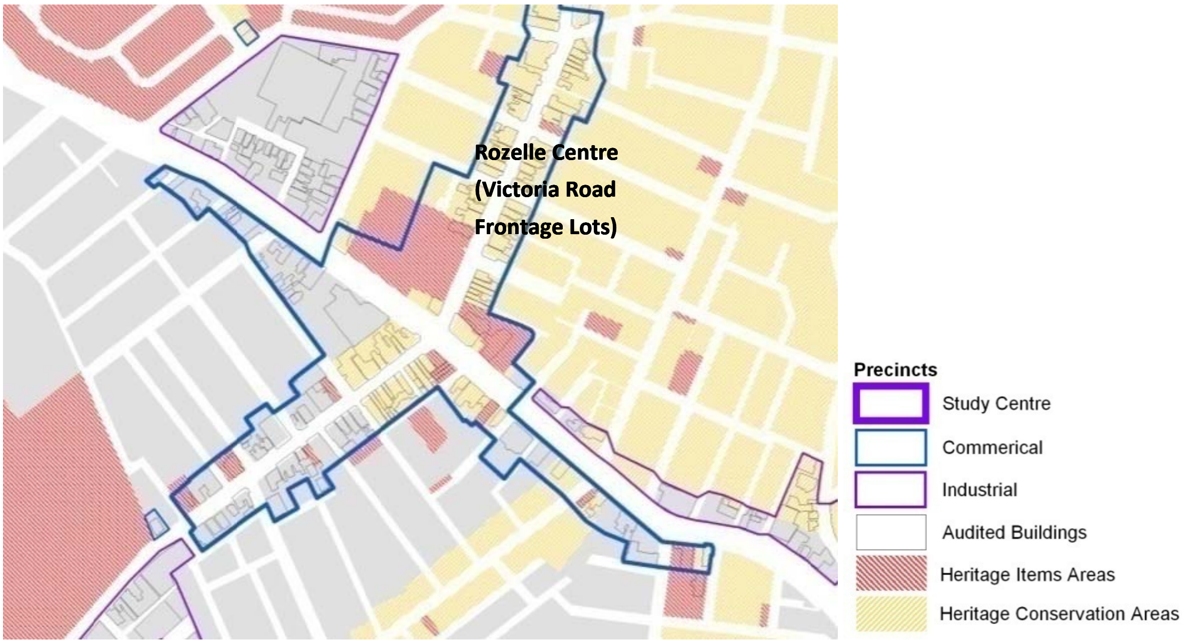
Land uses surrounding the corridor include predominantly detached residential dwellings to the north (most located within a heritage conservation area) and south, the White Bay Industrial precinct and REP 26 lands to the east and Rozelle centre to the west.

## Rozelle Centre (Victoria Road Frontage Lots)

This part of the corridor is an important intersection being the midpoint of the Balmain Road/Darling Street main street. Land uses in this part of the corridor are predominantly retail main street land uses with special uses (such as Rozelle Public School) and the Balmain Leagues Club.

[37] 77,000 AADT in 2002. No more recent data available. (RTA, 2005)

**Figure 75.** Rozelle Centre (Victoria Road Frontage Lots)




Source: SGS, 2009

The intersection frontage properties are located within a heritage conservation area and contain heritage items including Rozelle Public School and some period commercial properties.

There are significant traffic impacts in this area. Darling Street is the main arterial road through Leichhardt LGA. There are significant traffic volumes along Victoria Road with 78,000 Annual Average Daily Traffic movements recorded at Darling Street/Victoria Road in 2002[38]. Victoria Road provides access to the City West Link. Traffic volumes onto the City West link from Balmain Road/Lilyfield Road were in the order of 62,000 AADT movements in 2002 increasing to 64,000 AADT movements in 2005[39]. Traffic volumes along Balmain Road are smaller with 18,000 AADT movements recorded in 2005[40].

### Victoria Road North

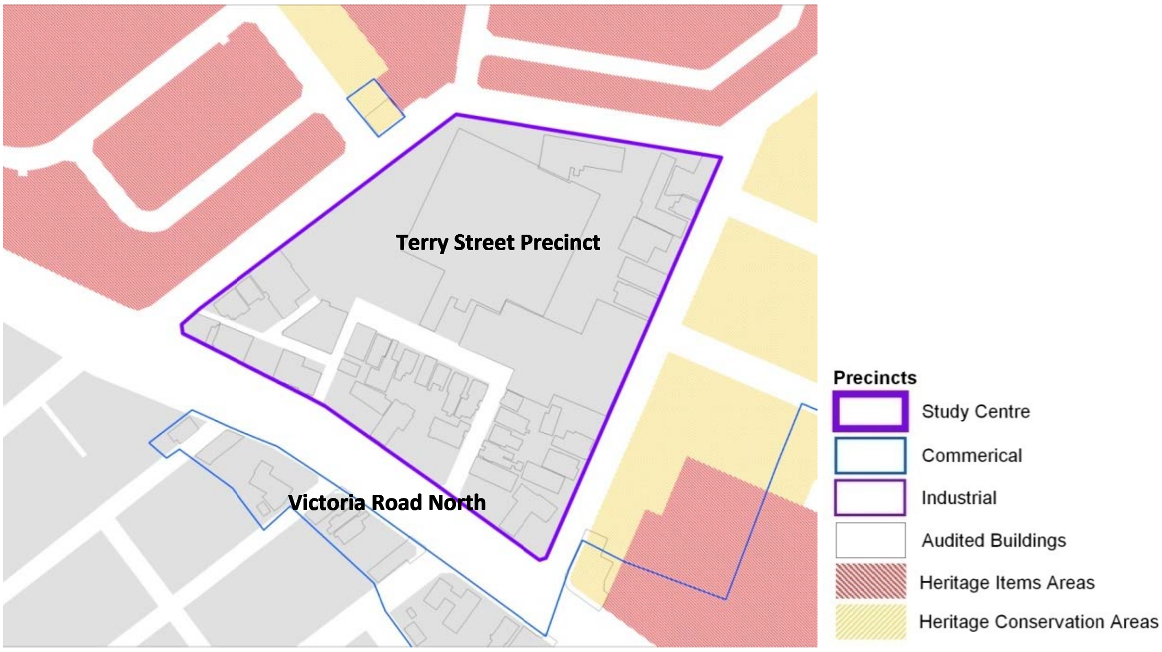
This part of the corridor contains Victoria Road frontage properties between Wellington and Terry Street and the Terry Street Precinct. This part of Victoria Road provides access to the Iron Cove Bridge which connects Leichhardt to the Canada Bay peninsula and to the north west Sydney suburbs.

[38] RTA AADT 2002 Data. All trips to and from this intersection averaged out across days each year.

[39] *ibid*

[40] *Ibid.*

**Figure 76.** Victoria Road North and Terry Street Precincts




Source: SGS, 2009

The Victoria Road corridor contains a diverse mix of typical corridor activities (bulky goods retail, light industrial and some retail mainstreet land uses). It does however, also contain a higher proportion of residential dwellings. This part of the corridor is not affected by heritage conservation area overlays nor does it contain heritage items.

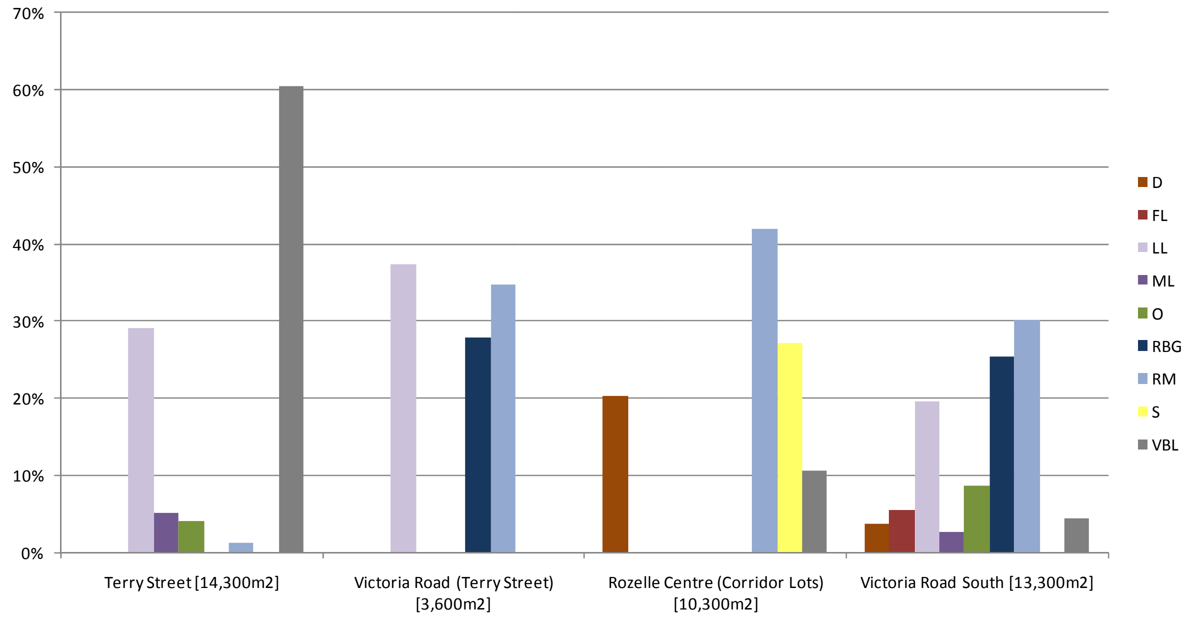
The remainder of the Terry Street precinct contains a large vacant site (known as the 'Carrier' site). Residential development proposals have been submitted to Council for this site. Detached residential dwellings also comprise a large part of this precinct. Existing employment land uses include local light industrial, light manufacturing and office land uses.

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

## Land Use and Activity Analysis

The Victoria Road Corridor contains 41,400 square metres of floorspace with most of this in Terry Street and Victoria Road South Precincts. The analysis of the BLC profile highlights the different character of each precinct within the corridor. Figure 77 summarises the proportions of each BLC in the corridor precincts.

**Figure 77.** Victoria Road Corridor Precinct – BLC Profile




Source: SGS, 2009

Note: This is based on lot area

The BLC for the precincts is summarised as follows:

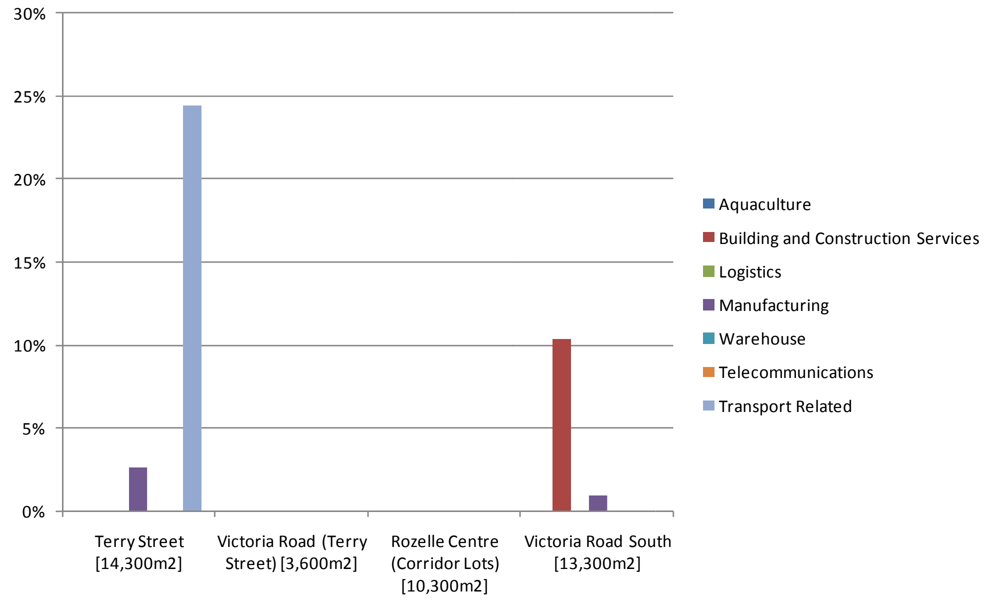
- **Victoria Road (Terry Street).** This corridor precinct contains bulky goods retail and local light industry but higher proportions of main street retail than typical for enterprise corridors. Residential development at street level in a corridor is not a desirable land use given the traffic impacts.
- **Rozelle Centre (Victoria Road frontage lots).** This corridor precinct contains main street retail activities, the Balmain Leagues Club and dispersed activities.
- **Victoria Road South.** This corridor precinct contains a wide range of land uses. Most land is utilised for main street retail purposes and retail bulky goods. There is a higher proportion of industrial land uses than the other parts of the corridor. The precinct also has office land uses.

There are minimal vacancies in the corridor with just one large vacant site and some vacant shops in the Victoria Road South precinct. Outside the corridor the Terry Street precinct is predominantly vacant.

Analysis of the specific activities within these BLCs provides a clearer picture of the character of the corridor precincts. In this analysis we have assessed the activity of each precinct in relation to broad classes of activity by the proportion it comprises:

- **Industrial activity.** Industrial activity floorspace is mostly located in the Terry Street corridor properties and made up of transport related and manufacturing activities.

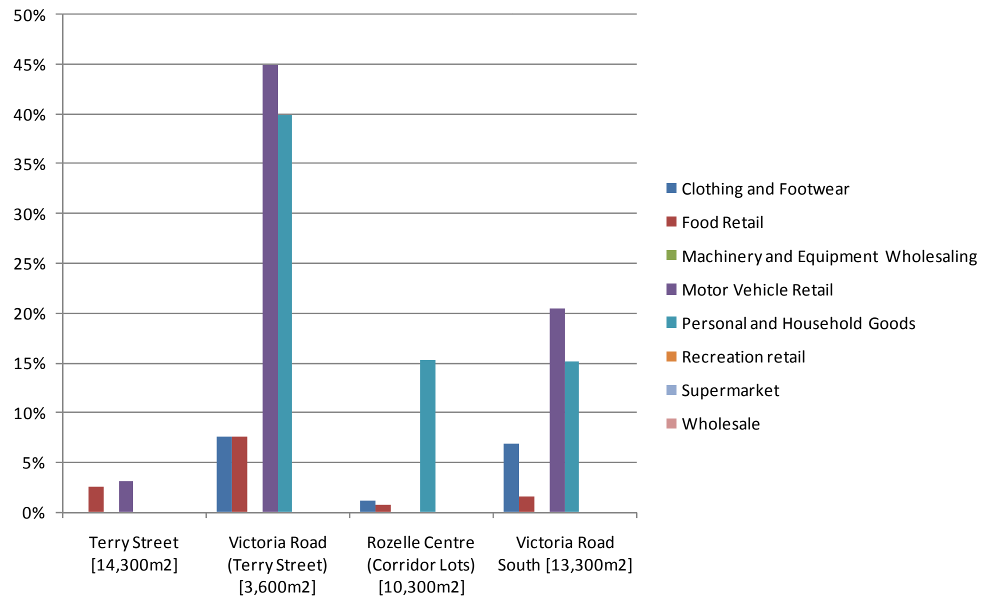
## Figure 78. Victoria Road Corridor – Industrial Activity




Source: SGS, 2009

- **Retail activity.** Most of the retail activity in the corridor is made up of bulky good retail (predominantly personal and household goods retail and food retailing). Victoria Road (Terry Street) has some higher proportions of clothing and footwear and food retail land uses (although form a much lower base). Victoria Road south has the lowest proportions of retail activity floorspace.

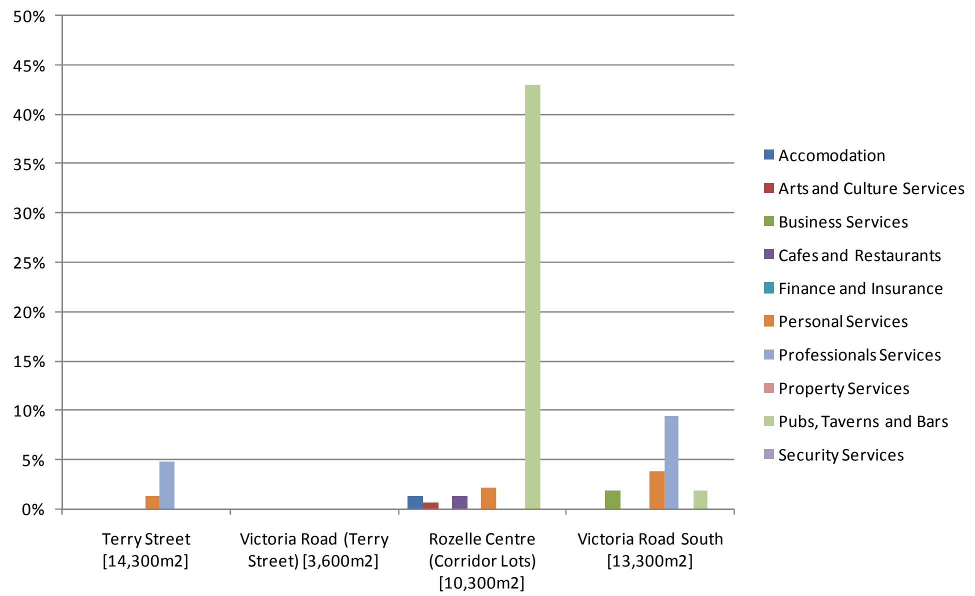
## Figure 79. Victoria Road Corridor – Retail Activity




Source: SGS, 2009

- **Office-based and special use activity.** Less than 10 per cent of the floorspace in the corridor has a connection to office related activities. Most of this is located in the White Bay and Moore Street Industrial Precincts. Prominent among these uses are professional services and arts and culture activities. There are more personal services and health related activity in the Rozelle centre corridor. There are no office related activities in Victoria Road frontage properties in the vicinity of Terry Street.

**Figure 80.** Victoria Road Corridor – Office-based and special use activity




Source: SGS, 2009

- **Terry Street Precinct.** The remaining land in the Terry Street precinct (without frontage to Victoria Road) contains approximately 8,600 square metres of vacant floorspace in the precinct. The vacant 'Carrier' site has around 12,800 square metres with the vacant building having approximately 7,600 square metres of floorspace. The employment activity currently on the site is provided in Table 16.

Table 16. Terry Street Activity Profile

| Class of Activity | Activity Floorspace | % |
|---|---|---|
| Vacant | 8,646 | 60% |
| Warehousing | 3,502 | 24% |
| Professional Services | 3,938 | 4% |
| Motor Vehicle Retail | 435 | 3% |
| Manufacturing | 373 | 3% |
| Food Retail | 366 | 3% |
| Personal Services | 188 | 1% |
| Health | 116 | 1% |
| **Total** | **14,315** | **100%** |

Source: SGS, 2009

## Opportunities and Constraints

### High level of public transport provision but on congested roads

Public transport along Victoria Road is comprised of 11 bus routes which connect the corridor precincts to other centres as follows:

- CBD and north western suburbs via Victoria Road (Routes 501, 502, L03, 504, X04, L39).
- CBD and Terry Street area (Routes 440, L40).
- Balmain and Canterbury Station, crosses Victoria Road (Route 445).
- CBD and Balmain (Route 441,442) – accesses Victoria Road south precinct.

While the provision of bus services is an attribute, the highly congested Victoria Road adds considerably to travel times.

### Active corridor with minimal vacancies but some poor quality public domain

Victoria Road South has some areas of poor amenity. Strategies to enhance the amenity of the corridor must have regard to the type of uses that would be located in such a highly impacted area.

### The corridor has sections of extensive heritage conservation area status

A heritage conservation area overlay affects parts of the Victoria Road south precinct and the corridor properties in the vicinity of Rozelle centre. The implications for land use are that developers must assess the contribution that their property makes to the streetscape and justify alterations, or demolition, proposed. This can add significant costs to development particularly for smaller developers.

**Corridor provides floorspace for large format retail and businesses start-ups**

The corridor plays an important role in the provision of affordable corridor floorspace for various large-format retailers (motor vehicle retailers, furniture stores, party hire equipment).These activities require large showroom/shop floor areas and significant passing trade making mainstreet retail and commercial floorspace unsuitable. Victoria Road South precinct provides some office floorspace.

**Opportunity to utilise redundant industrial land in Terry Street precinct on the fringe of the corridor to support the Rozelle Centres**

The Terry Street precinct contains important lands which can support the Rozelle centre (See Section 5.1). Unlike most of the Rozelle area, Terry Street contains no heritage items or heritage conservation area overlay. This land will be important in the provision of additional retail and office floorspace should main street sites be difficult to develop due to their heritage values. Industrial lands in other precincts have sufficient capacity to accommodate the industrial activities while retail and business activities would be appropriate at this location.

### Victoria Road Corridor Vision and Strategies

The future role of the Victoria Road Corridor is as follows:

- Victoria Road South – should be retained as an enterprise corridor.
- Rozelle Centre (Victoria Road frontage properties) – appropriate to retain for main street retail activities.
- Victoria Road North – southern side of Victoria Road should be retained for enterprise corridor activities. The north side of the road (including Terry Street precinct) should be set aside for a centre supporting retail and office activities and some higher density residential.

Strategies to achieve the enterprise corridor vision are to:

- Complete a corridor heritage study to identify properties of high heritage value and those which may be altered or which can be removed. This will provide the development community with some level of certainty and assist in moving forward renewal planning.
- Undertake further investigation of the Terry Street precinct to facilitate renewal of the precinct. Such structure planning will seek to investigate the potential to :
  - Investigate development of the remaining land for a mixture of retail, office and residential development.
  - Develop appropriate mixed-use built form typologies that address aircraft and traffic noise impacts for residential components.
  - Investigate public domain improvements as part of renewal activities.
- Improve local traffic management and investigate parking demand issues for enterprise corridor activities.

An enterprise corridor designation under the standard template is considered appropriate for most of the corridor with further detailed investigation of appropriate zoning for the Terry Street precinct. It should remain industrial until such investigations are undertaken.

## 6.3 White Bay Industrial Precinct

The area is located in close proximity to Sydney's CBD, and the Anzac Bridge. The area is 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. A cycleway runs along the Anzac Bridge.

**Figure 81.** White Bay/Victoria Road


Source: SGS, 2009

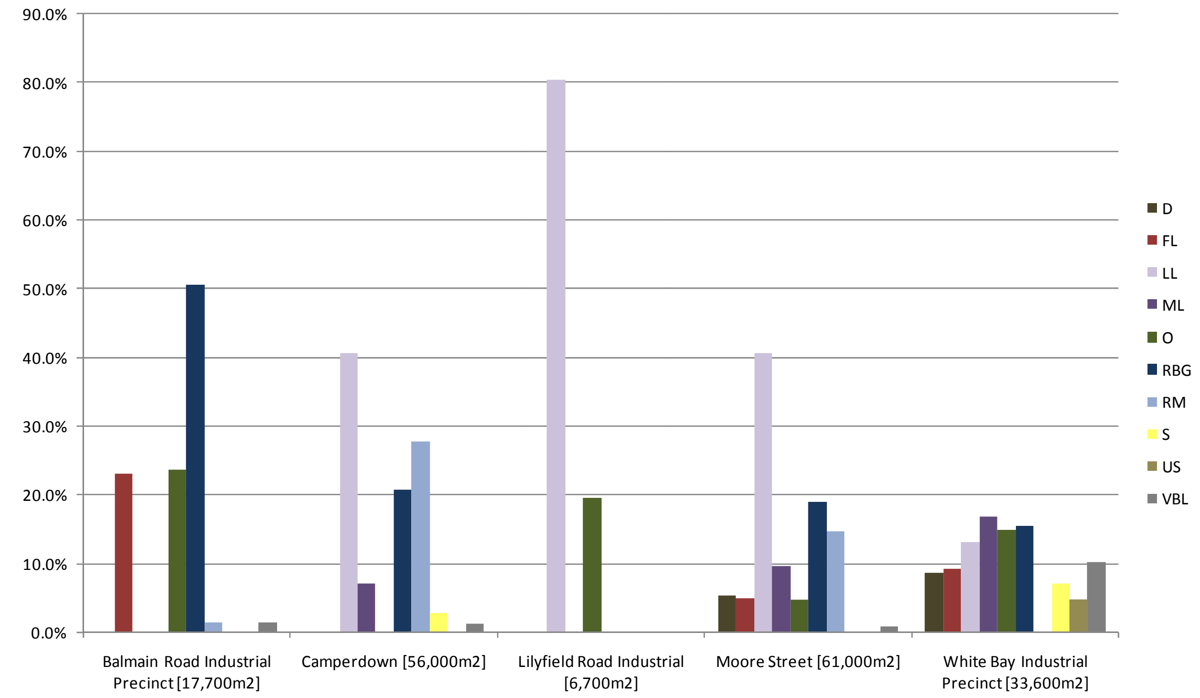
Crescent Street and Parsons Street include Office land uses while Roberts Street is comprised of Local Light including creative industries (media) in large-space warehouses. All of this precinct is located within a Heritage Conservation Area.

The Inner West Subregional Strategy classifies the Martin Bright Steel Works Site as Category 2 employment land site (appropriate for investigation for alternative employment generating uses). The remainder of this employment precinct is Category 1 land, and is to be retained for industrial land uses.

### Land Use and Activity Analysis

The White Bay Industrial Precinct contains 41,400 square metres of floorspace with most of this in Terry Street and Victoria Road South Precincts. The analysis of the BLC profile highlights the different character of each industrial precinct within the LGA. Figure 82 shows the proportions of each BLC in the precincts.

**Figure 82.** Industrial Precincts – BLC Share Analysis




Source: SGS, 2009

White Bay Industrial Precinct has the most diverse range of land uses and also contains a large amount of vacant floorspace.

The profile of White Bay in terms of employment activity categories [41] is shown in Table 17.

[41] SGS groupings.

**Table 17.** White Bay Industrial Precinct Activity Profile

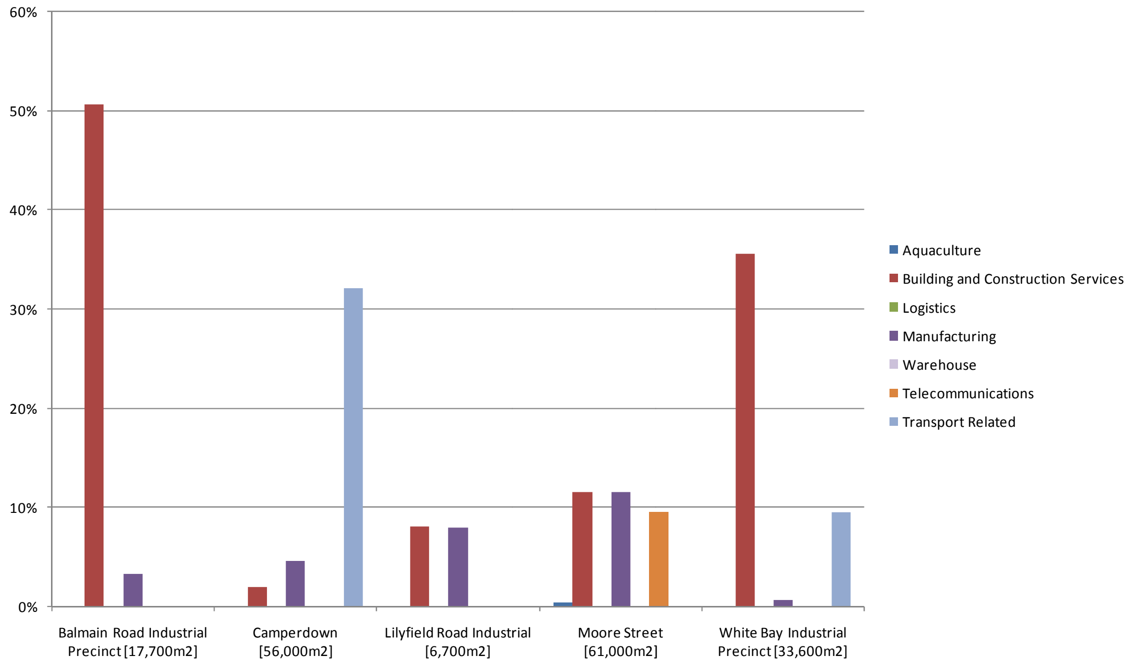
| White Bay Industrial Precinct Activity | Floorspace ( square metres) | % of total |
|---|---|---|
| Building and Construction Services | 11,965 | 36% |
| Motor Vehicle Retail | 5,696 | 17% |
| Warehouse | 3,192 | 10% |
| Professionals Services | 3,007 | 9% |
| Arts and Culture Services | 1,996 | 6% |
| Business Services | 1,503 | 4% |
| Health | 1,484 | 4% |
| Wholesale | 569 | 2% |
| Cafes and Restaurants | 501 | 1% |
| Manufacturing | 226 | 1% |
| Vacant | 3,424 | 10% |
| **TOTALS** | **33,564** | **100%** |

Source: SGS, 2009

The precinct has a diverse mix of office-based, industrial and bulky goods retail activities. Activities with high shares include Building and Construction Services, Motor vehicle Retail and Warehousing. Office uses include Professional Services and Arts and Culture Services including film and television studios). There is currently 10 per cent vacancy which is moderate.

The following charts look at the proportions of floorspace in comparison with the other LGA industrial precincts of Camperdown, Lilyfield Road, Balmain Road, Moore Street and Terry Street Industrial Precincts

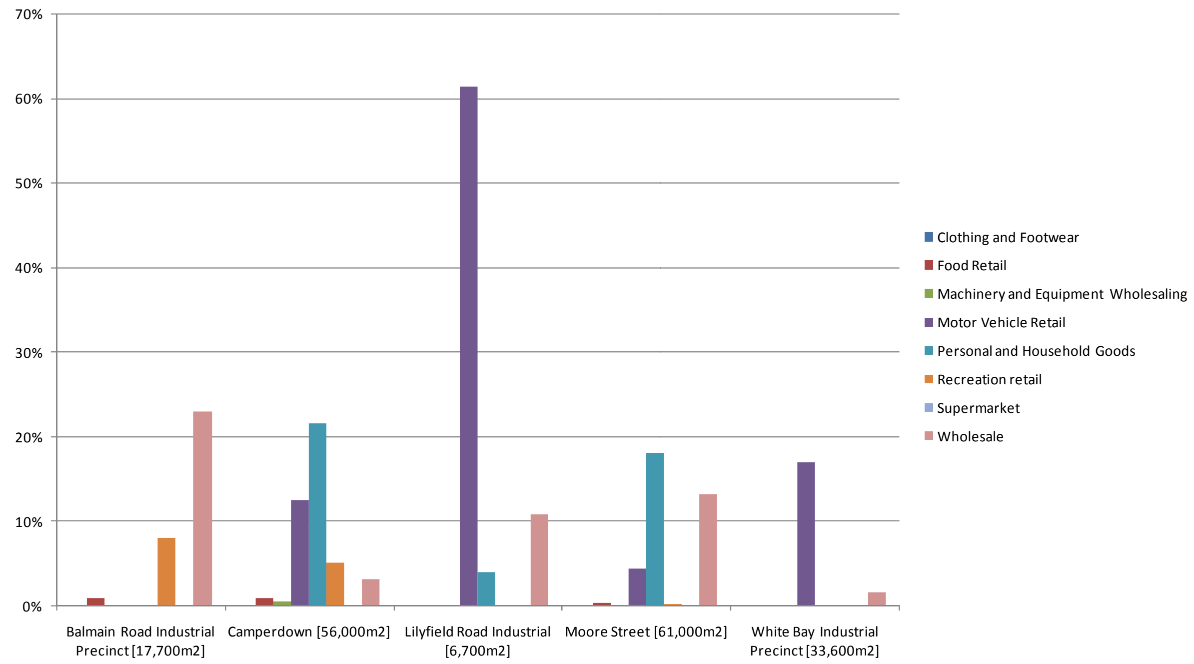
**Figure 83.** Manufacturing Floorspace




Source: SGS, 2009

White Bay and Victoria Rd contains Building and Construction Services activity and some minor manufacturing and transport related floorspace activity.

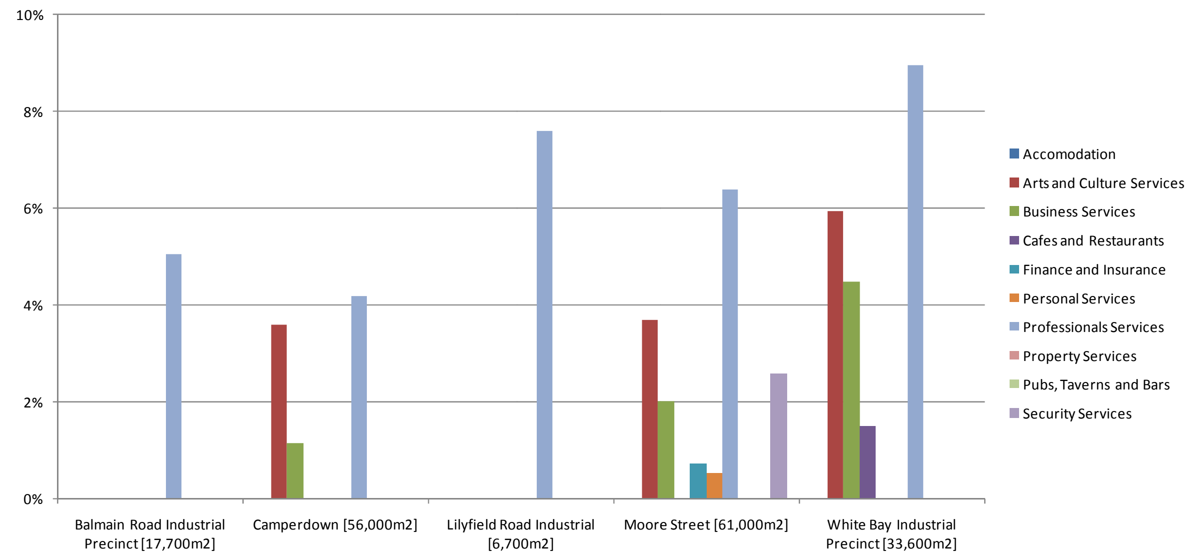
## Figure 84. Retail Floorspace




Source: SGS, 2009

Compared to the benchmark industrial precincts, White Bay has minor retail floorspace comprised of motor vehicle retail and some wholesale activities.

## Figure 85. Office-based and supporting activities




Source: SGS, 2009

White Bay and Victoria Road has a significant proportion of office-based activities. These are supported by business services, cafes, restaurants, pubs and bars. It is comparable with Moore Street in terms of profile however Moore Street also contains personal services.

### Opportunities and Constraints

**The precinct contains a diverse range of local industrial and creative industry activities**

The precinct has a diverse mix of uses and activities. Maintaining the creative industries supports Council desire to keep such industries in the LGA. It is currently well-tenanted and functions well. The mix of uses provides a high quality industrial environment and is possible due to the extensive associated office floorspace provision in the LEP for industrial areas (20 per cent of floorspace). There are also stand-alone office developments in the precinct which have potentially been approved through existing use, or other mechanisms. Further investigation should be undertaken of the possible connections, if any, between these office uses and the industrial activities.

**Glebe Island/White Bay futures may have significant impact on the precinct**

Recent commitments made by the State Government to investigate the Glebe Island/White Bay and former port lands will provide an opportunity to investigate residential and employment futures of this unique site. This would make White Bay a strategic industrial precinct and it should be preserved for this purpose.

**Limited public transport provision but on congested roads**

Public transport to the precinct is comprised of two bus routes which connect the precinct to other centres the CBD and Balmain (Route 441,442). While the provision of bus services is an attribute, the highly congested Victoria Road adds considerably to travel times.

**The precinct is within an industrial heritage conservation area**

A heritage conservation area overlay affects the precinct. The implications for land use are that developers must assess the contribution that their property makes to the streetscape and justify any alterations, or demolition, that is proposed. This can add significant costs to development particularly for smaller developers.

### White Bay Industrial Precinct Vision and Strategies

Based on the opportunities and constraints, the future role of the White Bay Industrial Precinct is to be retained as a general industrial area.

To assess the likely demand for floorspace with this vision in mind, the BLC profile of the corridor was adjusted to reflect the type of uses that would most likely occur in these precincts. These are principally local light industry, light manufacturing and some supporting retail uses (ie. food retail).

The key strategies to achieve the general industrial vision are to:

- Limit subdivision to preserve the large lots in the precinct.
- Undertake a corridor heritage study to identify the objectives of the heritage conservation in this industrial area. This will guide any proposed alteration of new development.
- Investigate public domain improvements at the intersection of Roberts Road and Crescent Street and along Roberts Road including enhancing safety features.
- Improve local traffic management and investigate parking demand issues for precinct activities.

A general industrial designation under the standard template is considered appropriate for this precinct. The entire site should be retained for industrial land uses.

## 6.4 Moore Street Industrial Precinct

Moore Street precinct is bound by White's Creek to the east, War Memorial Park on the corner of Catherine and Moore Street, and residential development predominately made up of workers cottages.

**Figure 86.** Moore Street


Source: SGS, 2009

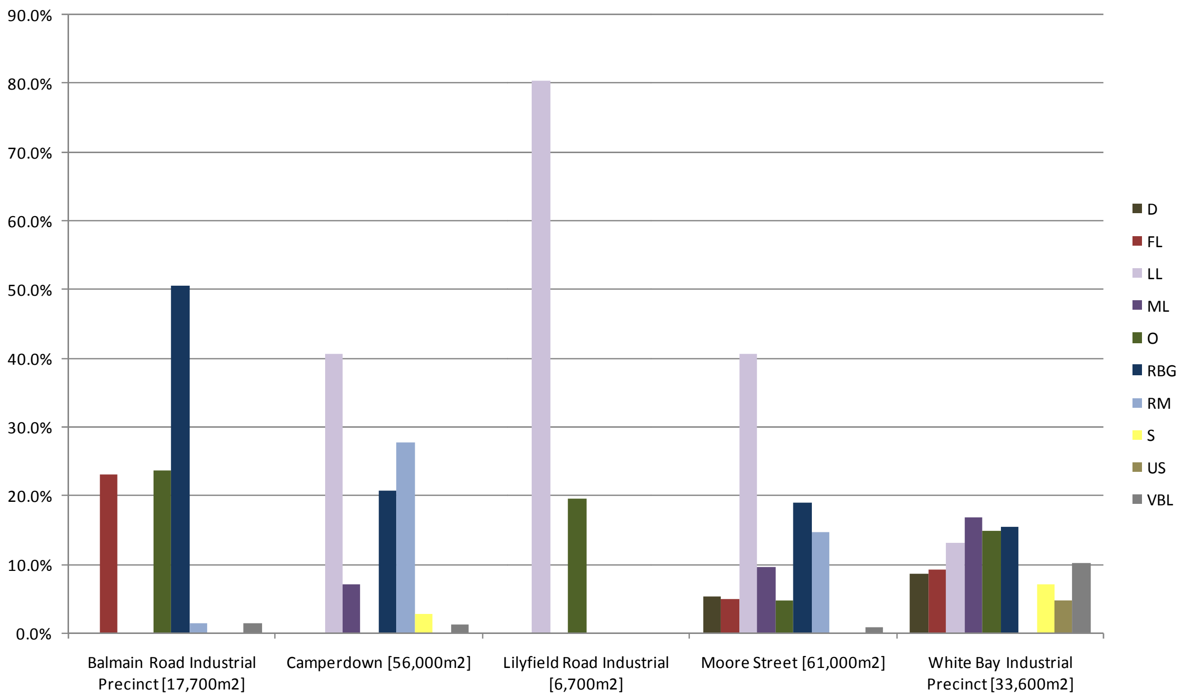
The majority of Moore Street precinct currently contains a mixture of local light industrial, manufacturing and bulky goods retail land uses. Smaller land uses include dispersed land uses and freight and logistics activities. Office uses and some detached residential are located on Moore Street. There are also residential properties located in the vicinity of Hill Street.

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

## Land Use and Activity Analysis

The Moore Street Precinct contains 61,000 square metres of floorspace and has the highest floorspace of the industrial precincts. The analysis of the BLC profile highlights the different character of Moore Street and the other industrial precincts within the LGA (Figure 82).

Figure 87. Industrial Precincts – BLC Share Analysis




Source: SGS, 2009

Moore Street has a diverse mix of uses and is comparable to the White Bay Industrial Precinct. The precinct has a high proportion of Local Light Industry and Retail Bulky Good land uses.

The profile of Moore Street in terms of employment activity categories[42] is shown in Table 18.

[42] SGS groupings.

**Table 18.** Moore Street Activity Profile

| Moore Street | Floorspace ( square metres) | % of Total |
|---|---|---|
| Personal and Household Goods | 11,057 | 20% |
| Wholesale | 8,099 | 15% |
| Building | 4,607 | 8% |
| Professionals Services | 3,891 | 7% |
| Business Services | 3,480 | 6% |
| Motor Vehicle Retail | 2,710 | 5% |
| Government and Community | 2,686 | 5% |
| Machinery and Equipment Manufacturing | 2,330 | 4% |
| Building Services | 2,481 | 4% |
| Metal Product Manufacturing | 1,559 | 3% |
| Ceramic Manufacturing | 1,468 | 3% |
| Wood and Paper Manufacturing | 1,504 | 3% |
| Other Cultural and Recreational Services | 508 | 1% |
| Other Manufacturing | 184 | 0% |
| Recreation retail | 179 | 0% |
| Food Retail | 234 | 0% |
| Other | 3,222 | 6% |
| Vacant | 5,028 | 9% |
| **Total** | **55,228** | **100%** |

Source: SGS, 2009

Moore Street has a high proportion of 'Personal and Household Goods' retailing (20 per cent). 'Wholesale' retail activity makes up 15 per cent of the precinct's floorspace, followed by 'Building' (8 per cent) and 'Professionals Services' (7 per cent). Vacant floorspace comprises of 9 per cent of floorspace.

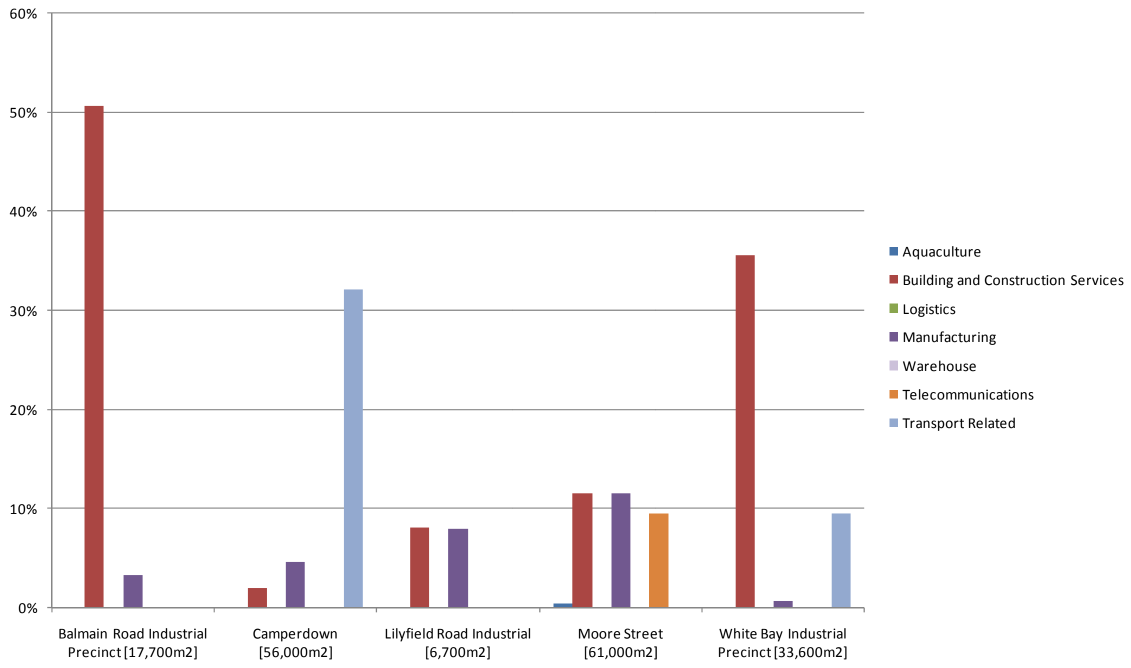
The precinct has a diverse mix of office-based, industrial and bulky goods retail activities. Activities with high shares include Building and Construction Services, Motor Vehicle Retail and Warehousing. Office uses include Professional Services and Arts and Culture Services including film and television studios). There is currently 10 per cent vacancy which is moderate.

The following charts look at the proportions of floorspace in comparison with the other LGA industrial precincts of Camperdown, Lilyfield Road, Balmain Road, White Bay and Terry Street Industrial Precincts. This analysis finds the following:

- Moore Street has a lower proportion of industrial land uses compared to the other precincts.
- Compared to the benchmark industrial precincts, Moore Street has high proportions of bulky goods retail (comprised of personal and household goods retailing) and wholesale activities.
- Moore Street has significant proportions of office-based activities. These are supported by business services, cafes, restaurants, pubs and bars. It is comparable with White Bay however this precinct contains higher proportions of professional services.

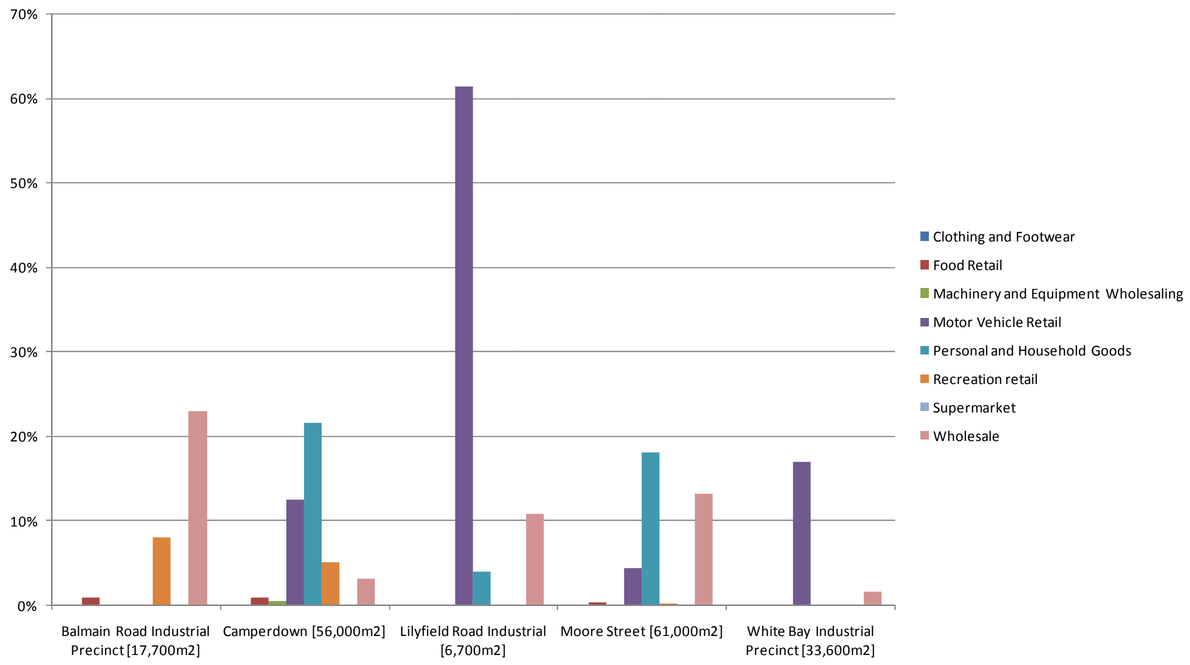
- Moore Street contains some arts and culture and business services activities.

## Figure 88. Industrial Floorspace



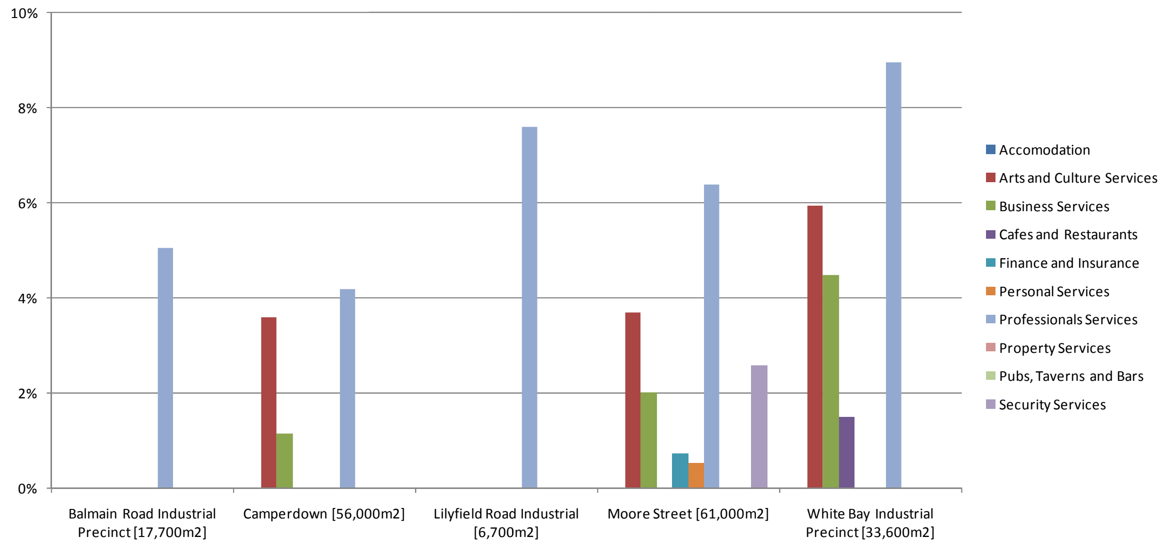

Source: SGS, 2009

## Figure 89. Retail Floorspace




Source: SGS, 2009

**Figure 90.** Office-based and supporting activities




Source: SGS, 2009

## Opportunities and Constraints

### Limited public transport provision on congested roads

Public transport accessing Moore Street is comprised of two bus routes which connect the precinct to Coogee (Route 370) and the CBD (Route 440). While the provision of bus services is an attribute, the highly congested Parramatta Road adds considerably to travel times.

### Moore Street predominantly contain land uses in declining industries

The precinct is currently well tenanted with moderate vacant floorspace (under 10 per cent). The precinct currently contains landuses in sectors which are in decline in the LGA (wholesale trade, manufacturing, transport and storage). This will create the need for consideration of other employment land uses in the medium to long term.

Given the high amenity and proximity to local centres, this precinct should be considered for further investigation for a creative industry precinct.

### The precinct contains considerable retail bulky goods floorspace

Current LEP controls direct retail bulky goods uses to industrial areas. Given the identified surplus floorspace for such activity located along Parramatta Road and the Victoria Road corridor, the uses should be directed to those corridors. This would create capacity for industrial land uses. This will also address the standard LEP template which prohibits retail development in the industrial zones.

**Extensive interface with residential development**

The precinct is surrounded by generally detached residential dwellings in tree-lined streets. This interface is problematic given the need for heavy vehicle movements to and from the site. Conversely, adjoining residential can create pressure for limited hours of operation.

Council has indicated a desire to attract creative industries to the LGA. These industries contain office-based and industrial components. SGS research finds that there are considerable challenges to creating a flexible zone which allows industrial and office land uses including:

- Higher land value attributed to office land uses
- The different environmental impacts of these uses
- Cannot assume that the business model for creative industries require that the production and office-based aspects need to occur in the location

However, providing the right development context across the LGA can be achieved by utilising the enterprise corridor land for business start-ups and affordable rent options and retaining select industrial areas for creative industries that seek industrial land. Moore Street industrial precinct provides an opportunity to investigate the feasibility of an industrial-based creative industry industrial park. The precinct has high amenity being located in a generally residential area and is in proximity to small villages and neighbourhood centres. The current manufacturing activities are within sectors that are declining due to increasing competition and changes in production processes. These activities will become redundant and create obsolete floorspace.

Retaining this area for these activities requires a precinct structure plan and feasibility analysis that identifies appropriate development controls and land uses. It is imperative that such a planning study be undertaken in conjunction with an investment attraction strategy to attract desired tenants to this location. This would ideally be part of a broader economic development strategy for the LGA which builds on this study.

### Moore Street Industrial Precinct Vision and Strategies

Based on the opportunities and constraints, Moore Street Industrial Precinct is to be retained as a light industrial area with investigation in the medium to long term for a creative industry precinct.

To assess the likely demand for floorspace with this vision in mind, the BLC profile of the corridor was adjusted to reflect the type of uses that would most likely occur in these precincts. These are principally local light industry, light manufacturing and some supporting retail uses (ie. food retail).

The key strategies to achieve the general industrial vision are to:

- Limit subdivision to preserve the large lots in the precinct
- Improve local traffic management and investigate parking demand issues for precinct activities
- Investigate the potential for a creative industry precinct through market and feasibility testing. This should assess:
  - Prospective tenants and their business needs
  - Appropriate ownership and site configurations

- Appropriate built forms in this context

- Provide supporting retail and commercial which does not have significant impacts on surrounding commercial centres
  - Public domain improvements and interface treatments with adjoining residential.

Light industrial designation under the standard template is considered appropriate for this precinct.

## 6.5 Camperdown Industrial Precinct

The precinct is located on Parramatta Road, and is dissected by Pyrmont Bridge Road. The precinct is accessible by road or public transport and has high visibility along Parramatta Road. Parramatta Road is a congested road which experiences 60,000 AADT[43] vehicle movements per day. The area is bounded by a canal to the North West, and Parramatta Road to the South and Booth and Mallet Streets to the east.

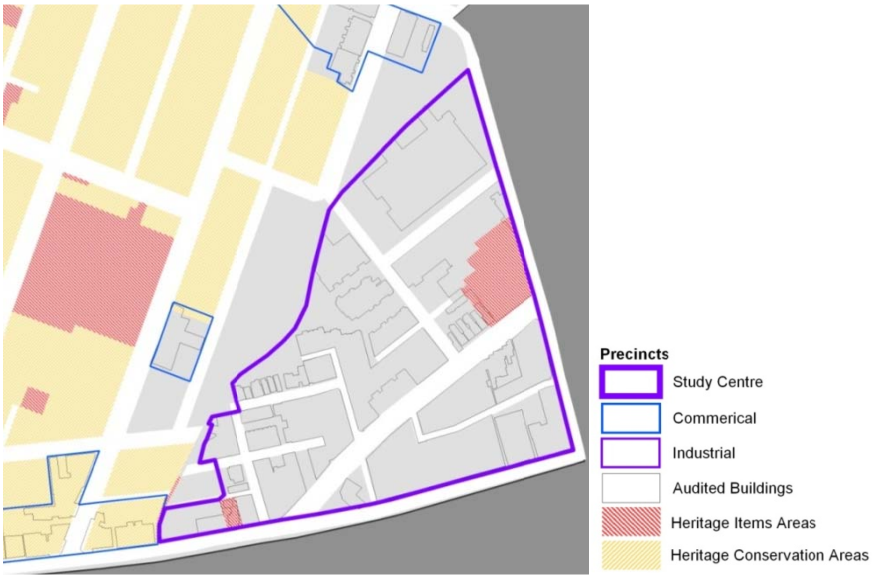
This area is located in close proximity to Sydney University and is adjacent to new high-density housing developments south of Parramatta Road in Marrickville LGA. A relatively high proportion of people employed within this precinct also live locally. This is reflected by a high proportion of employees who walked to work (8.8%).

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

Camperdown precinct is mainly made up of Retail Mainstreet and Retail Bulky Goods land uses. Smaller land uses include Local Light, Manufacture Light and Special uses.

[43] AADT. Annual Average Daily Traffic. Complied by the RTA, this data is an average of all traffic movements on a road averaged out over 365 days. 2005 released data used.

Figure 91. Camperdown

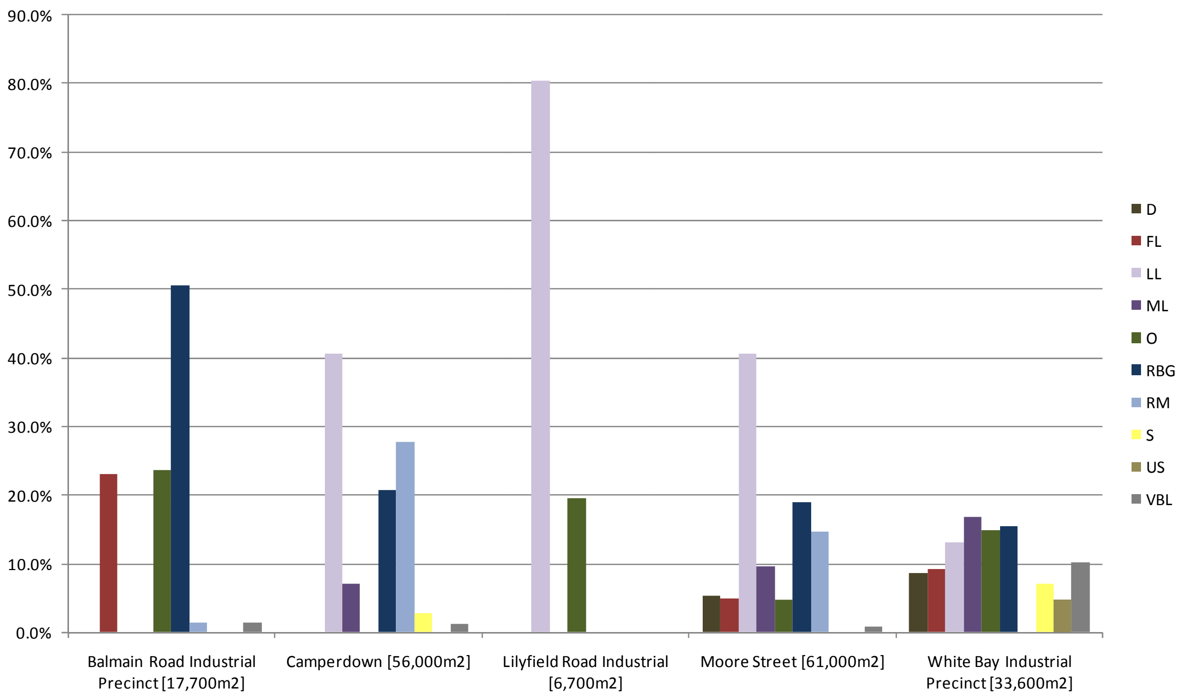



Source: SGS, 2009

## Land Use and Activity Analysis

The Camperdown Industrial Precinct contains 56,000 square metres of floorspace. The analysis of the BLC profile highlights the different character of Camperdown Street and the other industrial precincts within the LGA (Figure 82).

Figure 92. Industrial Precincts – BLC Share Analysis




Source: SGS, 2009

Camperdown has a mixture of retail and industrial land uses and activities. The profile of Camperdown Industrial Precinct in terms of employment activity categories[44] is shown in Table 19.

**Table 19.** Camperdown Activity Profile

| Camperdown | Floorspace ( square metres) | % of Total |
|---|---|---|
| Personal and Household Goods | 12,156 | 22% |
| Motor Vehicle Retail | 7,032 | 13% |
| Other Cultural and Recreational Services | 3,146 | 6% |
| Wholesale | 2,156 | 4% |
| Arts and Culture Services | 2,010 | 4% |
| Food Manufacturing | 1,867 | 3% |
| Recreation retail | 1,891 | 3% |
| Building | 1,347 | 2% |
| Professionals Services | 1,241 | 2% |
| Building Services | 577 | 1% |
| Food Retail | 572 | 1% |
| Business Services | 636 | 1% |
| Government and Community | 482 | 1% |
| Other | 19,141 | 34% |
| Vacant | 1,862 | 3% |
| **Total** | **56,116** | **100%** |

Source: SGS, 2009

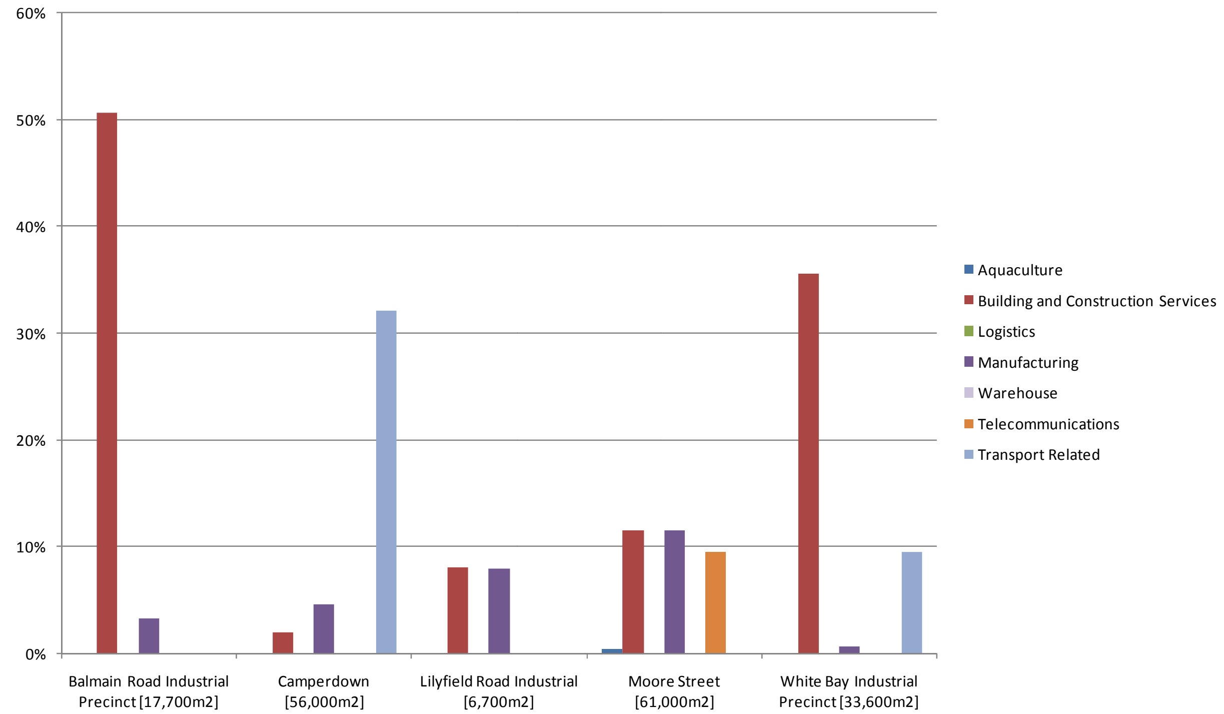
The precinct's floorspace is made up of 'Personal and Household Goods' (22 per cent) and 'Motor Vehicle Retail' (13 per cent). Camperdown has a high proportion of 'Other' activities which comprise of 34 per cent of its floorspace. There are low vacancy rates in this precinct (3 per cent).

The following charts look at the proportions of floorspace in comparison with the other LGA industrial precincts of White Bay, Lilyfield Road, Balmain Road, Moore Street and Terry Street Industrial Precincts. This analysis finds the following:

- Contains mostly transport related industrial activity
- Compared to the benchmark industrial precincts, Camperdown has high proportions of retail bulky goods comprised of personal and household goods retailing and motor vehicle retail
- Camperdown currently contains some arts and culture and business services activities

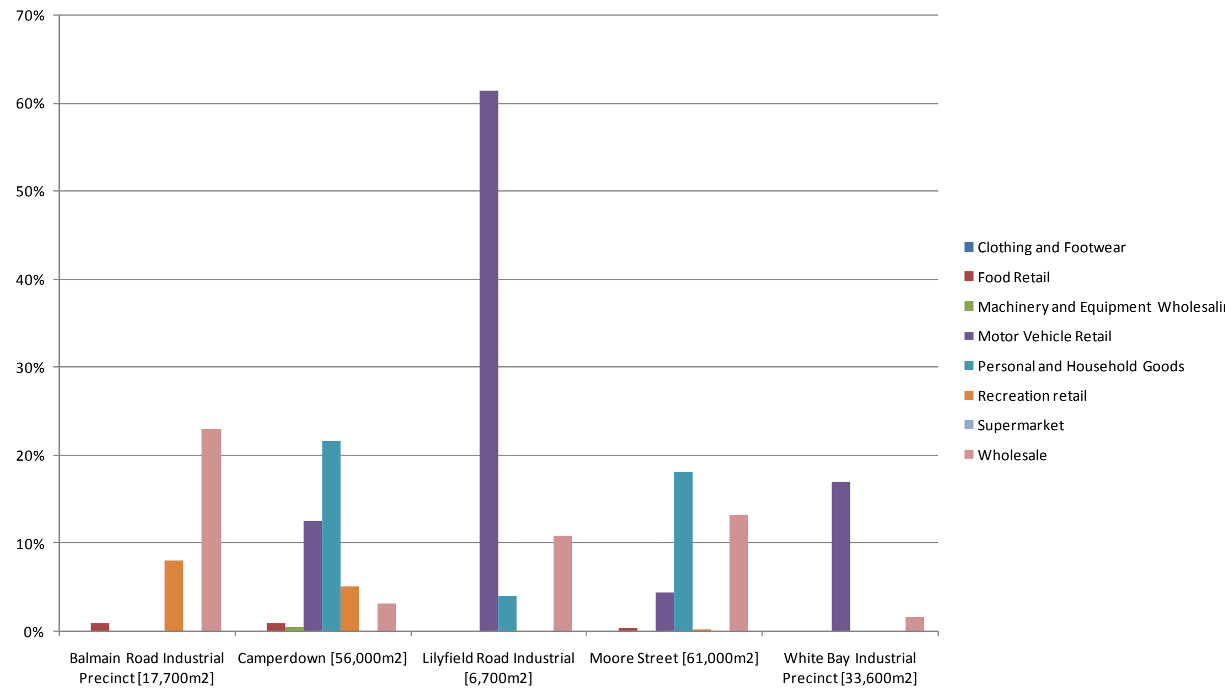
[44] SGS groupings.

## Figure 93. Industrial Floorspace



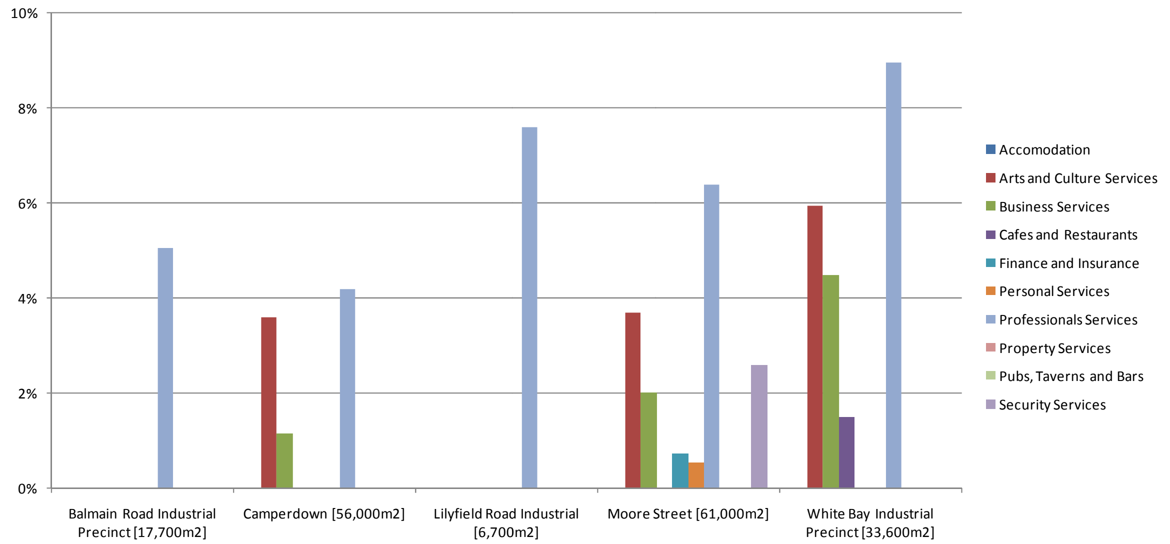

Source: SGS, 2009

## Figure 94. Retail Floorspace




Source: SGS, 2009

Figure 95. Office-based and supporting activities




Source: SGS, 2009

### Opportunities and Constraints

**Good access to public transport but on congested roads.**

The precinct is highly accessible by bus services however on busy Parramatta Road.

**Active precinct with a mix of large format retail and industrial landuses**

The precinct functions well with minor vacancies. The precinct currently has a mix of Retail Bulky Goods and Local Light activity with Retail Bulky Goods on Parramatta Road and Pyrmont Bridge Road. This is appropriate given the passing traffic volumes and should be retained.

### Camperdown Industrial Precinct Vision and Strategies

Based on the opportunities and constraints, the future role of the Camperdown Industrial Precinct is as a light industrial area with enterprise corridor activities on Parramatta Road.

To assess the likely demand for floorspace with this vision in mind, the BLC profile of the corridor was adjusted to reflect the type of uses that would most likely occur in these precincts. These are principally local light industry, light manufacturing and some supporting retail uses (ie. food retail).

Strategies to achieve the vision for Camperdown industrial precinct are to:

- Limit subdivision to preserve the large lots in the precinct
- Improve local traffic management and investigate parking demand issues for precinct activities

A light industrial designation under the standard template is considered appropriate for the northern part of the precinct with an economic corridor zone for Parramatta Road frontage lots.

## 6.6 Lilyfield Industrial Precincts

The Lilyfield industrial precincts are made up of two precincts located on Balmain Road and Lilyfield Road(Figure 96). The Balmain Road site is located opposite the Rozelle hospital and on the fringe of the Rozelle commercial precinct. The site is bounded by Balmain Road to the north, Alberto Street to the south west and Foucart Street to the east. The Lilyfield Road site is adjacent to the freight rail line and dissected by Joseph and Justin Streets. This site is bound by Lilyfield Road to the south, Halloran Street to the west and Lamb Street to the east. Both sites are surrounded by residential development comprising of median density walk up flats and workers cottages. Lilyfield precinct's land use is predominately made up of Retail Bulky Goods, followed by Local Light and Office. Freight and Logistics and a small percentage of Retail Mainstreet also exist. The Lilyfield site has a mixture of residential and commercial land uses.

**Figure 96.** Lilyfield Precincts


Source: SGS, 2009

The profile of the Lilyfield Industrial Precincts in terms of employment activity categories[45] is shown in Table 20.

[45] SGS groupings.

**Table 20.** Lilyfield Road and Balmain Road Industrial Precinct Activity Profile

| Lilyfield | Floorspace ( square metres) | % of total | Balmain Road Industrial Precinct | % of total |
|---|---|---|---|---|
| Building and Construction Services | 548 | 8% | 8,955 | 51% |
| Food Retail | - | | 180 | 1% |
| Health | - | | 715 | 4% |
| Manufacturing | 536 | 8% | 597 | 3% |
| Motor Vehicle Retail | 4,116 | 61% | - | |
| Personal and Household Goods | 268 | 4% | - | |
| Professionals Services | 510 | 8% | 895 | 5% |
| Recreation retail | - | | 1,430 | 8% |
| Wholesale | 727 | 11% | 4,071 | 23% |
| Vacant | - | - | 844 | 5% |
| **TOTALS** | **6,705** | **100%** | **17,686** | **100%** |

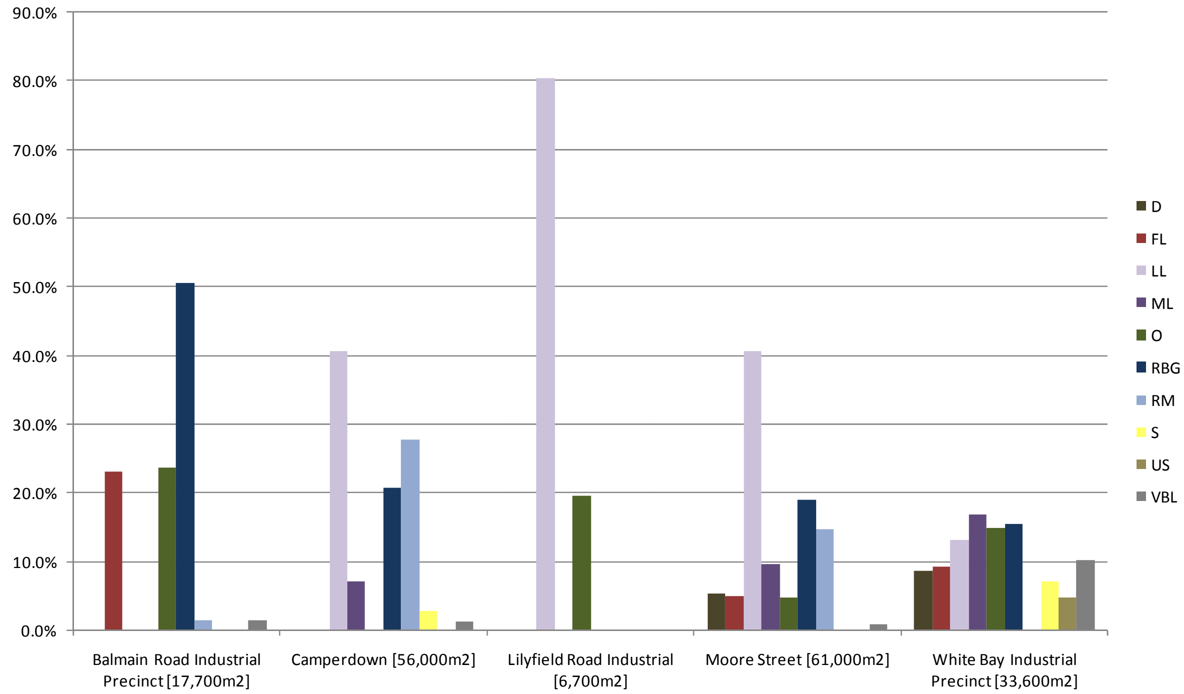
Source: SGS, 2009

Lilyfield has a highest share of floorspace in motor vehicle retail (61 per cent) floorspace while Balmain has 51 per cent in building and construction services. Vacant land is minimal in the Balmain Road precinct (5 per cent) with no vacancies recorded for Liliyfield Road.

### Land Use and Activity Analysis

The Liliyfield Industrial Precincts are comprised of Balmain Road and Lily field industrial precincts with 17,700 square metres and 6,700 square metres of floorspace respectively. The analysis of the BLC profile highlights the different character of these precincts compared to the other industrial precincts within the LGA (Figure 82).

**Figure 97.** Industrial Precincts – BLC Share Analysis



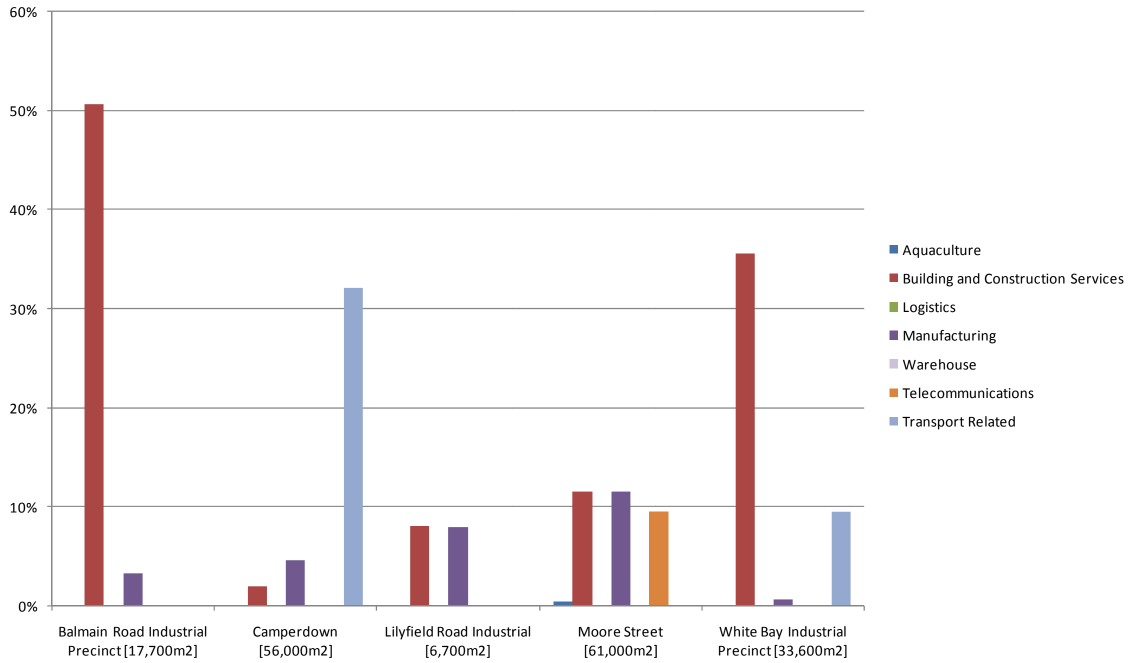

Source: SGS, 2009

Balmain Road has a mixture of bulky goods retail, freight and logistics and office land uses.

The following charts look at the proportions of floorspace in comparison with the other LGA industrial precincts of White Bay, Camperdown, Moore Street and Terry Street Industrial Precincts. This analysis finds the following:

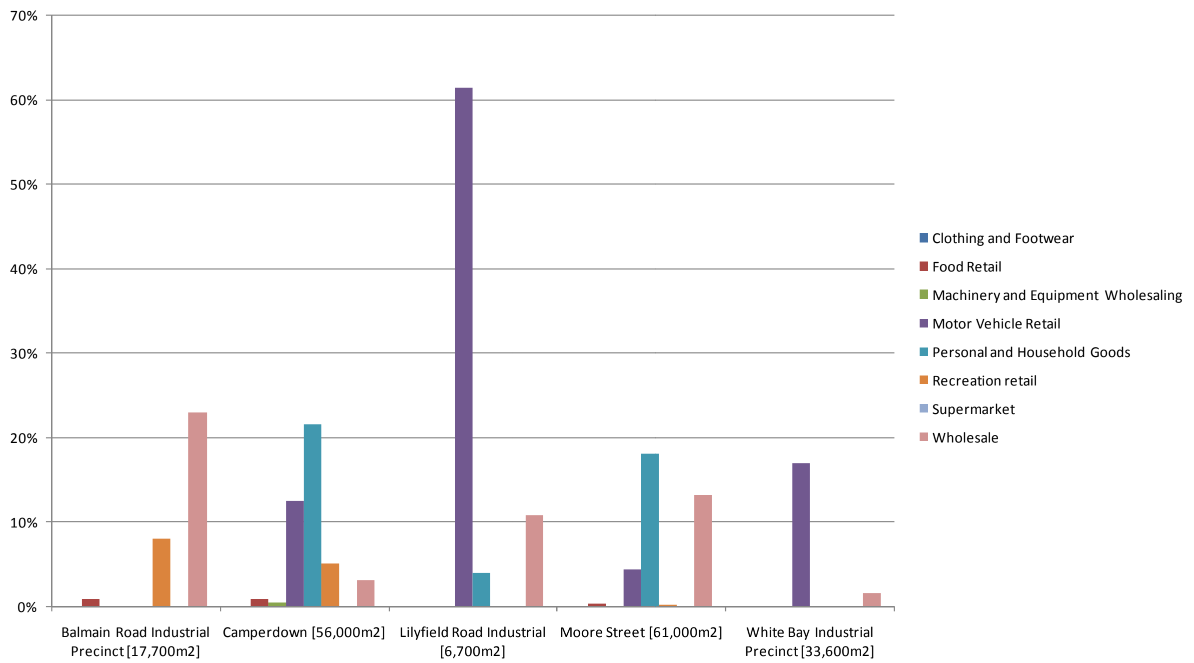
- The precincts' industrial activity is comprised of building and construction services activities in both precincts with some manufacturing at Lilyfield Road
- Retail activities are predominantly wholesale retailing at Balmain Road and motor vehicle retail at Lilyfield Road
- Both precincts contain high proportions of business services activities. This is due to the office land uses at Balmain Road and the live work floorspace in Lilyfield

## Figure 98. Industrial Floorspace



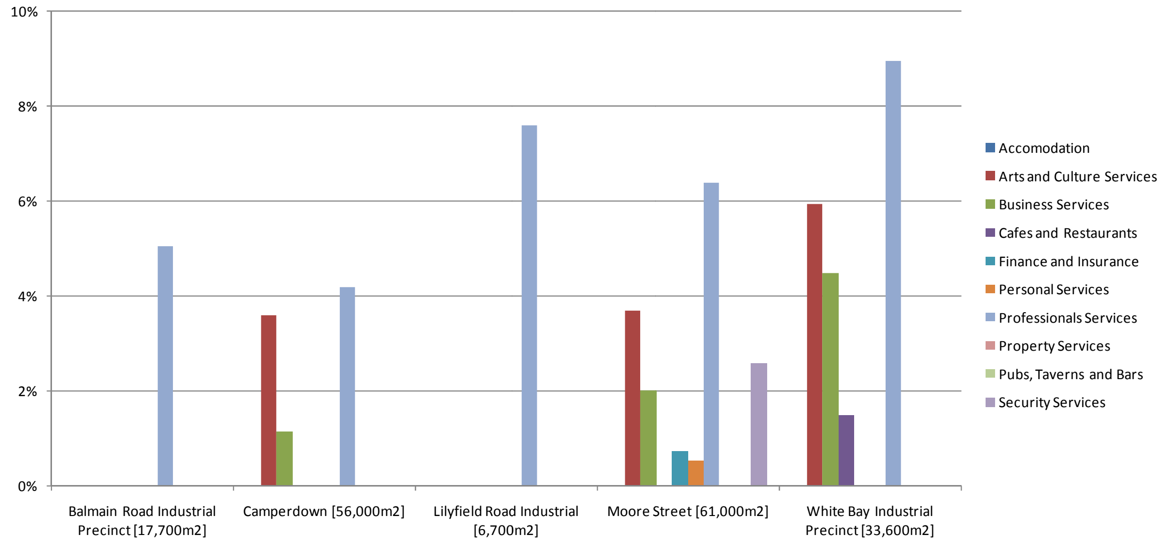

Source: SGS, 2009

## Figure 99. Retail Floorspace




Source: SGS, 2009

**Figure 100.** Office-based and supporting activities




Source: SGS, 2009

### Opportunities and Constraints

**Precincts accessible by public transport but on congested roads**

The precincts are accessible by bus services which connecting the precincts to the following areas:

- Balmain Road Precinct – CBD and Terry Street Precinct (Route L40, 440, 445)
- Lilyfield Road Precinct - Canterbury and Balmain (Routes 470,445)

**Active precinct with a mix of large format retail and industrial landuses**

The precinct functions well with minor vacancies. The precinct currently has a mix of Retail Bulky Goods and Local Light activity with RBG on Parramatta Road and Pyrmont Bridge Road. This is appropriate given the passing traffic volumes.

**Balmain Street Precinct fringe centre location can support the Rozelle Centre**

The edge of centre locations provides an opportunity to support the centre by providing land for large format retail, freight and logistics and industrial uses. This is the current BLC profile however there is currently a high proportion of office uses located in this precinct.

**Lilyfield Road precinct may become a strategic site**

The precinct contains landuses in decline and as such there may be some additional capacity in the precinct in the medium to long term. However, the precinct also contains live-work development which may increase in attractiveness as office-based sectors grow and if home based workers increase. This precinct has the potential to be a strategic site given its location adjacent to the existing light rail line.

### Vision and Strategies for Lilyfield Industrial Precincts

Based on the opportunities and constraints, the future role of the Liliyfield Industrial Precincts is light industrial activity for Lilyfield Road industrial precinct. The Balmain Road industrial precinct should provide a support role for the Rozelle centre.

To assess the likely demand for floorspace with this vision in mind, the BLC profile of the corridor was adjusted to reflect the type of uses that would most likely occur in these precincts. These are principally Local Light Industry, Light Manufacturing and some supporting retail uses (ie. food retail).

The key strategies to achieve the visions for the Lilyfield industrial precincts are to:

- Retain Balmain Road as a support precinct to Rozelle Centre
- Retain Lilyfield Road precinct for light industrial land uses
- Improve local traffic management and investigate parking demand issues for precinct activities

A business development designation under the standard template is considered appropriate for the Balmain Road industrial precinct with a light industrial template zone for Lilyfield Road lots.

## 6.7 Fragmented Industrial Sites

There are seven fragmented industrial zoned lands comprised of waterfront sites on Mort Bay and sites adjacent to, or within, the Rozelle Goods line corridor as shown in Figures Figure 101 to 104.

**Figure 101.** Balmain East Industrial A

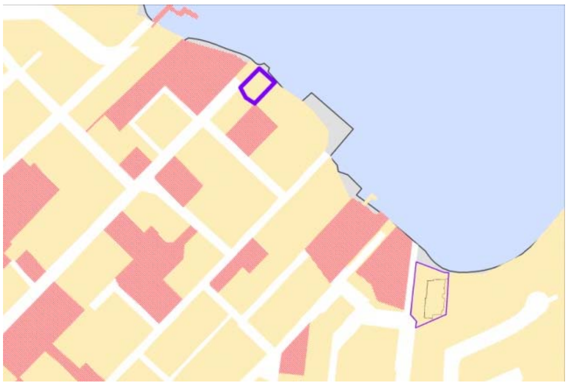


**Figure 102.** Balmain East Industrial B

**Figure 103.** Balmain East Industrial C

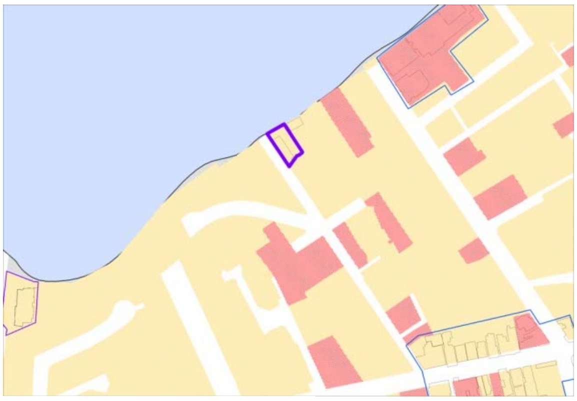


**Figure 104.** Leichhardt Industrial B

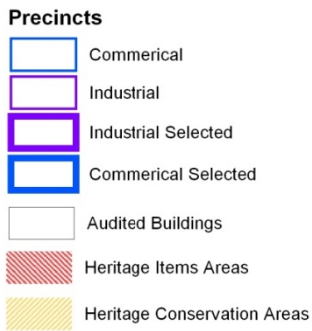
**Precincts**

- Commerical
- Industrial
- Industrial Selected
- Commerical Selected
- Audited Buildings
- Heritage Items Areas
- Heritage Conservation Areas

Source: SGS, 2009

**Figure 105.** Lords Road

**Figure 106.** Leichhardt Industrial A




Source: SGS, 2009

In assessing the future role for these fragmented areas the following questions were asked:

- Is the site currently vacant or developed for non-industrial land uses?
- Is the existing current land use important to the economic future of the LGA?
- Is the site appropriate for other industrial land uses?
- Are their future changes that may improve viability of this site for employment landuses?
- Is their sufficient floorspace in other industrial precincts to accommodate the land use on the site/s?

Based on the responses to the above, the following findings are provided:

**Balmain East Industrial A and Balmain East Industrial C**

These sites are currently vacant and developed for multi-unit residential land uses respectively. The site redeveloped for residential development should be rezoned to residential. The vacant site should be investigated for alternative land uses once its value as a former working port site has been assessed.

**Balmain East Industrial B**

This site is an existing port-related activity area. The associated BLC floorspace proportion was retained as no change to the current land use was envisaged.

**Leichhardt Industrial B**

This site currently contains a distribution operation and bulky good retail and wholesale retail land uses (Campbells Cash and Carry). These uses can be accommodated in the larger precincts (i.e. Moore Street). The site is surrounded by residential development where heavy vehicle truck movements associated with the current land uses are not considered ideal adjacent to residential development.

**Leichhardt North**

This large site contains a vacant industrial building and is located within the Rozelle Goods line corridor. The location has the following implications for future land uses:

- The site is currently inappropriate for residential development given the proximity to the Rozelle Goods line corridor.
- Additional retail and commercial landuses are also problematic given the identified need to strengthen the Norton Street North centre.

It may be appropriate to retain a light industrial zoning until the status of the corridor is established, then alternative uses may be considered in this location.

**Leichhardt Industrial A and Lords Road**

These sites contain local light land uses with Leichhardt Industrial A also containing special land uses (Uniting Church). The location has the following implications for future land uses:

- The site is currently inappropriate for residential development given the proximity to the Rozelle Goods line corridor.
- Additional retail and commercial landuses are inappropriate given the identified proximate Leichhardt Market Place centre.

It may be appropriate to retain a light industrial zoning until the status of the corridor is established, then alternative uses may be considered in this location.

## 6.8 Employment Land uses on Special Uses land

There are currently **90,300 square metres** of employment floorspace within the Regional Environmental Plan (REP) corridor and on special use land in the corridor which are a mixture of local light industry, manufacturing light, freight and logistics land uses and urban services (Sydney Buses Depot). These uses are important to the LGA and their location are considered appropriate.

The future use of the Rozelle goods corridor is yet to be confirmed and as such the future of the existing uses is not known. Any change will take place over the long-term.

## 6.9 Future Corridor and Industrial Floorspace Demand

The employment land demand forecasting method used in this study is summarised below and is described in more detail in Appendix 6. The method contains the following key elements:

- **Planning horizon employment growth rate.** The 2009 TDC employment forecasts by industry sector for the LGA were used to assess the level of change over the planning horizon (2006 – 2031). The employment growth forecast in the Bays Precinct was excluded when the growth rate by industry was estimated.
- **Floorspace demand calculation.** The growth rate by industry sector was applied to the recorded employment land audit floorspace and then reclassified into BLC floorspace by precinct.

Floorspace demand has been derived by applying the **growth rates by industry sector** to the **employment floorspace** recorded in 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:

- Future employment land demand is driven by employment trends
- The relationship between employment and land use remains constant
- The relationship between land use and floorspace remains constant

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.

The supply demand gap examines the potential floorspace in each precinct and compares this to the floorspace demand value under the following scenarios:

- **Business as Usual Scenario** – Current employment trends by industry sector continue (as discussed in Section 2.3). All available employment land can reach 80% of the maximum Floor Space Ratio (FSR) under the current controls.

Through the land use audit we have seen that some uses in existing industrial areas have, at face value, the potential to exist in other areas (such as transport corridors or commercial centres). This includes land uses in the main street retail, bulky goods retail and office categories. To test the implications of this, we have examined the effects of redistributing demand in these categories in industrial precints once capacity has been reached.

- **Redistribution of Excess Demand Scenario –** Where industrial precincts have insufficient capacity to accommodate the forecast demand, the 'excess' demand is redistributed to other appropriate employment areas. For example, Bulky Goods retail demand is redistributed to corridor areas and commercial centres. All available employment land can reach 80% of the maximum Floor Space Ratio (FSR) under the current controls.

- **Sites Removal Scenario –** In addition to the redistribution of excess demand described above, specific sites were removed from the pool of total employment land supply. This tests the tolerance of the system to accommodate forecast demand if specific sites are removed from the supply side through rezoning to other uses. Displaced demand is distributed pro-rata to employment lands with similar features (this scenario aligns with scenario 11 in Appendix 6); All available employment land can reach 80% of the maximum Floor Space Ratio (FSR) under the current controls. Sites removed include Multiplex residential site, Kolotex residential site, Campbells site and Site 7 (within the Balmain Road Industrial Precinct).

This modelling 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. Notes on questions to be answered at a local level are provided in Appendix 6.

A summary of the BAU supply demand analysis for the commercial centres is provided in Table 21. The values and formulas are described below. All values are in square metres:

- **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 80% of the maximum 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).**

This analysis has been completed for the Corridor and Industrial precincts separately.

### Parramatta Road and Victoria Road Corridors

A summary of different scenarios for the corridors is provided from Table 21 to Table 22.

**Table 21.** Corridor Supply Demand Analysis – **Business As Usual** (square metres)

| | A | B | C=A-B | D | E=D-B | F=E-C |
|---|---|---|---|---|---|---|
| **Precinct** | **Total future floorspace demand** | **Current employment floorspace** | **Additional Floorsace Demand** | **Potential total floorspace under current controls** | **Potential floorsapce minus current floorsapce** | **SUPPLY/DEMAND GAP** |
| Norton Street (Parramatta Road Corridor Lots) | 7,424 | 5,477 | 1,946 | 9,571 | 4,093 | 2,147 |
| Parramatta Road East | 41,877 | 33,609 | 8,268 | 65,289 | 31,680 | 23,412 |
| Parramatta Road West | 12,690 | 9,499 | 3,191 | 24,223 | 14,723 | 11,532 |
| Rozelle Centre (Corridor Lots) | 11,520 | 8,681 | 2,839 | 13,415 | 4,734 | 1,895 |
| Victoria Road (Terry Street) | 4,991 | 3,517 | 1,474 | 11,383 | 7,867 | 6,392 |
| Victoria Road South | 15,734 | 11,734 | 4,000 | 18,360 | 6,627 | 2,626 |
| Tebutt St/Parramatta Rd | 42,728 | 40,246 | 2,482 | 41,936 | 1,689 | -793 |
| Terry Street | 6,553 | 5,659 | 894 | 22,337 | 16,677 | 15,784 |
| **TOTAL** | **143,518** | **118,424** | **25,094** | **206,513** | **88,090** | **62,996** |

Source: SGS, 2010

**Table 22.** Corridor Supply Demand Analysis – **Redistribution of Excess Demand Scenario** (square metres)

| | A | B | C=A-B | D | E=D-B | F=E-C |
|---|---|---|---|---|---|---|
| Precinct | Total future floorspace demand | Current employment floorspace | Additional Floorsace Demand | Potential total floorspace under current controls | Potential floorsapce minus current floorsapce | SUPPLY/DEMAND GAP |
| Norton Street (Parramatta Road Corridor Lots) | 7,424 | 5,477 | 1,946 | 9,571 | 4,093 | 2,147 |
| Parramatta Road East | 41,877 | 33,609 | 8,268 | 65,289 | 31,680 | 23,412 |
| Parramatta Road West | 12,690 | 9,499 | 3,191 | 24,223 | 14,723 | 11,532 |
| Rozelle Centre (Corridor Lots) | 11,520 | 8,681 | 2,839 | 13,415 | 4,734 | 1,895 |
| Victoria Road (Terry Street) | 4,991 | 3,517 | 1,474 | 11,383 | 7,867 | 6,392 |
| Victoria Road South | 15,734 | 11,734 | 4,000 | 18,360 | 6,627 | 2,626 |
| Tebutt St/Parramatta Rd | 42,728 | 40,246 | 2,482 | 41,936 | 1,689 | -793 |
| Terry Street | 6,553 | 5,659 | 894 | 22,337 | 16,677 | 15,784 |
| **TOTAL** | **143,518** | **118,424** | **25,094** | **206,513** | **88,090** | **62,996** |

Source: SGS, 2010

**Table 23.** Corridor Supply Demand Analysis – **Sites Removal Scenario** (square metres)

| | A | B | C=A-B | D | E=D-B | F=E-C |
|---|---|---|---|---|---|---|
| **Precinct** | **Total future floorspace demand** | **Current employment floorspace** | **Additional Floorsace Demand** | **Potential total floorspace under current controls** | **Potential floorsapce minus current floorsapce** | **SUPPLY/DEMAND GAP** |
| Norton Street (Parramatta Road Corridor Lots) | 7,424 | 5,477 | 1,946 | 9,571 | 4,093 | 2,147 |
| Parramatta Road East | 41,877 | 33,609 | 8,268 | 65,289 | 31,680 | 23,412 |
| Parramatta Road West | 12,690 | 9,499 | 3,191 | 24,223 | 14,723 | 11,532 |
| Rozelle Centre (Corridor Lots) | 11,520 | 8,681 | 2,839 | 13,415 | 4,734 | 1,895 |
| Victoria Road (Terry Street) | 6,223 | 3,517 | 2,707 | 11,383 | 7,867 | 5,160 |
| Victoria Road South | 19,620 | 11,734 | 7,886 | 18,360 | 6,627 | -1,259 |
| Tebutt St/Parramatta Rd | 41,897 | 40,246 | 1,651 | 38,610 | -1,637 | -3,287 |
| Terry Street | 6,553 | 5,659 | 894 | 12,069 | 6,409 | 5,516 |
| **TOTAL** | **147,804** | **118,422** | **29,382** | **192,920** | **74,496** | **45,116** |

Source: SGS, 2010

As future employment land demand in the corridor precincts under the redistribution of excess demand scenario remains the same as the demand under the BAU scenario, both scenarios find that there would be a surplus of **63,000 square metres** with most of this surplus occurring in Parramatta Road East and Terry Street.

The sites removal scenario finds that there will be a surplus of **45,116 square metres** with half of this surplus in the Parramatta Road Corridor. The Victoria Road corridor also accounts for a significant part of the estimated surplus.

The proposed strategies for Parramatta Road East seek to stimulate economic activity and potentially absorb some of the 2031 capacity surplus in the medium to long term. Tebutt Street, being in a highly impacted area with poor amenity should be retained for its current uses.

The Victoria Road corridor currently functions well and is strategically located to benefit from future activity on Glebe Island /White Bay. Terry Street is proposed to be set aside to provide support to the proposed Rozelle Centre and additional development potential will need to be permitted as would a review of its Category 1 status.

### Industrial Precincts

A summary of the supply demand analysis for the industrial precincts is provided from Table 24 to Table 26.

The BAU analysis finds that there would be a deficit of **25,000 square metres** with most of this occurring in Camperdown, Leichhardt Industrial A, and Moore Street. This does not include land utilised by REP 26, which is part of the Bays Precinct.

The redistribution of excess demand and sites removal scenario find that there will be a surplus of **12,400 square metres and 7,500 square metres** respectively, with most of the surplus located in Moore Street, Leichhardt North and Bus Depot Precincts. The surplus compared to the deficit in the BAU analysis reflects the redirection of excess demand for non-industrial land uses from industrial precincts in deficit to commercial precincts. These land uses include the Retail (Main Street), Retail (Bulky Goods), Special Activities, and Office BLC categories.

**Table 24.** Industrial Supply Demand Analysis – **Business As Usual** (square metres)

| | A | B | C=A-B | D | E=D-B | F=E-C |
|---|---|---|---|---|---|---|
| **Precinct** | **Total future floorspace demand** | **Current employment floorspace** | **Additional Floorsace Demand** | **Potential total floorspace under current controls** | **Potential floorsapce minus current floorsapce** | **SUPPLY/DEMAND GAP** |
| Balmain East Industrial A | 0 | 0 | 0 | 354 | 354 | 354 |
| Balmain East Industrial B | 2,417 | 2,098 | 319 | 1,038 | -1,059 | -1,379 |
| Balmain East Industrial C | 104 | 90 | 14 | 413 | 323 | 309 |
| Balmain Road Industrial Precinct | 16,432 | 16,833 | -401 | 11,030 | -5,803 | -5,403 |
| Camperdown | 65,951 | 53,493 | 12,458 | 56,326 | 2,833 | -9,625 |
| Leichhardt Industrial A | 19,429 | 14,140 | 5,290 | 10,776 | -3,364 | -8,654 |
| Leichhardt Industrial B | 8,054 | 8,640 | -586 | 7,865 | -775 | -189 |
| Leichhardt North | 0 | 0 | 0 | 2,903 | 2,903 | 2,903 |
| Lilyfield Road Industrial | 8,075 | 6,705 | 1,371 | 8,393 | 1,688 | 317 |
| Moore Street | 62,414 | 55,560 | 6,854 | 55,594 | 34 | -6,820 |
| Tebutt Street North | 7,914 | 8,860 | -946 | 8,502 | -358 | 588 |
| White Bay Industrial Precinct | 35,082 | 30,140 | 4,942 | 32,796 | 2,657 | -2,286 |
| Bus Depot | 820 | 711 | 108 | 6,002 | 5,291 | 5,183 |
| **Total** | **226,692** | **197,269** | **29,423** | **201,639** | **4,369** | **-24,700** |

Source: SGS, 2010

**Table 25.** Industrial Supply Demand Analysis – **Redistribution of Excess Demand Scenario** (square metres)

| | A | B | C=A-B | D | E=D-B | F=E-C |
|---|---|---|---|---|---|---|
| **Precinct** | **Total future floorspace demand** | **Current employment floorspace** | **Additional Floorsace Demand** | **Potential total floorspace under current controls** | **Potential floorsapce minus current floorsapce** | **SUPPLY/DEMAND GAP** |
| Balmain East Industrial A | 0 | 0 | 0 | 354 | 354 | 354 |
| Balmain East Industrial B | 1038 | 2098 | -1059 | 1038 | -1059 | 0 |
| Balmain East Industrial C | 0 | 90 | -90 | 413 | 323 | 413 |
| Balmain Road Industrial Precinct | 12788 | 16833 | -4045 | 11030 | -5803 | -1758 |
| Camperdown | 52821 | 53493 | -672 | 56326 | 2833 | 3505 |
| Leichhardt Industrial A | 16880 | 14140 | 2740 | 10776 | -3364 | -6104 |
| Leichhardt Industrial B | 9717 | 8640 | 1077 | 7865 | -775 | -1852 |
| Leichhardt North | 0 | 0 | 0 | 2903 | 2903 | 2903 |
| Lilyfield Road Industrial | 8930 | 6705 | 2225 | 8393 | 1688 | -537 |
| Moore Street | 48000 | 55560 | -7560 | 55594 | 34 | 7594 |
| Tebutt Street North | 7914 | 8860 | -946 | 8502 | -358 | 588 |
| White Bay Industrial Precinct | 30628 | 30140 | 489 | 32796 | 2657 | 2168 |
| Bus Depot | 820 | 711 | 108 | 6002 | 5291 | 5183 |
| **Total** | **189,536** | **197,270** | **-7,733** | **201,992** | **4,724** | **12,457** |

Source: SGS, 2010

**Table 26.** Industrial Supply Demand Analysis – **Sites Removal Scenario** (square metres)

| | A | B | C=A-B | D | E=D-B | F=E-C |
|---|---|---|---|---|---|---|
| **Precinct** | **Total future floorspace demand** | **Current employment floorspace** | **Additional Floorsace Demand** | **Potential total floorspace under current controls** | **Potential floorsapce minus current floorsapce** | **SUPPLY/DEMAND GAP** |
| Balmain East Industrial A | 0 | 0 | 0 | 354 | 354 | 354 |
| Balmain East Industrial B | 1038 | 2098 | -1059 | 1038 | -1059 | 0 |
| Balmain East Industrial C | 0 | 90 | -90 | 413 | 323 | 413 |
| Balmain Road Industrial Precinct | 8226 | 16833 | -8607 | 5530 | -11303 | -2695 |
| Camperdown | 54163 | 53493 | 671 | 56326 | 2833 | 2162 |
| Leichhardt Industrial A | 17453 | 14140 | 3314 | 10776 | -3364 | -6678 |
| Leichhardt Industrial B | 0 | 8640 | -8640 | 0 | -8640 | 0 |
| Leichhardt North | 0 | 0 | 0 | 2903 | 2903 | 2903 |
| Lilyfield Road Industrial | 9297 | 6705 | 2592 | 8393 | 1688 | -904 |
| Moore Street | 49951 | 55560 | -5609 | 55594 | 34 | 5643 |
| Tebutt Street North | 8354 | 8860 | -506 | 8502 | -358 | 148 |
| White Bay Industrial Precinct | 31799 | 30140 | 1659 | 32796 | 2657 | 998 |
| Bus Depot | 820 | 711 | 108 | 6002 | 5291 | 5183 |
| **Total** | **181,101** | **197,270** | **-16,167** | **188,627** | **-8,641** | **7,527** |

Source: SGS, 2010

These industrial areas, unless identified for rezoning, should be retained due to the following:

- **Certain industrial precincts function well and have high occupancy rates.** White Bay and Camperdown are active precincts with minimal vacancies. The deficit however, suggests a need to intensify employment landuses in the medium to long term as former traditional manufacturing uses become obsolete. Camperdown already has a high proportion of enterprise corridor retail in the Parramatta Road and Pyrmont Bridge Road proximate lots and so an appropriate formalising of this in a higher order employment zone is appropriate.
- **Certain corridor precincts are well placed to support Rozelle Centre.** Victoria Road Corridor and Terry Street are well-placed to provide support to the proposed Rozelle Centre. These sites currently provide bulky goods retail and industrial landuses (logistics, warehousing). Terry Street in particular is an important precinct being unconstrained by a heritage conservation area overlay unlike most of the Rozelle centre.
- **Continued need for local industrial land.** There will also continue to be a need for local industrial land to service existing and future populations (i.e. Urban Services, Local Light Industry). As some industrial land becomes redundant it may be absorbed by these uses or may require investigations to assess the extent of these precincts.

# 7 Strategies and Actions

Based on the findings of this study, it is recommended Council pursue the following strategies to address the policy aspirations for the LGA. Figure 107 highlights strategies in terms of future zoning and centre designation.

**Figure 107.** Leichhardt Employment Strategy Map


Source: SGS, 2009

**Table 27.** Proposed Strategies and Actions Summary

| Strategy | | | Actions | | |
|---|---|---|---|---|---|
| **Strategy** | **1** | Increase the attractiveness of the LGA for creative industry activity and retain high skilled workers. | Action | 1.1 | Undertake economic development investigations in the creative industry sectors |
| | | | Action | 1.2 | Investigate the renewal of the Moore Street Industrial Precinct for a creative industry uses that require industrial contexts |
| | | | Action | 1.3 | Improve Linkage with Key Institutions |
| | | | Action | 1.4 | Support Home Based Employment |
| **Strategy** | **2** | Support and Enhance the Future Role of the Commercial Centres | Action | 2.1 | Initiate Masterplanning Process for Rozelle |
| | | | Action | 2.2 | Enhance the Norton Street entertainment, retail and commercial offer |
| | | | Action | 2.3 | Enhance the amenity of the traditional commercial centres and precincts |
| | | | Action | 2.4 | Restrict 'Out of Centre' Development |
| | | | Action | 2.5 | Retain Industrial Support Areas |
| **Strategy** | **3** | Revitalise Economic Activity in the Corridors | Action | 3.1 | Investigate the renewal of the Norton Street/Parramatta Road Gateway |
| | | | Action | 3.2 | Investigate the renewal of Parramatta Road East Precinct |
| | | | Action | 3.3 | Retail Tebutt Street/Parramatta Road for Industrial land uses |
| | | | Action | 3.4 | Build Cross-LGA relationships to manage the Parramatta Road corridor |
| | | | Action | 3.5 | Investigate opportunities for improvement of amenity along the corridors |
| **Strategy** | **4** | Protect & Improve Strategic Industrial Lands | Action | 4.1 | Maintain Strategic Industrial Areas |
| | | | Action | 4.2 | Maintain Active Role in White Bay/ Glebe Island Development |
| **Strategy** | **5** | Improved Local Transport Management and Public Domain | Action | 5.1 | Improve Local Transport Management |
| | | | Action | 5.2 | Undertake a detailed heritage study of all employment lands |
| | | | Action | 5.3 | Investigate appropriate urban design controls to preserve character of the centre |

Source: SGS, 2009

### Strategy 1 – Increase the attractiveness of the LGA for creative industry activity and retain high skilled workers.

#### Creative Industry Sectors

Council seeks to facilitate opportunities for the LGA to attract and retain creative industries, both industrial and office-based. This can build on the existing industry specialisation in this sector when compared with the Sydney and Inner West regions. Activities within this sector include film and video, arts, marketing and publishing. These industry sectors contain a high proportion of skilled workers , particularly professionals, and have forecast employment growth to 2031.

Providing the right development environment for 'creative industry' uses will require adjustment to the planning controls to re-position identified areas as creative industrial precincts supported by economic development actions. While detailed analysis of this sector has not been undertaken as part of this study, a general analysis of the requirements of these industries is provided as follows:

- **Business needs are broadly similar.** The needs of the complementary commercial industries do not differ much from target creative industries with the only real difference being the emphasis placed on site capacity to attract walk-in trade – exposure, pedestrian flow and parking provision.
- **Image is important.** Many firms suggest that the poor appearance of an area can deter creative industries from locating there. This is especially true for professional services firms. Attributes such as open space, public art and a variety of cafes and entertainment options add to the vibrancy of a precinct and make it more attractive to creative professionals.
- **Rents must be competitive.** Consideration should be given to rent incentives to attract the first target industries. This is necessary in areas with high vacancy where there is likely to be a degree of inertia to overcome before creative industries and professionals are attracted to targeted locations. The need for competitive rents also keeps these industries out of prime retail and commercial locations.
- **Buildings must meet needs.** Although creative industries generally do not have specific common building requirements, building quality must obviously be of an acceptable commercial standard. Building appearance and the quality of the finish are more important for medium sized and larger professional service firms. Smaller firms, especially those with lower levels of client interaction at the workplace are generally less concerned about building appearance. For visual and graphic arts businesses access to light is a key consideration and most prefer open plan workspaces. Access to high speed internet can also be of high importance.
- **Proximity to other business.** The most important locational factor for creative industries is proximity to similar businesses, followed by proximity to customers.

Based on these general requirements, and the floorspace surpluses identified in supply/demand analysis, appropriate locations in the LGA for creative industry activities are:

- **Corridor Renewal Locations**. An improved gateway at Norton Street would provide a value for money location for office-based creative industries. The Norton Street centre provides the entertainment and food retail needs of such industry sectors.
- **Moore Street Industrial Precinct**. This precinct has high amenity and is located in proximity to local centres. Future surplus land in this precinct (as other manufacturing and other industrial land users decline) creates an opportunity to investigate this site for a creative industry industrial park catering to creative industrial activities (i.e. Film and Television studios, stage craft operations). A detailed investigation of the planning and feasibility considerations of such a precinct should be undertaken. This should include an investment attraction strategy to attract desired tenants.

There are also creative arts activities occurring outside of the employment land areas (see Section 2.3). Any analysis of creative industry activities in the LGA should have regard to these existing businesses. It should consider their business needs and the opportunities to co-locate these with other creative industry activity on employment lands identified for renewal.

### Skilled worker leakage

The economic analysis found that the LGA has a significant amount of skilled workers (professionals and managers) who are leaving the LGA every day to access job opportunities elsewhere in the Sydney metropolitan region, predominantly in Sydney CBD. These workers are important in the local economy as they generate demand for associated retail and service industry sectors.

Professionals and managers are generally found in the following industry sectors and are generally higher than the proportions of these workers in the Sydney and Inner West regions:

- Professional, Scientific and Technical Services
- Public Administration and Safety
- Health Care and Social Assistance
- Information Media and Telecommunications
- Education and Training

These sectors are not within the LGA's specialisation sectors and the only sector identified for future growth in the LGA is the Professional, Scientific and Technical Services sector. A high proportion of jobs in public administration, health and education sectors are generated by State Government making the location of these jobs a matter Council cannot directly control. However, many of these jobs will be located within office floorspace in the centres. There are opportunities to increase office floorspace in the larger centres to attract these growing sectors.

### Support services and retail for skilled workers

The study finds that business services are not a significant activity in Leichhardt's centres. Businesses and home based workers generally require business services to carry out their activities such as post offices, stationary and newsagencies, and printing services. Further analysis of the business needs of local businesses, in the mainstreet and home based, would assist in assessing how the centres could better provide these support activities.

**Action 1.1** Undertake economic development investigations in the creative industry sectors

Detailed analysis of the arts and culture sector in the LGA should be undertaken with a view to creating a development environment, which encourages these activities.. This will include detailed auditing of all creative industry activities, links with other businesses locally and regionally, consultation with tenants to assess business needs and investigation of best practice methods of supporting these uses. Some sites for investigation have been identified through this study in Actions 1.2 and 3.1 which should be considered as part of this wider study into creative industries in the LGA.

The Moore Street Industrial precinct has been identified as an appropriate location to investigate for location of creative industry activities. This is due to the high amenity of the surrounding residential area, the proximity to retail and service centres and access to public transport. This also addresses the inappropriateness of the Moore Street Precinct for other employment land uses.

Uses in such a precinct may include uses currently occurring in the LGA in other industrial areas such as stagecraft manufacturers, film and television studios, and publishing houses. Detailed planning and feasibility analysis of such a precinct should be undertaken which should include an investment attraction strategy to identify desired tenants which targeted desired tenants and identifies partnership opportunities.

**Action 1.2** Improve Linkages with Key Institutions

Leichhardt has several key institutions within and bordering the LGA. These include:

- Sydney College of the Arts
- University of Sydney
- University of Technology
- Ultimo TAFE

Institutions such as these act as magnets for economic activity and will employ large numbers of skilled and creative workers. With education being such an important employer for the LGA, it is imperative that close contact is maintained so that institutional/ business planning and land use planning are mutually beneficial.

**Action 1.3** Support Home Based Employment

Under the existing LEP, home based employment requires development consent with only home based child care permitted under exempt and complying provisions. Leichhardt has a significant and growing level of home based work. The LGAs lifestyle attributes are a significant driver for this.

Encouraging a higher level of home based work could help to improve the retention of resident workers with professional or managerial occupations. A relaxation of controls for home based work is suggested. Care should be taken that the nature and level of home based activity does not negatively impact on the role and function of existing commercial centres

In tandem with a relaxation of controls in residential areas, business support functions should be encouraged in the existing commercial centres. Support functions should provide for the basic business needs of home based businesses in the surrounding residential areas. Support services could be clustered around existing municipal or community functions (such as libraries, community centres, etc).

***See also** Action 3.1 Investigations the renewal of the Norton Street/Parramatta Road Gateway*

**Strategy 2 – Support and Enhance the Future Role of the Commercial Centres**

Managing the extensive retail and commercial lands in the LGA given the identified future surplus to 2031 requires a strong centres policy. This strategy seeks to capitalise on mass-transport and strategic employment futures identified for Leichhardt. It aims to increase commercial activity in the town centres. There is also a desire to preserve the high amenity centres and improve those areas which are struggling through targeted planning exercises.

**Action 2.1** Initiate Masterplanning Process for Rozelle Centre

Over time it is envisaged that Rozelle will gorw and develop in line with other centres in the LGA. Rozelle has a highly valued village feel and some significant heritage areas. We recommend that Council initiates a comprehensive master planning process. This should incorporate the findings from this study and any housing strategy work completed by Council.

**Action 2.2** Enhance the Norton Street entertainment, retail and commercial offer

Norton Street is a vital centre in the LGA. This action seeks to enhance the retail and commercial offer of the centre by increasing the office floorspace and exploring opportunities for additional residential development potential. This gateway location is considered ideal for renewal focus.

**Action 2.3** Enhance the amenity of the traditional commercial centres and precincts

Certain centres and precincts in the LGA have high amenity values due to their intact heritage assets, public domain and mix of activities. These are Balmain, Norton Street (South of Marion Street), and Booth Street. Efforts to retain heritage values and amenity should be principally focused on these centres.

**Action 2.4** Restrict 'Out of Centre' Development

Out of centre development has the potential to negatively impact on the functioning of the existing commercial centres. In particular, out of centre development that generates significant trip volumes should be strongly discouraged.

It should be restricted except in the following cases:

- **Existing commercial floorspace** could be retained if it has proximity to public transport options and support services and where it would not impact on residential amenity or the role of surrounding centres. The Balmain East A and Balmain West sites currently accommodate mixed industrial/ office developments with very high office components. These sites provide high quality office environments with waterfront access. These areas function as business parks and should be zoned as such (B7 – Business Park). Care should be taken to discourage any significant level of retail activity at these locations.
- **Bulky goods retail in enterprise corridor locations** are considered appropriate given the business needs of these retail forms. These include high volume passing traffic, on-site parking, and large format industrial buildings. This supports the draft centres policy which identifies bulky goods retailing in enterprise corridors as appropriate out-of-centre retailing.

**Action 2.5** Retain Industrial Support Areas

On the fringes of some commercial centres, small clusters of mixed industrial and commercial use exist. These areas often accommodate uses that simply cannot exist within the town centre but which support the centre and contribute to the attraction of activity to the centre. These areas will often accommodate some of the lower density land uses such as storage or bulky goods activity and are likely to accommodate some of the excess demand for land in industrial precints from ostensibly commercial businesses. Appropriate locations for this activity are:

- Terry Street Precinct
- Balmain Road Industrial Precinct

Appropriate zoning for these areas is B5 – Business Development. Zoning should be adjusted to reflect this.

### Strategy 3 – Revitalise Economic Activity in the Corridors

The Parramatta Road corridor and Victoria Road corridors have varied character, activity profiles and areas which require attention. Supply and demand analysis finds that there will be considerable surplus floorspace in 2031 in both corridors but predominantly for Parramatta Road.

The Victoria Road corridor has minimal vacancies and generally functions well. The Parramatta Road corridor on the other hand has been the subject of significant planning investigations to find a way to enhance its amenity and attractiveness for investment. The key constraints to renewal are the extensive heritage conservation overlay affecting most of the corridor, aircraft noise impacts near Norton Street, narrow lot configuration and large concentrations of vacant properties in the Parramatta Road East precinct.

The findings of this study identify the need to examine the Parramatta Road corridor in precincts with tailored policies addressing the precinct issues. This includes a need for detailed structure planning of the Parramatta Road East Precinct which investigates renewal options.

**Action 3.1** Investigate the renewal of the Norton Street/Parramatta Road Gateway

This part of the corridor has the potential to provide some of the additional office floorspace considered appropriate for a town centre. An investigation should be undertaken to identify options for renewal of this gateway location with a view to the provision of commercial floorspace as part of mixed use development. This is one of the locations which could attract office-based creative industry activity.

**Action 3.2** Investigate the renewal of Parramatta Road East Precinct

The precinct currently provides low-cost retail floorspace for a range of typical enterprise corridor activities. However the precinct also contains most of the vacant floorspace in the corridor. An application has been lodged for the development of a supermarket, within a missed use development, within this precinct. A precinct investigation should be undertaken which identifies options for renewal. Key matters to investigate include:

- Potential for reconfiguration of the eight blocks which make up this precinct. This includes potential internal roads to provide frontages to rear lanes.
- Opportunities for enterprise corridor and mixed use development combinations.
- Opportunities for Council purchase of vacant lands corridor for signature community developments or to provide floorspace to community based organisations.

**Action 3.3** Retain Tebutt Street/Parramatta Road for Industrial land uses

This part of the corridor is impacted by traffic accessing the Parramatta Road overpass. It is also located in proximity to the Rozelle Goods line that may become an important transport corridor in the medium to long term. This area should be set aside for industrial land uses (between Brown Street and Flood

Street) subject to more detailed local study[47]. Land to the east of Flood Street should be zoned for enterprise corridor activities to formalise the existing uses.

**Action 3.4** Build Cross-LGA relationships to manage the Parramatta Road corridor

The Parramatta Road corridor is located within Leichhardt and Marrickville LGAs. The management of the corridor requires co-ordinated planning and lobbying for improved amenity or assistance to mitigate the traffic impacts on these localities. While the corridor is extensive it may be appropriate for Leichhardt and Marrickville Councils to create a working group to assist each other in the development of renewal policies.

**Action 3.5** Investigate opportunities for improvement of amenity along the corridors

The structure planning exercise for Parramatta Road East would investigate amenity improvements such as public domain and other streetscape treatments. Strong development controls for street frontage for the remainder of the corridor and the Victoria Road corridor should be developed. The following matters should be considered:

- Landscaping treatments and setbacks
- Material and finishes
- Opportunities for higher quality large-format retail premises. This should include increased energy and water efficiency through sustainable design.

### Strategy 4: Protect & Improve Strategic Industrial Lands

The Draft Subregional Strategy directs that certain employment land must be retained as Category 1 Employment Land (to be retained for industrial purposes). Employment land that is well positioned should be preserved and zoned appropriately.

The gap analysis showed that a large floorspace surplus exists for many industrial areas after the demand forecasts have been taken into account. This is driven by the decline in manufacturing and other traditional industrial sectors. For some areas, actions to facilitate the transition of the industrial areas should be considered along with actions to preserve strategically placed land.

Without appropriate planning policies, the use of industrial properties by 'clean industries' such as creative industries and services to the arts will be limited. New provisions should be applied to specific areas to provide a more flexible industrial environment.

[47] As part of this study we have tested the implications of removing this precinct from total the stock of employment land supply, with 'excess' demand for land in this precinct redistributed to toher appropriate areas. This analysis shows that (at a strategic level) the LGA could support the a rezoning. However, more detailed local study would need to demonstrate that any displaced activity (current anf future) could be accommodated at alternative sites within the LGA given local conditions and the operational requirements of these businesses.

### Action 4.1 Maintain Strategic Industrial Areas

Strategic industrial activities are those which have the potential to accommodate industries that serve a broad catchment. Business locations decisions are typically based on proximity to existing strategic assets. In the Leichhardt LGA context, strengths are proximity to future employment sites (Glebe Island/White bay), proximity to future transport corridors (Rozelle Goods line), proximity to major arterials, and distance from residential areas. Strategic industrial lands will typically accommodate freight and logistics and local industrial and manufacturing activities.

The IN2 – Light Industrial Zone would be appropriate for these areas. In Leichhardt LGA, this would apply to:

- Core employment lands:
  - White Bay/Victoria Road
  - Moore Street
  - Camperdown Precinct (part zone)
  - Lilyfield Road
  - Tebbutt Street/Parramatta Road (see action 3.3)

- Fragmented Parcels in proximity to Rozelle Goods line Corridor:
  - Leichhardt Industrial A
  - Lords Road Precinct
  - Leichhardt North
  - Liliyfield South B
  - Rozelle Commercial A

Zoning should be adjusted to reflect this.

### Action 4.2 Maintain an Active Role in White Bay/ Glebe Island Development

The future redevelopment of the Glebe Island/ White Bay area provides a significant opportunity for the economic development of the area. This will have significant impacts on Leichhardt LGA. The area identified as 'strategic industrial land' and zoned IN2 adjacent to Glebe Island, is likely to feel the greatest immediate effect. There is scope for considerable synergy of land uses here.

## Strategy 5 – Improved Local Transport Management and Public Domain

The public domain is highly valued in the LGA and this is reflected in streetscape treatments and the preservation of heritage through Heritage Conservation Areas and property listings. Heritage Conservation Areas affect most of the employment land in the LGA and careful guidance should be provided to the development community to assist in assessing the value of particular properties and streetscapes. This is particularly important in areas identified for future growth

Traffic impacts can also affect the quality of the public domain. The issue of parking provision and traffic volumes was consistently raised in the consultation undertaken for this study.

**Action 5.1** Improve Local Transport Management

The amenity of most of the commercial centres is affected by traffic congestion and parking issues. For some centres, public transport access is also a significant problem. Council should lobby for improved public transport service to:

- Rozelle
- Norton Street
- Balmain

Traffic management measures should be explored in tandem with this activity.

**Action 5.2** Undertake a detailed heritage study of all employment lands

Council should undertake a detailed study of all employment lands affected by Heritage Conservation Areas. This study should assess the value of the streetscape and buildings within them. Properties should be identified as contributory, neutral or suitable for redevelopment. This would provide certainty to the development community and allow Council to retain the highly valued streetscapes and properties, without providing unnecessary constraints on development.

**Action 5.3** Investigate appropriate urban design controls to preserve character of the centre

The distinctive character of Rozelle, Balmain and Norton Street (between Marion Street and Cary Street) should be vigorously protected. Care should be taken that the growth of these centres to accommodate forecast demand (particularly for retail) does not negatively impact on their character. The dilution of Norton Streets character was raised as an issue in consultation. Given the strategic importance of this centre, Council should explore this issue further through a targeted urban design and built form strategy which addresses findings of the proposed heritage study.

## 7.1 Planning and Zoning Requirements

The planning and zoning requirements which result from the Strategies and Actions are provided in Table 28 and Table 29. Generally the zones provide an appropriate range of permissible uses which reflect the centre, corridor and industrial precinct future roles. Comments regarding permissible uses are provided where they have not been addressed in the standard template.

**Table 28.** Commercial Centres.

| Subregional Strategy Metro Centre | Type 2031 | Precinct Definition | Proposed designation | Proposed zone |
|---|---|---|---|---|
| Balmain | Town Centre | Balmain Commercial | Town Centre | • B2 |
| Jane Street | Neighbourhood Centre | Considered part of Balmain Town centre and not spate neighbourhood centre | N/A | • B2 (Balmain Centre) |
| Norton Street | Town Centre | Norton Street | Town Centre | • B2 (north of Marion street)<br>• B4/R3/R4 (south of Marion Street) |
| Rozelle South | Small Village | Rozelle | Village | • Centre Core – 2<br>• B4/R3/R4 – Edge of Centre<br>• B6 - Victoria Road<br>• B5 - Terry Street (Victoria Road Corridor properties)<br>• Investigation Site – Terry Street |
| Rozelle North | Small Village | | | |
| Leichhardt Market Place | Village | Leichhardt Market Place | Village | • B2 |
| Annandale | Small Village | Booth Street | Small Village | • B2 |
| Norton Street North | Small village | Norton Street North | Small Village | • B2 |
| Orange Grove | Small village | Norton Street North Commercial C | Neighbourhood Centre | • B1 |
| Not identified as metro centre | | Norton Street North Commercial D | Neighbourhood Centre | • B1 |
| Catherine Street South-Leichhardt | Neighbourhood Centre | Norton Street Commercial A | Neighbourhood Centre | • B1 |
| Cecily Street/O'Neill Street-Liliyfield | Neighbourhood Centre | Corner shop, probably existing use - Not audited | Neighbourhood Centre | • B1 |
| Young Street/Collins Street-Annandale | Neighbourhood Centre | Pub and one corner shop, probably existing use - Not audited | Neighbourhood Centre | • B1 |
| Balmain East | Neighbourhood Centre | Balmain East A | Neighbourhood Centre | • B1 |
| Catherine Street-Lilyfield | Neighbourhood Centre | Lilyfield South A | Neighbourhood Centre | • B1 |
| Perry Street-Lilyfield | Neighbourhood Centre | Norton Street North Commercial A | Neighbourhood Centre | • B1 |

| Subregional Strategy Metro Centre | Type 2031 | Precinct Definition | Proposed designation | Proposed zone |
|---|---|---|---|---|
| Not identified as metro centre | | Norton Street North Commercial B | Neighbourhood Centre | • B1 |
| Not identified as metro centre | | Parramatta Road West | Enterprise Corridor | • B6;Bulky Goods Premises retail should be included as a permissible use. |
| Parramatta Road/Crystal Street | Small village | Parramatta Road East | Enterprise Corridor | • B6 Bulky Goods Premises retail should be included as a permissible use. |
| Leichhardt North | Neighbourhood Centre | Leichhardt North | Proximate to Rozelle Goods line – Industrial Zone | • IN2 |
| Rose Street/Johnston Street-Annandale | Neighbourhood Centre | Manufacturing/office located on residential land, probably existing use- Not audited | retain residential zoning to allow turnover of site Residential | • B1 |
| Nelson Street/Collins Street-Annandale | Neighbourhood Centre | Camperdown Commercial A | Out-of-centre Commercial Subject to rezoning | - |
| Allen Street-Leichhardt | Neighbourhood Centre | Residential only- not audited | Investigation areas. Do not currently posses retail/commercial floorspace. | - |
| Bayview Crescent-Annandale | Neighbourhood Centre | Currently no retail/commercial floorspace or business zoned land, residential only. | - | - |

Source: SGS, 2009 Draft Inner West Subregional Strategy, 2008.

**Table 29.** Employment Lands – Proposed Zoning

| Subregional Strategy Status | Leichhardt Employment Land Study Precincts | Within 2031 metro centre buffer* | Changes Proposed by SGS | Proposed Zoning |
|---|---|---|---|---|
| N/A | Balmain East B | Edge of Balmain centre buffer | Zoning to retain BP activity | B7 |
| Category 1 - Mort Bay | Balmain East Industrial A | No | Vacant site - Candidate for rezoning | N/A |
| | Balmain East Industrial B | No | Current port related use. Retain for employment land uses. | IN2 |
| | Balmain East Industrial C | Edge of Balmain centre buffer | Some residential development and vacant land - candidate for rezoning to residential | Rezone to residential |
| Category 1 - Parramatta Road, Mallet Street, Pyrmont Bridge Road | Camperdown (Industrial) | Parramatta Road/Mallet Street cnr edge of Sydney Education and Health specialised centre buffer | Retain northern part of precinct for employment land uses. | IN2 |
| | | | Retain southern part of precinct for enterprise corridor land uses. | B6; Bulky Goods Premises retail should be included as a permissible use. |
| Category 2 -Marion Street/Walter Street | Leichhardt Industrial A | Edge of Leichhardt Market Place centre buffer | Located within Rozelle Goods line corridor, has potential for strategic employment use in future. Retain for employment land uses. | IN2 |
| Category 1 - Allen and Flood Street | Leichhardt Industrial B | Edge of Leichhardt Market Place centre | Fragmented industrial surrounded by residential. Consider for rezoning to residential. | Rezone to residential |
| Category 1 - Moore St, McKenzie Street/Moore St, Catherine Street | Moore Street | Southern part of Precinct edge of Norton Street centre buffer | Retain for employment land uses. However, Mckenzie Street area should be considered for wider range of employment land uses. | B6; Bulky Goods Premises retail should be included as a permissible use. |
| Category 1 - Balmain Road | Balmain Road | Edge of Rozelle Centre buffer | Support industrial land uses for Rozelle Centre. Retain for employment land uses. | B5; Bulky Goods Premises retail should be included as a permissible use. |
| Category 1 - Lilyfield Road | Lilyfield Road | No | Retain foe employment land uses | IN2 |
| Category 1 - Parramatta Road, Tebutt Street; | Tebutt St/Parramatta Rd | Edge of Leichhardt Market Place centre buffer | Retain for employment land uses. However, consider Terry Street for flexible industrial land use activities. | |

| Subregional Strategy Status | Leichhardt Employment Land Study Precincts | Within 2031 metro centre buffer* | Changes Proposed by SGS | Proposed Zoning |
|---|---|---|---|---|
| Category 1 Lords Road | Lords Road | Edge of Leichhardt Market Place centre buffer | Located within Rozelle Goods line corridor may become important employment land in future. Retain for employment land uses. | IN2 |
| Category 2 - Victoria road/Terry Street/Wellington Street (Carrier Site) | Terry Street/ Victoria Road Corridor | Edge of Rozelle Centre buffer | Support industrial land uses for Rozelle Centre. Retain for employment land uses. | • Victoria Road Corridor - B5; Bulky Goods Premises retail should be included as a permissible use.<br>• Remainder of precinct - Investigation for rezoning to residential |
| Category 1 - Victoria Road, Robert Street (East of Mullens Street) | White Bay and Victoria Rd | No | Strategic employment land adjacent to White Bay Glebe Island Peninsula | IN2 |
| Category 2 _ Bays Precinct (Glebe Island/White Bay); Victoria Road/Robert Street (Former Martin Bright Steel Works Site) | REP 26 | No | Under Investigation | Under Investigation |
| Potential Enterprise Corridor | Parramatta Road (East and West); part of Norton Street Precinct. | Within Norton Street Town Centre buffer | Consider designation as enterprise corridor. | B6; Bulky Goods Premises retail should be included as a permissible use. |

Source: SGS, 2009, Draft Inner West Subregional Strategy, 2008; *Refers to the Metrix centre buffer GIS data provided by D