Photo credit
Aerial view of Dandenong South, DELWP aerial imagery March 2016.
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Summary of Findings

This report provides a detailed analysis of land use in the State Significant Industrial Precincts (SSIPs) by focusing on industrial land (supply and consumption), the types of buildings that occupy the land (built space), the economic use of the land (economic uses) and an estimate of the exhaustion of vacant land in the SSIPs.

Supply

There are 25,859 hectares of industrially zoned land across metropolitan Melbourne with 6,874 hectares of that being vacant. Two thirds of the vacant industrial land (4,520 hectares) is located within the State Significant Industrial Precincts (SSIP).

Consumption

The West SSIP is the largest industrial land consumer and is the largest industrial area in the State. The South SSIP has seen consumption increase to almost twice its average consumption since the GFC.

Built space

Over the last year a net total of 1.3 million square metres of floorspace was developed within the SSIPs. The majority of this was constructed in the West SSIP and the South SSIP.

Within the State Significant Industrial Precincts there are 28 million square metres of industrial building space. The West SSIP – Western Subregion (10.4 million square metres) has the largest amount of built space across the SSIPs.

West SSIP – Western Subregion is the location for just under half of the very large buildings (over 10,000m\(^2\)) found across all of the SSIPs. Many of these buildings are used as distribution centres as this SSIP plays a significant role in national and regional distribution and logistic networks.

Economic uses

The three largest SSIPs have large amounts of traditional “industrial” types of uses such as manufacturing, transport and wholesaling. The West SSIP – West Subregion has a greater share of transport and warehousing workplaces and fewer manufacturing workplaces compared to both the South and North SSIPs.

Exhaustion rates for vacant industrial land

The South SSIP is the most constrained SSIP in terms of vacant supply. Based on current rates of consumption, vacant land supply would start to become constrained some time in the 2020s. There is some evidence that larger industrial parcels in the South SSIP are attractive for re-subdivision.
1 Introduction

The Victorian economy is the outcome of decisions and actions of over half a million businesses, the productive activity of three million of workers, and the consumption of around 2.4 million households. This activity takes place in offices, factories, shops, warehouses and homes. It is this geographic dimension where planning connects with economic activity and plays a key role in ensuring land is appropriately zoned to support Victoria’s future economic development.

The Department of Environment, Land, Water and Planning is developing the Reformed and Expanded Urban Development Program to provide consistent data across metropolitan Melbourne (excluding the City of Melbourne) to monitor change in the structure and development of industrial, commercial, and retail buildings and land. This work will enable the department to monitor and report on locations identified in Plan Melbourne such as National Employment Clusters, State Significant Industrial Precincts and Metropolitan Activity Centres.

This first report focuses on buildings, economic uses, land supply and consumption located in State Significant Industrial Precincts (see Figure 1).

**Figure 1:** Zoned industrial land in Metropolitan Melbourne, 2016

The State Significant Industrial Precincts (SSIP) are significant areas of economic activity that were identified in Plan Melbourne 2014 to ensure there is sufficient strategically located land available for major industrial development linked to the principal freight network and transport gateways. They are to be protected from inappropriate development to allow for continual growth in freight, logistics and manufacturing investment. The SSIPs are also the most active non-residential land development areas in the state, consuming an average of 200 hectares of vacant land per year over the last few years.
2 Supply of industrial land

There are 25,859 hectares of industrially zoned land across metropolitan Melbourne with 6,874 hectares of this vacant.

Two thirds of vacant industrial land (4,520 hectares) is located within SSIPs. In the future, the amount of vacant land in the SSIPs will increase as the Growth Corridor Plans identified an additional gross 3,700 hectares in the SSIPs. This land will be zoned to industrial land as the Precinct Structure Planning process progresses.

Figure 2: Zoned vacant industrial land and *proposed future industrial land in State Significant Industrial Precincts, 2015/16

In terms of both vacant land and future land identified for proposed industrial uses, the West SSIP - Western Subregion has the greatest land capacity to support additional industrial and commercial uses.

Over time, when land identified as ‘Proposed Future Industrial’ is added to the SSIPs, the West SSIP and the North SSIP remain the largest, while the Pakenham/Officer SSIP will become the third largest. The South SSIP is the most constrained SSIP with no further land identified to be added to this precinct.

Much of the occupied land in the Hastings SSIP is currently occupied by a range of non-industrial uses. These pieces of land will be converted to industrial purposes once an industrial market is established.

The Central SSIP (which abuts the West SSIP) is the smallest of the SSIPs, and with little vacant land, has not been included in Figure 2. Growth and change in the Central SSIP relies on the demolition of buildings and redevelopment for new uses (see the Components of Industrial Land Consumption section for more discussion).

* The final amount of additional land will be less than this once roads, drainage reserves and other facilities are planned for.
3 Consumption of industrial land

3.1 Average annual consumption

As can be seen in Figure 3, demand for industrial land is volatile. Following the Global Financial Crisis (GFC) consumption of industrial land declined within all of the SSIPs. Consumption in the SSIPs is now returning to the rates experienced prior to the GFC.

The West SSIP has consistently maintained the highest average levels of land consumption and is the largest and most active industrial land market in Victoria. This precinct exhibits a pronounced cyclic pattern of consumption with regular peaks and declines. Yet, even when the cycle reaches its trough, annual consumption in this precinct is still higher than that in other SSIPs even during their peak years.

For instance, in the 2012-13 period when both the North SSIP and the South SSIP experienced peaks in consumption the West SSIP experienced a trough in consumption – yet consumption was still far greater than the other SSIPs.

Figure 3: Annual average consumption of industrial land in State Significant Industrial Precincts, 2005-06 to 2015-16

The South SSIP is the second largest consumer of industrial land. Since the GFC it has averaged 40 hectares of consumption per year, which is below its pre-GFC average of 50 hectares per year.

The North SSIP experienced a significant increase in consumption over 2014-15 to record its highest level of consumption since the Urban Development Program started monitoring industrial activity. However, much of this (84 hectares) was due to the development of the first phase of the Department of Agriculture and Water
Resources’ Post Entry Quarantine facility in Mickleham. If this development is subtracted from total consumption then the current level of consumption in the North SSIP would be approximately 22 hectares. However consumption in the in the 2015-16 period is as high as was in the mid 2000s.

3.2 Components of industrial land consumption

The Urban Development Program reports on net consumption as its primary indicator of activity. When land is consumed, it changes from vacant to occupied land – usually by a building being constructed. Industrial land can also become vacant which typically involves the demolition of buildings or removal of storage facilities. In this instance, the land is returned to the supply of industrial land for development. Net consumption is the amount of land that changes from developed (vacant land to occupied) minus the amount of newly vacant land (land that has changed from occupied to vacant).

In 2015-16, a total of 350 hectares of land changed from vacant to occupied (‘developed’). Most of this occurred in the State Significant Industrial Precincts (see Figure 4). On the other hand, some 52 hectares of land became ‘newly vacant’ (changed from occupied to vacant). Most of this occurred in industrial areas outside the SSIPs.

When the amount of developed land is subtracted from newly vacant land, the net consumption for 2015-16 was 298 hectares. The preference for new uses to be located in the SSIPs reinforces their importance as sources of new economic activity.

Figure 4: Components of consumption in State Significant Industrial Precincts, 2015-16

Source: Department of Environment, Land, Water and Planning
4 How industrial land is used

This section profiles floor space, recent additions to floor space, and how floor space is currently used in the SSIPs.

4.1 Stock of floorspace

Within the State Significant Industrial Precincts there is 28 million square metres of industrial floor space (see Definitions section for an explanation of how this data is reported). The West SSIP has the largest amount of floor space with 10.4 million square metres of built space (see Table 1).

Table 1: Number and area of buildings within State Significant Industrial Precincts in Metropolitan Melbourne, 2015-16

<table>
<thead>
<tr>
<th>SSIP</th>
<th>Number of Buildings</th>
<th>Total area (m²)</th>
</tr>
</thead>
<tbody>
<tr>
<td>West</td>
<td>5,301</td>
<td>10,378,600</td>
</tr>
<tr>
<td>Inner</td>
<td>574</td>
<td>1,044,600</td>
</tr>
<tr>
<td>North</td>
<td>6,599</td>
<td>7,343,900</td>
</tr>
<tr>
<td>South</td>
<td>6,929</td>
<td>8,583,400</td>
</tr>
<tr>
<td>Pakenham/Officer</td>
<td>542</td>
<td>401,000</td>
</tr>
<tr>
<td>Hastings</td>
<td>443</td>
<td>287,100</td>
</tr>
<tr>
<td>Total</td>
<td>20,388</td>
<td>28,038,600</td>
</tr>
</tbody>
</table>

Source: Department of Environment, Land, Water and Planning

Across the SSIPs, smaller buildings (from 1m² to 5,000m²) make up the vast majority (close to 95%) of the stock of industrial buildings (see Table 2) but only account for 52% of the built industrial floorspace. In contrast, the 1,019 large buildings of over 5,000m² make up the remaining 48% of floor space. As can be seen below, the West SSIP has the highest proportion of very large buildings (in excess of 10,000m²) across all of the SSIPs.

Table 2: Number of buildings, area and size categories of buildings within State Significant Industrial Precincts, Metropolitan Melbourne, 2015-16

<table>
<thead>
<tr>
<th>SSIP</th>
<th>0 to 1,000 m²</th>
<th>1,000 to 5,000 m²</th>
<th>5,000 to 10,000 m²</th>
<th>10,000 to 25,000 m²</th>
<th>25,000 m² plus</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>Area (m²)</td>
<td>Number</td>
<td>Area (m²)</td>
<td>Number</td>
</tr>
<tr>
<td>West</td>
<td>3,614</td>
<td>1,303,000</td>
<td>1,238</td>
<td>2,731,200</td>
<td>224</td>
</tr>
<tr>
<td>Inner</td>
<td>376</td>
<td>136,000</td>
<td>159</td>
<td>400,000</td>
<td>25</td>
</tr>
<tr>
<td>North</td>
<td>5,162</td>
<td>2,012,000</td>
<td>1,237</td>
<td>2,531,100</td>
<td>108</td>
</tr>
<tr>
<td>South</td>
<td>5,095</td>
<td>1,776,600</td>
<td>1,514</td>
<td>3,217,700</td>
<td>195</td>
</tr>
<tr>
<td>Pakenham/Officer</td>
<td>443</td>
<td>156,600</td>
<td>94</td>
<td>181,600</td>
<td>2</td>
</tr>
<tr>
<td>Hastings</td>
<td>413</td>
<td>72,300</td>
<td>24</td>
<td>54,200</td>
<td>3</td>
</tr>
<tr>
<td>Total SSIPs</td>
<td>15,103</td>
<td>5,456,500</td>
<td>4,266</td>
<td>9,115,800</td>
<td>557</td>
</tr>
</tbody>
</table>

Source: Department of Environment, Land, Water and Planning
SSIPs encompass a variety of building sizes that provide accommodation for a range of businesses. Supply and demand factors that contribute to variations across the SSIPs.

Supply

Prior to the mid 1990s, industrial land tended to be subdivided into small lots and sold to individual owners to develop buildings. Since the early 2000s, the industrial land and building market has attracted the interest of public and private Real Estate Investment Trusts that have purchased a number of large land holdings. These organisations provide a degree of flexibility for industrial users by delivering land parcels and buildings based on the requirements of individual users as well as offering users a range of tenure options (i.e. purchase or lease). This type of business model operates to varying degrees across the SSIPs.

Demand

The SSIPs vary in proximity to international gateways, such as the Port of Melbourne. The Port of Melbourne is Australia's busiest container port and the closest SSIP is the West SSIP. This precinct accounts for half of the very large buildings (in excess of 10,000m²) in the SSIPs, and reflects the number of national and regional distribution centres located there that require access to the port as well as road infrastructure connections to other state capitals.

Population growth also increases demand for both small and large users. All of the SSIPs have a large number of small industrial premises that can be used by service businesses that grow with population such as specialty wholesalers, panel beaters and kitchen cabinet makers, etc. There are also large users that require access to a metropolitan and Victorian market. An example is the retailer Aldi which has two distribution centres in Melbourne, one located in Derrimut (West SSIP) and the other in Dandenong South (South SSIP).

4.2 Growth in floorspace

Over the last year a total of 1,298,900 m² of industrial floorspace was constructed within the SSIPs or an additional 4.6% compared to 2014-15. As can be seen in Table 3 and Figure 4, the majority of this floorspace was constructed in the West, North and South SSIPs.

Over the last year, most of the floor space has been developed in buildings that are between 1,000 and 5,000 m² and 10,000 to 25,000 m². Two very large buildings (in excess of 25,000 m²) were added to this stock in the West SSIP.

Table 3: Change in the number of buildings, area and size categories of buildings within State Significant Industrial Precincts, Metropolitan Melbourne, 2014-15 to 2015-16

<table>
<thead>
<tr>
<th>SSIP</th>
<th>0 to 1,000 m²</th>
<th>1,000 to 5,000 m²</th>
<th>5,000 to 10,000 m²</th>
<th>10,000 to 25,000 m²</th>
<th>25,000 m² plus</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>Area (m²)</td>
<td>Number</td>
<td>Area (m²)</td>
<td>Number</td>
</tr>
<tr>
<td>West</td>
<td>134</td>
<td>56,000</td>
<td>61</td>
<td>129,100</td>
<td>7</td>
</tr>
<tr>
<td>Inner</td>
<td>6</td>
<td>1,000</td>
<td>-2</td>
<td>-3,200</td>
<td>-1</td>
</tr>
<tr>
<td>North</td>
<td>171</td>
<td>59,000</td>
<td>58</td>
<td>122,700</td>
<td>5</td>
</tr>
<tr>
<td>South</td>
<td>99</td>
<td>21,400</td>
<td>63</td>
<td>156,200</td>
<td>8</td>
</tr>
<tr>
<td>Pakenham/Officer</td>
<td>31</td>
<td>10,900</td>
<td>16</td>
<td>32,800</td>
<td>0</td>
</tr>
<tr>
<td>Hastings</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total SSIPs</td>
<td>444</td>
<td>148,700</td>
<td>196</td>
<td>437,600</td>
<td>19</td>
</tr>
</tbody>
</table>

Source: Department of Environment, Land, Water and Planning
4.3 Economic structure of the SSIPs

The location of workplaces by industry uses WorkSafe Victoria data as an indicator of the economic structure of the SSIPs (see Definitions section for more detail).

The South, North and West SSIPs are the largest employment centres with a combined total of about 9,500 workplaces identified within their boundaries. The smaller SSIPs have substantially fewer workplaces within them (see Figure 6).

The three largest SSIPs have a similar distribution of workplaces with relatively large amounts of traditional “industrial” uses such as manufacturing, transport and wholesaling that make up around 60% of the workplaces. There are, nonetheless, differences. The West SSIP –West Subregion has a greater share of Transport and Warehousing workplaces and fewer manufacturing workplaces as compared to both the South and North SSIPs. The economic structure of the West SSIP –West Subregion is reflected in the type of buildings that have been developed (see Table 2), particularly buildings in excess of 10,000 m$^2$, which, as discussed, are indicative of large distribution centres.

The SSIPs also provide accommodation for non-traditional industrial uses including population serving businesses and business services that require accommodation in industrial areas. For instance, a retailer may require a distribution centre in an industrial area or may use an industrial facility to conduct on-line retailing. Business Services in the SSIPs include firms that directly service industrial users such as labour hire firms or equipment hire businesses.

The Central SSIP is a relatively small area and has 240 workplaces. At present, most of the land is developed and it is expected that there will be little change in the number of workplaces over time. The Pakenham/Officer SSIP is an emerging location and currently has 209 workplaces, which is anticipated to increase over time.
Figure 6: Share of workplaces by industry type*, State Significant Industrial Precincts, 2013/14.

Source: Worksafe Victoria, unpublished data.

*Industry categories by Australian and New Zealand Standard Industrial Classification (ANZSIC) can be found in Definitions Section.
5 Modelling exhaustion rates for vacant Industrial land

Measuring the supply of industrial land in relation to the consumption of land provides the basis to estimate the time at which vacant land within a SSIP becomes exhausted.

Exhaustion rate models for the most active and established SSIPs (West, North and South SSIPs) have been developed to provide estimates of when vacant land is likely to be totally consumed.

The estimates of when vacant industrial land will become exhausted are calculated by subtracting a consumption rate (based on historic data) from the current amount of vacant land. Further information about the assumptions and method can be found in the definitions section.

The method adopted in this report creates a linear exhaustion rate, however in the real world, land supply in the SSIPs would become constrained prior to all vacant land being consumed. This is because:

- the amount of new development would start to decline as land prices increase in response to increased scarcity. Users might be priced out of areas and search for other locations.
- not all zoned land is suitable for development as either built space or non-built space (such as a storage yard).

Notwithstanding the above, modelling provides a useful estimation and illustrates the level of ongoing demand each of the SSIPs may be able to accommodate and the pressures they may encounter in the future.
5.1 West SSIP – West Subregion

The West SSIP is the largest of the State Significant Industrial Precincts and is also the most active in terms of consumption. On current zoned land supply, vacant land supply would potentially be exhausted some time in the early to mid 2030s. However, there are significant supplies of industrial land that have been identified as proposed industrial land that will substantially extend land supply to between the early to late 2040s.

Figure 7: Modelled exhaustion of industrial land, West SSIP

Source: Department of Environment, Land, Water and Planning.
5.2 North State Significant Industrial Precinct

The North SSIP is the second largest of the SSIP and has both zoned land supply and proposed industrial land.

Pre and post GFC consumption rates in the North SIPP vary substantially (see Figure 3). This is demonstrated in the significant difference between the pre and post GFC exhaustion scenarios in Figure 8. The pre-GFC scenario sees vacant land being consumed at the end of the 2030s while the post-GFC scenario sees ongoing supplies of land beyond 2050. While the 2015-16 consumption rate was close to the levels experienced before the GFC, it is not yet clear if the lower post-GFC consumption rate will continue into the longer term, or whether it will return to a consumption rate closer to the higher pre-GFC consumption rate in the future.

**Figure 8:** Modelled exhaustion of industrial land, *North SSIP*

Source: Department of Environment, Land, Water and Planning.

* The post-GFC consumption rate used in the model does not include land taken up by the consumption of land for the Post Entry Quarantine facility in Mickleham. See section 3.1 for a full discussion.
5.3 South State Significant Industrial Precinct

Of the State Significant Industrial Precincts, the South SSIP is the most constrained in terms of vacant supply. In addition, the South SSIP also has the second highest rate of consumption of all the SSIPs.

Unlike the North and West SSIPs, there is no proposed industrial land that will be added to the South SSIP in the future. On current zoned land supply, vacant land supply would start to become constrained some time in the mid 2020s. As the cost of land and rents increase, users would be expected to start to search for less costly locations.

Figure 9: Modelled exhaustion of industrial land, South SSIP

Source: Department of Environment, Land, Water and Planning.

As land becomes more constrained and valuable in the South SSIP, there is evidence of some land owners divesting themselves of underutilized excess land and redeveloping it for other users. An example of this has occurred on the Farm Pride site in Keysborough where excess office space on the site was demolished and new industrial premises are being developed. Figure 10 shows the recent history of the site.
Figure 10: Change in the occupancy of the Farm Pride site, Keysborough, 2010, 2014 and 2016

**2010** The original site with redundant administration buildings

**2014** Administration buildings demolished
2016 The vacant land is subdivided and a number of new industrial buildings developed.

Source: Department of Environment, Land, Water and Planning, Aerial Imagery.
6 Definitions

Building area

The area of buildings in industrial zones is based on the area of the footprint. While the data collected by the Reformed and Expanded Urban Development Program contains building heights, it has been assumed that industrial activity occurs on a single level. While there are many industrial buildings that have a double storey component or are entirely multi-storey, for reasons of transparency, the area is assumed be equal to the area of the footprint.

Exhaustion Rates

The vacant land and proposed industrial land are refined by using these assumptions:

- All vacant lots over 4 hectares have been discounted by 20% to model potential further subdivision.
- All vacant lots below 4 hectares have not been discounted further as it is assumed that these lots will be consumed as they currently are.
- All land is assumed to be usable, however, some pieces of land will be used for other uses (such as road reservations) or are not physically suitable for industrial development.

All Proposed Industrial land has been discounted in a two step process:

- Step 1: 15% discount to account for infrastructure such as major roads, drainage reserves and open space.
- Step 2: 20% discount to model potential further subdivision such as roads within subdivisions.

Consumption rates are based on pre-GFC (1994-95 to 2007-08) and post-GFC (2008-09 to 2015-16) consumption rates for each SSIP. The pre-GFC consumption rates are higher than those of the post-GFC. This provides a range of potential times when vacant becomes exhausted.

No assumptions have been made about the recycling of industrial land (i.e. land that is currently occupied is assumed to remain occupied). As discussed in the section about the Components of Industrial Land Consumption, occupied industrial land can be recycled and be returned to the supply of vacant land. However this has not been modelled as the recycling of occupied industrial land is dependant on the age of the existing building/ use, the potential to reuse the current built form and the potential for the future development of the land.

Land development status

Occupied – Some evidence of use of the land. This includes buildings, hardstand storage areas, carparks, etc.

Vacant – The land is vacant and there is no use occurring on the land.

WorkSafe Victoria

WorkSafe Victoria maintains a database of workplaces that are registered for a WorkCover insurance policy. However not all businesses are within this database such as some large businesses that insure themselves, businesses and federal government agencies registered with Comcare, sole traders as well as employers with less than $7,500 in remuneration. However the WorkSafe data provides a broad estimate of the location of workplaces located across Victoria.
State Significant Industrial Precincts

Plan Melbourne has identified four State Significant Industrial Precincts (West, North, South and Hastings) and one emerging Precinct (Officer/Pakenham) (see Map 1). The boundaries of these precincts have been approximated for analytical purposes.

Industry Type

Industry level data from WorkSafe Victoria have been aggregated to provide clarity for the analysis. The table below provides a break-down of the categories, by Australian and New Zealand Standard Industry Classification – Industry Divisions, used in this report.

<table>
<thead>
<tr>
<th>Industry type</th>
<th>Australian and New Zealand Standard Industry Classification – Industry Divisions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>Manufacturing</td>
</tr>
<tr>
<td>Transport and Warehousing</td>
<td>Transport, Postal and Warehousing</td>
</tr>
<tr>
<td>Wholesaling</td>
<td>Wholesale Trade</td>
</tr>
<tr>
<td>Construction</td>
<td>Construction</td>
</tr>
<tr>
<td>Business and Professional Services</td>
<td>Information Media and Telecommunications</td>
</tr>
<tr>
<td></td>
<td>Financial and Insurance Services</td>
</tr>
<tr>
<td></td>
<td>Rental, Hiring and Real Estate Services</td>
</tr>
<tr>
<td></td>
<td>Professional, Scientific and Technical Services</td>
</tr>
<tr>
<td></td>
<td>Administrative and Support Services</td>
</tr>
<tr>
<td>Population Services</td>
<td>Retail Trade</td>
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<tr>
<td></td>
<td>Accommodation and Food Services</td>
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<tr>
<td></td>
<td>Public Administration and Safety</td>
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<td>Education and Training</td>
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<td>Health Care and Social Assistance</td>
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<td>Arts and Recreation Services</td>
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<tr>
<td>Other</td>
<td>Agriculture, Forestry and Fishing</td>
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<tr>
<td></td>
<td>Mining</td>
</tr>
<tr>
<td></td>
<td>Electricity, Gas, Water and Waste Services</td>
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<td>Other Services</td>
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