New Form submission on Planning for Melbourne’s Industrial and Commercial Land

Hi planning.implementation@delwp.vic.gov.au

There has been a submission on Planning for Melbourne’s Industrial and Commercial Land through Engage Victoria

A copy of the submission is provided as below:

Planning principles and strategies for employment land.

The draft Melbourne industrial and commercial land use plan includes principles and strategies to guide planning for industrial and commercial land. (page 32).

Do you think the principles and strategies provide enough clarity and guidance to assist planning for industrial and commercial land?

No

If no, please let us know why and how they could be improved.

The principles are appropriate. However, the strategies are not. The following principles cannot...
be achieved in the context of the Southern Region - Principle 1 Provide a zoned supply of land to accommodate growth over at least a 15-year period, including sufficient stocks of large sites for strategic investment. Maintain access to an adequate supply of well-located land for industrial and commercial uses. Principle 2 Ensure that state, regional and local policies are aligned to support industrial and commercial areas. Clarify and strengthen the role and function of commercial centres as primary locations for commercial development and employment, prioritising economic activity and business synergies over residential development. Principle 4 Provide for significant local employment opportunities, and where appropriate, provide for large scale industrial or regional employment generators. A more comprehensive strategy and policy environment, along with a pipeline of committed infrastructure investment is required to adequately service the Southern Region for both industrial and commercial land. This work also needs to consider both supply and demand opportunities.

Criteria to identify regionally-significant industrial precincts.

Plan Melbourne identifies state-significant industrial precincts. The draft Melbourne industrial and commercial land use plan identifies regionally-significant industrial precincts and includes criteria used as the basis to identify these locations (page 34).

Do you support the criteria developed to identify regionally-significant industrial precincts?
Yes

If no, please let us know why and how they could be improved.
Purpose for regionally-significant industrial precincts and local industrial precincts.

Plan Melbourne outlines a purpose for state-significant industrial precincts. The draft Melbourne industrial and commercial land use plan identifies a purpose for regionally-significant industrial precincts and local industrial precincts (page 35).

Do you support the purpose developed for regionally-significant industrial precincts and local industrial precincts?
Yes

If no, please let us know why and how they could be improved.

Developing local industrial land use strategies.

Appendix 2 of the draft Melbourne industrial and commercial land use plan proposes guidance for developing local industrial land use strategies.

Do you have any comments or suggestions to improve the guidance for developing local industrial land use strategies?
No

Key industrial and commercial areas.
The draft Melbourne industrial and commercial land use plan identifies and describes key industrial and commercial areas for each of the six metropolitan regions (refer to Part B of the plan).

Have the key industrial and commercial areas been adequately identified and described across the regions?
No

If no, please let us know which other area we should identify or how the areas can be better described.

The Southern Region (pg 89) states that the Southern SSIP will become significantly constrained in the early 2020s and be exhausted by mid-2020’s. When this occurs, demand transfer is likely to occur at the closest industrial areas. This is in contradiction with the Macroplan reports which suggest 10-12 years supply for Dandenong (pg 39 stage 1 final report). Another comment by Marcoplan suggests the Southern SSIP may exhaust faster within 5-10 years. Our independent assessment by CKC suggests only 2-4 years supply remains. These discrepancies need further resolution. The Macroplan report (pg 75 stage 2 final report) also indicates “Feedback from these groups and local real estate agents suggests large scale industrial REITS are less likely to make further investments beyond the Southern SSIP into areas as far east as Officer/Pakenham and are more likely to invest in Melbourne’s northern and western growth fronts. This shift in focus will have implications for future investment levels within the Southern Region, particularly considering forecast land availability within the Southern SSIP”. Whilst the report highlights significant potential for commercial floorspace with Greater Dandenong (and other Southern Region councils) and the Dandenong MAC being a key provider – the report fails to reference the importance of, and a strategic plan to deliver, a polycentric Melbourne outcome. The status quo appears to remain being increased demand/supply in inner Melbourne and its fringe including a likely role for key nodes along the proposed Suburban rail loop – all to the detriment of the metro regions such as City of Greater Dandenong.
Would you like to comment on any other aspects of the plan?

The City of Greater Dandenong is a member of the Southern Economy and Planning Working Group (SEPWG) overseen by the Department of Jobs, Precincts and Regions. The group recently met to discuss the MICLUP and have collectively raised several concerns which we understand DJPR will be tabling with the Metropolitan Development Advisory Panel. We now ask that prior to DELWP confirming its key findings and releasing a final plan in mid-2020, that further engagement occur early in the New Year inclusive of DJPR and the Councils of Melbourne’s Southern Region (SEPWG). We also note work that has just commenced via the VPA to develop a South East Economic Corridor Strategic Context to 2060 report which is due for completion in the first half of 2020 and is likely to provide valuable insights that cross over with the MICLUP. Our fundamental concern is that the Southern Region will miss out on providing jobs both Industrial and Commercial locally - with Melbourne’s North and West securing the industrial land demand and central Melbourne and fringe Melbourne securing the commercial land demand, this imbalance needs to be remedied to reflect our region’s forecast population growth.

If you would like to upload a submission, please do so here.

I am making this submission:

on behalf of a local council

Email address (Optional)
I agree to receive emails about my submission if required or project updates.

Yes

Privacy Statement - Draft Melbourne Industrial and Commercial Land Use Plan

What we will do with your submission

The Department of Environment, Land, Water and Planning (DELWP) is committed to protecting personal information provided by you in accordance with the principles of the Victorian privacy laws. The submission you provide to DELWP will be used to inform the finalisation of the Melbourne Industrial and Commercial Land Use Plan.

The information you provide will be made available to DELWP to develop a consultation report. This report will be uploaded to the Melbourne Industrial and Commercial Land Use Plan page on the DELWP website.

The contact information you provide may be used to contact you should we need to clarify your submission or to provide you with project updates.

The submission you provide will be published on the DELWP website. To protect individual privacy, DELWP will remove your name and address from your submission when we receive it.

If you do not wish to be identified, please ensure there is no other information in your submission that could identify you or other individuals.

If you are making comment as an organisation, then your comments may be published, including the name of your organisation.

De-identified submissions may be used by DELWP, or its contracted service providers under confidentiality agreements, in preparing its recommendations to government.
Please note, if you do not provide your name/email address we will not be able to identify your submission if you wish to access it, make a correction, or require technical support.

Should you need to correct the information you provided or gain access to your submission, please contact us via email at planning.implementation@delwp.vic.gov.au

I agree to the privacy statement

yes

To view all of the form's submissions, visit:


Regards,

The Engage Victoria Team

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Issues Paper
Draft Commercial & Industrial Plan [DELWP]

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Instructions.

Instructing Party
Senior Economic Development Officer
City of Greater Dandenong

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Our Reference Charter Contact
Report Author
1. **Purpose**

The purpose of the Issues Paper is to provide an assessment of the *Draft Melbourne Industrial and Commercial Land Use Plan (the ‘Plan’)* recently released by the Department of Environment, Land, Water & Planning (DELWP). The review aims to highlight any key questions and/issues that arise in relation to the Southern SSIP and in particular, the City of Greater Dandenong.

Central to the assessment are two key questions:

1) Firstly, does the extent of industrial land supply identified across the Southern Region (with a focus on the Southern SSIP in Dandenong South), accurately reflect the actual supply situation; and

2) Are the Plan’s objectives, including that which identifies the Pakenham/Officer industrial precinct as a State Significant Industrial Precinct (SSIP) and thus assuming the significant role that the SSIP has and continues to play, realistic?
2. Draft Melbourne Industrial and Commercial Land Use Plan Overview

The Plan aims to provide an overview of the current and future need for industrial and commercial land across metropolitan Melbourne, while also seeking to establish a framework that will allow for the Victorian Government to better plan for future employment and industry needs.

The Plan seeks to facilitate the implementation of a number of key objectives of Plan Melbourne 2017 – 2050. It seeks to do this by ensuring that well-priced commercial and industrial land is available a fact that is recognised as necessary to strengthen industry and support Melbourne’s continued population growth, which will enable it to remain prosperous in the coming years.

2.1 Economic Structure of the SSIPs

Plan Melbourne – 2017 to 2050, identifies five State Significant Industrial Precincts (Western Industrial Precinct, Northern Industrial Precinct, Southern Industrial Precinct, Port of Hastings Industrial Precinct and the Officer-Pakenham Industrial Precinct.

The purpose of the State Significant Industrial Precincts is “To provide strategically located land for major industrial development linked to the Principal Freight Network and transport gateways. They will be protected from incompatible land uses to allow continual growth in freight, logistics and manufacturing investment.” (Plan Melbourne – 2017 to 2050). The following section highlights the vast differences in the economic structure that exists across the various SSIPs with a focus on the Southern SSIP and the Officer/Pakenham SSIP.

2.1.1 Number of Businesses

Understanding the economic structure of each SSIP is instructive when seeking to understand property markets including the requirement for land to accommodate commercial and industrial uses, including the Southern SSIP, which includes land within the City of Greater Dandenong. The Urban Development Program (UDP) sheds light on this subject by providing insight into the number and type of businesses that exist within each SSIP.

Notably, the UDP identifies that the three largest SSIPs (Western, Southern and Northern) have a similar distribution of workspaces, with large amounts of traditional “industrial” uses such as manufacturing, transport and wholesaling, comprising around 60% in each. Of the SSIPs, the Southern SSIP comprises the most business – almost 4,000, followed by the North SSIP with approximately 3,500 and the West SSIP, approximately 3,200 businesses. The Officer/Pakenham SSIP has a considerably lower number of businesses with approximately 250.

2.1.2 Stock of Industrial Floor Space

The total stock of industrial floor space across the SSIP’s is nearly 32 million square metres. The Western SSIP has the largest amount with 13.5 million square metres approximately distributed over 6,800 buildings, followed by the Southern SSIP with 9.9 million square metres spread across about 5,400 buildings, almost and the Northern SSIP with almost 7.6 million square metres. The Officer/Pakenham SSIP has just under 560,000 square metres dispersed across nearly 540 buildings.

2.1.3 SSIPs by Building Size & Area

The most notable feature of the three largest SSIPs is that which relates to the number of industrial buildings. Within the Western SSIP there are just over 4,600 industrial buildings, of which 80 are 25,000 square metres ‘plus’. This is followed by the Northern SSIP where there is just over 4,000 buildings, including 20 which are 25,000 square metres ‘plus’, and the Southern SSIP where there are almost 3,100 buildings, including 23 which are 25,000 square metres ‘plus’. The Officer/Pakenham SSIP contains a significantly less 390 buildings (approximately), none of which fall into the 25,000 square metres ‘plus’ category.

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PAGE 2
2.2 Southern SSIP

Melbourne’s Southern Region is defined in The Plan as the area which includes the local government areas (LGAs) of Kingston, Casey, Frankston, Greater Dandenong, Cardinia and Mornington Peninsula. The Southern Region is home to over one million residents and contains more than 350,000 jobs. A significant proportion of jobs across the Region are within industrial businesses, with significant provisions of industrial land required to support these industries. Across the Southern Region there are three State Significant Industrial Precincts (SSIPs):

- Southern Industrial Precinct
- Officer/Pakenham Industrial Precinct
- Port of Hastings Industrial Precinct

These precincts account for approximately 5,000 ha of industrial land, which is more than 50% of the total industrial land across the Southern Region (approximately 9,500 ha).

The Southern SSIP is a significant industrial precinct located predominantly within the City of Greater Dandenong with a small proportion located within the City of Casey. It is the largest industrial precinct within the Southern Region, comprising almost 3,000 ha of industrial land.

Owing to the presence of the Southern SSIP, Greater Dandenong is the largest employer in the Southern Region with approximately 97,000 jobs (27% of total jobs across the Southern Region). Many jobs within Greater Dandenong are located within the Southern SSIP with industrial employment accounting for approximately 47% of total employment. The Southern SSIP is a significant provider of industrial employment opportunities across the Southern Region with approximately 37% of all industrial jobs across the Southern Region located within Greater Dandenong.

Figure 1: Dandenong National Employment and Innovation Cluster

Source: Plan Melbourne
3. Review of Industrial Land Supply Forecast

In seeking to establish an understanding and thus, a response to The Plan, it is instructive for Council to understand that there are contradictions with regards to DELWP’s land supply figures as they relate to the Southern SSIP. The purpose of this section is to highlight that the supply assumptions made are in fact flawed, and do not accurately represent the rapidly diminishing supply of industrial land in the Southern SSIP, of which the economic implications are significant.

Perhaps most notably, DELWP provides differing figures with regards to the date when industrial land across the Southern SSIP will become exhausted. The Southern Region Industrial Land Current State Assessment, which was released in December 2018 states that across the Southern SSIP land supply will become exhausted in the next 11-12 years, indicating a potential exhaustion date of 2029-2030. In contrast the Draft Melbourne Industrial and Commercial Land Use Plan states that land supply in the Southern SSIP will be exhausted by the mid-2020s, becoming significantly constrained by the early 2020s.

The highly constrained land supply situation in the Southern SSIP is recognised the 2018 UDP which states:

“Of the State Significant Industrial Precincts, the Southern SSIP is the most constrained in terms of vacant supply. In addition, the Southern SSIP also has the second highest rate of consumption of all the SSIPs. Unlike the Northern and Western SSIPs, there is no proposed industrial land that will be added to the Southern SSIP in the future. On current zoned land supply, vacant land supply would start to become constrained sometime in the early to mid 2020s”.

Charter notes that the Future State Assessment Stage 2 Final Report models multiple scenarios relating to the likely exhaustion of industrial land stock within the Southern SSIP and considers possible implications for total employment and output across the Southern Region. In establishing these scenarios, a number of high-level assumptions adopted by DELWP are considered overly simplistic, and whilst should be considered as inputs into understanding the future state, they should not be considered the key determinants. As an example, these include:

- That the current output by worker by industry will remain constant across the forecast period (adopted in all scenarios); and
- 50% of the loss of industrial employment growth in the Greater Dandenong will transfer to the Officer/Pakenham SSIP and the Port of Hastings SSIP (adopted in Scenario 2).

Charter considers that across the forecast period it is likely that the output by worker by industry will vary across industries and that there is no basis to support the assumption that the loss of employment growth in Greater Dandenong will translate to employment growth across the Officer/Pakenham SSIP and the Port of Hastings SSIP.

In addition, Charter notes that the land supply scenario for the SSIP in The Plan relies upon data from the 2017 Urban Development Program, now two years old. Since the release of The Plan (Future State Assessment Stage 2 Final Report) more recent data has been released by the Urban Development Program which highlights there is 140 hectares less industrial land than identified in the 2017 report.
3.1 Southern SSIP Land Supply

In July 2017 Charter conducted a land supply assessment for the City of Greater Dandenong in relation to the Southern SSIP, in particular industrial land that was located within two precincts:

- **The Lyndhurst Precinct** located within an area bound by Dandenong – Hastings Road, Glasscocks Road, Frankston-Dandenong Road and Abbots Road, and
- **The North West Precinct** vacant land located both and east and west of Eastlink.

Charter’s findings assessed vacant industrial land as either ‘available’ or ‘not available’. Land considered ‘available’ was that deemed to be for sale or lease as evidenced through explicit marketing campaigns or otherwise known to be on the market.

Land considered ‘not available’ included all land that is vacant, but which is currently unavailable due to a variety of circumstances including it either being within the long term ownership of passive landowners, held by long term investors with no motivation to sell and/or develop in the foreseeable future, or has been sold, but is yet to be developed.

A total of 409 hectares of vacant industrial land was identified across the Southern SSIP. Of this, 289 hectares were located in the Lyndhurst Precinct, of which 212.5 hectares was considered to be ‘actual’ or ‘available’ supply while 126.5 hectares was identified as ‘not available’. The remaining 120 hectares were located in the North West Precinct of which 70 hectares were identified as ‘available’ and 50 hectares ‘unavailable’. Since the previous assessment was completed in July 2017, there has been further development completed across the Southern SSIP. The North West Precinct has seen significant development over the 2017 – 2019 period with many previously vacant sites now being occupied.

Development across the North West Precinct has occurred in multiple locations including:
- North of Greens Road, West of Eastlink
- South of Dandenong Bypass, East of Eastlink
- Between Perry Road and Eastlink

**Figure 2: North West Precinct Land Supply Comparison**

![Map comparison of land supply in February 2017 and October 2019.](Source: Nearmap)
Lower volumes of development activity have been observed in the Lyndhurst Precinct with the only significant development occurring at:

- Frankston Dandenong Road and;
- Coleman Rd

**Figure 3: Lyndhurst Precinct Land Supply Comparison**

![Map comparison of land supply](nearmap.png)

Source: Nearmap

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### 3.2 Land Consumption Overview

The Plan investigates industrial land consumption across the Southern Region. The report findings detail that a majority of industrial land development across the Southern Region over the 2015-16 to 2017-18 period occurred within the Southern SSIP. Over the assessed period, a total of 321.5 ha of industrial land was consumed with approximately 190 ha located within the Southern SSIP.

<table>
<thead>
<tr>
<th>Region</th>
<th>2015-16 (ha)</th>
<th>2016-17 (ha)</th>
<th>2017-18 (ha)</th>
<th>Average 2015-16 to 2017-18 (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Southern SSIP</td>
<td>55.9</td>
<td>71.4</td>
<td>63.3</td>
<td>63.5</td>
</tr>
<tr>
<td>Southern Region</td>
<td>102.3</td>
<td>108.3</td>
<td>110.2</td>
<td>107.1</td>
</tr>
<tr>
<td>Southern SSIP proportion of total land consumption</td>
<td>55%</td>
<td>65%</td>
<td>57%</td>
<td>59%</td>
</tr>
</tbody>
</table>

Source: DELWP, Urban Development Program – Melbourne Metropolitan Industrial 2018

Charter’s July 2017 assessment calculated a total of 409 hectares of vacant industrial land across the Southern SSIP. Assuming a consumption rate of 63.5 ha (the average consumption rate across the 2015-16 to 2017-18 period) from 2018-19 onwards, land supply across the Southern SSIP will become exhausted by the end of 2023. This analysis assumes all vacant industrial zoned land within the Southern SSIP will be developed.
In reality, this is unlikely to occur as not all land will be available to the market with some landowners having limited motivation to sell and are likely to hold their land into the future. As a result, it is estimated that land supply will likely become significantly constrained in the short term.

Table 2: Annual Land Consumption Breakdown

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Remaining Industrial Land (ha)</td>
<td>409</td>
<td>345.7</td>
<td>282.2</td>
<td>248.7</td>
<td>156.2</td>
<td>91.7</td>
<td>26.2</td>
<td>-35.3</td>
</tr>
<tr>
<td>Consumption Rate (ha)</td>
<td>71.4</td>
<td>63.3</td>
<td>63.5</td>
<td>63.5</td>
<td>63.5</td>
<td>63.5</td>
<td>63.5</td>
<td>63.5</td>
</tr>
</tbody>
</table>

Source: Charter Keck Cramer
4. The Officer/Pakenham SSIP

This section highlights the role and performance of the Officer/Pakenham SSIP. The purpose is to outline that despite its SSIP status, there is currently no indication that it is likely to fulfil this function nor achieve this policy objective, in the foreseeable future. Any assumptions made that it will, are failing to fully recognise the constraints and challenges in it being able to do so.

The Officer/Pakenham SSIP is an industrial precinct located within the Cardinia Shire. It is the smallest of the three SSIPs across the Southern Region with a current size of 655 ha (22% of the size of the Southern SSIP). In addition, it is planned to increase the size of the Officer/Pakenham SSIP by rezoning an additional 938 ha of land for industrial uses.

Within the regional context, the Officer/Pakenham SSIP is a relatively insignificant employment location. The Cardinia Shire provides only 7% of all jobs across the Southern Region and is responsible for just 6% of all manufacturing jobs. In addition, the Cardinia Shire recorded a Gross Regional Product of just below $3 billion which represented approximately 6% of the total Gross Regional Product of the Southern Region (approximately $49 billion).

4.1 Industrial Land Consumption – A Comparison

Across the Officer/Pakenham SSIP, there has been limited demand for industrial land, with an annual consumption rate of just 13.9 ha over the 2015-16 to 2017-18 period. Over the assessed period, the Officer/Pakenham SSIP has been responsible for just 13% of the total industrial land consumption across the Southern Region.

<table>
<thead>
<tr>
<th>Region</th>
<th>2015-16 (ha)</th>
<th>2016-17 (ha)</th>
<th>2017-18 (ha)</th>
<th>Average 2015-16 to 2017-18 (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Officer/Pakenham SSIP</td>
<td>15.5</td>
<td>12.4</td>
<td>13.9</td>
<td>13.9</td>
</tr>
<tr>
<td>Southern SSIP</td>
<td>55.9</td>
<td>71.4</td>
<td>63.3</td>
<td>63.5</td>
</tr>
<tr>
<td>Southern Region</td>
<td>102</td>
<td>109.3</td>
<td>110.2</td>
<td>107.1</td>
</tr>
<tr>
<td>Officer/Pakenham SSIP proportion of total land consumption</td>
<td>15%</td>
<td>11%</td>
<td>13%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Source: DELWP, Urban Development Program – Melbourne Metropolitan Industrial 2018

The significant difference in the economic structure and thus the consumption of industrial land between the Southern SSIP and the Officer/Pakenham SSIP over the long term is highlighted in the following chart which shows annual consumption rates back to 2005.
4.2 Industry & Employment Comparison

The Officer/Pakenham SSIP is significantly less developed than the Southern SSIP with a total of 15,385 jobs currently located within the Officer/Pakenham SSIP, compared to 67,858 within the Southern SSIP.

The Southern SSIP contains a significantly larger number of jobs within heavy industrial industries. In total, there are 33,726 jobs within Manufacturing and Wholesale Trade, compared to just 5,492 jobs within the Officer/Pakenham SSIP. The Officer/Pakenham SSIP is underpinned by light industrial uses with heavy industry accounting for only 36% of total jobs. In contrast, heavy industry comprises approximately 50% of total jobs across the Southern SSIP.

Table 4: Jobs by Industry Comparison

<table>
<thead>
<tr>
<th>Industry</th>
<th>Officer/Pakenham SSIP</th>
<th>Southern SSIP</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No. of Jobs</td>
<td>Proportion of Total Jobs</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>4,569</td>
<td>29.7%</td>
</tr>
<tr>
<td>Construction</td>
<td>3,631</td>
<td>23.6%</td>
</tr>
<tr>
<td>Retail</td>
<td>1,400</td>
<td>9.1%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>923</td>
<td>6.0%</td>
</tr>
<tr>
<td>Transport Postal and Warehousing</td>
<td>862</td>
<td>5.6%</td>
</tr>
<tr>
<td>Other</td>
<td>4,000</td>
<td>26%</td>
</tr>
<tr>
<td>Total</td>
<td>15,385</td>
<td></td>
</tr>
</tbody>
</table>

Source: REMPLAN, ABS, MacroPlan Demasi
4.2.1 Industrial Employment by Place of Residence

An analysis of the ‘place of residence’ of industrial workers across Cardinia Shire, further emphasises that the Officer/Pakenham SSIP is predominately a local industrial precinct. More than 60% of all industrial workers across Cardinia Shire also reside within the LGA. A potential impediment to establishing the Officer/Pakenham SSIP as a significant industrial precinct will be the reduced pool of workers which the precinct can draw upon when compared to the Southern SSIP.

The Southern SSIP is a significant employment precinct within Melbourne’s south east. Industrial workers across Greater Dandenong reside within a number of LGAs across the south-east indicating that its locational attributes are able to attract from a much wider pool of workers from which to draw upon. Whilst some future workers within the Southern SSIP catchment area may be willing to commute to the Officer/Pakenham SSIP it is an option unlikely to be taken up all. While housing development across Cardinia Shire will increase the number of residents within the catchment of the Officer/Pakenham SSIP into the future, the pool of potential workers will still be significantly lower than that of the Southern SSIP.

Table 5: Cardinia Industrial Workers by Place of Residence

<table>
<thead>
<tr>
<th>LGA</th>
<th>Manufacturing</th>
<th>Construction</th>
<th>Wholesale Trade</th>
<th>Transport, Postal and Warehousing</th>
<th>Total Industrial Workers</th>
<th>Proportion of Industrial Workers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cardinia</td>
<td>1,068</td>
<td>1,738</td>
<td>280</td>
<td>688</td>
<td>3,774</td>
<td>60.5%</td>
</tr>
<tr>
<td>Casey</td>
<td>330</td>
<td>441</td>
<td>67</td>
<td>146</td>
<td>984</td>
<td>15.8%</td>
</tr>
<tr>
<td>Baw Baw</td>
<td>137</td>
<td>175</td>
<td>46</td>
<td>65</td>
<td>423</td>
<td>6.8%</td>
</tr>
<tr>
<td>Yarra Ranges</td>
<td>50</td>
<td>65</td>
<td>15</td>
<td>9</td>
<td>119</td>
<td>1.9%</td>
</tr>
<tr>
<td>Greater Dandenong</td>
<td>52</td>
<td>52</td>
<td>0</td>
<td>10</td>
<td>114</td>
<td>1.8%</td>
</tr>
<tr>
<td>Frankston</td>
<td>38</td>
<td>53</td>
<td>11</td>
<td>5</td>
<td>107</td>
<td>1.7%</td>
</tr>
<tr>
<td>Bass Coast</td>
<td>24</td>
<td>36</td>
<td>7</td>
<td>24</td>
<td>91</td>
<td>1.5%</td>
</tr>
<tr>
<td>South Gippsland</td>
<td>36</td>
<td>24</td>
<td>6</td>
<td>18</td>
<td>84</td>
<td>1.3%</td>
</tr>
<tr>
<td>Mornington Peninsula</td>
<td>25</td>
<td>52</td>
<td>3</td>
<td>3</td>
<td>83</td>
<td>1.3%</td>
</tr>
<tr>
<td>Knox</td>
<td>12</td>
<td>44</td>
<td>6</td>
<td>10</td>
<td>72</td>
<td>1.2%</td>
</tr>
<tr>
<td>Rest of Victoria</td>
<td>54</td>
<td>221</td>
<td>37</td>
<td>38</td>
<td>390</td>
<td>6.2%</td>
</tr>
<tr>
<td>Total</td>
<td>1,846</td>
<td>2,901</td>
<td>478</td>
<td>1,016</td>
<td>6,241</td>
<td>100%</td>
</tr>
</tbody>
</table>

Source: ABS, Charter Keck Cramer

Table 6: Greater Dandenong Industrial Workers by Place of Residence

<table>
<thead>
<tr>
<th>LGA</th>
<th>Manufacturing</th>
<th>Construction</th>
<th>Wholesale Trade</th>
<th>Transport, Postal and Warehousing</th>
<th>Total Industrial Workers</th>
<th>Proportion of Industrial Workers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Casey</td>
<td>6,636</td>
<td>1,749</td>
<td>2,211</td>
<td>2,073</td>
<td>12,669</td>
<td>29.3%</td>
</tr>
<tr>
<td>Greater Dandenong</td>
<td>3,751</td>
<td>1,222</td>
<td>912</td>
<td>1,251</td>
<td>7,136</td>
<td>16.5%</td>
</tr>
<tr>
<td>Frankston</td>
<td>1,867</td>
<td>573</td>
<td>681</td>
<td>527</td>
<td>3,648</td>
<td>8.4%</td>
</tr>
<tr>
<td>Cardinia</td>
<td>1,244</td>
<td>530</td>
<td>489</td>
<td>463</td>
<td>2,726</td>
<td>6.3%</td>
</tr>
<tr>
<td>Kingston</td>
<td>1,242</td>
<td>421</td>
<td>554</td>
<td>361</td>
<td>2,578</td>
<td>6.0%</td>
</tr>
<tr>
<td>Knox</td>
<td>1,040</td>
<td>392</td>
<td>482</td>
<td>388</td>
<td>2,302</td>
<td>5.3%</td>
</tr>
<tr>
<td>Monash</td>
<td>991</td>
<td>276</td>
<td>419</td>
<td>349</td>
<td>2,035</td>
<td>4.7%</td>
</tr>
<tr>
<td>Mornington Peninsula</td>
<td>843</td>
<td>356</td>
<td>296</td>
<td>207</td>
<td>1,702</td>
<td>3.9%</td>
</tr>
<tr>
<td>Yarra Ranges</td>
<td>428</td>
<td>295</td>
<td>203</td>
<td>156</td>
<td>1,082</td>
<td>2.5%</td>
</tr>
<tr>
<td>Whitehorse</td>
<td>390</td>
<td>143</td>
<td>217</td>
<td>144</td>
<td>903</td>
<td>2.1%</td>
</tr>
<tr>
<td>Rest of Victoria</td>
<td>2,780</td>
<td>1,329</td>
<td>1,414</td>
<td>929</td>
<td>6,452</td>
<td>14.9%</td>
</tr>
<tr>
<td>Total</td>
<td>21,221</td>
<td>7,286</td>
<td>7,878</td>
<td>6,848</td>
<td>43,233</td>
<td>100%</td>
</tr>
</tbody>
</table>

Source: ABS, Charter Keck Cramer
4.2.2 Projected Employment Growth

Plan Melbourne identifies that in the period to 2031, employment in the City of Greater Dandenong will grow by 21,000 compared to in the City of Cardinia which will grow by 19,000. Perhaps, most telling, is the fact that key industries for employment in Greater Dandenong will include manufacturing and wholesale trade, whereas in Cardinia, none of the key industries will be major industrial land users.

The limited role of the Officer/Pakenham SSIP and its role as a precinct accommodating local rather than state significant users is highlighted in the 2018 Urban Development Program report which states the following:

“Industrial land across metropolitan Melbourne also provides 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 include firms that directly service industrial users such as labour hire firms or equipment hire businesses. This is particularly true in the Inner Metro and Inner South East Regions where population services and business and professional services make up a significant share of workplaces compared to the State Significant Industrial Precincts.”