

PART B: REGIONAL SUMMARIES AND DIRECTIONS

Inner Metro Region

Regional snapshot

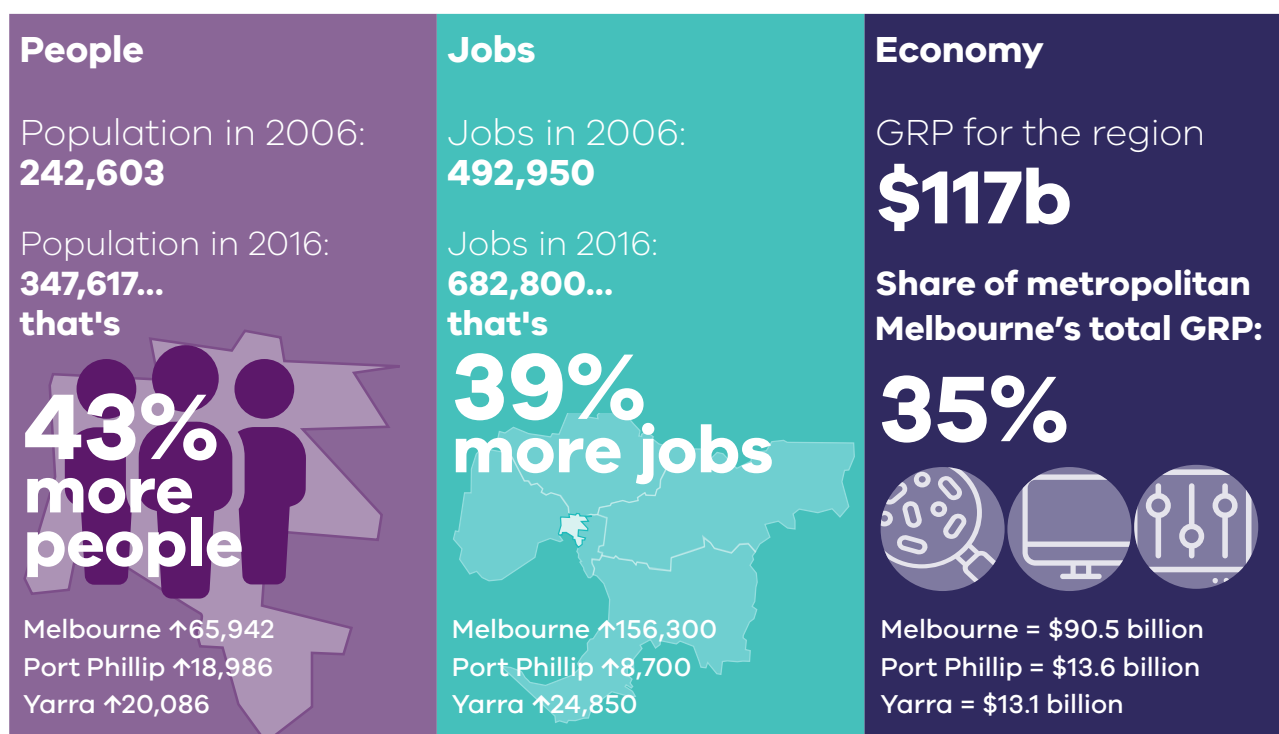
The Inner Metro Region comprises the municipalities of Melbourne, Port Phillip and Yarra. The region includes the Melbourne CBD and major urban renewal precincts including Docklands, Fishermans Bend, Arden, Macaulay, Dynon and the Flinders Street Station to Richmond Station corridor. These precincts will play a key role in the further evolution of central Melbourne as a destination to live, work, visit and invest.

The areas from Richmond to Docklands through the Central City and Southbank, include the sporting precincts of the Melbourne Cricket Ground and Melbourne Park, the Arts Precinct, Melbourne Aquarium, museums and other key destinations for local, interstate and international visitors. The region is home to many sites of environmental significance including the Yarra and Maribyrnong Rivers and Port Phillip Bay. The extensive open space areas in the region are integral to Melbourne's liveability.

The Central City is the city's highest order centre and also supports key sporting, cultural, tourism and leisure precincts and public institutions. The economic strengths of the Central City are supported by two national employment and innovation clusters (NEICs). The first located at Parkville is focussed on health, education, research, professional and technical industries. The second is Fishermans Bend with a strong specialisation in innovation, design and manufacturing. These NEICs will provide for 21st century jobs adjacent to the CBD.

The business service sector is the largest contributor to the economy for the region, with a total value-added estimate at around \$72.8 billion. Manufacturing and industrial is the next largest contributor with a total value-added estimate at around \$14.9 billion. Combined, these sectors account for around 78 per cent of the total value-add for the region.

Fast facts



Source: Department of Environment, Land, Water and Planning, unpublished data (2019)

The region was home to around 347,600 people in 2016. By 2031 it is projected that the region will grow by 191,700 people to a total population of around 539,300. The municipality of Melbourne will experience the strongest population growth over this period.

In 2016 the region supported 682,800 jobs accounting for around 30 per cent of all employment in metropolitan Melbourne.

By 2031 it is projected that approximately 280,000 additional jobs will be located across the region. Approximately 70 per cent of new jobs in the region are expected to be within the municipality of Melbourne.

The industries that are expected to experience the strongest growth are: professional, scientific and technical services; health care and social assistance; financial and insurance services; public administration and safety; Education and training.

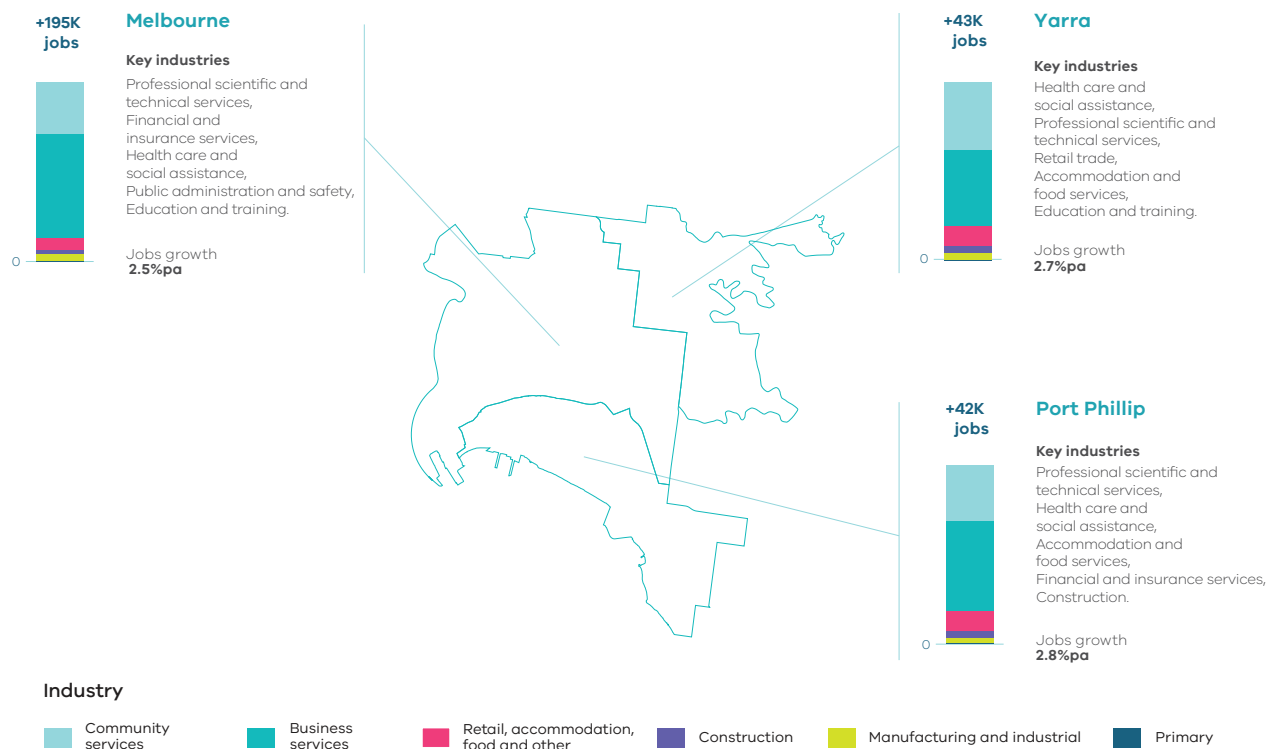
Figure 11: Projected population growth, Inner Metro Region, 2016 to 2031



Source: Department of Environment, Land, Water and Planning, *Victoria in Future 2019* (July 2019).



Figure 12: Projected employment growth, Inner Metro Region, 2016 to 2031



Source: Department of Jobs, Precincts and Regions, internal analysis (2019)

NOTE: Job figures have been rounded to the nearest thousand.

Key industrial and commercial areas

The **Central City** incorporates the CBD (Hoddle grid, north to Grattan Street between Peel and Swanston Streets) as well as Docklands, Southbank and St Kilda Road. It is home to the largest concentration of jobs across the city and is metropolitan Melbourne's principal centre for commerce, professional, business and financial services. It will continue to be the key location for business services offering a range of office, retail and tourism. Increasingly these areas are becoming locations for housing. St Kilda Road is a significant mixed-use and commercial area that transverses the City of Melbourne and City of Port Phillip. It comprises large concentrations of existing offices and accommodation and will be further enhanced with the proposed Anzac Station as part of the Melbourne Metro rail project.

Fishermans Bend NEIC has direct access to West Gate Freeway and CityLink and is strategically located, adjacent to the Port of Melbourne, the CBD and Docklands. The employment precinct is currently home to approximately 13,000 jobs. The Fishermans Bend Framework outlines a vision for the

precinct to become internationally renowned as a centre of innovation in advanced manufacturing, engineering and design, building on the presence of the University of Melbourne at the former General Motors Holden site and significant investment in public transport. It is anticipated that there will be up to 40,000 jobs in this precinct by 2050. The Framework also envisages significant opportunity for increased commercial floorspace and jobs in the mixed-use precincts, particularly in the Sandridge precinct. These mixed-use precincts will transition away from industrial uses and it is projected that 40,000 jobs will be provided across the mixed-use precincts, potentially creating a total of 80,000 jobs in Fishermans Bend by 2050.

The **Parkville NEIC** has a range of education, research, health, professional and technical industries as well as significant parkland. It is an established, internationally renowned research centre, particularly in biomedical sciences, on the doorstep of the CBD. It comprises a range of institutions including the University of Melbourne, Monash University (Faculty of Pharmacy and Pharmaceutical Sciences), RMIT University, Royal Melbourne Hospital, Doherty Institute, the Victorian

Comprehensive Cancer Centre, the Walter and Eliza Hall Institute of Medical Research, the Florey Institute and the Commonwealth Serum Laboratories. The cluster has a high level of public transport access, with tram routes via Swanston and Elizabeth Streets. Accessibility will be improved with the establishment of a new, state-of-the-art train station at Parkville as part of the Metro Tunnel project.

Arden and Macaulay located in Kensington and North Melbourne have been identified as major urban renewal areas which have the potential to transition away from traditional industries to new areas for knowledge-based employment, extending from the Central City to the Parkville NEIC. The Arden area will be further enhanced by a new train station as part of the Metro Tunnel project. A number of sites have been rezoned from industrial to mixed-use. Arden Central will provide an extension of the Parkville Biomedical Precinct, providing an estimated 34,000 jobs and 15,000 residents (Arden Vision, July 2018). The area around Macaulay provides opportunity to create a mid-rise, mixed use neighbourhood with sustainable transport, new open spaces and community facilities.

The **Port of Melbourne** is the largest international container terminal, automotive and general cargo port in Australia. It operates 24 hours per day, 365 days per year, and it handles around 36 per cent of Australia's container trade. The port plays a vital role in generating jobs and economic prosperity for Victoria and south-eastern Australia, with a total trade of more than \$90 billion annually. Planning and development for land uses within and near the port area needs to protect the viability of the port's operation and Melbourne's position as a leader in freight and logistics.

West Melbourne and Dynon Road industrial area is an industrial area located in West Melbourne. It accommodates a range of freight and industrial uses. Council's strategy supports the ongoing manufacturing, wholesale transport and distribution industries in the precinct. The precinct is located adjacent to the Port of Melbourne and has direct access to the PFN.

In the City of Yarra, there are a number of **industrial precincts in Abbotsford** along the Yarra River. The Carlton and United Breweries (CUB) site is an anchor use in this area and has been identified for ongoing industrial and business needs. These precincts are identified by council to be retained for a range of employment uses including manufacturing, offices and urban services.

The **Gipps Street** precinct in Collingwood is home to creative sectors such as architecture and design, software and interface design and visual arts. Council strategies support commercial office conversions, small office complexes, light industry and office warehouse developments in the area.

The **Cremorne** precinct is strategically located adjacent to CityLink and Richmond Station and is emerging as one of Melbourne's premier destinations for creative design, particularly tech and digital design. It is an area that has experienced a transition from manufacturing uses to more contemporary uses such as small creative industry firms as well as large web-based companies. It is home to global companies as well as small to medium sized firms, start-ups and co-working spaces. The Victorian Planning Authority is currently working with the City of Yarra to support Cremorne's continued growth as a thriving enterprise precinct.

The **South Melbourne Central Business Precinct** in the City of Port Phillip offers a mixture of service industries and showrooms, offices and warehouses. This precinct is a long-standing key location for creative industries such as design, music, film and television as well as photography. The area enjoys a premium location adjacent to the South Melbourne Major Activity Centre. It has close proximity to the CBD and Fishermans Bend as well as good access to a skilled workforce and public transport services.

The **Activity Centres network** in the region is anchored by the Central City and supported by 10 major activity centres and numerous smaller neighbourhood activity centres across the region. These activity centres are generally located on the Principal Public Transport Network. They vary in size, role and function and offer different potential for growth.

Victoria Gardens, a large free-standing shopping centre, together with Victoria Street, offers a significant retail presence, serving a larger, sub-regional catchment. In other parts of the region, strip-based centres such as Balaclava, Carlton-Lygon Street, Fitzroy-Brunswick Street, Bay Street Port Melbourne, Richmond-Bridge Road and Swan Street, Clarendon Street South Melbourne and Acland Street and Carlisle Street St Kilda offer a range of retailing, office, restaurant, entertainment, tourism, accommodation and community uses.

Supply and demand for industrial and commercial land across the region

Industrial land

There are 460 hectares of zoned industrial land within the Inner Metro Region. Most of this land is occupied with only 28 hectares of land being vacant. The majority of vacant industrial land is located within the City of Melbourne, adjacent to the Port of Melbourne in the Dynon Precinct.

Consumption figures provided here and in the UDP are for net activity. A negative figure indicates that building demolition activity was greater than the level of building construction activity (consumption). In locations such as the Inner Metro Region, most of the land is occupied by an existing building and use. In many instances, in order to develop land for new industrial use, the existing building needs to be demolished. Therefore, a negative consumption figure will be recorded until the site is redeveloped for further industrial development activity. The former GMH site is an example of this where the building was demolished, however the site will be used for a new building or use at a point in time in the future.

Between 2000-01 and 2017-18 a total of 326 hectares of industrial land was rezoned across the region for non-industrial uses.

The largest single loss of industrial land over this period was within the City of Port Phillip with approximately 216 hectares of land rezoned to Capital City Zone within Fishermans Bend. Of the remaining industrial land rezonings over this period, the vast majority (77 per cent) were sites of less than 2 hectares in size.

Of all the industrial land rezoned over the period, 87 per cent was rezoned to allow for mixed-use or residential development. This included the land at Fishermans Bend rezoned to Capital City Zone.

While there is limited land available for industrial purposes across the region, growth in manufacturing and industrial jobs will account for almost 4 per cent of all new jobs over the period 2016 to 2031. Therefore, opportunities will need to continue to be provided across the region to accommodate these types of jobs.

Table 9: Industrial land supply, Inner Metro Region

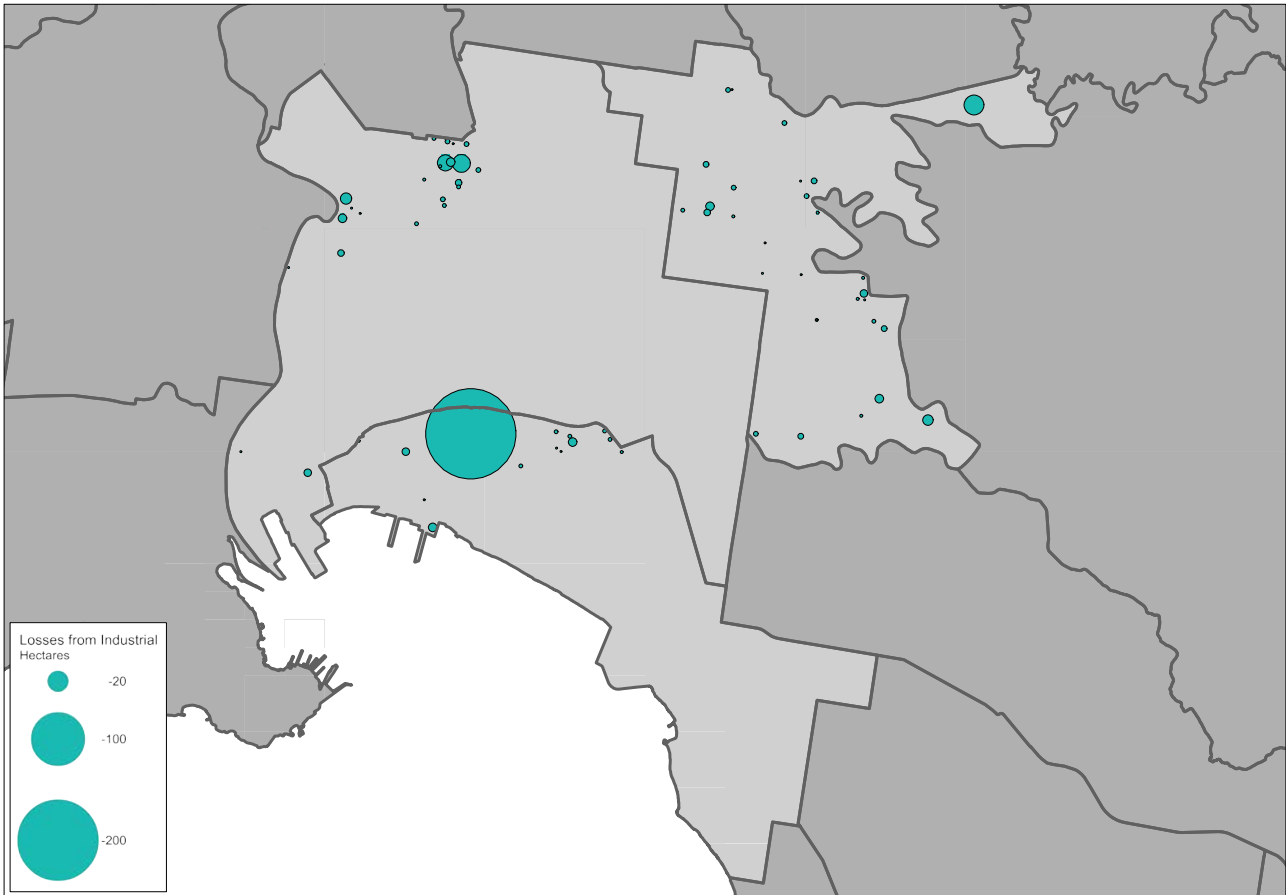
Council	Zoned occupied (ha)	Zoned vacant (ha)	Future supply (ha)	Total available supply (ha)
Melbourne	310.0	25.5	0.0	25.5
Port Phillip	12.7	0.8	0.0	0.8
Yarra	136.7	1.7	0.0	1.7
Total	459.4	28.0	0.0	28.0

Source: Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018

Table 10: Industrial land consumption, Inner Metro Region, 2015-16 to 2017-18

Council	2015-16 (ha)	2016-17 (ha)	2017-18 (ha)
Melbourne	-1.0	-0.3	-18.3
Port Phillip	0.0	-0.1	-0.7
Yarra	-0.1	-0.3	-0.6
Total	-1.1	-0.7	-19.6

Source: Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018

Figure 13: Change of zoned industrial land, Inner Metro Region, 2000-01 to 2017-18

Source: Department of Environment, Land, Water and Planning, 2018, Urban Development Program – Melbourne Metropolitan Industrial 2018

Commercial land

Currently across the region there is a total of 1,158 hectares of land that has been identified as being zoned for commercial purposes. It is estimated that there is approximately 9 million square metres of floorspace used or available for commercial purposes on this land.

Across the region, a total of 72 commercial areas or centres have been identified. Of these, 35 have less than 10,000 square metres of floorspace and 19 centres have between 10,000 and 49,999 square metres.

Thirteen commercial areas have more than 100,000 square metres of floorspace, including the key office locations of Victoria Parade, Docklands, Southbank and St Kilda Road (both in the City of Melbourne and the City of Port Phillip) as well as retail areas such as Lygon Street, St Kilda and Smith Street. These

centres account for approximately 89 per cent of all commercial floorspace supply in the region, and of this approximately 86 per cent is located within the City of Melbourne.

Based on projected growth, it is anticipated that an additional 4 million square metres of commercial floorspace will be required across the Inner Metro Region by 2031. Approximately 3.3 million square metres will be required for office uses and the remaining 700,000 square metres will be required for retail. Almost 71 per cent of this additional floorspace is anticipated to be located within the City of Melbourne.

Options to accommodate projected demand for commercial floorspace in the region need to be identified within existing commercial areas, as well as considering areas that could accommodate future floorspace requirements through rezoning.

Table 11: Existing commercial floorspace by centre size, Inner Metro Region

Council	Less than 2,000 (m2)		2,000 to 9,999 (m2)		10,000 to 49,999 (m2)		50,000 to 99,999 (m2)		Greater than 100,000 (m2)	
	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)
Melbourne	2	3,300	4	20,500	7	177,100	0	0	7	7,011,600
Port Phillip	4	3,050	10	50,300	5	125,700	1	52,700	3	689,700
Yarra	9	8,450	6	26,250	7	215,550	4	271,700	3	411,450
Total	15	14,800	20	97,050	19	518,350	5	324,400	13	8,112,750

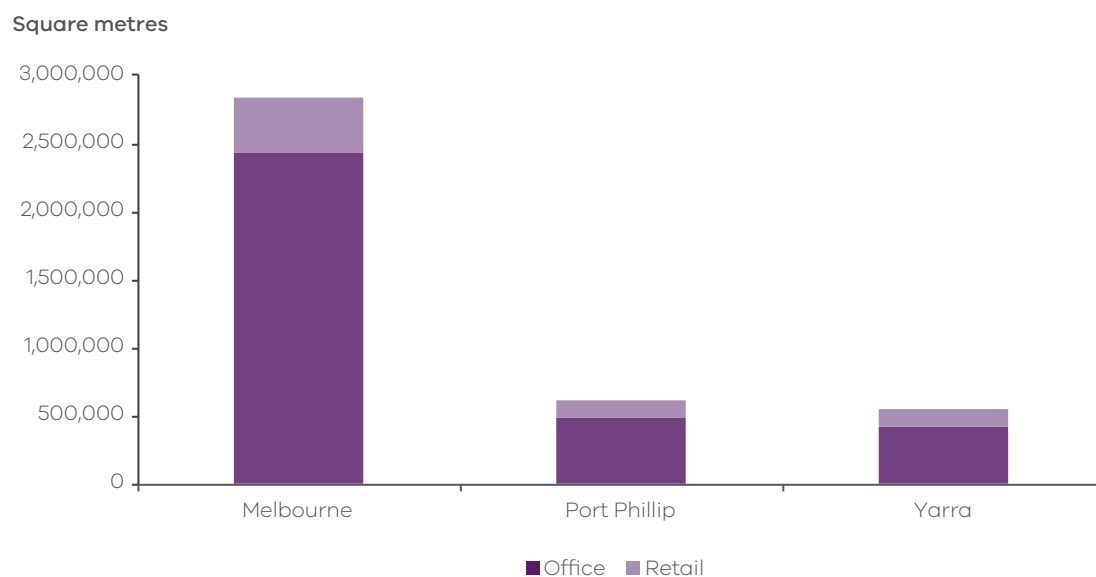
Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Table 12: Commercial floorspace supply and estimate, Inner Metro Region

Council	Existing commercial floorspace 2018 (m2)	Estimated additional commercial floorspace 2016 to 2031 (m2)
Melbourne	7,212,500	2,841,000
Port Phillip	921,450	618,000
Yarra	933,400	548,000
Total	9,067,350	4,007,000

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

*Existing commercial floorspace for the City of Melbourne has been based on their 2017 Census of Land Use and Employment Summary Report.

Figure 14: Estimated additional commercial floorspace by type and municipality, Inner Metro Region, 2016 to 2031

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Planning framework for industrial and commercial land across the region

The Inner Metro Region contains the largest supply of commercial land in the metropolitan area, however there is a relatively small amount of industrial land. Even so, the region is home to industrial areas critical to the State's economy and ongoing prosperity. They provide employment and economic functions which are significant at state, regional and local levels.

Industrial land has been decreasing across the region and commercial uses are being increasingly displaced by accommodation and other uses. This trend potentially has negative impacts for the region's economy and employment. Improved monitoring, oversight and protection of remaining industrial and commercial land is therefore required.

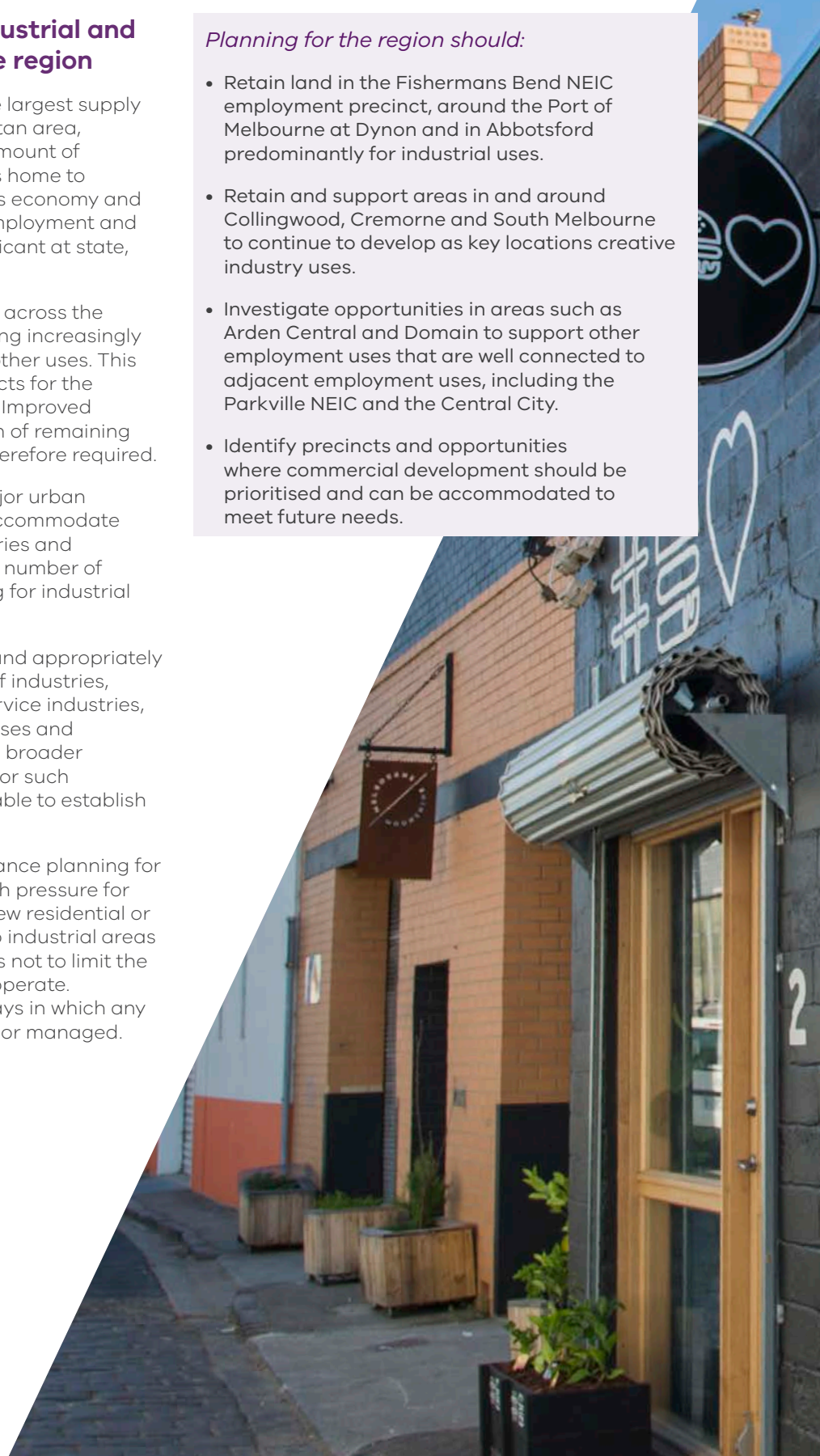
Significant opportunity exists at major urban renewal sites across the region to accommodate future growth of appropriate industries and businesses, however, there remain a number of challenges for the region in planning for industrial and commercial land.

Maintaining a supply of affordable and appropriately located industrial land for a range of industries, including creative industries and service industries, will be important to support businesses and residents in the region as well as the broader metropolitan area. A key challenge for such industries will be ensuring they are able to establish and operate effectively.

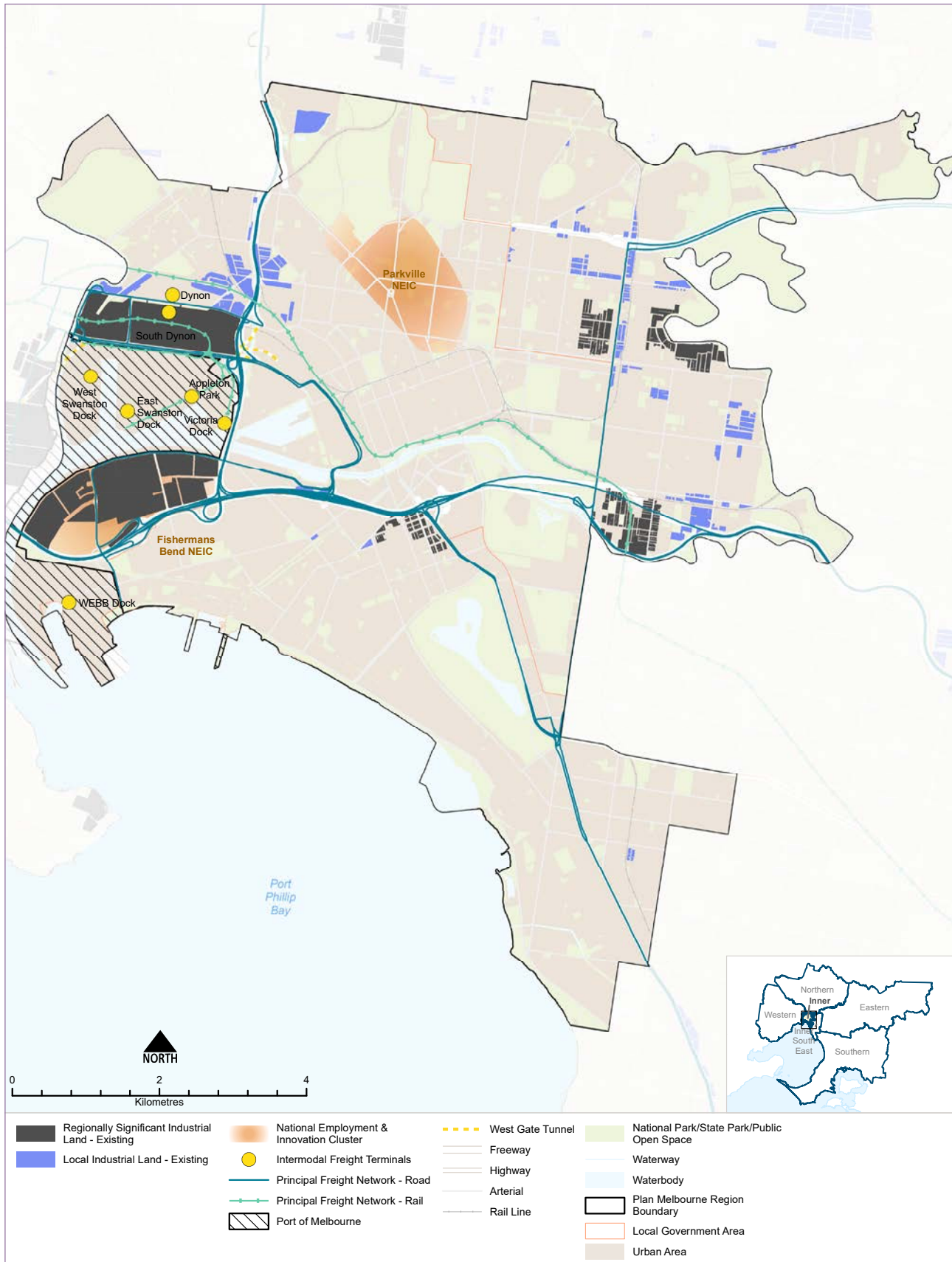
There is also a need to carefully balance planning for industrial and commercial areas with pressure for ongoing residential development. New residential or mixed-use development adjacent to industrial areas will need careful consideration, so as not to limit the ability of businesses to continue to operate. Consideration should be given to ways in which any potential conflicts can be mitigated or managed.

Planning for the region should:

- Retain land in the Fishermans Bend NEIC employment precinct, around the Port of Melbourne at Dynon and in Abbotsford predominantly for industrial uses.
- Retain and support areas in and around Collingwood, Cremorne and South Melbourne to continue to develop as key locations creative industry uses.
- Investigate opportunities in areas such as Arden Central and Domain to support other employment uses that are well connected to adjacent employment uses, including the Parkville NEIC and the Central City.
- Identify precincts and opportunities where commercial development should be prioritised and can be accommodated to meet future needs.

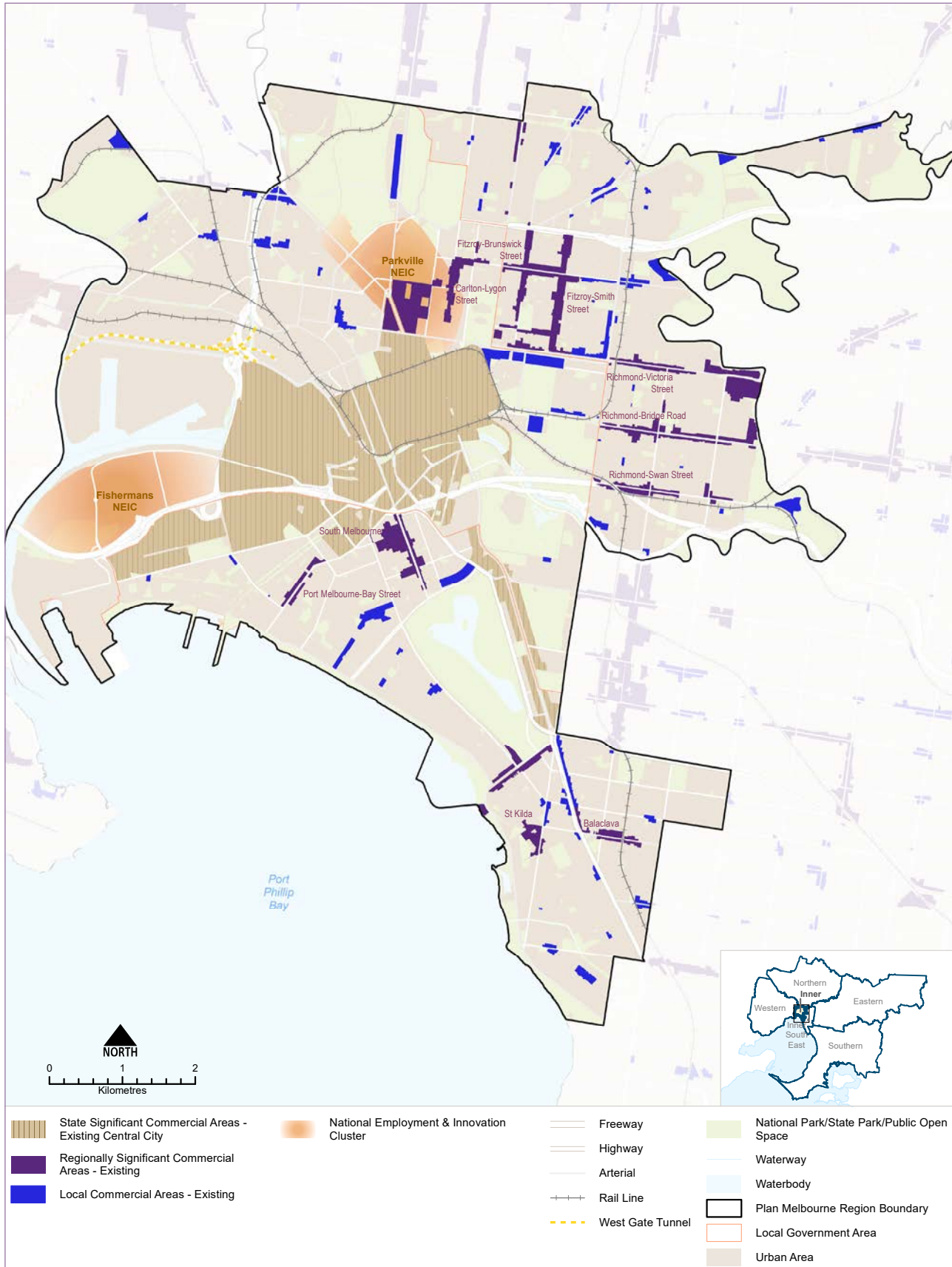


Map 4: Inner Metro Region - industrial land



Source: Department of Environment, Land, Water and Planning

Map 5: Inner Metro Region - commercial land



Source: Department of Environment, Land, Water and Planning

Western Region

Regional snapshot

The Western Region comprises the municipalities of Brimbank, Hobsons Bay, Maribyrnong, Melton, Moonee Valley and Wyndham. It is the fastest growing region in metropolitan Melbourne, and home to the Western Growth Corridor with two major growth fronts, Melton to the north and Wyndham to the south.

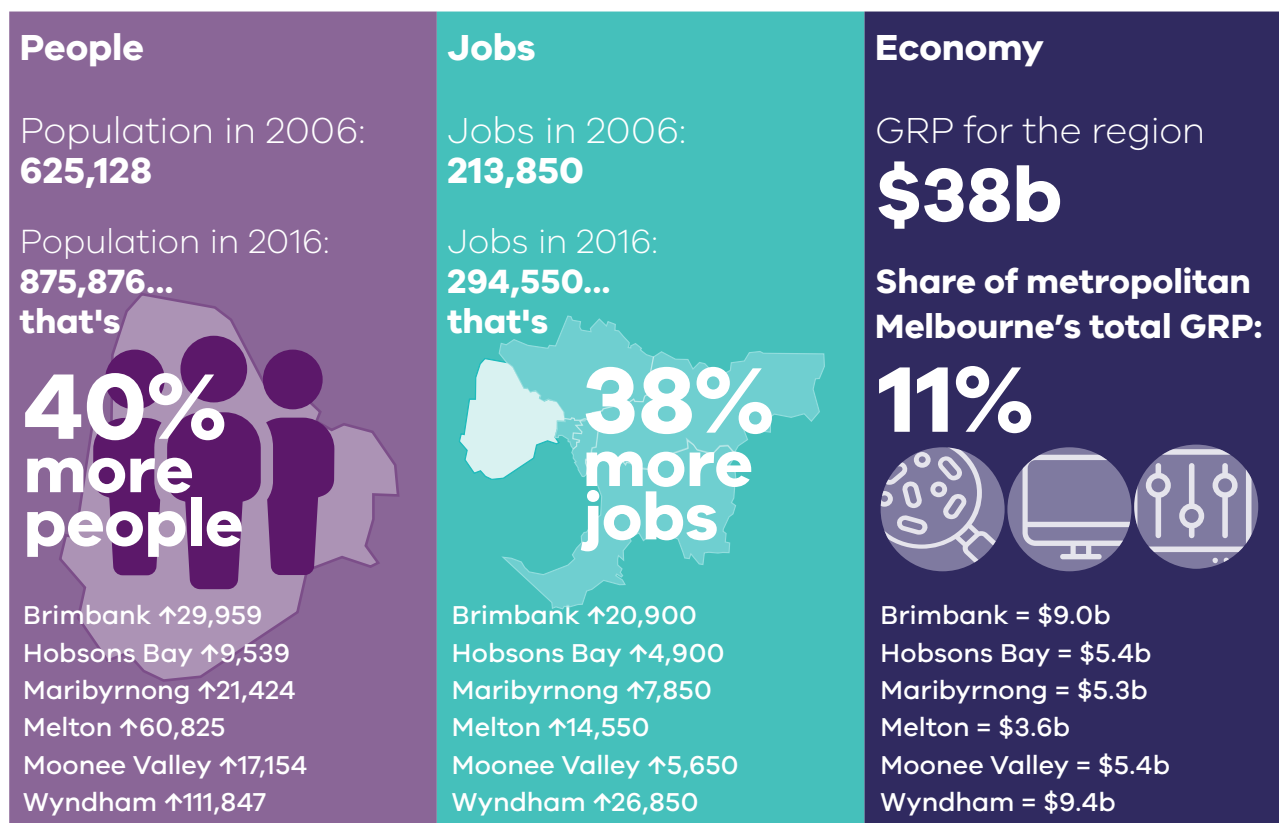
The region has good connections to transport gateways along key roads and railways, although road capacity is creating some constraints within the Western state-significant industrial precinct (Western SSIP). Significant competitive advantages exist for the region having easy access to Avalon, Essendon and Melbourne Airports as well as the Port of Melbourne and proposed Bay West container port. There are also substantial synergies provided by complementary industries nearby.

The proposed Western Interstate Freight Terminal (WIFT) is an important future asset for the distribution of freight from industrial and commercial production in the Western Region linking to freight networks in other regions and interstate.

The key transport links include the Western Highway, Princes Highway and Freeway and the Western Ring Road connecting through to the Hume Highway. The region also has three key railway links through the region and beyond to regional Victoria. These provide important connections to industrial areas across the region and to existing and proposed transport gateways via the PFN. The proposed Outer Metropolitan Ring / E6 Transport Corridor (OMR) further enhances intra metropolitan regional network connections, together with connections to regional Victoria including Geelong, Ballarat and Bendigo via Regional Rail Link and the Calder Freeway.

The business service sector is the largest contributor to the economy for the region with a total value-added estimate at around \$13.3 billion. The manufacturing and industrial sector is the next largest contributor with a total value-added estimate at around \$11.1 billion. Combined, these sectors account for almost 64 per cent of the total value-add for the region.

Fast facts



Source: Department of Environment, Land, Water and Planning, unpublished data (2019)

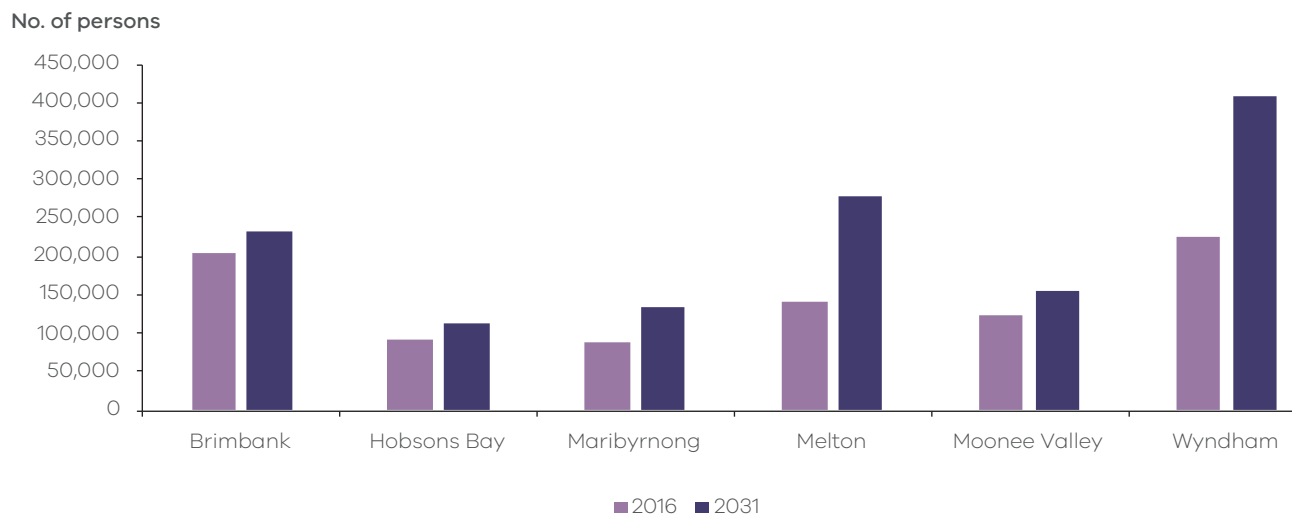
The region was home to around 875,900 people in 2016. By 2031 it is projected that the region will grow by another 444,800 people to a total population of around 1.3 million. The growth area municipalities of Wyndham and Melton will experience the strongest population growth over this period and by 2031 are likely to be home to over 683,100 people.

In 2016 the region supported just over 294,500 jobs, accounting for 13 per cent of all employment across the metropolitan area.

By 2031 it is projected that approximately 151,000 additional jobs will be located across the region. Over half of the new jobs in the region are expected to be within the growth area municipalities of Wyndham and Melton.

The industries that are expected to experience the strongest growth are: health care and social assistance; transport, postal and warehousing; retail trade; education and training; manufacturing.

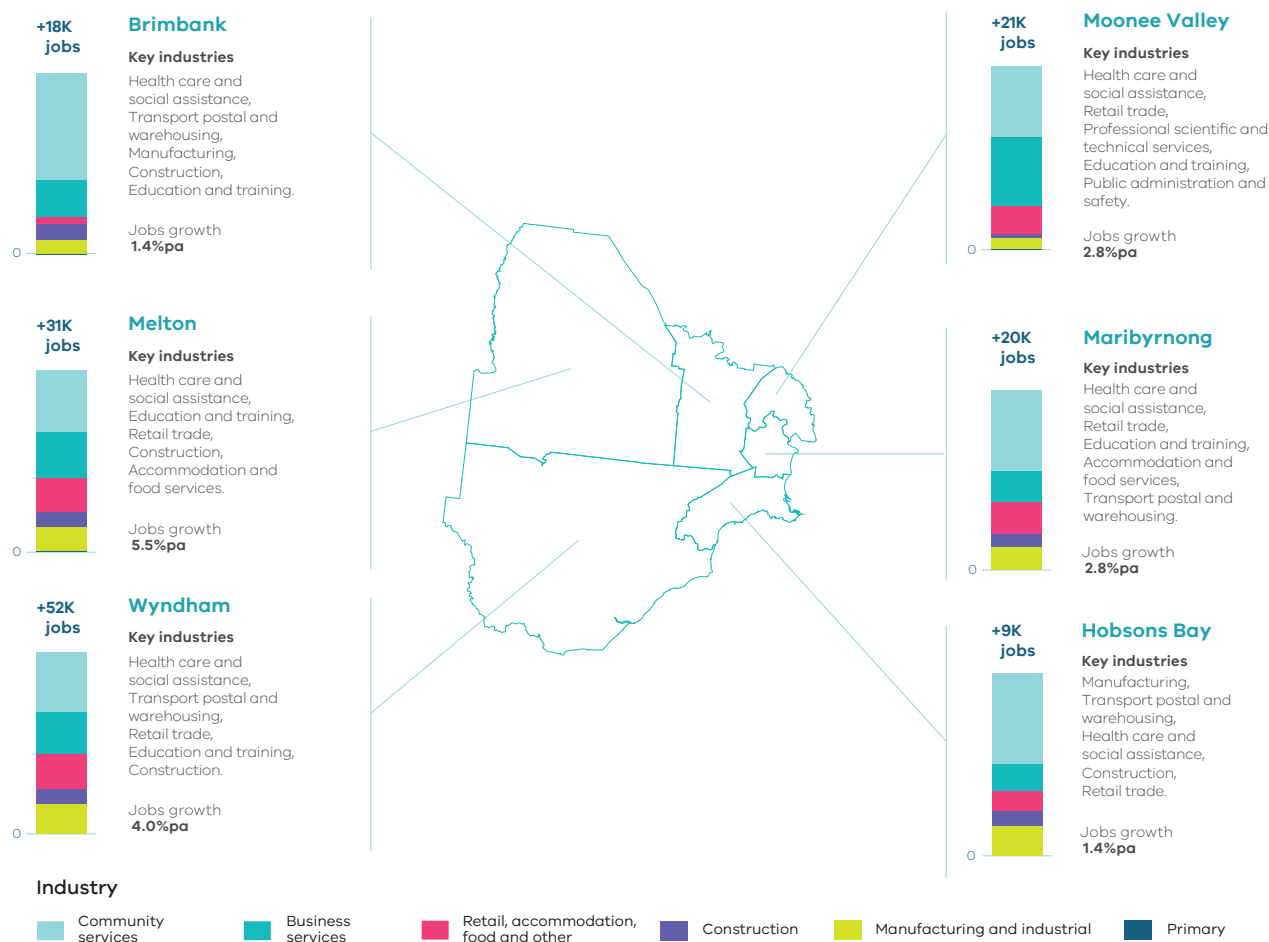
Figure 15: Projected population growth, Western Region, 2016 to 2031



Source: Department of Environment, Land, Water and Planning, *Victoria in Future 2019* (July 2019).



Figure 16: Projected employment growth, Western Region, 2016 to 2031



Source: Department of Jobs, Precincts and Regions, internal analysis (2019)

NOTE: Job figures have been rounded to the nearest thousand.

Key industrial and commercial areas

The **Western state-significant industrial precinct** (Western SSIP) is Melbourne's largest SSIP. It comprises 7,200 hectares of existing and future zoned and unzoned land identified for industrial purposes across the municipalities of Brimbank, Hobsons Bay, Maribyrnong, Melton and Wyndham. The SSIP has access to significant transport infrastructure such as the Western Ring Road, Princes and Western Highways, and has a number of distinct precincts as follows:

- **Derrimut** is one of the two locations in metropolitan Melbourne of Industrial 2 Zoned land. This land is designed for uses that require large threshold distances as well as uses that may have an impact on the amenity of local communities. This area contains both long established hazardous uses as well as newer manufacturing and logistics uses that take advantage of the area's access to the Western Ring Road.

- **Brooklyn** currently supports a range of uses including quarries, landfills and other heavy industry, and increasingly freight and logistics operations. The nearby areas of **Tottenham** and **West Footscray** are contiguous with Brooklyn, creating a large industrial area that draws employees from across the region. These industrial areas provide for logistics, container storage, food processing and production, manufacturing, chemical production and warehousing functions and feature older industrial stock. When complete, the West Gate Tunnel will provide alternative access to the area and new truck bans on east west roads in the inner west will reduce heavy vehicle access to some areas.

- **Altona** and **Altona North** provide regional employment and accommodate major petroleum complexes, intermodal freight terminals and food manufacturing with direct access to Kororoit Creek Road and the Princes Freeway. The Mobil Altona Refinery operates year-round as a key supplier in the fuel supply chain, processing crude oil into a range of petroleum products and providing around half of Victoria's refined fuel needs. Significant buffers are required to this facility. Surrounding areas provide space for transport, warehouse and distribution businesses and general manufacturing.
- **Truganina, Truganina North** and **Tarneit** are planned for transport, storage industry, construction and the property and business services sectors with industry, manufacturing and storage uses encouraged towards the core of the SSIP. The Ravenhall landfill and Boral Quarry are located to the north with an interface to three correctional facilities. Further south an interface industrial area is located adjacent to the Port Phillip Prison and light industry, research and development and other business uses are encouraged along Palmers and Leakes Roads. The WIFT is proposed for this area.

Tullamarine, Keilor Park and **Keilor East Industrial Precincts** are adjacent to Melbourne Airport, Calder Freeway and Western Ring Road and are established with very little vacant industrial land supply. The Keilor Park industrial precinct forms part of a larger office park area that extends and connects to the Melbourne Airport Business Park. These precincts are generally affected by the Melbourne Airport Environs Overlay, which places limits on particular uses. They offer excellent access to major road networks and are strategically located relative to Melbourne Airport.

Essendon Airport is a key employment area with aviation and retail uses. Currently zoned as Commonwealth land, there are plans to further develop Essendon Airport as a centre for aviation, technology and retail with up to 25,000 jobs.

Airport West is the largest area of industrial land in the municipality of Moonee Valley and is located on the western side of the Tullamarine Freeway, adjacent to Essendon Airport. The area is fully established and identified by Council as a technology and enterprise precinct. The area has excellent access to Tullamarine Freeway, Western Ring Road and Calder Freeway as well as Essendon and Melbourne Airports.

Station Road Precinct and **Orica Precinct** along the Western Highway provide a range of industrial and employment uses. The western half of the Orica Precinct is within the Western SSIP, linking to the broader SSIP located to the south. An existing facility on site requires significant buffers to sensitive uses. The eastern half of the Orica Precinct is vacant and not part of the SSIP. This site, along with other areas along Station Street and north of Ballarat Road, are important buffers between sensitive uses and the western portion of the Orica site within the SSIP.

Yarraville Port and Mobil Terminal Precincts in Maribyrnong and **Spotswood Precinct** in Hobsons Bay offer significant industrial land holdings strategically located adjacent to the Port of Melbourne. These areas house a mix of industrial uses with a focus on port related uses such as transport and logistics. The storage and operation of petrochemical industries within and adjacent to the precincts require significant buffers which need to be protected. The Yarraville Port Precinct is increasingly becoming a preferred location for a range of small and medium creative industries to establish.

Williamstown Marine Precinct is an important precinct associated with the operation of the Port of Melbourne and ship building, marine engineering and marine related industries.

The **Sunshine NEIC** is centrally located between the Melbourne CBD and the two western growth areas. Anchored by the **Sunshine Metropolitan Activity Centre, Sunshine Hospital** and **Victoria University**, it has excellent access to major road and metropolitan and regional rail networks and supports approximately 14,600 existing jobs, with potential growth in tertiary education, health-related training, research, health care, retail and professional services sectors. Improvements and expansions to the rail network, including the proposed Airport Rail Link and Suburban Rail Loop, will further enhance opportunities in this location. The Sunshine Metropolitan Activity Centre comprises approximately 271,100 square metres of commercial floorspace with substantial retail and office and a growing food and drink offer.

The **Werribee NEIC** is located on a large 775 hectares site with around 8,400 jobs and potential for more than 50,000 jobs in health, education and high-technology research. The cluster includes the University of Melbourne Veterinary Hospital, the University of Notre Dame, St Vincent's Private Hospital, Victoria University, the Werribee Mercy Hospital, the Wyndham Private Medical Centre, the CSIRO, the Suzanne Cory High School and a range of high-technology research companies in the food and agricultural industries. Significant provision is made for future commercial and industrial land within the NEIC.

Hoppers Crossing Industrial Precinct is located north-east of the Werribee NEIC and is strategically located between the Hoppers Crossing and Williams Landing railway stations. The precinct is established with little vacant industrial land and has direct access to the PFN (road and rail). It is well linked to Werribee NEIC and beyond to Werribee Major Activity Centre.

The **Footscray Metropolitan Activity Centre** is an important regional, mixed-use centre with high accessibility to the Melbourne CBD. It comprises of a range of uses including commercial floorspace with civic, health and education facilities, including two Victoria University campuses. It provides a range of retailing, office and food and drink premises with a growing residential population.

The broader **activity centre network** across the region comprises 24 existing major activity centres which vary in size, role and function and offer different potential for growth. Some are limited in size with minimal prospects for growth, while others provide substantial opportunities. Larger free-standing shopping centres such as Airport West, Highpoint, Watergardens (Sydenham), Werribee Plaza and Woodgrove offer significant retailing, serving larger sub-regional catchments. In other parts of the region, strip-based centres such as Altona, Ascot Vale-Union Road, Moonee Ponds, St Albans, Werribee and Williamstown offer a range of retailing, office and community uses. These centres are supported by a range of large and small neighbourhood activity centres.

It is envisaged that the growth corridors will play a significant role in the diversification of the broader region over time. The **Hopkins Road Business Precinct**, together with existing and planned activity centres, will provide significant new opportunities for jobs, investment and services within the region.

The region will also continue to play a vital role in meeting Victoria's industrial, freight and logistics needs over the long term, whilst diversifying the employment offer in the region. The Growth Corridor Plan for the Western Region identifies a number of areas for future industrial purposes that are of regional importance and combined with planned upgrades to freeways and freight facilities, will reinforce the region's importance to the industrial sectors in the future.

The **Melton Highway Industrial Precinct** at Plumpton sets aside approximately 330 hectares of land for future industrial purposes. The precinct will have direct access to Melton Highway and the proposed OMR. As such, it will easily link to Melbourne's north and the proposed WIFT.

The **Toolern Employment Precinct** sets aside around 350 hectares of land for industrial purposes adjacent to the Melton Industrial Park to the north. The precinct has direct access to the PFN (road and rail) and will be serviced by the future Toolern Metropolitan Activity Centre to the south.

The **South West Quarries Industrial Node** adjacent to the Princes Freeway, sets aside approximately 1,400 hectares of land for industrial purposes. The precinct will have direct access to the Princes Freeway and the proposed WIFT via the proposed OMR. This area has been set aside to support the operation of adjacent quarry sites and needs to be carefully planned to ensure that sensitive land uses do not adversely impact their ability to operate now or into the future.

The **future Toolern Metropolitan Activity Centre** will have an important regional role with approximately 100 hectares of land having been identified for future development of the town centre.

To further support the activity centre network in the region, **five future major activity centres** have been identified through the Growth Corridor Plan. To complement this network, further town centres and convenience centres have also been identified through the PSP process.

All of these future centres will be important locations for future commercial development.

Supply and demand for industrial and commercial land across the region

Industrial land

The Western Region contains metropolitan Melbourne's second largest holdings of industrial land. The region has a total of around 8,640 hectares of zoned land set aside for industrial uses. Of this, almost 5,820 hectares is currently occupied, and around 2,820 hectares is currently zoned for industrial purposes and vacant. An additional 2,880 hectares of land has been identified for future industrial purposes that is yet to be zoned.

Across the region there are approximately 5,700 hectares of vacant zoned and unzoned industrial land available for development. Of this, approximately 2,845 hectares is located within the

Western SSIP. A portion of this land will be required to accommodate the proposed WIFT and ancillary uses.

Of the remaining 2,855 hectares of available land, approximately 1,848 hectares are unzoned within key future industrial precincts in growth areas.

Demand for industrial land in the region has been strong for the freight and logistics sector which requires large parcels of land with ready access to rail and road networks. This sector accounted for approximately 15 per cent of work places in the Western SSIP in 2016-17 compared to five per cent of work places across Melbourne as a whole. These operations are likely to continue to drive demand for land within the region given easy access to major road and rail, the proposed development of the WIFT and easy access to a potential second container port at Bay West.

Table 13: Industrial land supply, Western Region

Council / SSIP	Zoned occupied (ha)	Zoned vacant (ha)	Future supply (ha)	Total available supply (ha)
Brimbank	1,679.7	396.1	0.0	396.1
Hobsons Bay	1,261.3	328.3	0.0	328.3
Maribyrnong	477.1	16.4	0.0	16.4
Melton	519.4	1,150.4	1,189.6	2,340.0
Moonee Valley	54.3	0.7	0.0	0.7
Wyndham	1,827.4	926.5	1,691.7	2,618.2
Western Region	5,819.2	2,818.4	2,881.3	5,699.7
<i>Western SSIP</i>	<i>4,356.3</i>	<i>1,810.5</i>	<i>1,033.8</i>	<i>2,844.3</i>

Source: Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018 and internal analysis

Table 14: Industrial land consumption, Western Region, 2015-16 to 2017-18

Council / SSIP	2015-16 (ha)	2016-17 (ha)	2017-18 (ha)
Brimbank	42.3	47.3	19.7
Hobsons Bay	15.5	3.3	6.6
Maribyrnong	0.7	-4.3	8.6
Melton	31.0	24.6	20.6
Moonee Valley	-0.2	-0.2	0.3
Wyndham	54.7	83.2	45.1
Western Region	144.0	153.9	100.9
<i>Western SSIP</i>	<i>133.0</i>	<i>149.8</i>	<i>78.9</i>

Source: Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018

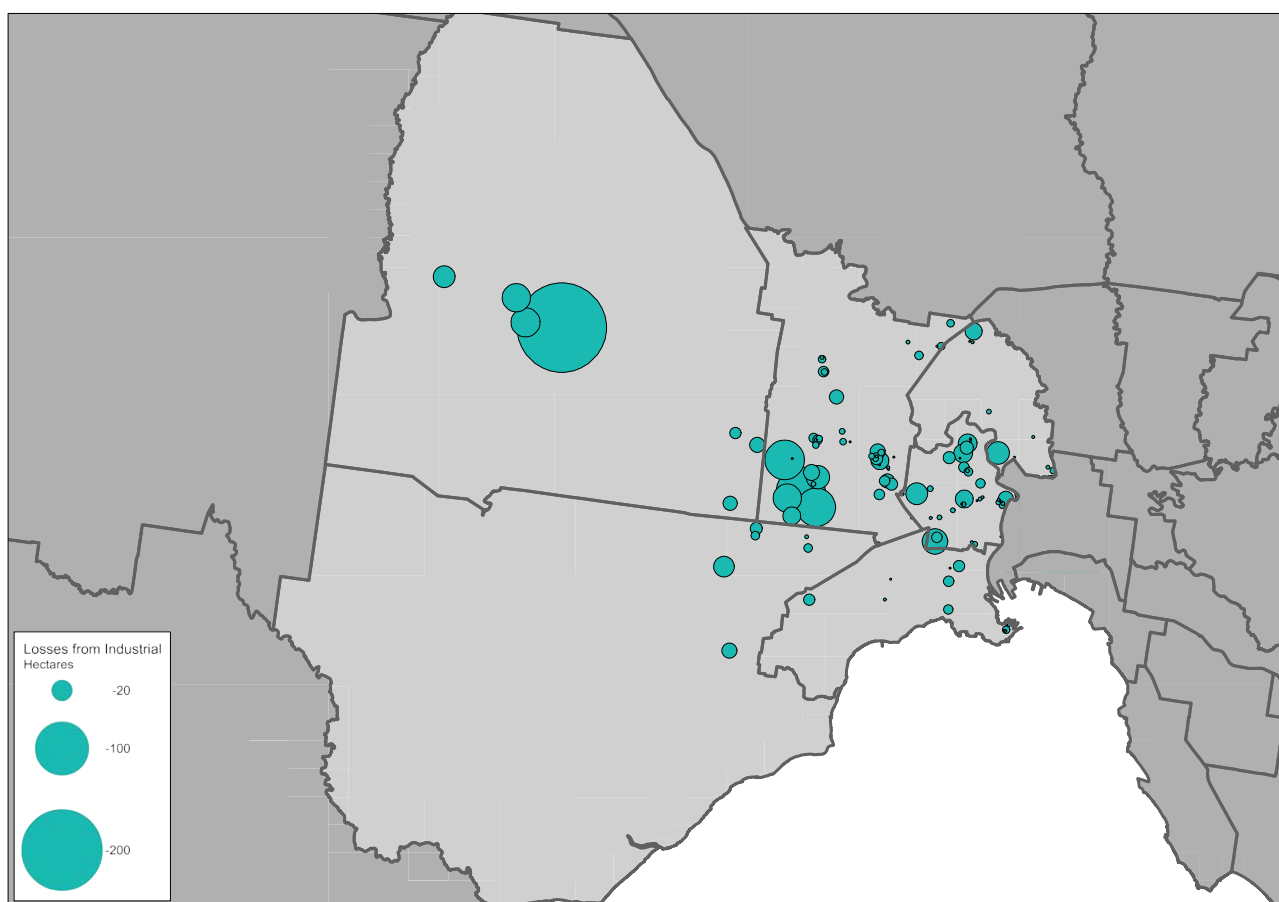
Over the last three years, the average annual rate of consumption of industrial land in the region has been around 133 hectares per annum. Consumption rates decreased slightly last year to just over 100 hectares per annum, however during the periods 2015-16 and 2016-17 consumption was much higher at an average of just under 150 hectares per annum. The vast majority of industrial land consumed within the region occurs within the Western SSIP.

If consumption rates return to around 150 hectares per annum, then the region as a whole would have approximately 19 years supply of zoned industrial land. Unzoned areas identified for future industrial purposes could provide another 13 years of supply, however this is dependent on future planning for these areas as part of the PSP process.

Of the total zoned and unzoned supply of vacant land, around 50 per cent is within the Western SSIP. Over the last three years, the consumption of industrial land in the Western SSIP has averaged around 120 hectares per annum. There was a significant decline in consumption over the last year, and prior to that consumption was averaging around 140 hectares per annum.

If consumption rates in the Western SSIP remain at around 120 hectares per annum, then this would provide almost 15 years of zoned supply and just over 6 years of unzoned supply. If consumption rates in the SSIP increased again to around 140 hectares per annum, then there would be around 13 years of zoned supply and 5 years of unzoned supply. The establishment of the proposed WIFT has the potential to bring forward much of this consumption.

Figure 17: Change of zoned industrial land, Western Region, 2000-01 to 2017-18



Source: Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018

Between 2000-01 and 2017-18 a total of 840 hectares of industrial land was rezoned across the region for other non-industrial uses.

The largest single loss of industrial land over this period was within Melton where a site of just under 200 hectares of industrial land was rezoned to allow for residential development. Of the remaining industrial land rezonings that occurred over this period, 49 per cent involved sites of less than 2 hectares in size.

Of all the industrial land rezoned over the period, more than half (54 per cent) was rezoned to allow for mixed-use or residential development.

Commercial land

Currently across the region there is a total of 949 hectares of land that has been identified as being zoned for commercial purposes. It is estimated that there is approximately 2.9 million square metres of floorspace used or available for commercial purposes on this land. Approximately 47 per cent of all the existing floorspace supply is located within the municipalities of Brimbank and Moonee Valley.

Across the region a total of 187 commercial areas or centres, have been identified. Of these, 140 have less than 10,000 square metres of floorspace.

Eight centres have more than 100,000 square metres of floorspace. This includes free-standing shopping centres such as Pacific Werribee and Highpoint in Maribyrnong, and strip-based centres such as Moonee Ponds. Combined these centres account for half of the identified commercial floorspace across the region.

Brimbank has the largest number of centres (62) and Melton the fewest (14).

In addition to the existing zoned commercial land, approximately 559 hectares of land has been identified through other strategic plans such as Growth Corridor Plans and PSPs for future commercial purposes. These areas are confined to Melton and Wyndham.

A significant proportion of the land identified for future commercial purposes is within the Werribee NEIC (106 hectares). This land accounts for 19 per cent of all future commercial land identified for the region and some of this land is also generally suitable for a range other employment purposes, including industrial uses.

Table 15: Existing commercial floorspace by centre size, Western Region

Council	Less than 2,000 (m2)		2,000 to 9,999 (m2)		10,000 to 49,999 (m2)		50,000 to 99,999 (m2)		Greater than 100,000 (m2)	
	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)
Brimbank	37	35,050	16	63,600	7	169,700	0	0	2	445,650
Hobsons Bay	16	19,800	13	65,350	8	177,050	0	0	0	0
Maribyrnong	3	1,650	8	33,300	5	105,600	0	0	2	494,450
Melton	8	800	3	17,750	1	19,350	2	148,650	0	0
Moonee Valley	6	5,300	11	69,850	8	191,500	2	146,900	2	247,850
Wyndham	11	7,300	8	42,350	6	143,550	0	0	2	257,350
Total	81	69,900	59	292,200	35	806,750	4	295,550	8	1,445,300

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Based on projected growth, by 2031 it is anticipated that around 1.5 million square metres of commercial floorspace will be required across the Western Region. Almost 800,000 square metres will be required for office uses and the remaining 700,000 million square metres will be required for retail. Around 60 per cent of this additional floorspace is projected to be located in the growth area municipalities of Melton and Wyndham. These councils have land identified for future commercial purposes.

Table 16: Future commercial land supply, Western Region

Council	Future commercial land (ha)	Share of metropolitan Melbourne
Melton	222	17%
Wyndham	336	25%
Total	559	42%

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

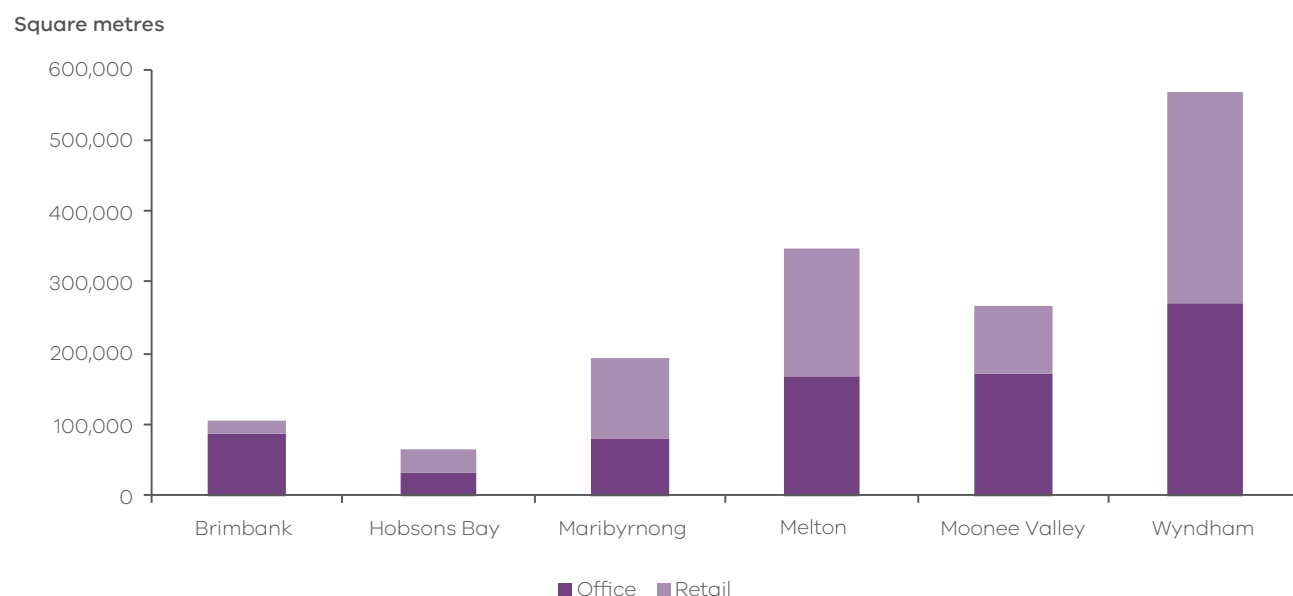
The municipalities of Brimbank, Hobsons Bay, Maribyrnong and Moonee Valley will need to identify options to accommodate projected demand for commercial floorspace within existing commercial areas, as well as considering areas that could accommodate future floorspace requirements through rezonings.

Table 17: Commercial floorspace supply and estimate, Western Region

Council	Existing commercial floorspace 2018 (m2)	Estimated additional commercial floorspace 2016 to 2031 (m2)
Brimbank	714,000	106,000
Hobsons Bay	262,200	64,000
Maribyrnong	635,000	194,000
Melton	186,550	348,000
Moonee Valley	661,400	267,000
Wyndham	450,550	569,000
Total	2,909,700	1,548,000

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Figure 18: Estimated additional commercial floorspace by type and municipality, Western Region, 2016 to 2031



Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Planning framework for industrial and commercial land across the region

There is a large amount of industrial land across the region providing state, regional and locally-significant employment and economic functions. The region has excellent arterial road, freeway and fixed rail connections to major transport gateways such as the Port of Melbourne, Port of Geelong, Melbourne and Avalon Airports and the proposed Bay West container port and WIFT. These networks will be further enhanced by the proposed OMR.

The region has a significant number of unfragmented site available for industrial uses that can provide for freight, logistics, warehousing, transport, manufacturing and other larger format industrial uses. It also has traditional industrial and major hazard facilities operating within regulatory requirements, requiring buffers, and minimal restraints imposed by sensitive uses.

While there is opportunity for industrial land supply to increase over time in area in the municipalities of Wyndham and Melton, other municipalities are reducing their industrial land area through rezonings, which may potentially have negative impacts for the region's future economic and employment opportunities.

Previous planning for new greenfield industrial areas has in some cases reduced the overall amount of land set aside for industrial purposes. Future industrial land identified in the Western SSIP and at Toolern, Plumpton and south of Werribee needs to be retained and protected for future industrial uses. Other areas that should be retained and protected include precincts adjacent to major transport gateways such as the Port of Melbourne and Melbourne Airport.

There will need to be a significant increase in the amount of commercial floorspace to serve growing populations in the municipalities of Melton and Wyndham in particular. The Werribee NEIC provides significant opportunity, however its role as an NEIC should be prioritised. Significant opportunity will still need to be made across the region and growth areas for future retail development.

Careful consideration will be required through the PSP processes to ensure adequate provision is made to accommodate medium and longer term commercial development. Approaches that will support delivery of 20-minute neighbourhoods should be put in place offering a finer grain network of activity centres.

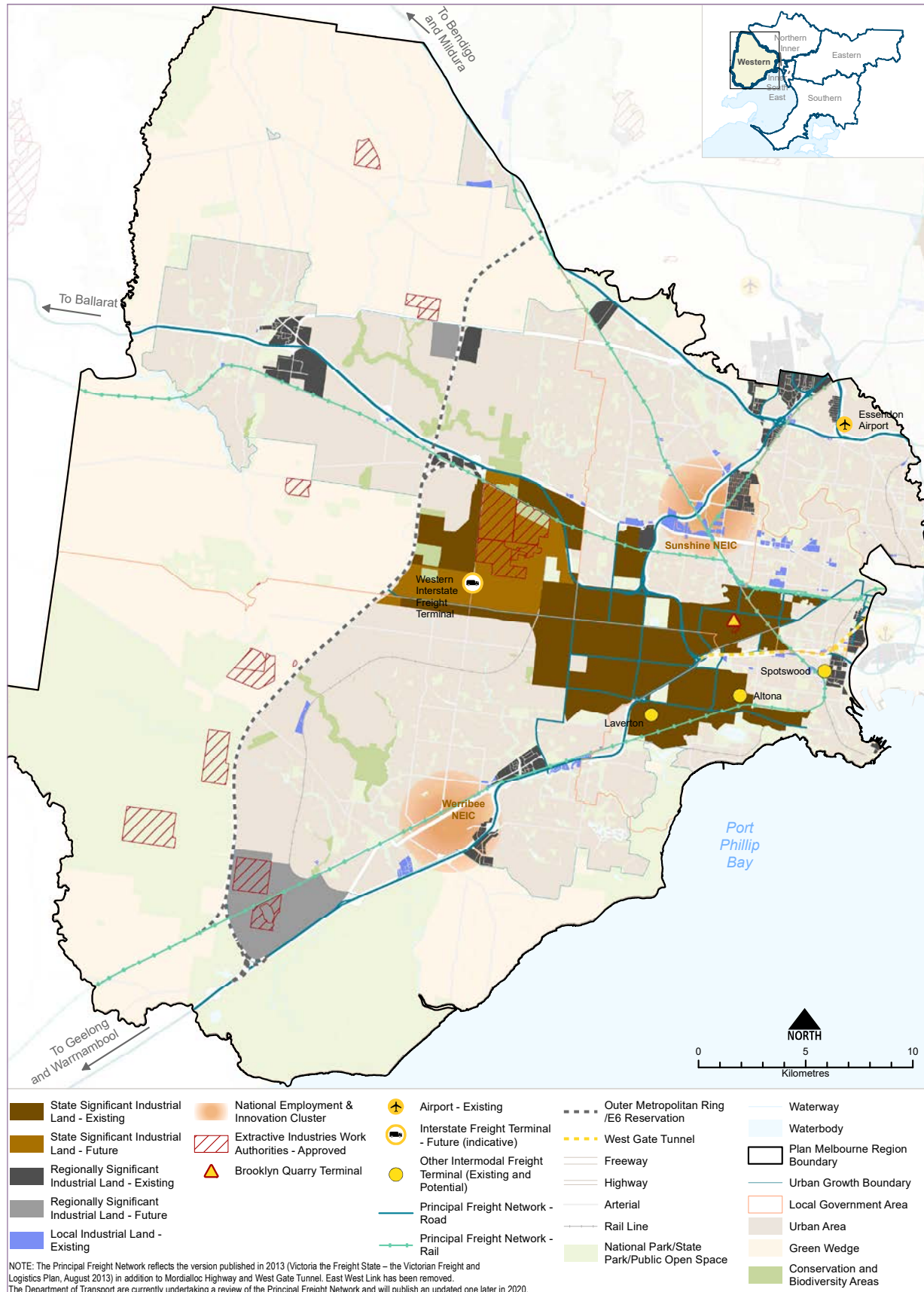
Within the established areas of Maribyrnong and Moonee Valley, and to a lesser extent, Brimbank and Hobsons Bay, there will be an ongoing need to allow for expansion of commercial facilities. In addition to this, there will be ongoing pressure in older industrial areas to convert to predominantly residential uses, particularly in Maribyrnong and Hobsons Bay. The ongoing erosion of industrial land to residential uses needs to be better managed.

Planning for the region should:

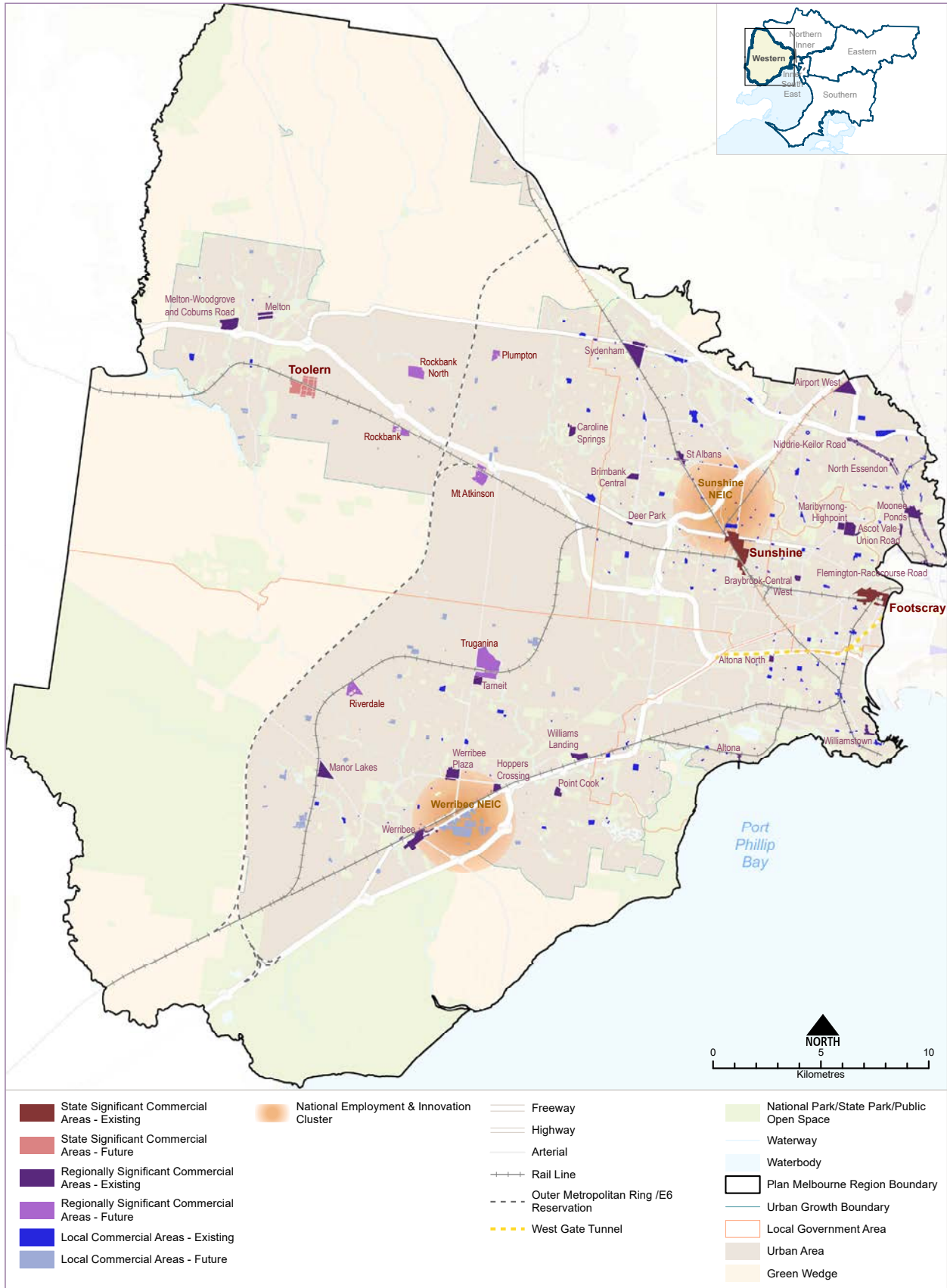
- Investigate industrial areas that could support other employment uses that support or are well connected to adjacent employment uses or transport connections.
- Consider the future demand for and need for, commercial and employment land across the growth areas and ensure that PSPs make adequate and sufficient provision to accommodate longer-term commercial and employment needs.



Map 6: Western Region - industrial land



Map 7: Western Region - commercial land



Source: Department of Environment, Land, Water and Planning

Northern Region

Regional snapshot

The Northern Region comprises the municipalities of Banyule, Darebin, Hume, Moreland, Nillumbik, Whittlesea and the area within the urban growth boundary (UGB) in the Shire of Mitchell. The region includes the Northern Growth Corridor which makes significant provision for future industry and housing.

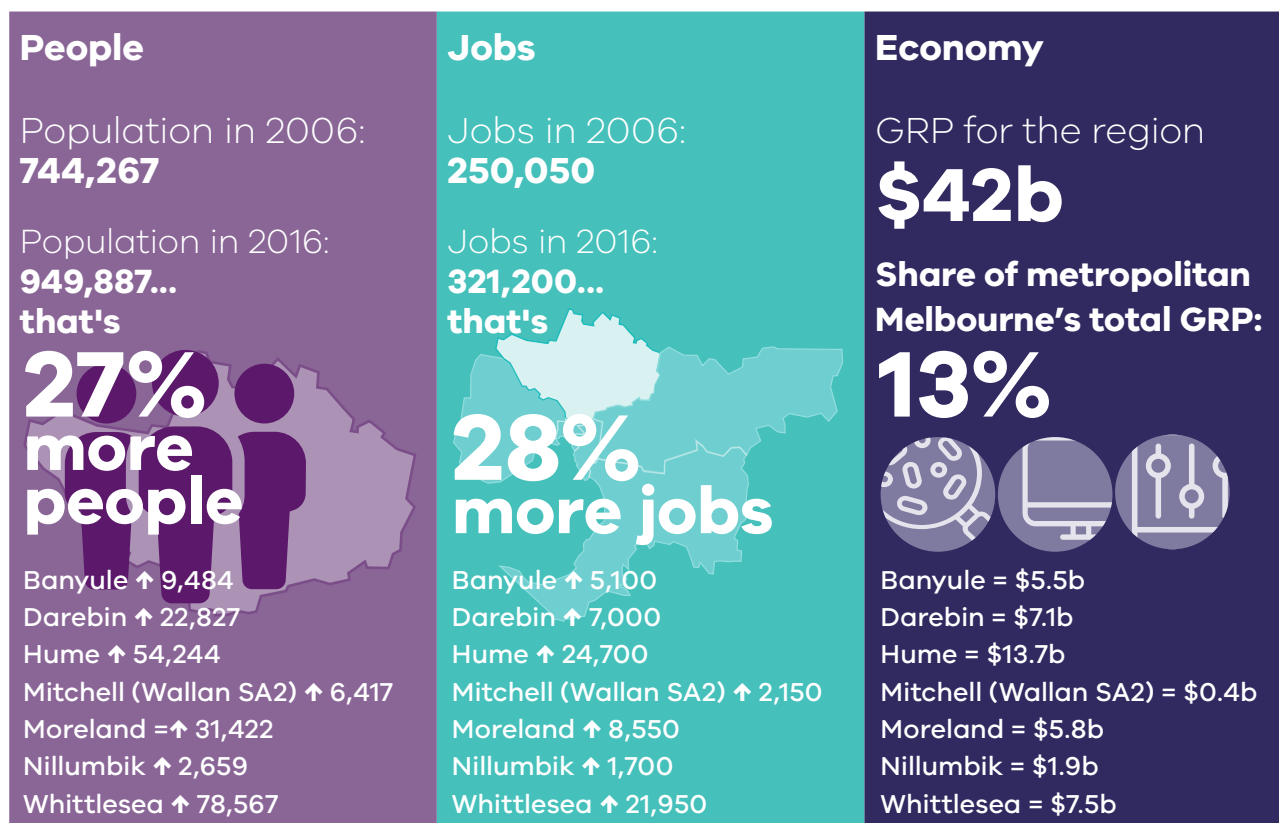
The region has good connections to transport gateways and the freight network along key roads and railways. While east-west linkages across the region are a limiting factor, there is significant appeal for businesses wanting eastern seaboard access from Melbourne to Sydney and Brisbane. Significant competitive advantages are created by the region having good access to Essendon and Melbourne Airports and there are substantial synergies that can be gained with the Melbourne Wholesale Markets and complementary industries. The region also contains significant high-quality extractive resources that are critical to support the development and ongoing functioning of the city.

The proposed Beveridge Interstate Freight Terminal (BIFT) is an important future asset for the region with direct access to the PFN and the proposed Outer Metropolitan Ring / E6 Transport Corridor (OMR) and North East Link will further enhance connections within the region and beyond.

The region has a strong and vibrant network of activity centres closer to the city, as well as three existing and future metropolitan activity centres and the La Trobe National Employment and Innovation Cluster (La Trobe NEIC).

The business service sector is the largest contributor to the economy for the region, with a total value-added estimate at just under \$14 billion. The manufacturing and industrial sector is the next largest contributor with a total value-added estimate at around \$11.2 billion. Combined, these sectors account for almost 62 per cent of the total value-add for the region.

Fast facts



Source: Department of Environment, Land, Water and Planning, unpublished data (2019)

The region was home to around 949,900 people in 2016. By 2031 it is projected that the region will grow by around 375,100 people to a total population of around 1.3 million people. The growth area municipalities of Hume and Whittlesea will account for 60 per cent of the projected growth in the region by 2031. The area in Mitchell Shire (Wallan SA2) will also experience relatively significant growth over this period.

In 2016 the region supported around 321,200 jobs, accounting for around 14 per cent of all employment across the metropolitan area.

By 2031 it is projected that approximately 138,000 additional jobs will be located across the region. Over half of the new jobs in the region are expected to be located within the growth area municipalities of Hume and Whittlesea.

The industries that are expected to experience the strongest growth are: health care and social assistance; education and training; retail trade; manufacturing; transport, postal and warehousing.

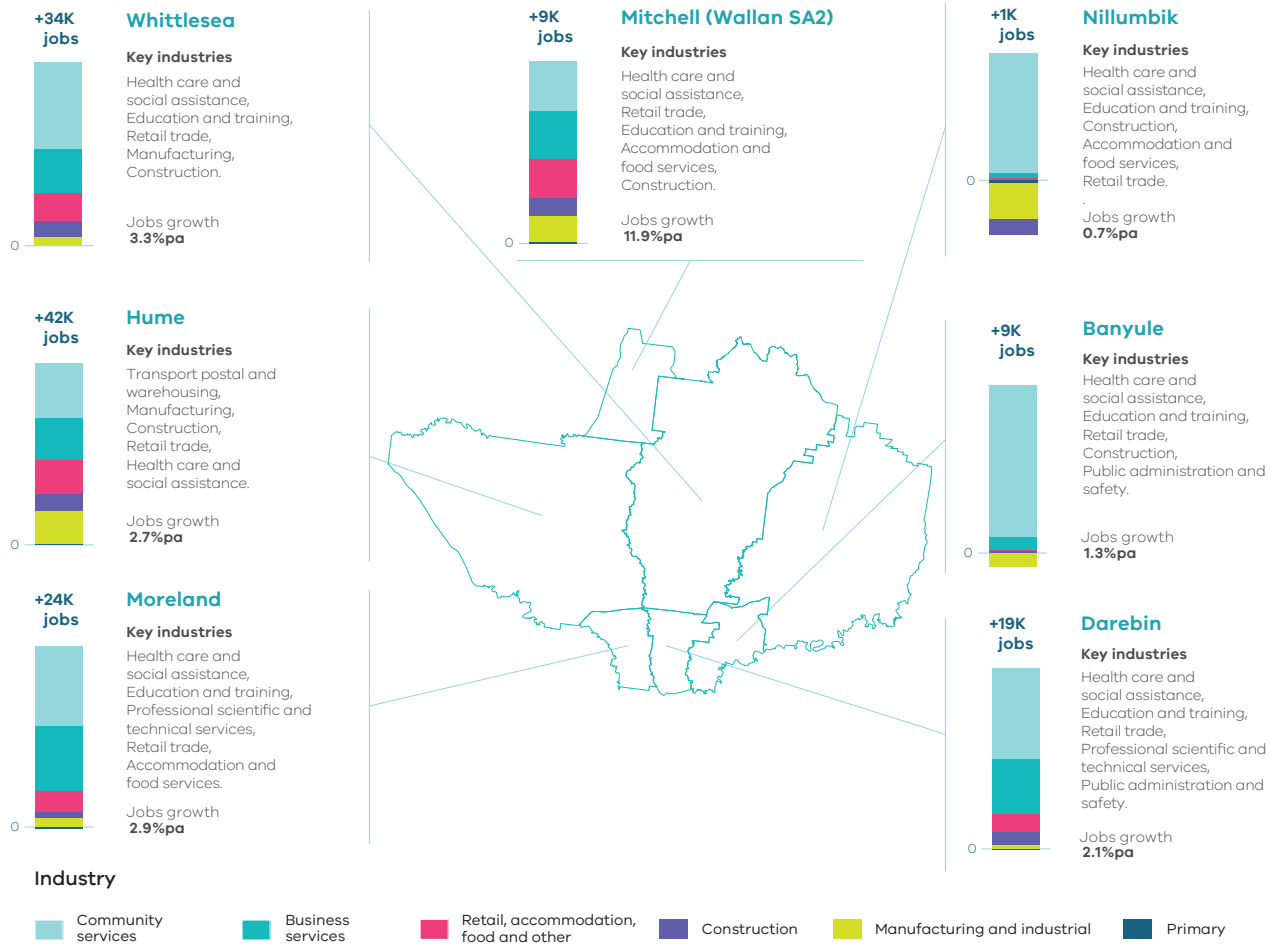
Figure 19: Projected population growth, Northern Region, 2016 to 2031



Source: Department of Environment, Land, Water and Planning, *Victoria in Future 2019* (July 2019).



Figure 20: Projected employment growth, Northern Region, 2016 to 2031



Source: Department of Jobs, Precincts and Regions, internal analysis (2019).

NOTE: Job figures have been rounded to the nearest thousand.

Key industrial and commercial areas

The **Northern state-significant industrial precinct** (Northern SSIP) is Melbourne's second largest SSIP. It comprises almost 5,770 hectares of existing and future zoned and unzoned land identified for industrial purposes across the municipalities of Hume, Whittlesea and Mitchell. It has access to significant transport infrastructure including interstate rail freight connections and the key roads of the Hume Highway and Freeway, Metropolitan Ring Road, and potential OMR which could provide important orbital connections to industrial land throughout the region and beyond. The Northern SSIP has been expanded to include approximately 1,590 hectares of land identified within the proposed BIFT and the Craigieburn South Employment Precinct. The Northern SSIP is well placed with easy road and rail access to interstate markets along the eastern seaboard and has a number of distinct precincts as follows:

- The **Thomastown** precinct supports a range of manufacturing, warehousing and services industries. It has excellent access to the Western Ring Road and the Hume Freeway via the Craigieburn Bypass. To the north is the **Cooper Street** employment precinct. As well as being home to the Melbourne Wholesale Fruit, Vegetable and Flower Market, it is also an increasingly attractive location for warehousing and freight and logistics businesses.
- The **Campbellfield** precinct extends from the Metropolitan Ring Road north to Cooper Street and Somerton Road. It is home to a range of manufacturing and storage facilities as well as the former Ford site. It is a finer grain, densely developed industrial area and a major employment area for the municipality of Hume. It has excellent freight connections to regional Victoria and interstate via both road and rail. It also has easy access to Melbourne Airport and its surrounding businesses via the Metropolitan Ring Road.
- **Somerton** is located north of the Campbellfield precinct with excellent access to major road and rail networks. The area is used predominantly for logistics, warehousing and distribution and includes an inter-modal freight terminal at the Austrak Business Park. There is also a bulk cement terminal in this location.
- A number of future industrial areas have also been identified for future expansion of the Northern SSIP. Areas around **Craigieburn, Donnybrook** and **Mickleham** offer opportunities for future industrial development with easy access to freight networks and larger land holdings suitable for warehousing, freight and logistics. These locations can provide for a range of employment and business

opportunities. Development is underway at the Merrifield Business Park adjacent to Donnybrook Road with Dulux establishing its brand new, state-of-the-art paint manufacturing facility there.

- The proposed **Beveridge Interstate Freight Terminal (BIFT)** will be an important future asset for the Northern Region. Approximately 1,500 hectares of land has been set aside for a major freight hub supporting a range of other businesses which benefit from being co-located with major terminals including distribution centres and warehousing. The terminal will play a vital role in enabling the transfer of interstate freight across Australia and is located adjacent to the Melbourne-Sydney-Brisbane rail line, Hume Freeway and proposed OMR.
- The **Craigieburn South Employment Precinct** is a site of approximately 190 hectares located adjacent to the Craigieburn North Employment Precinct within the Northern SSIP. To its east are a number of existing quarries. It provides the opportunity for future industrial development with excellent access to rail and road available.

Beyond the Northern SSIP, there are a number of other industrial areas considered to be of state or regional significance.

To the north on Donnybrook Road, the **Shenstone Park PSP** area includes approximately 280 hectares of industrial land identified through the North Growth Corridor Plan and PSP process. This land provides an important buffer to existing and proposed quarry operations, a proposed sewerage treatment plant to the south, and nearby residential land uses. This precinct has good access to the Hume Freeway from Donnybrook Road.

In **Wollert**, 160 hectares of land for industrial uses is set aside adjacent to the proposed OMR. The Wollert PSP identifies the land as a future general light industrial precinct with large format retailing on its south west corner. This industrial land functions as a buffer to existing quarry and landfill sites.

In **Sunbury South** there is just under 60 hectares of land set aside for future industrial purposes. As well as providing important employment land with good access, the area also provides an important buffer to existing landfill and quarrying operations.

Melbourne Airport is the region's largest employer with key industrial precincts located to its south and east. The Melbourne Airport will continue to play an important role in providing for a range of aviation and non-aviation uses. East and south of the airport are established precincts, that combined with the Tullamarine and Keilor Park Industrial Precinct in Brimbank, form a large cluster of industrial land located adjacent to the airport, that support a range

of transport and logistics, wholesale trade and other sectors that require easy access to the airport.

The **La Trobe NEIC** includes La Trobe University, the Northland Shopping Centre and the Austin Biomedical Alliance Precinct, plus a concentration of other health, research, commercial and retail activities in and around the Heidelberg Major Activity Centre. It has strengths in education, research, health and retail with approximately 28,700 jobs in the cluster. La Trobe University is continuing to expand its education and research activities, particularly in the biosciences.

The **Heidelberg West Business Park** is the main industrial area in the municipality of Banyule and is located adjacent to La Trobe University within the La Trobe NEIC. It houses a range of manufacturing, construction, wholesale trade and motor industry businesses. There is opportunity for it to evolve supporting higher technology production and services.

Further to the south, the **East Preston Industrial Precinct** is Darebin's largest industrial area including manufacturing, light industrial and restricted retailing. It is included in the Northland Urban Renewal Precinct, a long-term planning project with an horizon of 30+ years being undertaken by council. The **Fairfield Industrial Precinct** is used for industry, wholesale and retail trade as well as service industries and includes higher density built form. These precincts have a good access to a skilled workforce, however they are limited by adjacent residential uses and lack direct access to major road and rail networks.

The **West Reservoir** precinct is located generally between Edwardes Park Lake and the Merri Creek within Darebin and extends southwards to adjoin the **Newlands Road Industrial Precinct** within Moreland. These areas are used predominantly for a range of manufacturing and light industrial uses and are surrounded by residential land uses.

Beyond the Newlands Road Precinct, there are two other large concentrations of industrial zoned land in Moreland at **North Coburg** and **Brunswick**. These areas have been identified to be retained for industry and employment uses and are increasingly supporting a range of creative industries including makers spaces, film studios, recording studios and specialist 3D artwork production as well as a designated "Design District" in Brunswick centred around RMIT's campus.

The activity centres network in the region is anchored by the two existing metropolitan activity centres of Broadmeadows and Epping and a future metropolitan activity centre at Lockerbie.

The **Epping Metropolitan Activity Centre** is an important centre with good accessibility throughout the region via rail and road. It comprises approximately 230,300 square metres of commercial floorspace and provides a range of retailing and food and drink premises with a small but growing residential population. It also includes health and education facilities and there are large areas of land available for expansion.

The **Broadmeadows Metropolitan Activity Centre** is important due to its location within the fast-growing northern region and as a major hub for transport to both metropolitan and key regional centres. It comprises approximately 623,700 square metres of commercial floorspace and is an important regional mixed-use centre providing significant retailing, entertainment, civic, office, health and education facilities. There is significant opportunity for expansion and urban renewal to the east of the existing centre.

The future **Lockerbie Metropolitan Activity Centre** will have an important regional role with approximately 60 hectares of land identified for future commercial purposes. This will be complemented by substantial employment and residential areas between the railway line and Hume Freeway and at the nearby Northern SSIP.

There are 19 existing **major activity centres** that vary in size, role and function and five future major activity centres identified across the region. These activity centres vary in their potential for growth. Some are limited in size with minimal prospects for growth, while others provide substantial opportunities. Larger free-standing shopping centres such as Craigieburn Town Centre, Epping Plaza, Gladstone Park, Greensborough, Preston-Northland and Plenty Valley (South Morang) offer significant retail activity, which serves larger sub-regional catchments. In other parts of the region, strip-based centres such as Brunswick, Coburg, Ivanhoe, Northcote and Heidelberg offer a range of retailing, office and community uses. Future activity centres such as Beveridge and Sunbury South offer an opportunity to provide for additional employment while Wallan will play an increasingly important role in the corridor and beyond to regional townships. This network of centres is supported by a range of neighbourhood and local centres, both existing and proposed.

Supply and demand for industrial and commercial land across the region

Industrial land

The Northern Region contains metropolitan Melbourne's third largest holding of industrial land. The region has a total of around 4,960 hectares of zoned land set aside for industrial uses. Of this, almost 3,720 hectares is currently occupied and just over 1,240 hectares is currently zoned for industrial purposes and vacant. An additional 2,867 hectares of land has been identified for future industrial purposes that are yet to be re-zoned.

Approximately 5,773 hectares of all industrial land in the region is located within the Northern SSIP.

Across the region there are 4,108 hectares of vacant zoned and unzoned industrial land available for development, of which 3,372 hectares is located within the Northern SSIP. A portion of this land will be required to accommodate the proposed BIFT and ancillary uses.

Of the remaining 736 hectares of available land, approximately 473 hectares are unzoned within key future industrial precincts in growth areas.

Demand for industrial land in the Northern Region has been variable in recent years but has steadily increased, with the region continuing to be an important location for the manufacturing sector. This sector accounted for approximately 33 per cent of work places in the Northern SSIP in 2016-17 compared to 22 per cent of work places for Melbourne as a whole.

Table 18: Industrial land supply, Northern Region

Council / SSIP	Zoned occupied (ha)	Zoned vacant (ha)	Future supply (ha)	Total available supply (ha)
Banyule	116.5	1.4	0.0	1.4
Darebin	288.6	16.0	0.0	16.0
Hume	2,141.9	859.0	490.1	1,349.1
Moreland	246.7	13.2	0.0	13.2
Nillumbik	29.2	0.1	0.0	0.1
Whittlesea	889.7	328.1	1,642.3	1,970.4
Wallan (within UGB)	6.0	23.4	734.5	757.9
Northern Region	3,718.6	1,241.2	2,866.9	4,108.1
<i>Northern SSIP</i>	<i>2,400.7</i>	<i>978.2</i>	<i>2,393.7</i>	<i>3,371.9</i>

Source: Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018 and internal analysis

Table 19: Industrial land consumption, Northern Region, 2015-16 to 2017-18

Council / SSIP	2015-16 (ha)	2016-17 (ha)	2017-18 (ha)
Banyule	1.6	-0.1	-0.1
Darebin	0.0	0.0	0.1
Hume	20.4	24.5	28.5
Moreland	0.8	1.5	0.0
Nillumbik	0.0	-0.1	0.0
Whittlesea	1.5	8.6	23.5
Wallan (within UGB)	N/A	N/A	N/A
Northern Region	24.3	34.4	52.0
<i>Northern SSIP</i>	<i>15.8</i>	<i>26.2</i>	<i>43.3</i>

Source: Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018

These operations are likely to continue to drive demand for land within the region, given easy access to major road, rail and transport gateways at Melbourne and Essendon Airports.

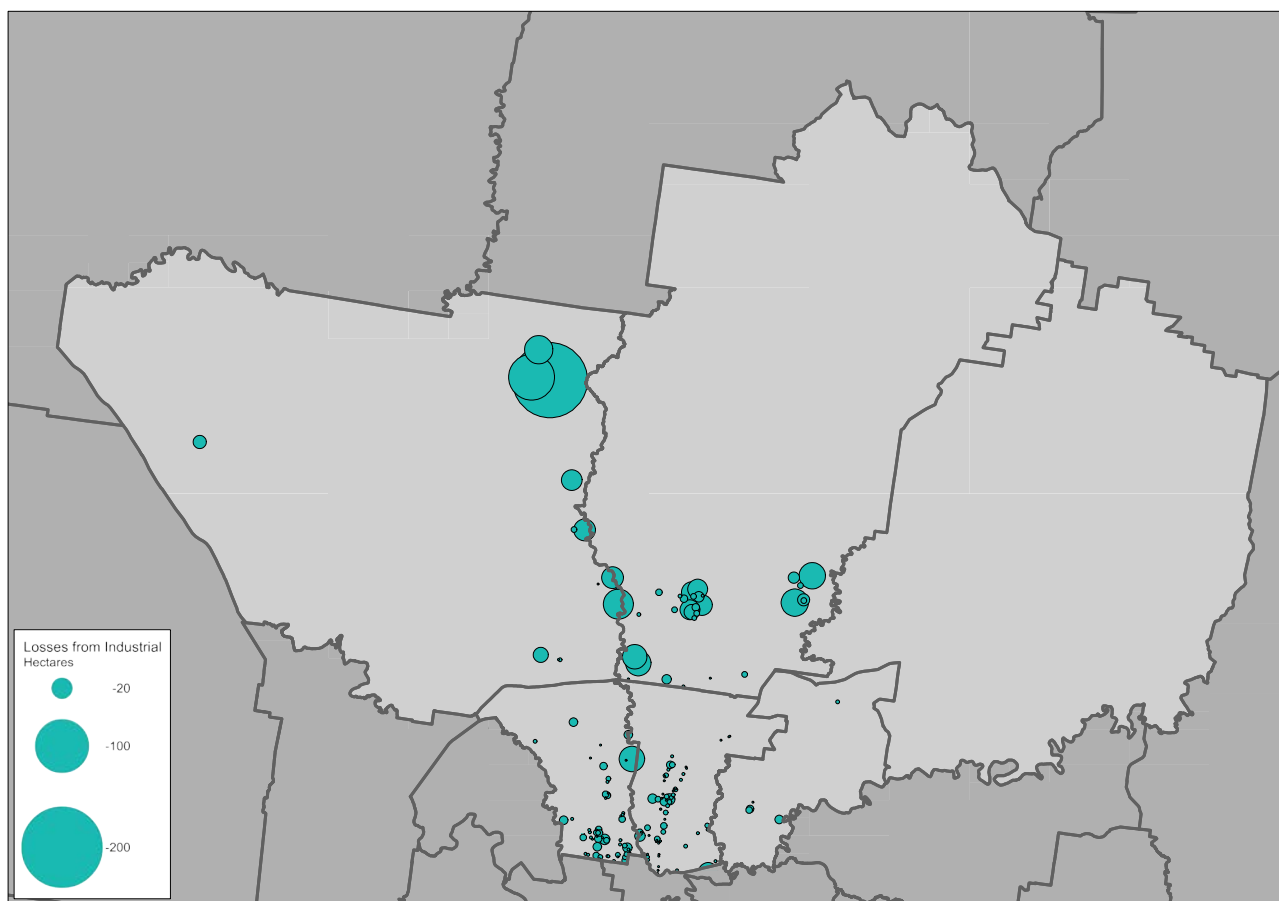
There is also future opportunity for the region to expand in the freight and logistics sector, given the proposed development of the BIFT adjacent to the Hume Freeway and interstate rail.

Over the last three years the average rate of consumption of industrial land in the region has been around 37 hectares per annum. If average annual consumption rates continue at these levels, then the region as a whole has approximately 34 years supply of zoned industrial land. Unzoned areas identified for future industrial purposes could provide another 53 years of supply, but this is dependent on future planning for these areas as part of the PSP process. The vast majority of industrial land supply and consumption for the region is within the Northern SSIP. Based on average consumption rates over the last three years there are approximately 26 years supply of zoned land and around 44 years supply of unzoned land within the Northern SSIP.

However, consumption rates have increased significantly in the Northern Region. In 2017-18 the rate of consumption was 52 hectares for the region as a whole and 43 hectares in the Northern SSIP. Based on these consumption rates, it is estimated that there is approximately 24 years of zoned land supply in the region overall. Unzoned land could provide for approximately 37 years of additional supply, however if the future land set aside for the proposed BIFT is removed from the future supply, then there would only be around 12 years of unzoned future industrial land supply available in the region.

Of the total zoned and unzoned supply of vacant land, over 82 per cent is within the Northern SSIP. If consumption rates in the Northern SSIP remain at around 43 hectares per annum, then this would provide around 23 years of zoned supply and almost 38 years of unzoned supply. If land for the proposed BIFT is removed from the unzoned supply, then there would only be around 14 years of unzoned future industrial land supply available in the Northern SSIP. If consumption rates in the Northern SSIP were to increase further, then supply would be exhausted more quickly.

Figure 21: Change of zoned industrial land, Northern Region, 2000-01 to 2017-18



Source: Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018

Between 2000-01 and 2017-18 a total of 669 hectares of industrial land was rezoned across the region for other non-industrial uses.

The largest single loss of industrial land over this period was within Hume, where almost 145 hectares of land was rezoned as Commonwealth Land for the Post-Entry Quarantine Facility in Mickleham. Of the remaining rezonings that occurred over this period in the region, approximately 72 per cent involved sites of less than 2 hectares in size.

Of all the industrial land rezoned over the period, around 28 per cent was rezoned to allow for mixed-use or residential development. While this is the lowest overall percentage of all metropolitan regions, there are great variances across the region with over 60 per cent of industrial land rezoned in Moreland allowing for mixed-use or residential development.

Commercial land

Currently across the region there is a total of 1,086 hectares of land that has been identified as being zoned for commercial purposes. It is estimated that there is approximately 3.2 million square metres of floorspace used or available for commercial purposes on this land. Just under 50 per cent of all

existing floorspace supply is located within the municipalities of Darebin and Moreland.

Across the region a total of 238 commercial areas or centres have been identified. Of these, 190 have less than 10,000 square metres of floorspace.

Eleven centres have more than 100,000 square metres of floorspace. This includes free-standing shopping centres like Northland and Epping and strip-based centres such as Brunswick. Combined these centres account for over half of the region's total existing commercial floorspace.

Darebin has the largest number of centres (60) and Nillumbik (8) and Mitchell (2) the fewest.

In addition to existing zoned commercial land, there are approximately 208 hectares of land that have been identified through other strategic plans such as Growth Corridor Plans and PSPs for future commercial purposes. These areas are confined to Hume, Whittlesea and the area of Mitchell within the UGB.

The future Lockerbie Metropolitan Activity Centre will be a key location for future commercial development.

Table 20: Existing commercial floorspace by centre size, Northern Region

Council	Less than 2,000 (m2)		2,000 to 9,999 (m2)		10,000 to 49,999 (m2)		50,000 to 99,999 (m2)		Greater than 100,000 (m2)	
	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)
Banyule	21	23,300	12	50,300	3	43,950	1	50,750	2	212,550
Darebin	29	31,450	17	72,800	8	156,650	3	194,050	3	357,600
Hume	23	15,800	10	59,150	4	96,900	2	149,400	1	198,700
Moreland	21	23,300	30	121,400	5	116,300	1	92,450	2	409,300
Nillumbik	5	5,700	1	4,050	2	51,600	0	0	0	0
Whittlesea	11	8,700	9	44,750	7	130,900	0	0	3	494,500
Mitchell (within UGB)	1	600	0	0	1	22,250	0	0	0	0
Total	111	108,850	79	352,450	30	618,550	7	486,650	11	1,672,650

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Table 21: Future commercial land supply, Northern Region

Council	Future commercial land (ha)	Share of metropolitan Melbourne
Hume	92	7%
Mitchell (within UGB)	12	1%
Whittlesea	104	8%
Total	208	16%

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Based on projected growth, by 2031 it is anticipated that approximately 1.4 million square metres of additional commercial floorspace will be required across the Northern Region. Approximately 800,000 square metres will be required for office uses and 600,000 square metres will be required for retail.

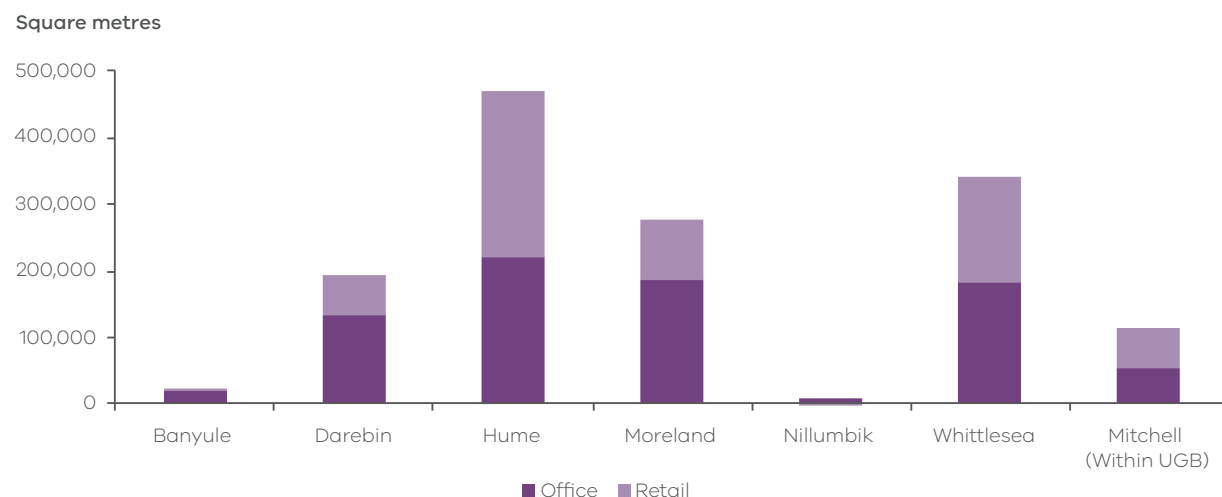
Around 65 per cent of additional floorspace will need to be provided in the growth area municipalities of Hume, Whittlesea and Mitchell (within UGB). All of these councils have land identified for future commercial purposes. If this floorspace is not able to be provided across new planned centres, then consideration will need to be given to ways to either provide additional opportunity for commercial development or increase the density of commercial development.

Moreland and Darebin is projected to need an additional 471,000 square metres of commercial floorspace by 2031, and Banyule and Nillumbik will need an additional 21,000 square metres of commercial floorspace. These councils will need to look at ways to accommodate projected demand for commercial floorspace within existing commercial areas, as well as considering areas that could accommodate future floorspace requirements through rezonings.

Table 22: Commercial floorspace supply and estimate, Northern Region

Council	Existing commercial floorspace in 2018 (m2)	Estimated additional commercial floorspace 2016 to 2031 (m2)
Banyule	380,850	19,000
Darebin	812,550	194,000
Hume	519,950	468,000
Moreland	762,750	277,000
Nillumbik	61,350	2,000
Whittlesea	678,850	342,000
Mitchell (within UGB)	22,850	112,000
Total	3,239,150	1,414,000

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Figure 22: Estimated additional commercial floorspace by type and municipality, Northern Region, 2016 to 2031

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Planning framework for industrial and commercial land across the region

There is a large amount of industrial and commercial land across the region providing state, regionally and locally-significant employment and economic functions. There is reasonably good arterial road, freeway and fixed rail accessibility within the region and to the Port of Melbourne, Melbourne Airport and to the proposed BIFT, however east-west links across the region are limited.

The region accommodates a range of traditional industrial and manufacturing industries. While the decline of the automotive industry has impacted significantly on the region, there is opportunity to grow in high-technology manufacturing, niche manufacturing and food and beverage manufacturing, given proximity to the Melbourne Wholesale Fruit and Vegetable Market. There is also opportunity for the freight and logistics sector given the established and proposed freight network and easy access to interstate markets along the eastern seaboard.

The region also has large areas set aside with significant high-quality extractive resources for quarrying operations. A shortfall in extractive resources close to market means that the cost of construction will rise as these materials are sourced from further afield. These operations need to be protected both now and into the future to secure adequate long-term supply of quality and competitively priced extractive resources for growing Victoria's population and economy, especially with demand for extractive resources expected to double between 2015 and 2050.

While the region has substantial land set aside for future industrial purposes, site fragmentation, the disjointed nature of precincts and site access often makes securing suitable larger sites limiting. While this may not limit certain industries, others such as those operating large format uses or freight and logistics may find it difficult to secure a site.

While new industrial land is set aside in the municipalities of Hume and Whittlesea, other municipalities are losing industrial land and are under increasing pressure from gentrification of residential areas and repurposing of land for mixed-use or residential development. This could have potential negative impacts for the region's economy and employment opportunities.

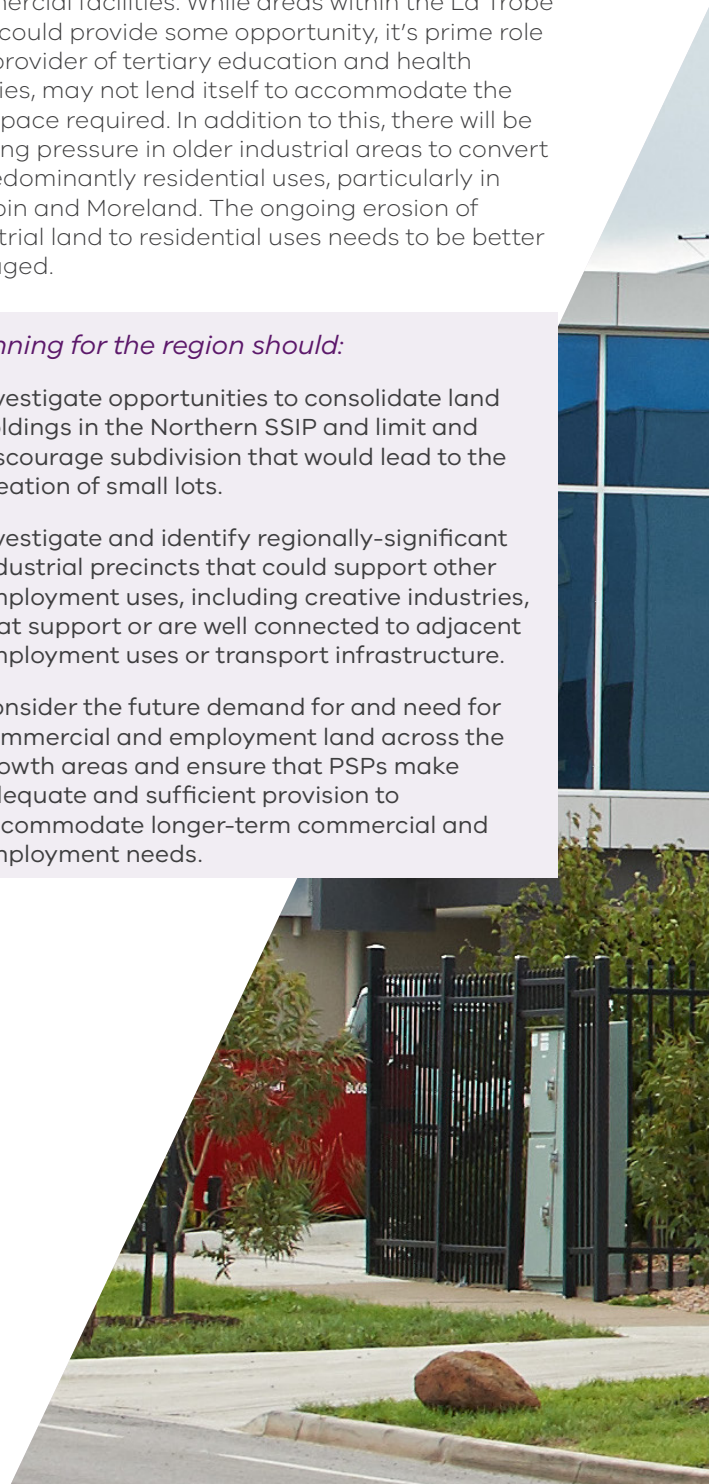
There will need to be a significant increase in the amount of commercial floorspace in growth area municipalities to serve growing populations in Whittlesea and Hume, and to a lesser extent, Mitchell.

Careful consideration will be required through the PSP processes to ensure adequate provision is made to accommodate medium and longer term commercial development. Approaches that will support delivery of 20-minute neighbourhoods should be put in place offering a finer grain network of activity centres.

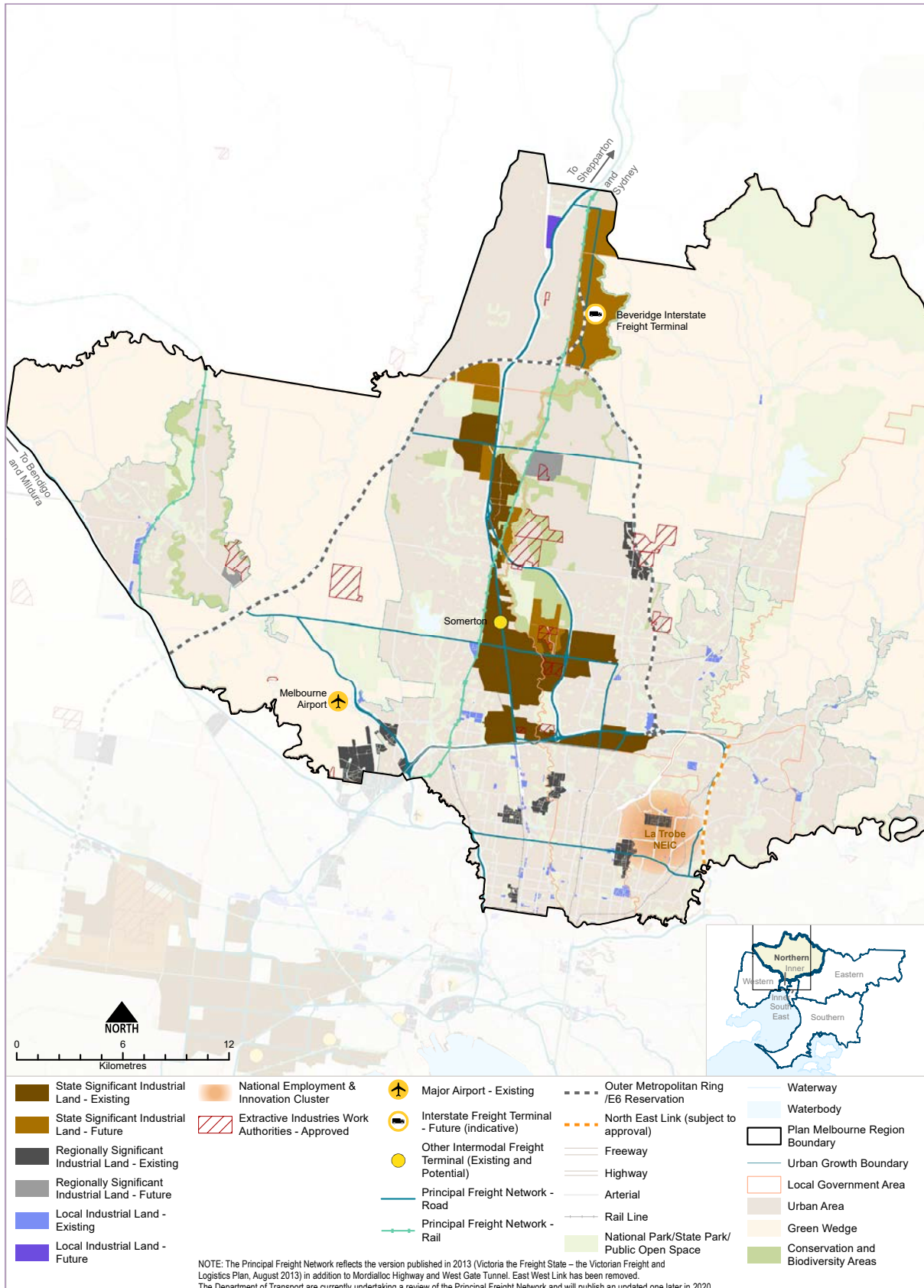
Within the established areas of the region, there will be an ongoing need to allow for expansion of commercial facilities. While areas within the La Trobe NEIC could provide some opportunity, it's prime role as a provider of tertiary education and health facilities, may not lend itself to accommodate the floorspace required. In addition to this, there will be ongoing pressure in older industrial areas to convert to predominantly residential uses, particularly in Darebin and Moreland. The ongoing erosion of industrial land to residential uses needs to be better managed.

Planning for the region should:

- Investigate opportunities to consolidate land holdings in the Northern SSIP and limit and discourage subdivision that would lead to the creation of small lots.
- Investigate and identify regionally-significant industrial precincts that could support other employment uses, including creative industries, that support or are well connected to adjacent employment uses or transport infrastructure.
- Consider the future demand for and need for commercial and employment land across the growth areas and ensure that PSPs make adequate and sufficient provision to accommodate longer-term commercial and employment needs.

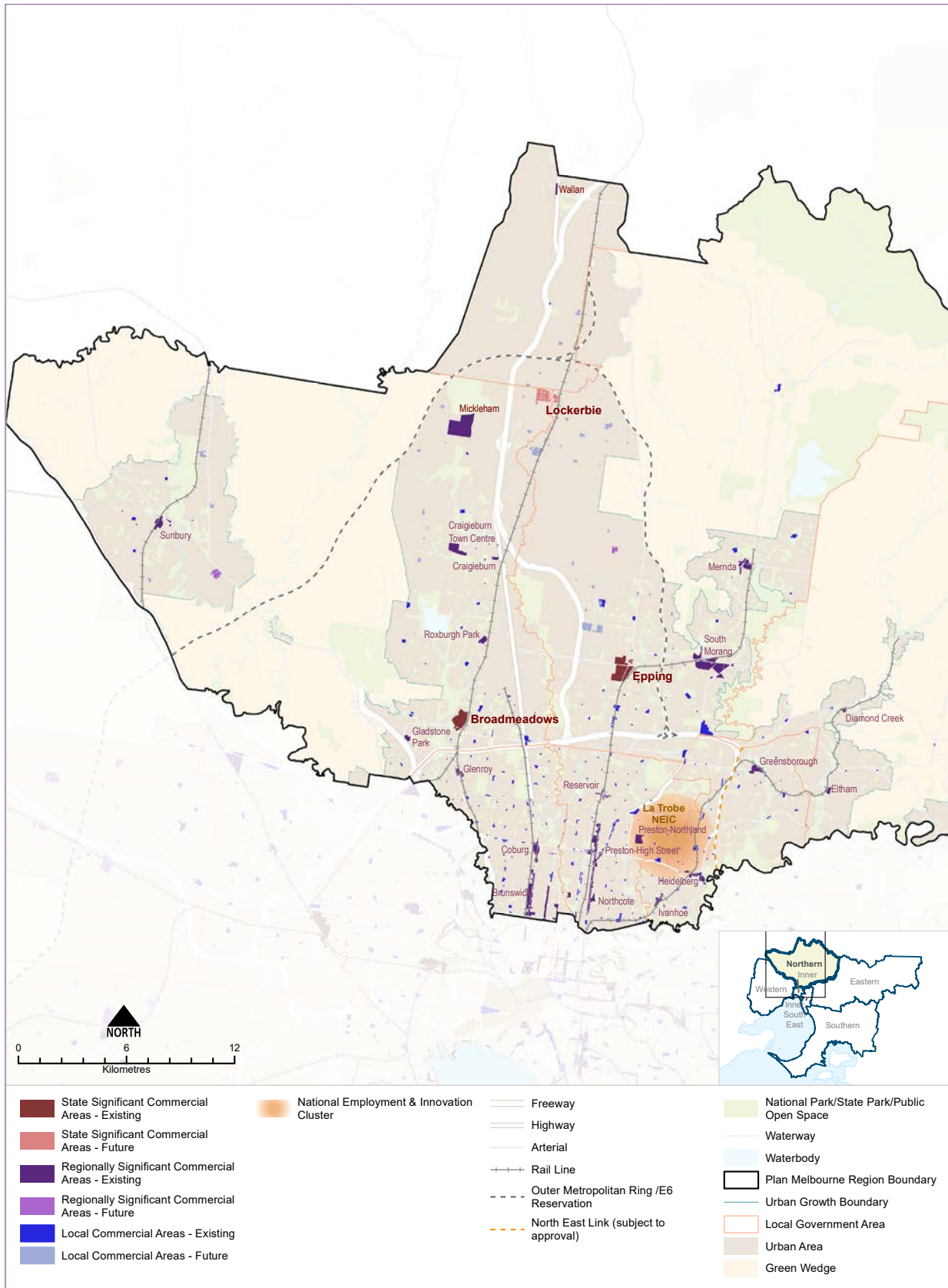


Map 8: Northern Region - industrial land



Source: Department of Environment, Land, Water and Planning

Map 9: Northern Region - commercial land



Source: Department of Environment, Land, Water and Planning

Eastern Region

Regional snapshot

The Eastern Region comprises the municipalities of Knox, Manningham, Maroondah, Monash, Whitehorse and Yarra Ranges.

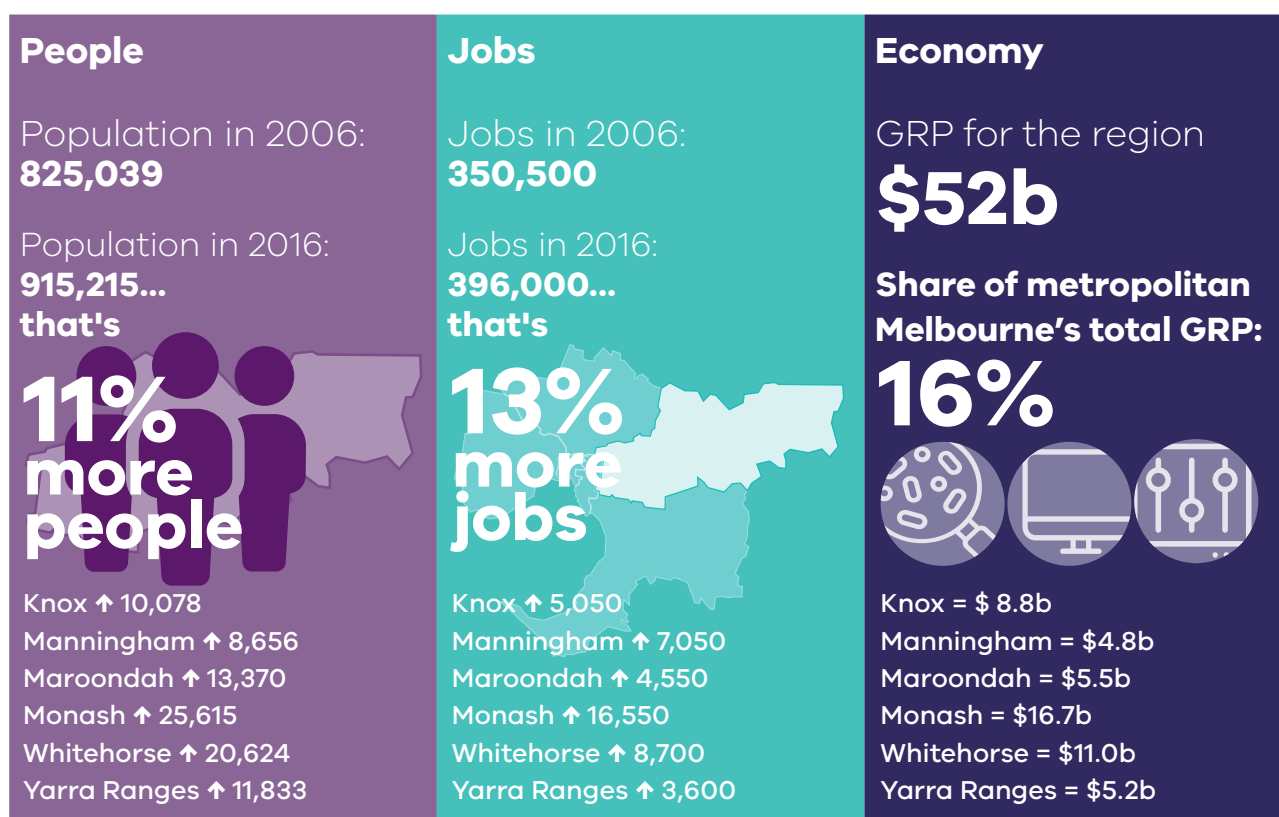
The region has good connections with the Maroondah Highway, Monash Freeway, Eastern Freeway, and Eastlink providing important connections to industrial and commercial areas throughout the region as well as to other adjoining regions.

While many still travel outside the region for work, the Eastern Region is home to the largest number of jobs and highest share of GRP for metropolitan Melbourne outside of the Inner Region. The area in and around the Monash NEIC has one of the largest concentrations of jobs outside of the Central City. The Bayswater Business Precinct offers another major concentration of employment for the region with over 5,000 businesses and more 33,000 jobs. The region has a significant range of health and education facilities.

A significant part of the region lies beyond the UGB in the Shire of Yarra Ranges. The Upper Yarra Valley and Dandenong Ranges contribute significantly to the region's economy and include a number of major tourism attractions and are home to significant regional agricultural production areas for wine and intensive horticulture.

The business services sector is the largest contributor to the economy for the region with a total value-added estimate at around \$19.4 billion. The manufacturing and industrial sector is the next largest contributor with a total value-added estimate at around \$10.8 billion. Combined, these sectors account for just over 60 per cent of the total value-add for the region.

Fast facts



Source: Department of Environment, Land, Water and Planning, unpublished data (2019)

The region was home to around 915,200 people in 2016. By 2031 it is projected that the region will grow by around 164,600 people to a total population of around 1.1 million people.

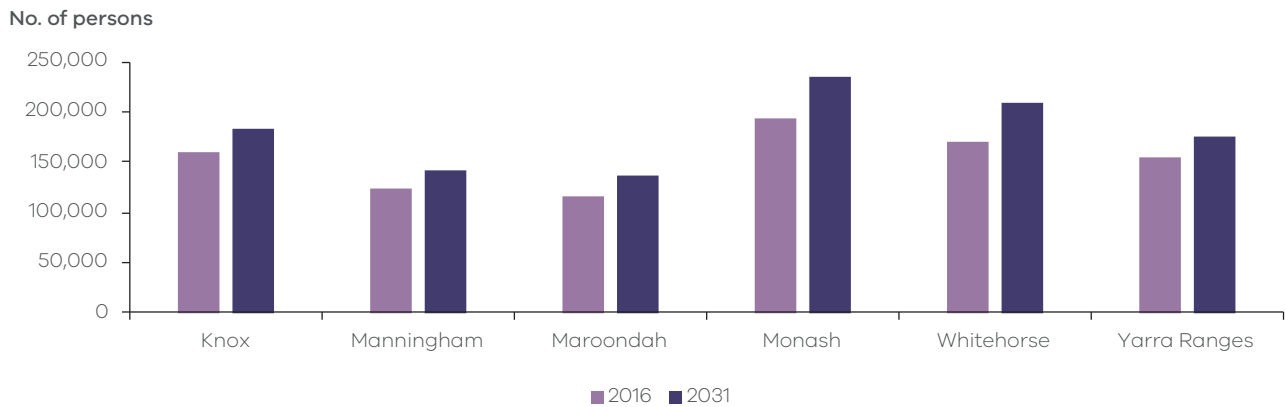
In 2016 the region supported just over 396,000 jobs, accounting for around 17 per cent of all employment across the metropolitan area.

By 2031 it is projected that approximately 87,000 additional jobs will be located across the region.

Almost 60 per cent of the new jobs in the region are expected to be within the municipalities of Monash and Whitehorse.

The industries that are expected to experience the strongest growth are: health care and social assistance; education and training; retail trade; professional, scientific and technical services; construction.

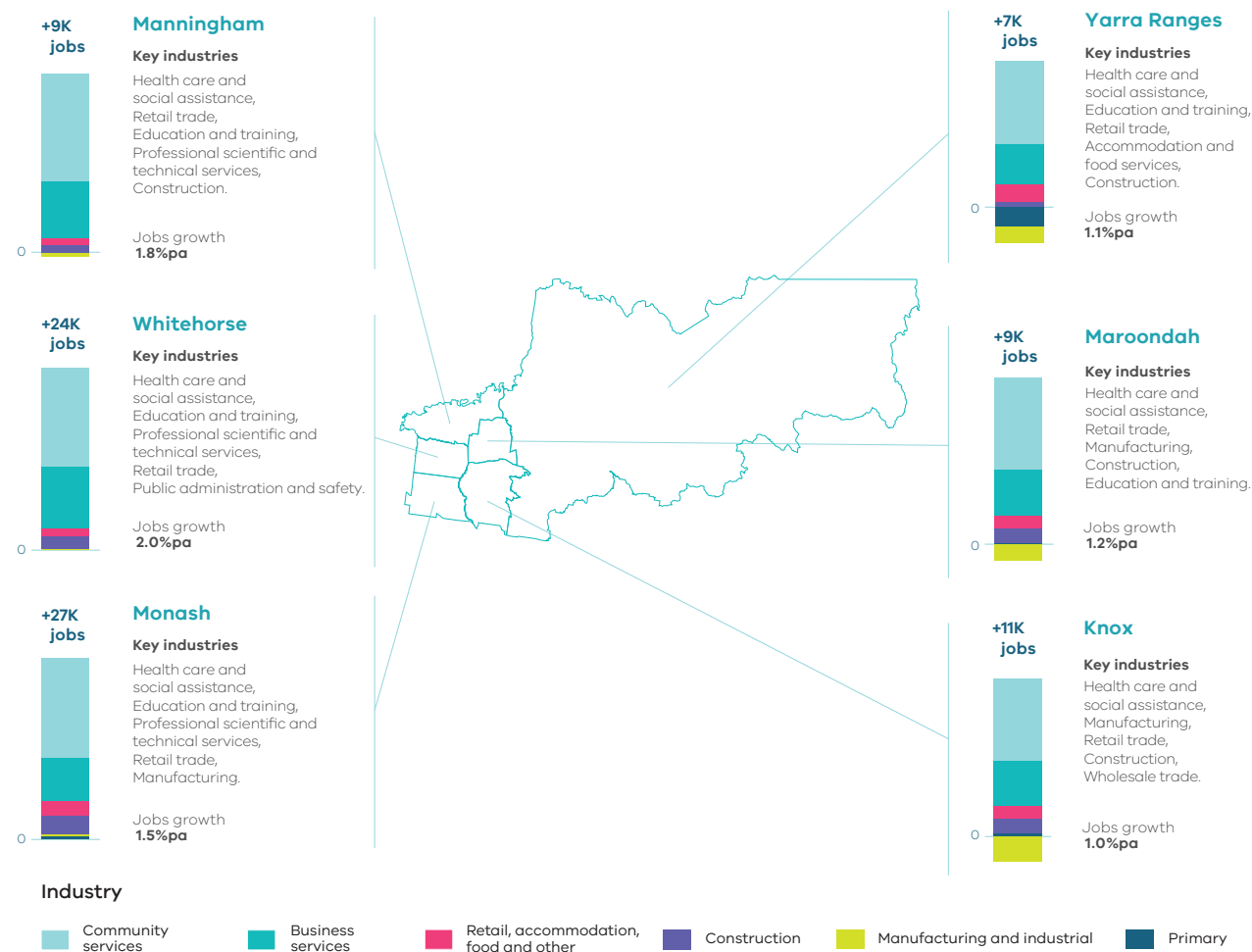
Figure 23: Projected population growth, Eastern Region, 2016 to 2031



Source: Department of Environment, Land, Water and Planning, *Victoria in Future 2019* (July 2019).



Figure 24: Projected employment growth, Eastern Region, 2016 to 2031



Source: Department of Jobs, Precincts and Regions, internal analysis (2019).

NOTE: Job figures have been rounded to the nearest thousand.

Key industrial and commercial areas

There are a number of key industrial areas of regional significance that should be protected and carefully planned for as key economic contributors to the region.

The **Bayswater Business Precinct** extends across the municipalities of Knox, Maroondah and Yarra Ranges with a large industrial land holding of 730 hectares which accommodates over 33,000 jobs. The precinct is almost fully developed with less than 10 per cent of the land vacant and available for future development. The **Bayswater Major Activity Centre** is located to the south-west of the precinct. Strategically located close to a skilled workforce and transport links, the precinct is important in generating employment and economic value in the region.

The **Scoresby-Rowville Industrial Area** is located adjacent to Eastlink in the City of Knox. The **Rowville-Stud Park Major Activity Centre** is located to the south-east. The precinct accommodates a range of production and service industries as well as business parks. It has good access to a skilled workforce and markets and has direct access to EastLink.

The **Monash NEIC** contributes significantly to Melbourne's economy and includes the Monash University, Monash Medical Centre, Monash Children's Hospital, Monash Enterprise Centre, CSIRO, Australian Synchrotron and the Melbourne Centre for Nanofabrication focussing on research and technology. It is the largest concentration of employment outside the Central City with approximately 75,000 jobs in the cluster. It is well linked to existing industrial areas with Huntingdale and Clayton offering further employment. With its educational and scientific institutions, high amenity

employment precincts, access to a skilled workforce and direct access to the PFN, it will continue to play an important role in generating jobs and wealth in the region.

The **MegaMile Home and Lifestyle Precinct** extends along Whitehorse Road between Blackburn and Mitcham. It is home to more than 250 businesses supporting more than 2,500 jobs. The precinct largely consists of large format retailing. Adjacent to this area is the **Blackburn Industrial Precinct**. Along with a number of key industrial precincts in Whitehorse, such as **Rooks Road** and the **Redland Estate**, these precincts perform an important role in providing locations for small and medium sized businesses in the region. These areas have become more significant, as industrial businesses in the inner city have been displaced as a result of rezoning of industrial land for alternative uses. They also play an important role in meeting strong demand for businesses which serve industry in Melbourne's outer eastern region.

The **Box Hill Metropolitan Activity Centre** is a significant regional mixed-use centre with high accessibility to the Melbourne CBD. It comprises approximately 182,860 square metres of commercial floorspace with significant retailing, office, accommodation, restaurant, civic, health and education facilities.

The **Ringwood Metropolitan Activity Centre** has an important regional role, with good accessibility to the Melbourne CBD and the Eastern Region via rail and road links, with relatively large areas of land for expansion, consolidation and mixed-uses. It comprises approximately 256,570 square metres of commercial floorspace with substantial retailing uses. The centre has been predominantly retail focussed but is increasingly moving towards a range of accommodation, food and drink and office uses.

There are 19 **major activity centres** across the region which offer significant retailing, serving larger sub-regional catchments. Larger free-standing shopping centres and restricted retailing uses are found at Chirnside Park, Doncaster Hill, Forest Hill Chase, Glen Waverley, Nunawading and Wantirna South-Knox Central. In other parts of the region, strip-based centres such as Boronia, Croydon, Lilydale and Oakleigh offer a range of retailing, office and community uses. Tally Ho Major Activity Centre acts as a regional employment node with significant office space accommodating a range of professional services as well as government offices and headquarters for large corporations. These centres are supported by a range of large and small neighbourhood activity centres.

Supply and demand for industrial and commercial land across the region

Industrial land

The Eastern Region contains a total of 2,570 hectares of land zoned for industrial uses. Of this land, 2,435 hectares is currently occupied and 135 hectares is vacant. There is no future land identified for industrial purposes in the region.

Overall, there is very little available supply of zoned industrial land across the region. Around 70 per cent of the overall supply in the region is located within the municipalities of Knox and Maroondah.

Manningham has the lowest supply of zoned industrial land in the region, none of which is vacant. The vast majority of this land is located within one precinct, where Manningham and Templestowe Roads intersect. This land is proposed to be used as an interchange for the North East Link.

While there is limited remaining vacant land available across the region, there is opportunity for existing underutilised land to be redeveloped and evidence of buildings being demolished and the land being recycled for new industrial uses.



Table 23: Industrial land supply, Eastern Region

Council	Zoned occupied (ha)	Zoned vacant (ha)	Future supply (ha)	Total available supply (ha)
Knox	771.2	44.1	0.0	44.1
Manningham	13.1	0.0	0.0	0.0
Maroondah	425.8	49.8	0.0	49.8
Monash	703.5	7.6	0.0	7.6
Whitehorse	226.2	2.9	0.0	2.9
Yarra Ranges	295.3	30.7	0.0	30.7
Eastern Region	2,435.0	135.1	0.0	135.1

Source: Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018

Table 24: Industrial land consumption, Eastern Region, 2015-16 to 2017-18

Council	2015-16 (ha)	2016-17 (ha)	2017-18 (ha)
Knox	7.6	13.9	1.2
Manningham	0.0	0.0	0.0
Maroondah	3.4	3.6	1.8
Monash	6.6	3.0	-1.4
Whitehorse	-1.5	1.8	0.3
Yarra Ranges	1.7	-9.6	1.6
Eastern Region	17.8	12.7	3.5

Source: Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018

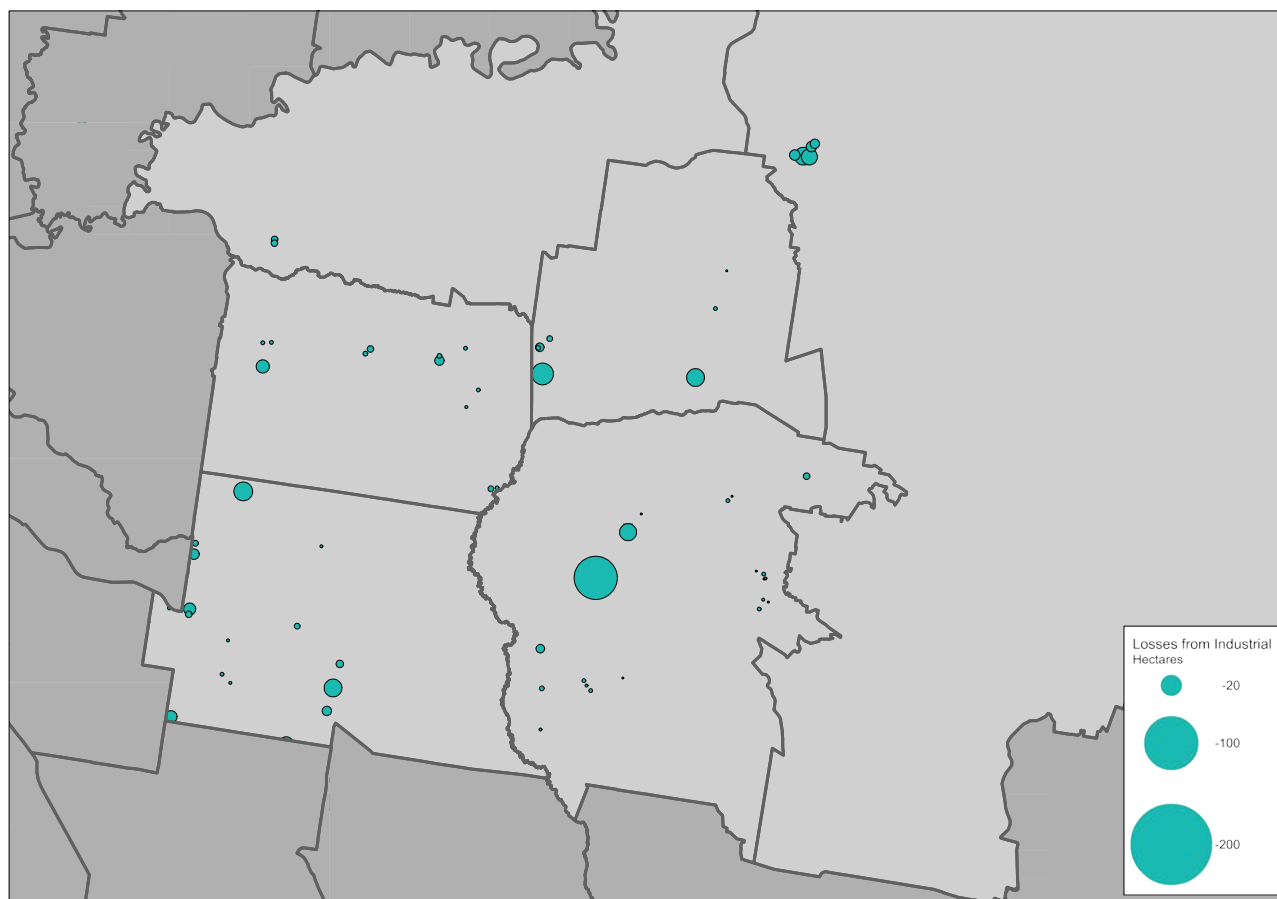
Over the period 2015-16 to 2017-18 a total of 34 hectares of industrial land was consumed in the region at an average annual rate of approximately 11 hectares per annum. Consumption of industrial land dropped off significantly during the 2017-18 period (3.5 hectares). Prior to that period the rate of consumption was much higher.

Based on an average annual consumption rate of 11 hectares per annum, there is approximately 12 years supply of industrial land remaining in the region, with the only significant supplies in Knox (4 years supply), Maroondah (4.5 years supply) and Yarra Ranges (just under 3 years supply).

Between 2000-01 and 2017-18 a total of 231 hectares of industrial land was rezoned across the region for non-industrial uses. The largest loss of industrial land over this period was within Knox where 20 sites were rezoned resulting in an overall loss of 80 hectares of industrial land.

The largest single loss of industrial land over this period was in Knox where a site of just over 56 hectares was rezoned from industrial land to allow for residential development.

Of the remaining rezonings that occurred over this period, approximately 65 per cent involved sites of less than 2 hectares in size. Of all the industrial land rezoned over the period, almost 60 per cent were rezoned to allow for residential development.

Figure 25: Change of zoned industrial land, Eastern Region, 2000-01 to 2017-18

Source: Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018

Commercial land

Currently across the region there is a total of 761 hectares of land that has been identified as being zoned for commercial purposes. It is estimated that there is approximately 2.8 million square metres of floorspace used or available for commercial purposes on this land. Approximately 49 per cent of all the existing floorspace supply is located within the municipalities of Monash and Whitehorse.

Across the region, a total of 286 commercial areas or centres have been identified. This is the most of all metropolitan regions, and of these almost 80 per cent (226 centres) have less than 10,000 square metres of floorspace. While numerous in number, these smaller centres only account for around 16 per cent of the region's total floorspace.

Only five centres in the region have more than 100,000 square metres of floorspace. All of these centres include large free-standing shopping centres at Doncaster, Ringwood, Wantirna South, Glen Waverley and Box Hill. Combined, these centres account for 32 per cent of all identified floorspace across the region.

Monash has the largest number of centres (73) and Knox the fewest (31).

Based on projected growth, by 2031 it is anticipated that 837,000 square metres of additional commercial floorspace will be required across the Eastern Region. Approximately 614,000 square metres will be required for office uses and the remaining 223,000 square metres will be required for retail. Around 53 per cent of this additional floorspace will need to be provided in the municipalities of Monash and Whitehorse.

As there are no future commercial areas identified in the region, councils will need to look at ways to accommodate project demand for commercial floorspace within existing commercial areas, as well as considering areas that could accommodate future floorspace requirements through rezonings.

Table 25: Existing commercial floorspace by centre size, Eastern region

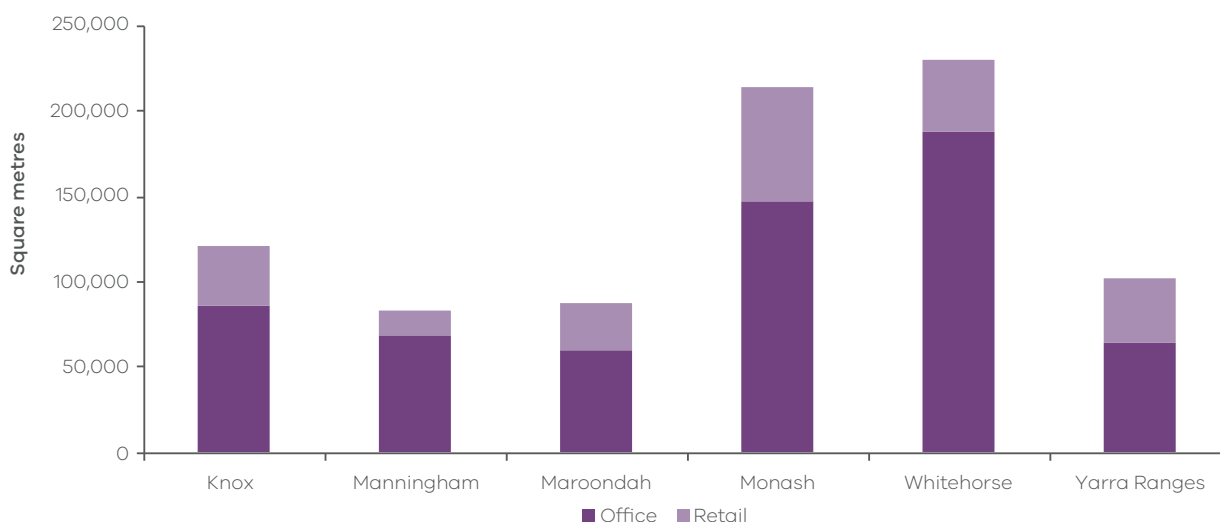
Council	Less than 2,000 (m ²)		2,000 to 9,999 (m ²)		10,000 to 49,999 (m ²)		50,000 to 99,999 (m ²)		Greater than 100,000 (m ²)	
	No. of centres	Floor-space (m ²)	No. of centres	Floor-space (m ²)	No. of centres	Floor-space (m ²)	No. of centres	Floor-space (m ²)	No. of centres	Floor-space (m ²)
Knox	10	6,900	12	55,300	7	28,250	1	94,250	1	153,100
Manningham	17	17,850	8	37,800	7	120,500	0	0	1	176,850
Maroondah	22	21,600	14	58,850	2	25,600	1	53,100	1	256,550
Monash	45	45,950	13	37,650	12	307,600	2	157,700	1	133,800
Whitehorse	34	35,250	17	68,250	9	181,050	3	233,300	1	180,850
Yarra Ranges	22	12,100	12	52,350	10	182,750	1	82,550	0	0
Total	150	139,650	76	310,200	47	845,750	8	620,900	5	901,150

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Table 26: Commercial floorspace supply and estimate, Eastern Region

Council	Existing commercial floorspace 2018 (m ²)	Estimated additional commercial floorspace 2016 to 2031 (m ²)
Knox	337,800	121,000
Manningham	353,000	84,000
Maroondah	415,700	87,000
Monash	682,700	214,000
Whitehorse	698,700	229,000
Yarra Ranges	329,750	102,000
Total	2,817,650	837,000

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Figure 26: Estimated additional commercial floorspace by type and municipality, Eastern Region, 2016 to 2031

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Planning framework for industrial and commercial land across the region

The Eastern Region has relatively moderate levels of industrial and commercial land compared to other regions, however its contribution to metropolitan Melbourne's economy is significant and second only to the Inner Metro Region. Overall it accounts for around 16 per cent of metropolitan Melbourne's GRP generating significant employment and economic functions.

The region is home to a number of significant industrial precincts at Clayton-Mulgrave, Scoresby-Rowville and Bayswater-Kilsyth, important not just to the region, but also to broader metropolitan areas. The industrial areas around Clayton-Mulgrave form part of the broader Monash NEIC and the areas around Scoresby-Rowville and Bayswater-Kilsyth have good and relatively easy access to broader metropolitan areas via EastLink. A number of other smaller industrial areas at Ringwood, Mitcham and Nunawading, while not as large, are also considered important to the broader region.

To support and maintain the contribution these industrial areas make to the region's economy and as important places of employment, they should be retained and carefully planned for. As many of the precincts traverse municipal boundaries, consideration should be given to a coordinated approach that provides for consistent planning for the areas.

As an established region, there is limited opportunity for expansion of commercial areas beyond those that exist. Areas around Chirnside Park offer some opportunity for new commercial development, however in other areas there will be an ongoing need to allow for expansion and development through intensification of commercial facilities.

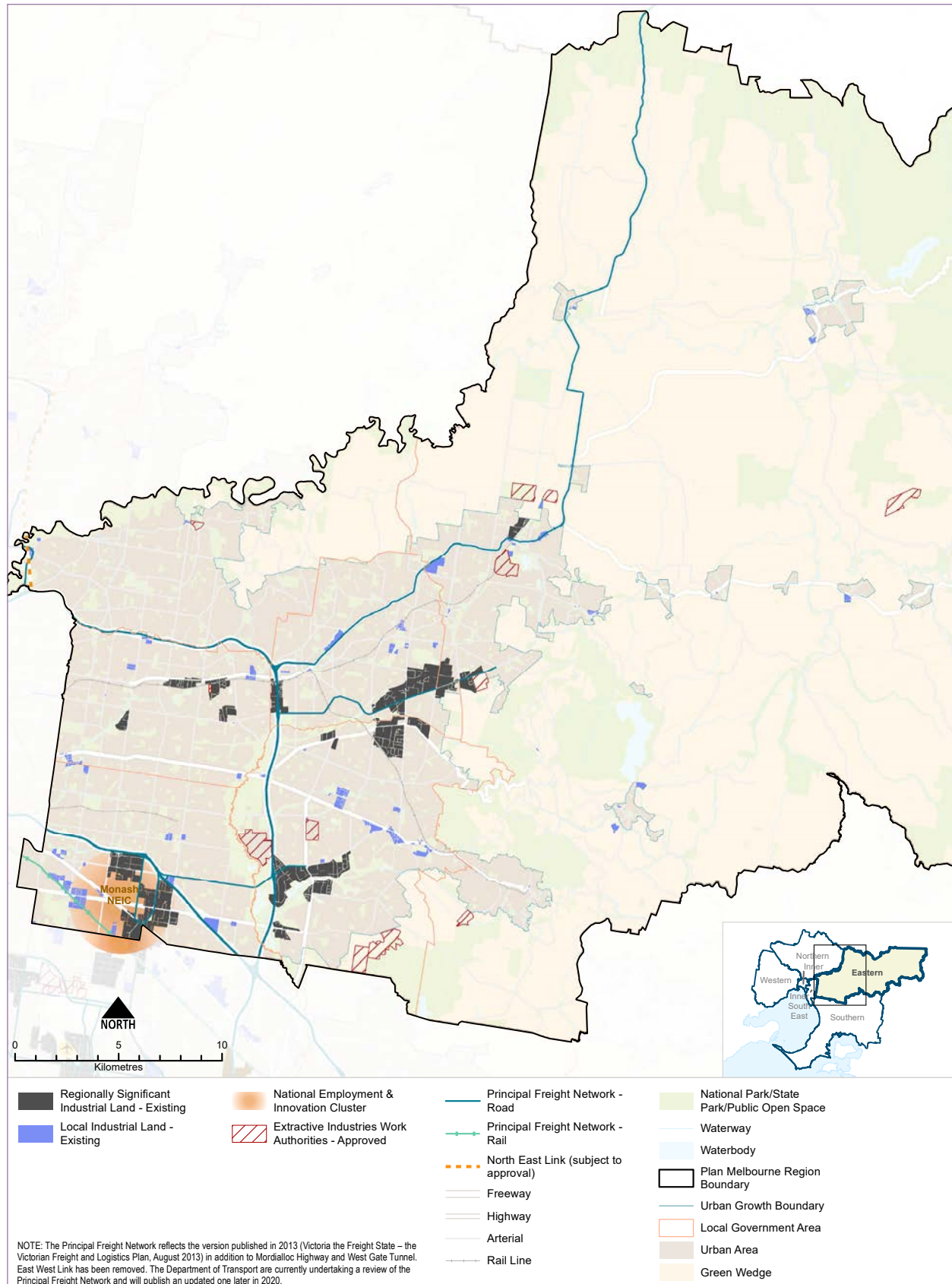
The metropolitan activity centres of Box Hill and Ringwood provide opportunities to consolidate as significant locations for commercial development. In addition to this, a number of larger major activity centres across the region could also offer opportunities to accommodate future growth. The Monash NEIC also offers significant opportunity to accommodate future growth, particularly for office development.

Planning for the region should:

- Retain industrial zoned land at Clayton-Mulgrave, Scoresby-Rowville and Bayswater-Kilsyth predominately for industrial uses and limit encroachment by other uses that would fragment the industrial land.
- Investigate and identify areas within regionally-significant industrial precincts that could support other employment uses, including offices, creative industries and start-ups, that support or are well connected to adjacent employment uses or transport connections.
- Identify areas that can support future demand for commercial floorspace and new investment in the region and plan for these areas to support future growth.

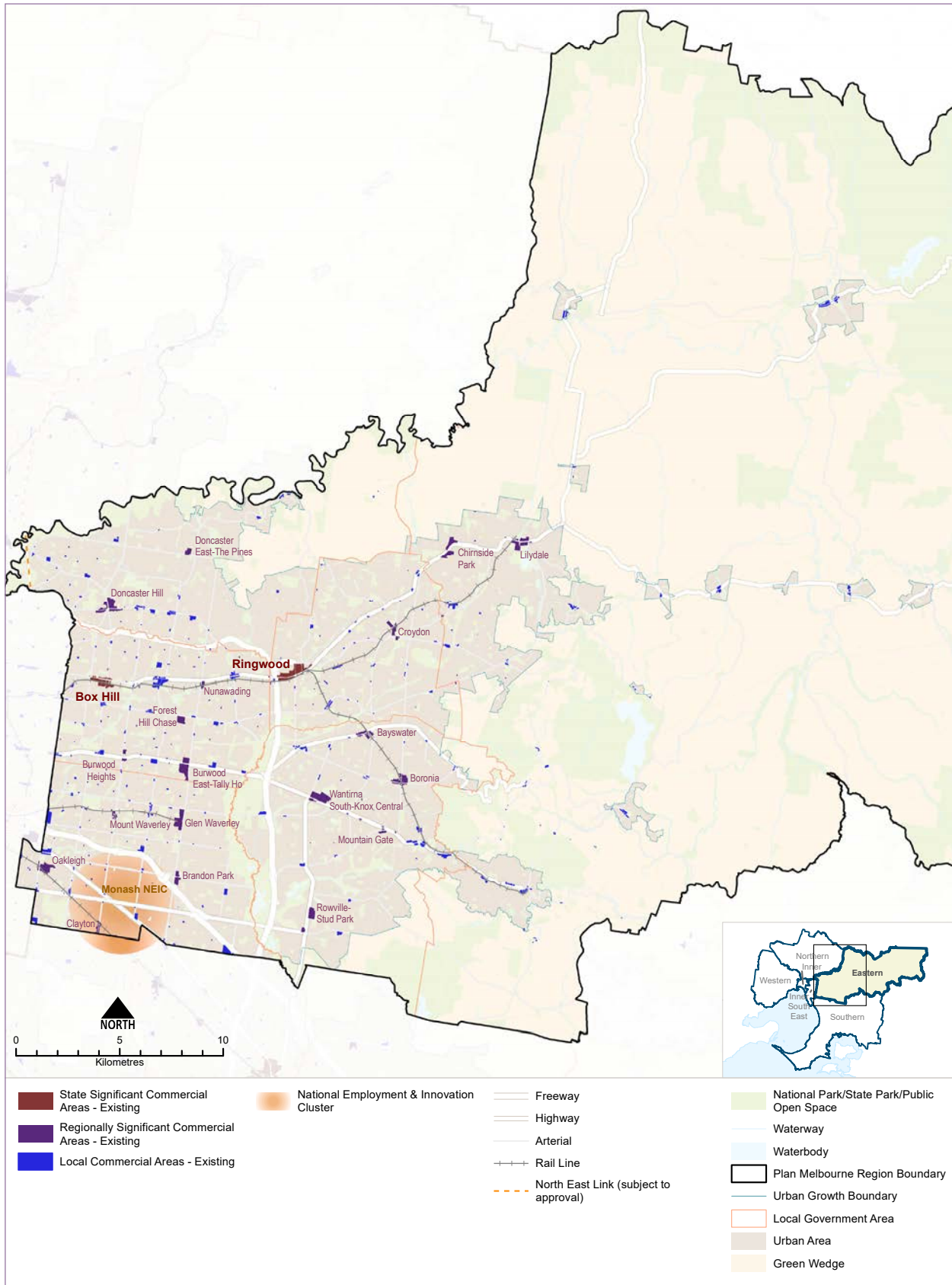


Map 10: Eastern Region - industrial land



Source: Department of Environment, Land, Water and Planning

Map 11: Eastern Region - commercial land



Source: Department of Environment, Land, Water and Planning

Southern Region

Regional snapshot

The Southern Region comprises the municipalities of Cardinia, Casey, Frankston, Greater Dandenong, Kingston and Mornington Peninsula. The region includes the South East Growth Corridor and makes significant provision for future industry and housing. The region has three state-significant industrial precincts (SSIPs).

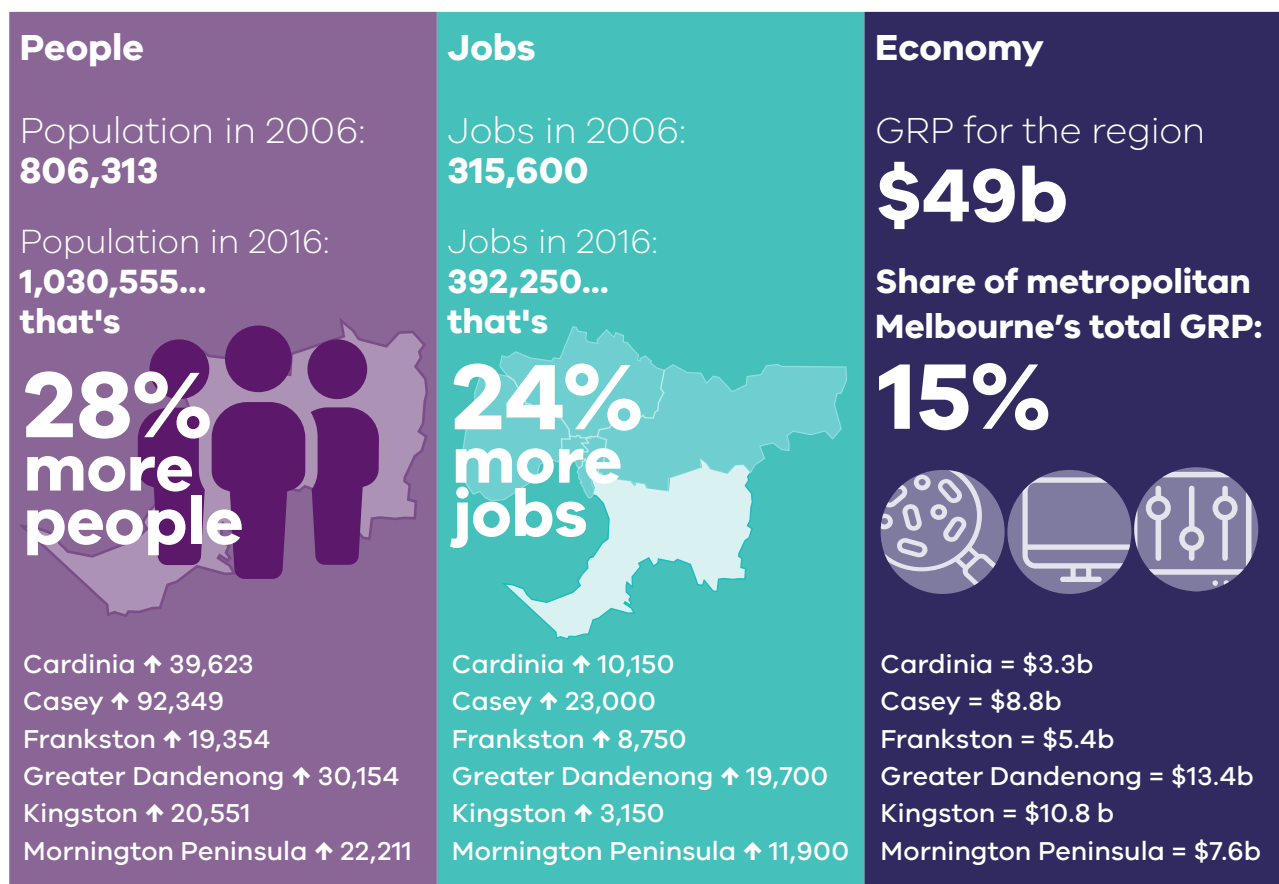
There are good road and rail connections across the region. The key roads of Eastlink, Monash Freeway, Mornington Peninsula Freeway, the Princess Highway and Freeway, Nepean Highway, Western Port Highway and South Gippsland Freeway and Highway provide important connections throughout the region and beyond to other regions, including regional Victoria. Three rail lines provide connections to Frankston and Stony Point, Cranbourne and Pakenham.

Significant competitive advantages exist for the region, having easy access to Moorabbin Airport and the Port of Hastings. A potential intermodal freight terminal at Lyndhurst could support the Southern SSIP and the distribution network across the region and a possible South-East Airport would further enhance the region's accessibility.

The region has three metropolitan activity centres at Dandenong, Frankston and Fountain Gate-Narre Warren providing retail, commercial, civic, institutional and cultural services.

The business service sector is the largest contributor to the economy for the region with a total value-added estimate at around \$16.7 billion. The manufacturing and industrial sector is the next largest contributor with a total value-added estimate at around \$13.2 billion. Combined, these sectors account for just over 60 per cent of the total value-add for the region.

Fast facts



Source: Department of Environment, Land, Water and Planning, unpublished data (2019)

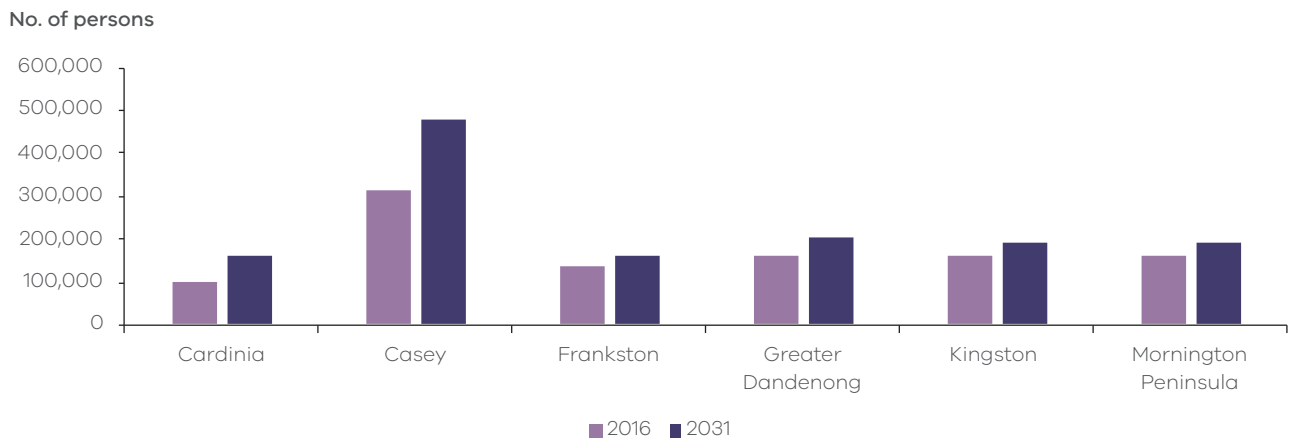
The region was home to over 1 million people in 2016. By 2031 it is projected that the region will grow by around 356,300 people to a total population of around 1.4 million people. The growth area municipalities of Cardinia and Casey will experience the strongest population growth over this period and by 2031, are likely to be home to over 644,700 people.

In 2016 the region supported around 392,250 jobs, accounting for 17 per cent of all employment across the metropolitan area.

By 2031 it is projected that approximately 128,000 additional jobs will be located across the region. Over half of the new jobs in the region are expected to be within the growth area municipalities of Casey and Cardinia. The municipalities of Kingston and Greater Dandenong are also expected to experience substantial growth in jobs.

The industries that are expected to experience the strongest growth are: health care and social assistance; retail trade; manufacturing; construction; education and training.

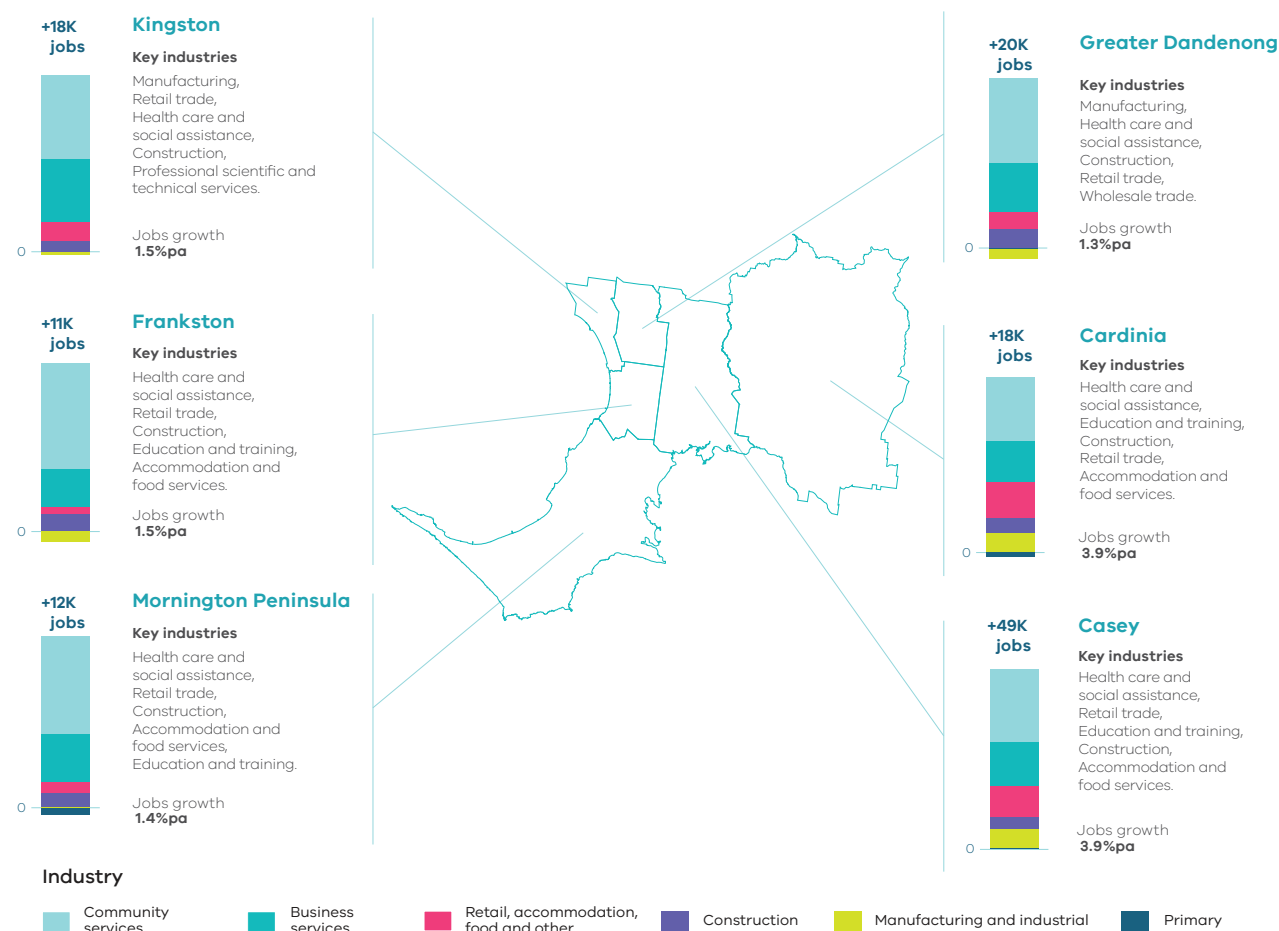
Figure 27: Projected population growth, Southern Region, 2016 to 2031



Source: Department of Environment, Land, Water and Planning, *Victoria in Future 2019* (July 2019).



Figure 28: Projected employment growth, Southern Region, 2016 to 2031



Source: Department of Jobs, Precincts and Regions, internal analysis (2019).

NOTE: Job figures have been rounded to the nearest thousand

Key industrial and commercial areas

The Southern Region has the largest overall supply of zoned and unzoned industrial land supply across metropolitan Melbourne.

The **Southern state-significant industrial precinct** (Southern SSIP) is Melbourne's third largest SSIP, comprising 2,957 hectares of zoned land within the municipalities of Greater Dandenong and Casey. It forms part of the Dandenong National Employment and Innovation Cluster (NEIC) and has easy access to significant transport infrastructure including, rail freight connections and the key roads of Eastlink, Western Port Highway, the South Gippsland Highway and Freeway and Monash Freeway. It includes several distinct precincts as follows:

- The **Hammond Road Precinct** is centrally located within the Southern SSIP and adjacent to Eastlink. It is one of only two areas of Industrial 2 zoned land

in metropolitan Melbourne and the only supply in the region. A key purpose of this land is to allow for a range of heavy manufacturing. Surrounding are several precincts that allow for lighter industrial uses and act as a buffer to more sensitive land uses. These generally comprise business park, service industry or logistics uses.

- The **Frankston-Dandenong Road Precinct** extends east of the Hammond Road Precinct to the Cranbourne railway line. It contains a range of industrial activities including freight and logistics, light manufacturing, service industry, storage facilities and business parks and offices, with a strong presence of large format retailers along Frankston-Dandenong Road.
- The **Lyndhurst Precinct** is the southern-most precinct within the Southern SSIP and is adjacent to green wedge land. It has the largest supply of vacant land, and new development is used for manufacturing and increasingly warehousing and distribution.

- The **South Gippsland Highway Precinct** extends from Greater Dandenong into Hallam in the City of Casey. It has a high level of accessibility and comprises a range of warehousing and distribution uses as well as general manufacturing.

The **Officer-Pakenham state-significant industrial precinct** (Officer-Pakenham SSIP) is the largest area of industrial land in Cardinia. It is located adjacent to the Princes Highway and extends south to the edge of the UGB. Development has started at the eastern most part of the SSIP near Pakenham. Most of the remaining land is currently not zoned for industrial purposes and is required to undergo a PSP process before it can be used. For the Officer South and Cardinia Road Employment PSP areas, proposed place based strategic planning to develop PSPs may require reconfiguring the state-significant industrial precinct. This is to support the establishing community at Cardinia Road to improve connectivity, provide land for schools or community facilities and achieve an improved urban land use interface. Through this process, should reconfiguration of any state-significant industrial land be required, there must be no net loss of overall state-significant industrial land provision, maintaining contiguity, and orderly and efficient layout for industrial purposes.

The **Hastings state-significant industrial precinct** (Hastings SSIP) is located to the north of Long Island Jetty and includes the BlueScope Steel Wharves. The land could support growth of the Port of Hastings should it ever be required to operate as a major container port. While there is a significant amount of vacant land in this location, the zoning provisions require that any industrial use must be dependent on or gain significant economic advantage from proximity to deep water port facilities, be directly associated with such a use or be a marine service industry.

Industrial precincts in **Moorabbin** and **Clayton South** are older, established industrial areas that are essentially fully developed with limited vacant industrial land available. Industrial areas in Moorabbin are identified by the council as supporting a range of manufacturing and services industries, as well as restricted retailing, and with good access to major roads. The Clayton South precinct abuts the South East Green Wedge to the south and the Monash NEIC is located to the north. The green wedge area between these precincts houses a number of golf courses and parks as well as quarrying and land fill sites. The Victorian Planning Authority has been directed to undertake a planning project specific to the Clayton Business Park. Resolution of future land uses for this site will be determined through this project which is currently underway.

Moorabbin Airport is located south of these precincts within the green wedge. While the airport is Commonwealth land and not subject to provisions in Kingston Planning Scheme, it supports a range of aviation, light industry, logistics, office and retail uses. An Airport Environs Overlay limits adjacent land uses and built form to protect aviation uses.

The **Mordialloc-Braeside** industrial precincts adjacent to Moorabbin Airport are well established with some vacant industrial land supply. These precincts have excellent access to Moorabbin Airport and major road networks. The proposed extension to the Mornington Peninsula Freeway is set aside along the eastern boundary of these precincts. The precincts accommodate a diverse range of industrial activities and are located close to markets and a skilled labour force. Despite their age and physical constraints, these areas will continue to play an important role in generating jobs and wealth in the region.

Carrum Downs industrial area is the largest industrial area in Frankston and has direct access to EastLink and the Mornington Peninsula Freeway. There is very limited supply remaining in the precinct and there is no ability to expand due to its location adjacent to the UGB. The Seaford precinct to the south is developed for a range of manufacturing, light industry and large format retailing. These industrial areas play a vital role in generating employment and wealth for the area and broader region.

In the vicinity of **Tyabb, Hastings and Cribb Point** there is a significant supply of Special Use Zone 1 land set aside for port related uses. Like the Hastings SSIP, these areas are not available for general industrial use and development, and are set aside to support port operations, including storage and export of gas and oil.

The **Cranbourne West** industrial precinct is identified in the South East Growth Corridor Plan as a future industrial area. It has access to the PFN along Western Port Highway and is located approximately two to three-kilometres south of the Southern SSIP. Development is occurring in the northern portion of the precinct. A current proposal seeks to rezone a significant amount of the existing industrial land in this precinct to allow for residential development. This would reduce the stock of industrial land available in Casey by over 20 per cent.

The **Casey Fields South** future industrial precinct adjacent to the South Gippsland Highway near Clyde is identified in the South East Growth Corridor Plan as a future industrial node with approximately 288 hectares of land identified for future industrial uses. This precinct enjoys direct access to the South Gippsland Highway and a proposed new railway station and major activity centre immediately to its north at Clyde. It has the potential to accommodate a range of future industrial uses.

The **Thompsons Road Business Corridor** is identified in the South East Growth Corridor Plan as a future high amenity business with residential precinct to support a mix of business services, service industry and associated uses. It will have easy access to the future major activity centre at Clyde North and will be readily accessible to the Principal Public Transport Network by a series of north-south connections. Planning for the area should ensure that a potential freight route along Thompsons Road is protected from sensitive uses.

The **Officer-Pakenham Business Corridor** identified in the South East Growth Corridor Plan is adjacent to the Officer-Pakenham SSIP and has excellent access to the PFN via the Princes Freeway. It has been identified to support a high amenity business park at Minta Farm and a range of advanced manufacturing and commercial enterprises.

The **Dandenong NEIC** incorporates the Southern SSIP as well as the Dandenong Metropolitan Activity Centre and Dandenong Hospital and Chisholm TAFE Precinct. The **Dandenong Metropolitan Activity Centre** is an important regional mixed-use centre with good accessibility to the Melbourne CBD and Southern Region. It comprises approximately 405,000 square metres of commercial floorspace with significant retail, office, restaurant, civic and accommodation uses.

The **Fountain Gate–Narre Warren Metropolitan Activity Centre** has an important regional role with good accessibility to the eastern region of Victoria via rail and road links. It comprises approximately 305,000 square metres of commercial floorspace with large areas of land for expansion, consolidation and mixed-uses. The centre includes the Fountain Gate Shopping Centre as well as a range of other retail, commercial, entertainment, civic and recreational uses.

The **Frankston Metropolitan Activity Centre** is an important regional centre comprising approximately 358,000 square metres of commercial floorspace. It has significant retail, hospitality, office, civic, health and education use as well as community, arts and cultural uses. It is located adjacent to Port Phillip Bay and the Frankston railway line provides access to the Melbourne CBD. It is also well served by road infrastructure with EastLink, the Frankston Freeway, Moorooduc Highway, and Nepean Highway connecting the centre within metropolitan Melbourne and to the Mornington Peninsula.

The **broader activity centre network** across the region comprises 20 existing major activity centres and two identified future major activity centres. Larger free-standing shopping centres such as Casey Central, Cheltenham-Southland, Keysborough-Parkmore, and Karingal offer significant retailing, serving larger sub-regional catchments. In other parts of the region, strip-based centres such as Cranbourne, Mentone, Mornington and Springvale offer a range of retailing, office and community uses.



Supply and demand for industrial and commercial land across the region

Industrial land

The Southern Region contains metropolitan Melbourne's largest holdings of industrial land and has three SSIPs. The region has a total of around 9,610 hectares of zoned land set aside for industrial uses. Of this around 7,270 hectares is currently occupied, and 2,338 hectares is currently zoned for industrial purposes and vacant. An additional 1,184 hectares of land has been identified for future industrial purposes that is yet to be zoned.

Across the region there are approximately 3,520 hectares of vacant zoned and unzoned industrial land available for development, of which approximately 1,260 hectares is located within the Officer-Pakenham SSIP, and approximately 1,080 hectares of zoned vacant land is available within the Southern and Hastings SSIPs. Beyond the SSIPs there is approximately 1,180 hectares of vacant zoned and unzoned land available for industrial purposes.

While there is significant zoned vacant supply available within Mornington Peninsula, the vast majority of this supply (approximately 980 hectares) is zoned Special Use Zone 1. In accordance with the provisions of that zone, the land is unable to be used for general industrial purposes and is intended for selected port and industrial uses, which depend upon or gain significant economic advantages from the natural deep water channels in Western Port. Aside from the Special Use Zone 1 land in Mornington Peninsula, there is just under 48 hectares of vacant land available. Frankston and Kingston have limited amounts of vacant industrial land.

Demand for industrial land in the Southern Region, and particularly in the Southern SSIP, has been strong for the manufacturing sector. This sector accounted for approximately 32 per cent of workplaces in the Southern SSIP in 2016-17 compared to 22 per cent of workplaces across Melbourne as a whole. While these types of operations will continue to drive demand for land within the region, increasingly the freight, logistics and warehouse sectors will grow to support strong projected population growth in the region.

Table 27: Industrial land supply, Southern Region

Council / SSIP	Zoned occupied (ha)	Zoned vacant (ha)	Future supply (ha)	Total available supply (ha)
Cardinia	380.9	375.2	938.3	1,313.5
Casey	670.7	367.5	245.2	612.7
Frankston	368.4	21.6	0.0	21.6
Greater Dandenong	2,448.2	469.6	0.0	469.6
Kingston	1,217.3	75.9	0.0	75.9
Mornington Peninsula	2,184.8	1,027.7	0.0	1,027.7
Southern Region	7,270.3	2,337.5	1,183.5	3,521.0
<i>Southern SSIP</i>	<i>2,454.4</i>	<i>502.6</i>	<i>0.0</i>	<i>502.6</i>
<i>Officer-Pakenham SSIP</i>	<i>317.7</i>	<i>323.8</i>	<i>938.3</i>	<i>1,262.1</i>
<i>Hastings SSIP</i>	<i>814.1</i>	<i>578.1</i>	<i>0.0</i>	<i>578.1</i>

Source: Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018 and internal analysis

Table 28: Industrial land consumption, Southern Region, 2015-16 to 2017-18

Council / SSIP	2015-16 (ha)	2016-17 (ha)	2017-18 (ha)
Cardinia	15.1	12.8	14.8
Casey	4.1	7.8	9.4
Frankston	10.6	8.7	8.3
Greater Dandenong	53.7	74.2	57.5
Kingston	14.6	2.8	13.4
Mornington Peninsula	3.9	3.0	6.8
Southern Region	102.0	109.3	110.2
<i>Southern SSIP</i>	<i>55.9</i>	<i>71.4</i>	<i>63.3</i>
<i>Officer-Pakenham SSIP</i>	<i>15.5</i>	<i>12.4</i>	<i>13.9</i>
<i>Hastings SSIP</i>	<i>0.0</i>	<i>0.0</i>	<i>-3.6</i>

Source: Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018

Over the last three years, the average rate of consumption of industrial land in the region has been 107 hectares per annum. Consumption rates have been higher than this over the last two years and during the period 2017-18 was at 110 hectares. Almost 60 per cent of this consumption occurred within the Southern SSIP (63 hectares).

If consumption rates remain at last year's level, it is anticipated that the region as a whole has approximately 21 years supply of zoned industrial land. If land in Mornington Peninsula zoned Special Use Zone 1 is removed from supply, there would be just over 12 years supply of zoned industrial land.

Unzoned areas identified for future industrial purposes could provide another 7 years of supply, but this is dependent on future planning for these areas as part of the PSP process. Of the total future unzoned supply, around 80 per cent is located within the Officer-Pakenham SSIP.

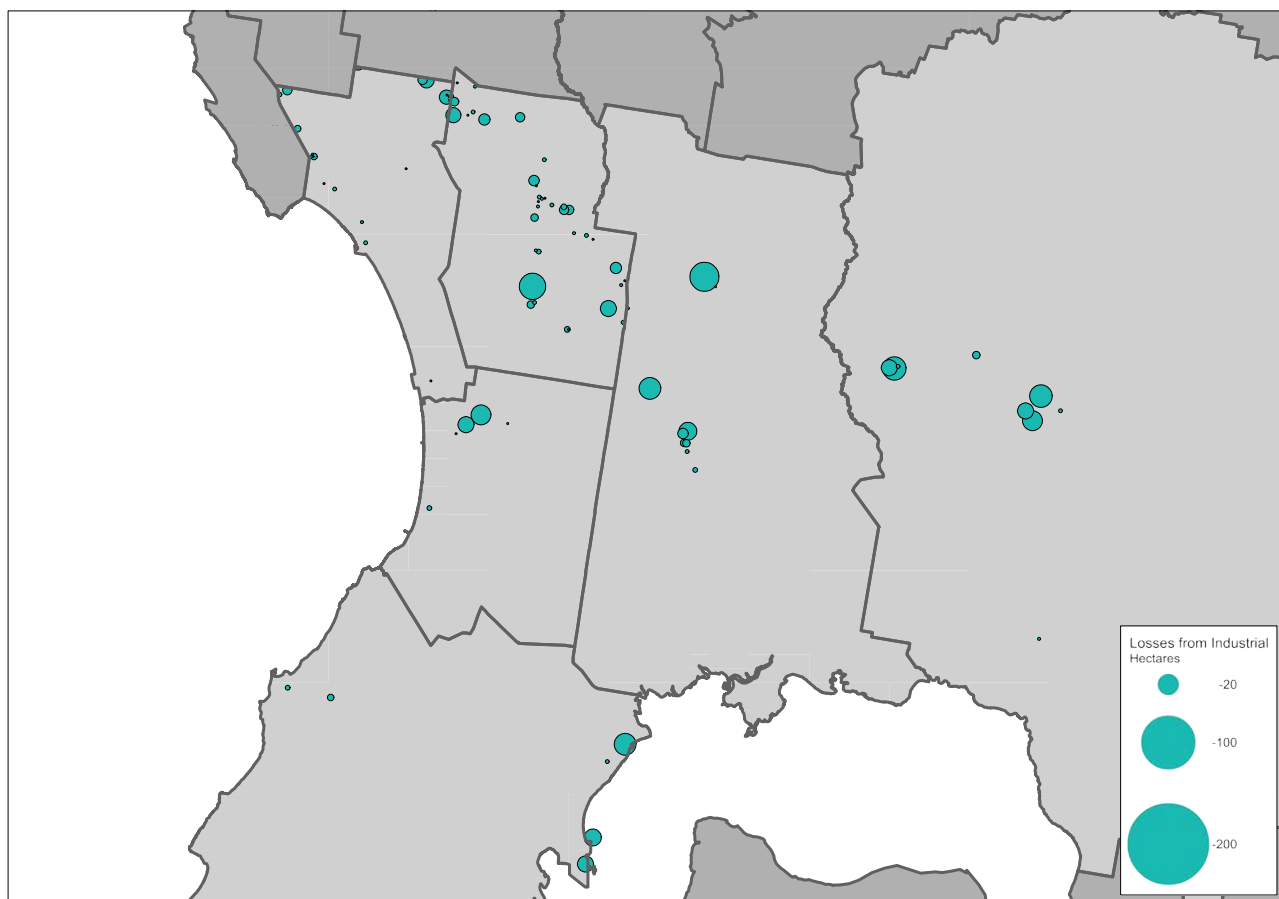
It is estimated that land supply in the Southern SSIP will become significantly constrained in the early 2020s and be exhausted by the mid-2020s. When this occurs, demand transfer is likely to occur at the closest industrial areas.

The exhaustion of industrial land within the Southern SSIP within the next decade will likely direct future demand for large-format, regionally-significant industrial uses into neighbouring areas, such as Braeside and Cranbourne West. In these locations there are relatively large contiguous tracts of vacant industrial land with easy access to the Principal Freight Network for large heavy vehicles and access to existing supply chains and distribution networks. Development will progressively move to the Officer-Pakenham SSIP as land in these locations is exhausted and new major road connections, such as the North East Link, are delivered.

Between 2000-01 and 2017-18 a total of 328 hectares of industrial land was rezoned across the region for other non-industrial uses.

The largest single loss of industrial land over this period was within Casey, where just under 28 hectares of industrial land was rezoned to allow for residential development. Of the remaining industrial land rezonings that occurred over this period, almost 60 per cent involved sites of less than 2 hectares in size.

Of all the industrial land rezoned over the period, around 37 per cent was rezoned to allow for mixed-use or residential development.

Figure 29: Change of zoned industrial land, Southern Region, 2000-01 to 2017-18

Source: Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018

Commercial land

Currently across the region there is a total of 855 hectares of land that has been identified as being zoned for commercial purposes. It is estimated that there is almost 3.2 million square metres of floorspace used for or available for commercial purposes on this land. Approximately 43 per cent of all the existing floorspace supply is located within the municipalities of Casey and Greater Dandenong.

Across the region a total of 216 commercial areas or centres have been identified. Of these, 171 have less than 10,000 square metres of floorspace.

Seven centres have more than 100,000 square metres of floorspace. This includes large free-standing shopping-centre based locations such as Fountain Gate-Narre Warren and Cheltenham-Southland, and traditional strip-based centres such as Dandenong and Frankston. Combined these centres account for 46 per cent of the identified commercial floorspace across the region.

Kingston has the largest number of centres (49) and Cardinia the fewest (16). Only 7 per cent of all the existing floorspace supply is located within the municipality of Cardinia.

Table 29: Existing commercial floorspace by centre size, Southern Region

Council	Less than 2,000 (m2)		2,000 to 9,999 (m2)		10,000 to 49,999 (m2)		50,000 to 99,999 (m2)		Greater than 100,000 (m2)	
	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)
Cardinia	7	1,100	4	21,700	4	72,350	0	0	1	111,550
Casey	10	11,900	15	87,050	7	198,700	0	0	2	420,650
Frankston	17	18,050	14	56,200	2	22,500	2	113,800	1	274,700
Greater Dandenong	25	26,200	6	24,100	3	82,950	0	0	2	520,650
Kingston	22	24,300	16	72,250	8	178,600	2	176,150	1	144,450
Mornington Peninsula	22	20,150	13	59,800	7	183,500	3	243,400	0	0
Total	103	101,700	68	321,100	31	738,600	7	533,350	7	1,472,000

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

In addition to the existing zoned commercial land, approximately 555 hectares of land has been identified through other strategic plans (such as Growth Corridor Plans and PSPs) for future commercial purposes. These areas are confined to Cardinia and Casey.

A significant proportion of this land has been identified in areas designated as future business with residential precincts in the municipalities of Cardinia (160 hectares) and Casey (85 hectares). These areas are intended to be suitable for a range of other employment uses, including some industrial uses, as well as some residential uses. This land accounts for just over 44 per cent of all future commercial land identified for the region and nearly 20 per cent of all future supply for the entire metropolitan area.

Table 30: Future commercial land supply, Southern Region

Council	Future commercial land (ha)	Share of metropolitan Melbourne
Cardinia	300	23%
Casey	255	19%
Total	555	42%

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Based on projected growth, by 2031 it is anticipated that an additional 1.4 million square metres of commercial floorspace will be required across the Southern Region. Approximately 800,000 square metres will be required for office uses and 571,000 square metres will be required for retail. Over half of this additional floorspace is anticipated to be provided in the growth area municipalities of Cardinia and Casey. These councils have land identified for future commercial purposes. Around one-third of the future commercial floorspace projected is expected to be located in Greater Dandenong and Kingston.

The municipalities of Frankston, Greater Dandenong, Kingston and Mornington Peninsula will need to identify options to accommodate projected demand for commercial floorspace within existing commercial areas, as well as considering areas that could accommodate future floorspace requirements through rezonings.

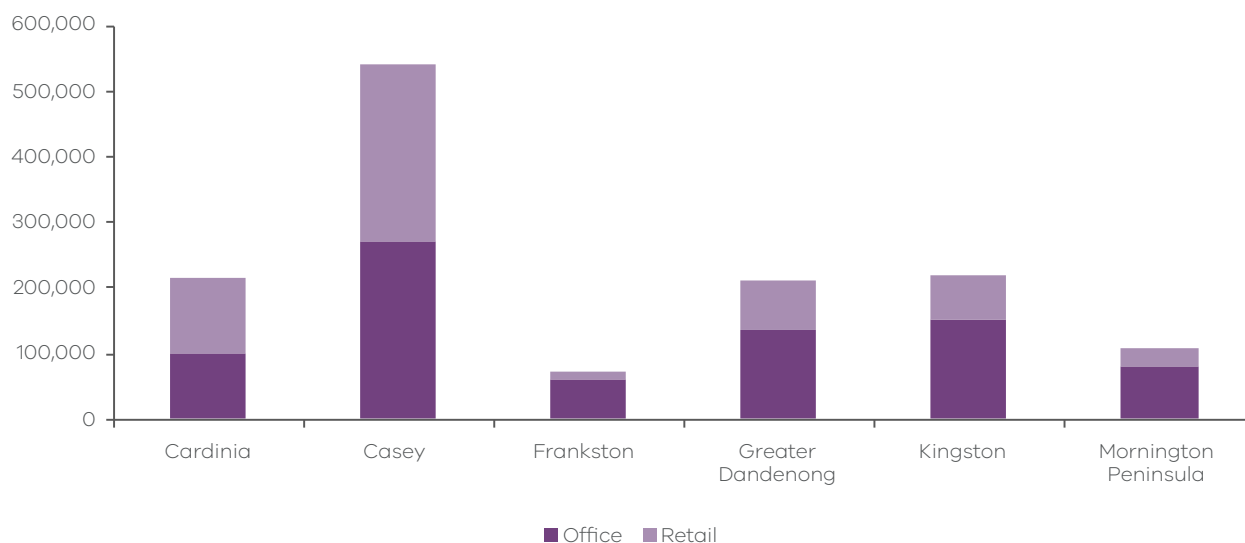
Table 31: Commercial floorspace supply and estimate, Southern Region

Council	Existing commercial floorspace 2018 (m2)	Estimated additional commercial floorspace 2016 to 2031 (m2)
Cardinia	206,700	217,000
Casey	718,300	541,000
Frankston	485,250	75,000
Greater Dandenong	653,900	213,000
Kingston	595,750	218,000
Mornington Peninsula	506,850	107,000
Total	3,155,750	1,371,000

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Figure 30: Estimated additional commercial floorspace by type and municipality, Southern Region, 2016 to 2031

Square metres



Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Planning framework for industrial and commercial land across the region

There is a large amount of industrial and commercial land providing state, regionally and locally-significant employment and economic functions in the Southern Region. Across the region there are good arterial road, freeway and fixed rail connections to major transport gateways such as the Port of Hastings, Moorabbin Airport, the possible South-East Airport and beyond to the Gippsland region.

The region's significant industrial land holding is a key advantage. However, many established industrial areas such as those in Kingston around Moorabbin Airport, in Frankston around Carrum Downs and in Greater Dandenong in the SouthernSSIP, will soon offer little or no opportunity for further expansion. These areas need to be protected and retained and opportunities to consolidate and recycle land should be considered in these locations.

Crucial in supporting these areas will be new industrial areas that have been set aside. These can provide large areas of unfragmented land providing the required land area for freight, logistics, warehousing, transport, manufacturing and other larger format industrial uses once supply runs out in other locations. While significant land is available in the Hastings area, it is limited to port related uses and cannot be developed for general industrial purposes.

While the region has significant land set aside for future industrial purposes, it is increasingly under pressure for other non-industrial purposes. Reduction in land available for future industrial purposes will further reduce employment opportunities in the region, but particularly in growth areas.

Planning for industrial land across the region needs to be carefully managed to ensure it continues to support the regional economy. Areas significant to the region need to be protected and retained to support the region's economy and employment opportunities into the future.

Considerable provision has been identified for future commercial development at future activity centres in growth areas as well as at two key growth area business with residential precincts in Cardinia and Casey. Future activity centres will play an important role in providing for future retail and office floorspace and supporting the delivery of 20-minute neighbourhoods. The growth areas business with residential precincts also offer an opportunity to provide for significant office development and higher-order, knowledge-based jobs in the region. Combined these areas provide an opportunity to accommodate demand for future commercial floorspace and deliver more jobs in the region.

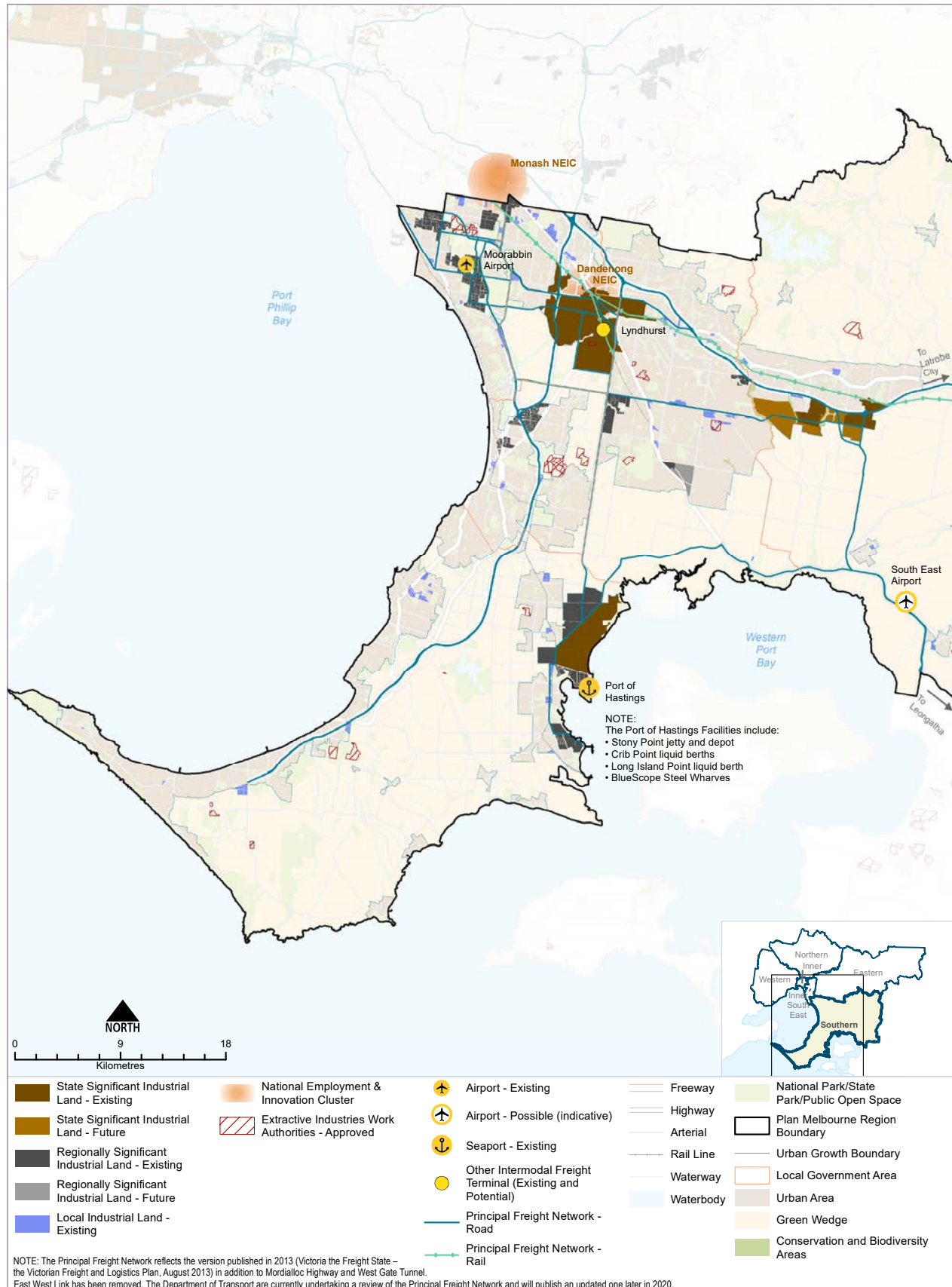
Careful consideration will be required through the PSP processes to ensure adequate provision is made to accommodate medium and longer term industrial and commercial development.

Planning for the region should:

- Retain industrial land at Clayton South, Moorabbin, Moorabbin Airport, Braeside, Carrum Downs, Seaford, Cranbourne West and Casey Fields South predominately for industrial uses, limit encroachment by other uses that would fragment this land and protect them from encroachment of sensitive uses that may compromise development and efficient operation of businesses in these locations.
- Investigate and identify areas within regionally-significant industrial precincts that could support other employment uses, including offices, creative industries and start-ups, that support or are well connected to adjacent employment uses or transport connections.
- In consultation with the Port of Hastings Development Authority and Mornington Peninsula Shire Council, investigate the potential for any Special Use Zone 1 land outside of the Hastings SSIP that could allow for a broader range of industrial uses.
- Support the development of growth area business with residential precincts for predominately commercial development providing for higher-order, knowledge-based jobs and businesses. These precincts should have a primary role for economic and employment purposes with no less than 50 per cent of the land in each precinct being allocated for these purposes.
- Consider the future demand for and need for commercial and employment land across the growth areas and ensure that PSPs make adequate and sufficient provision to accommodate longer-term commercial and employment needs.

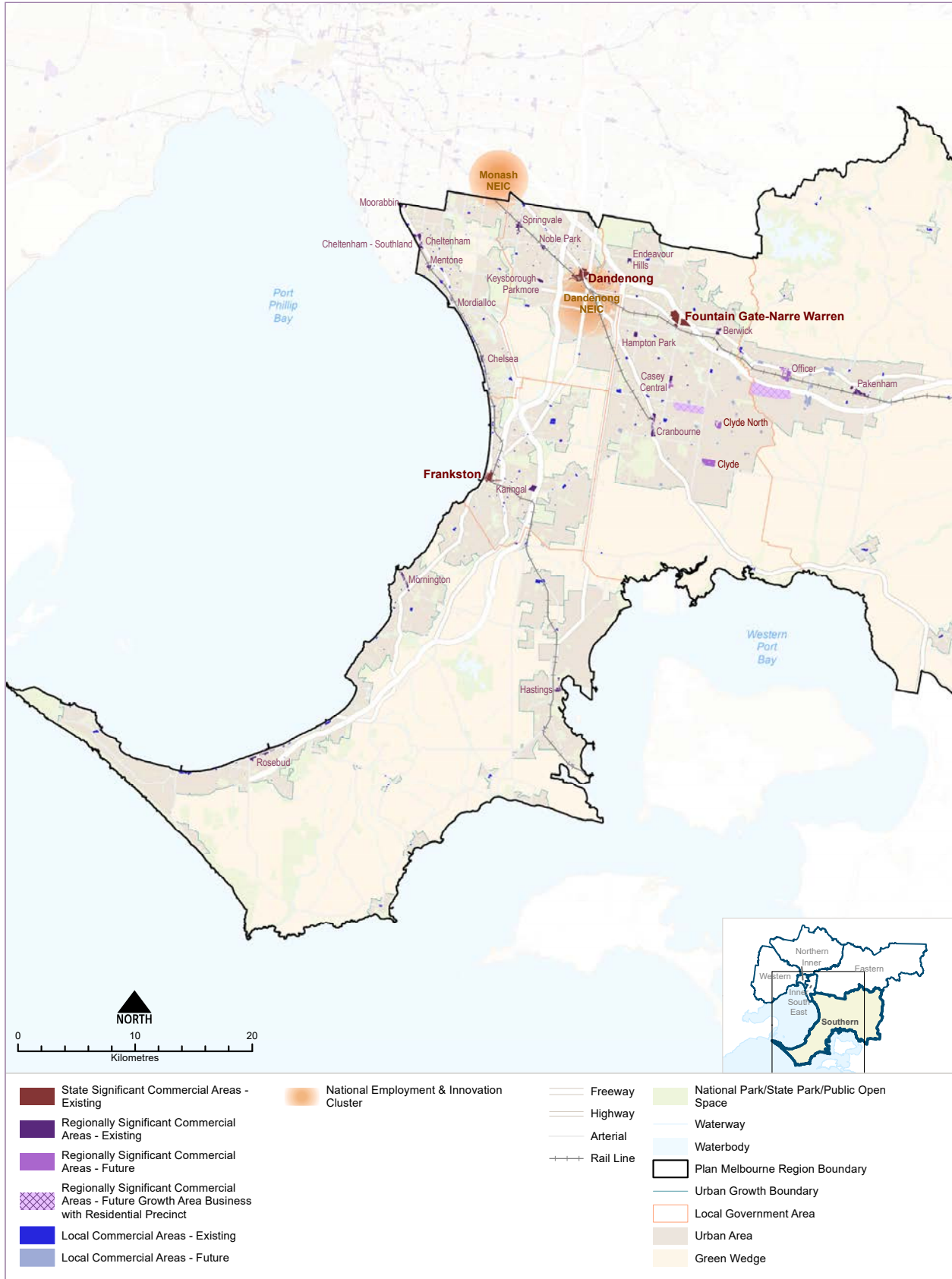


Map 12: Southern Region - industrial land



Source: Department of Environment, Land, Water and Planning

Map 13: Southern Region - commercial land



Source: Department of Environment, Land, Water and Planning

Inner South East Region

Regional snapshot

The Inner South East Region comprises the municipalities of Bayside, Boroondara, Glen Eira and Stonnington. The region is well served by public transport with an extensive tram network and numerous rail lines. The key roads of Nepean Highway, Dandenong Road-Princes Highway, Monash Freeway and the Eastern Freeway provide important connections throughout the region and beyond.

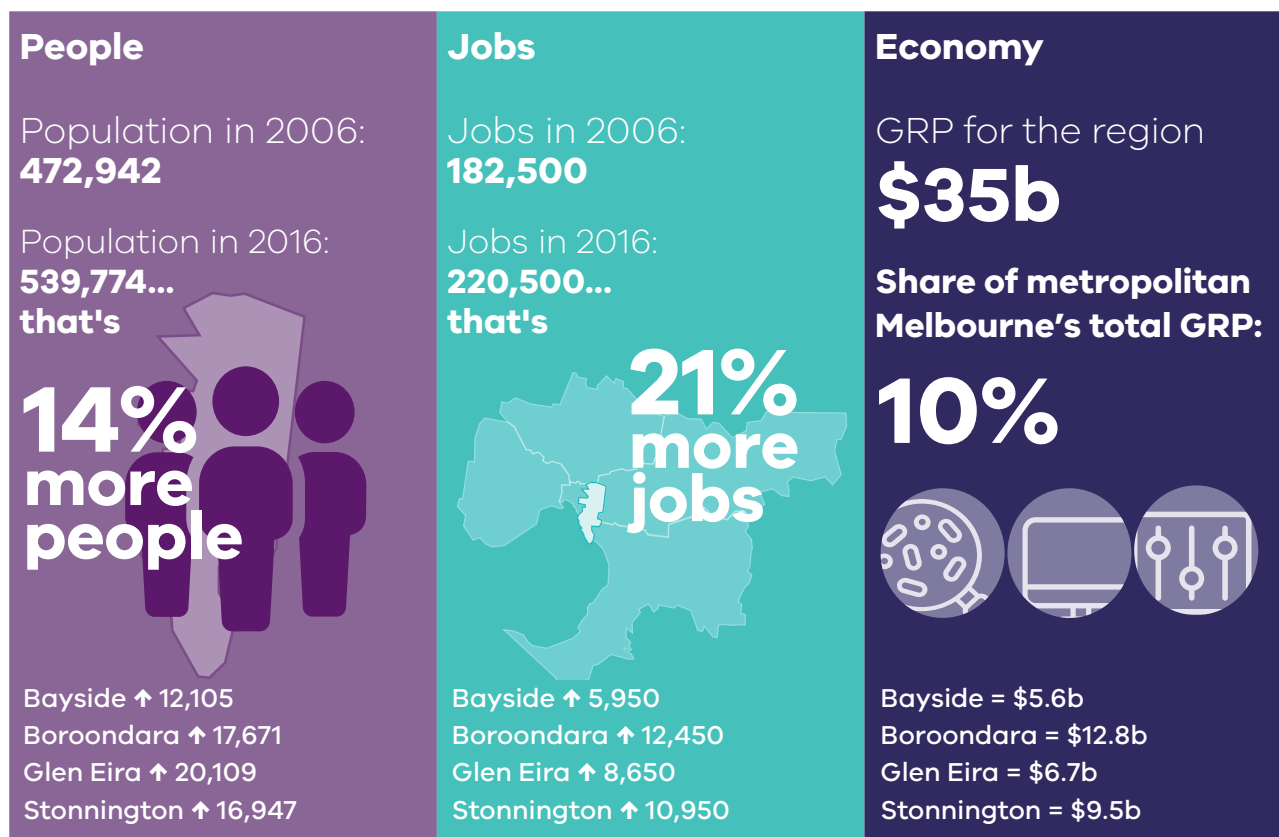
The region is well established with easy access to the Central City and extends from Port Phillip Bay in the south to the Yarra River and Eastern Freeway in the north.

In 2016 the region was home to around 539,800 people. By 2031 it is projected that the region will grow by 99,500 people to a total population of around 639,200 people.

The region has very little traditional industry remaining and is dominated by a largely service-orientated economy. There is a very large retail offer available in the region and a number of major education facilities.

The business service sector is the largest contributor to the economy for the region with a total value-added estimate at around \$13.7 billion. The manufacturing and industrial sector's value-added contribution to the region's economy is estimated at around \$5.7 billion. Combined, these sectors account for just under 60 per cent of the total value-add for the region.

Fast facts



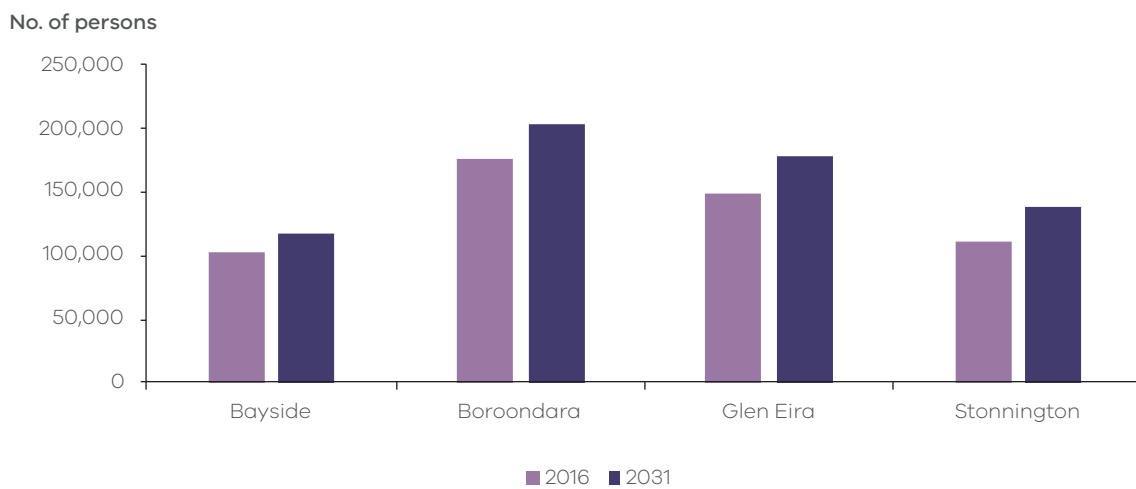
Source: Department of Environment, Land, Water and Planning, unpublished data (2019)

In 2016 the region supported 220,500 jobs, accounting for around 10 per cent of all employment across the metropolitan area.

By 2031 it is projected that approximately 73,000 additional jobs will be located across the region. Over two-thirds of the new jobs in the region are expected to be needed in the municipalities of Boroondara and Stonnington.

The industries that are expected to experience the strongest growth are: health care and social assistance; professional, scientific and technical services; education and training; retail trade; accommodation and food services.

Figure 31: Projected population growth, Inner South East Region, 2016 to 2031



Source: Department of Environment, Land, Water and Planning, *Victoria in Future 2019* (July 2019).



Figure 32: Projected employment growth, Inner South East Region, 2016 to 2031



Industry



Source: Department of Jobs, Precincts and Regions, internal analysis (2019)
NOTE: Job figures have been rounded to the nearest thousand.



Key industrial and commercial areas

The **Bayside Business District** in Cheltenham surrounds the Cheltenham Memorial Park Cemetery and is the largest area of industrial land within the region. Having been identified by Bayside Council as an area to transition from its traditional manufacturing base to a more business services focus, it provides for a range of manufacturing and industrial uses as well as a growing commercial role. Other industrial land within the region is located either along major roads or in smaller isolated pockets.

In **East Bentleigh** a large area of industrial land has been identified and is being planned for as a new mixed-use precinct, with a focus on innovative employment and education opportunities. It is currently proposed to include new commercial and office development along East Boundary Road, a new retail precinct and, over time, transition the existing industrial and service businesses along North Road to commercial and other employment uses.

The activity centres network in the region is quite dense and extensive, anchored by 16 major activity centres. While most are retail based, a number are supported by other commercial uses as well as education and health services.

Chadstone Major Activity Centre is metropolitan Melbourne's largest free-standing shopping centre. It has a significant retail and entertainment offer and is increasingly expanding its uses to include office uses and a hotel development.

The **Prahran-South Yarra Major Activity Centre** centred on Chapel Street also offers a range of retail activity, office accommodation and entertainment facilities such as cinemas and nightclubs.

The major activity centres of **Camberwell Junction** and **Hawthorn-Glenferrie Road** offer a range of retail and commercial uses while the adjacent areas along Burwood and Camberwell Roads are significant corridors for office and commercial development.

Other strip-based major activity centres such as Bentleigh, Brighton-Bay Street, Brighton-Church Street, Carnegie, Caulfield, Elsternwick, Glenhuntly, Hampton, Kew Junction, Malvern-Armadale, Sandringham and Toorak Village offer a range of retail, office, food and drink and community uses. These centres are supported by a range of smaller neighbourhood activity centres serving local communities and smaller catchments.

Supply and demand for industrial and commercial land across the region

Industrial land

The Inner South East Region contains metropolitan Melbourne's smallest holdings of industrial land. The region has a total of only 143 hectares of land set aside for industrial uses. Of this land, 141 hectares are occupied and just over 2 hectares are currently vacant and available for industrial purposes. No land has been identified for future industrial purposes.

The only supply of vacant zoned industrial land remaining in the region is in Bayside (1.9 hectares) and Boroondara (0.4 hectares). Stonnington has the smallest supply of zoned industrial land in the region, none of which is vacant. Almost 85 per cent of all the land identified for industrial purposes in the region is zoned Commercial 2 Zone. Given the amount of vacant industrial land, any new industrial development in the region would require either the reuse of an existing building or demolition and redevelopment of an existing industrial site.

Over the period 2015-16 to 2017-18 consumption of industrial zoned land in the region has been small with just over half a hectare consumed in 2017-18. Consumption figures provided here and in the UDP are for net activity. A negative figure indicates that building demolition activity was greater than the level of building construction activity (consumption). In locations such as the Inner South East Region, most of the land is occupied by an existing building and use. In many instances, in order to develop land for new industrial use, the existing building needs to be demolished. Therefore, a negative consumption figure will be recorded until the site is redeveloped for further industrial development activity.

Between 2000-01 and 2017-18 a total of 29 hectares of industrial land was rezoned across the region for non-industrial uses. The largest loss of industrial land over this period was within Glen Eira where 14 sites were rezoned, resulting in an overall loss of 14 hectares of industrial land. Bayside also lost 14 hectares of industrial land over the period through rezonings at 7 sites.

Of the rezonings that occurred over this period, almost 80 per cent involved sites of less than 2 hectares in size. In Glen Eira 55 per cent of land rezoned allowed for mixed-use or residential development and in Bayside more than 90 per cent of land was rezoned for mixed-use or residential development.

Table 32: Industrial land supply, Inner South East Region

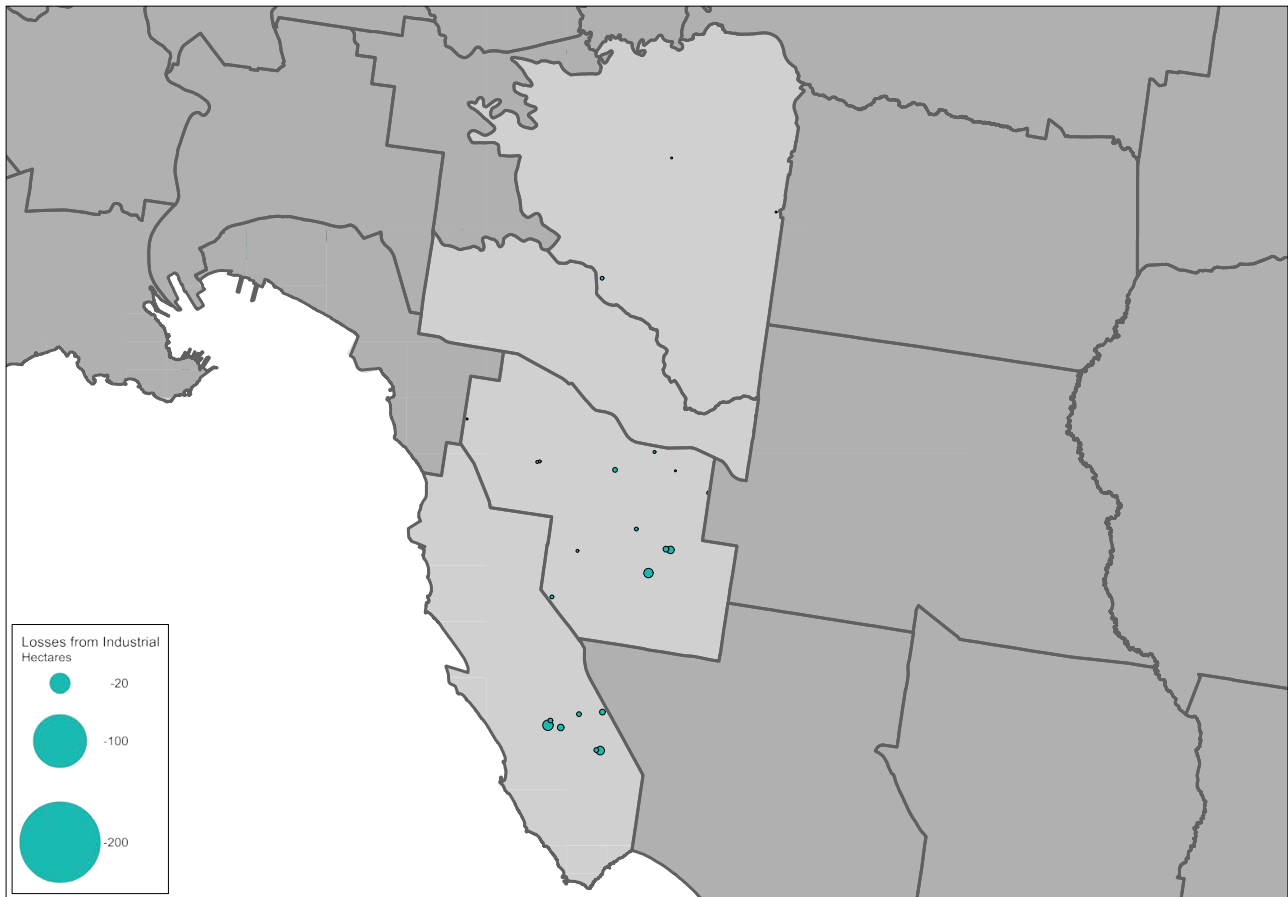
Council	Zoned occupied (ha)	Zoned vacant (ha)	Future supply (ha)	Total available supply (ha)
Bayside	73.7	1.9	0.0	1.9
Boroondara	20.1	0.4	0.0	0.4
Glen Eira	43.2	0.0	0.0	0.0
Stonnington	3.7	0.0	0.0	0.0
Inner South East Region	140.7	2.3	0.0	2.3

Source: Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018

Table 33: Industrial land consumption, Inner South East Region, 2015-16 to 2017-18

Council	2015-16 (ha)	2016-17 (ha)	2017-18 (ha)
Bayside	-0.2	0.0	0.2
Boroondara	-0.1	-0.4	0.3
Glen Eira	-0.6	0.8	0.1
Stonnington	0.0	0.0	0.0
Inner South East Region	-0.9	0.4	0.6

Source: Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018

Figure 33: Change of zoned industrial land, Inner South East Region, 2000-01 to 2017-18

Source: Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018

Commercial land

Currently across the region there is a total of 515 hectares of land that has been identified as being zoned for commercial purposes. It is estimated that there is almost 3 million square metres of floorspace used for or available for commercial purposes on this land. Over 70 per cent of all the existing floorspace supply is located within the municipalities of Boroondara and Stonnington.

Across the region a total of 152 commercial areas or centres have been identified. Of these, 101 have less than 10,000 square metres of floorspace. While accounting for around two-thirds of all centres across the region, these smaller centres only make up around 12 per cent of the region's total floorspace.

Five centres have more than 100,000 square metres of floorspace. These include strip-based centres like Camberwell, Hawthorn, Malvern-Armadale and Chapel Street as well as Chadstone, which is the largest free-standing shopping centre in metropolitan Melbourne. Combined these centres account for 40 per cent of the region's existing commercial floorspace.

Boroondara has the largest number of centres (51). Although Stonnington has the fewest number of centres (25), it has the largest commercial floorspace supply and accounts for 38 per cent of the region's overall supply.

Based on projected growth, by 2031 it is anticipated that around 784,000 square metres of additional commercial floorspace will be required across the Inner South East Region. Approximately 571,000 square metres will be required for office uses and 212,000 square metres will be required for retail. Around 70 per cent of this additional floorspace is anticipated to be located in Boroondara and Stonnington.

As there are no future commercial areas identified in the region, councils will need to look at ways to accommodate project demand for commercial floorspace within existing commercial areas, as well as considering areas that could accommodate future floorspace requirements through rezonings.

Table 34: Existing commercial floorspace by centre size, Inner South East Region

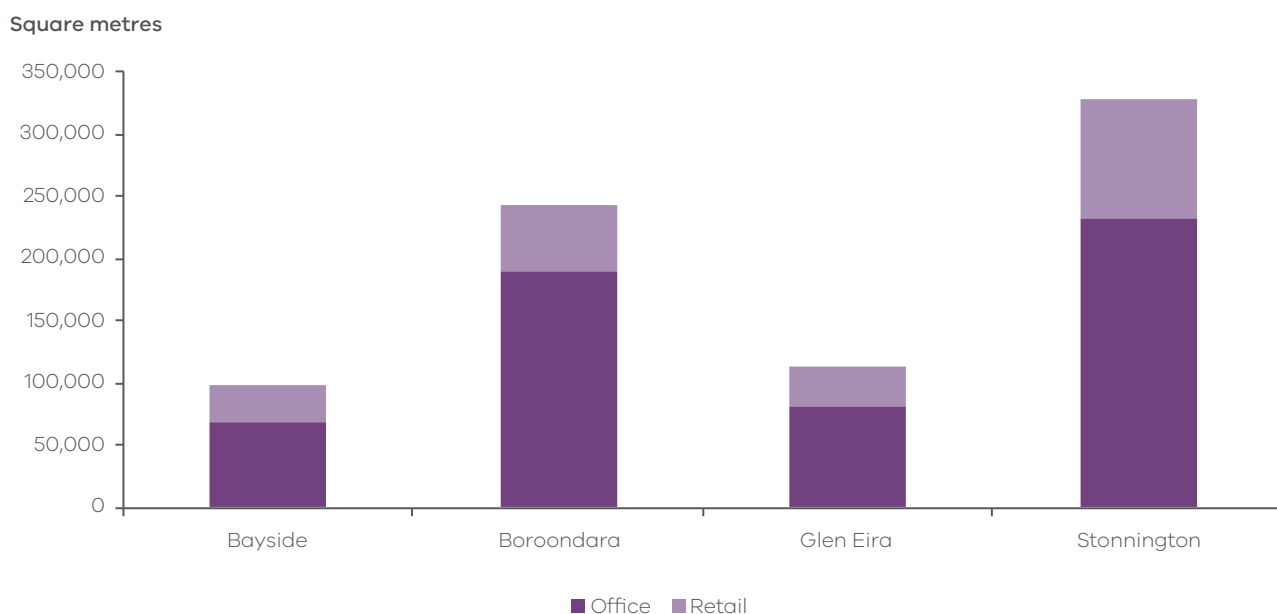
Council	Less than 2,000 (m2)		2,000 to 9,999 (m2)		10,000 to 49,999 (m2)		50,000 to 99,999 (m2)		Greater than 100,000 (m2)	
	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)	No. of centres	Floor-space (m2)
Bayside	6	5,950	15	65,850	8	190,100	1	60,200	0	0
Boroondara	10	9,100	22	122,200	13	272,350	4	285,700	2	303,750
Glen Eira	14	17,950	20	74,500	9	249,300	3	187,700	0	0
Stonnington	3	2,000	11	56,250	8	183,250	0	0	3	905,050
Total	33	35,000	68	318,800	38	895,000	8	533,600	5	1,208,800

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Table 35: Commercial floorspace supply and estimate, Inner South East Region, 2016 to 2031

Council	Existing commercial floorspace 2018 (m2)	Estimated additional commercial floorspace 2016 to 2031 (m2)
Bayside	322,100	99,000
Boroondara	993,100	243,000
Glen Eira	529,450	113,000
Stonnington	1,146,550	328,000
Total	2,991,200	784,000

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Figure 34: Estimated additional commercial floorspace by type and municipality, Inner South East Region, 2016 to 2031

Source: Department of Environment, Land, Water and Planning, unpublished data (2020)

Planning framework for industrial and commercial land across the region

While the Inner South East Region offers significant commercial floorspace across its network of activity centres, it contains the smallest supply of industrial land of all Melbourne's regions with the majority of this located within the municipality of Bayside.

Strip-based major activity centres such as Prahran-South Yarra, Glenferrie Road Hawthorn and Camberwell Junction offer significant retailing and office development. In addition to this, Chadstone Major Activity Centre continues to expand its commercial offerings beyond retail.

Industrial land supply across the region has been gradually decreasing. The largest remaining industrial area within the region is the Bayside Business District in Cheltenham. This area has been gradually transforming from a more traditional industrial area towards a more general business area allowing for a mix of activities including existing and new industrial uses as well as office-based facilities.

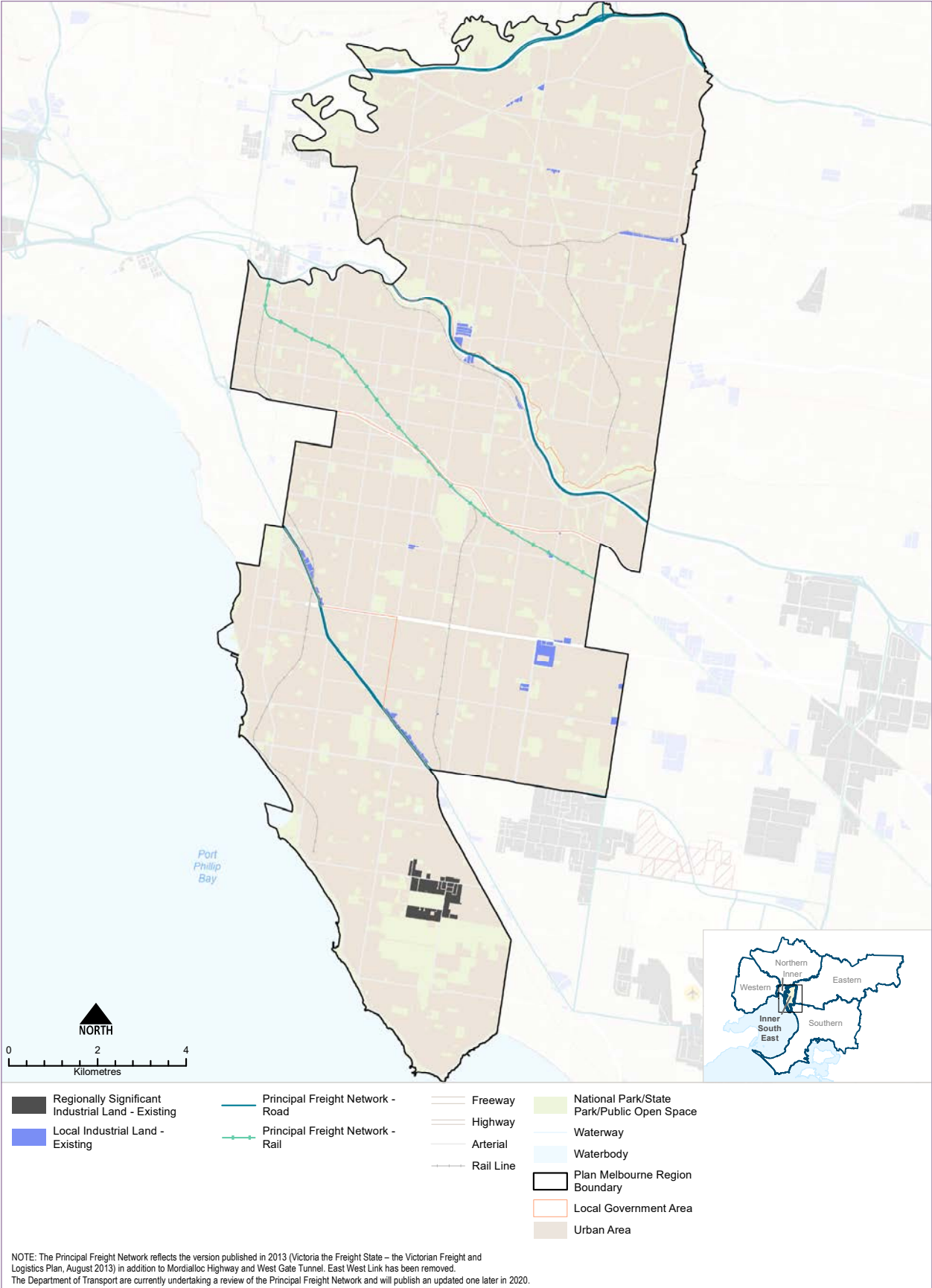
Across the region there is ongoing pressure for residential development and a key challenge will be ensuring that rezoning proposals do not further diminish opportunity for industry and businesses to serve the region.

Planning for the region should:

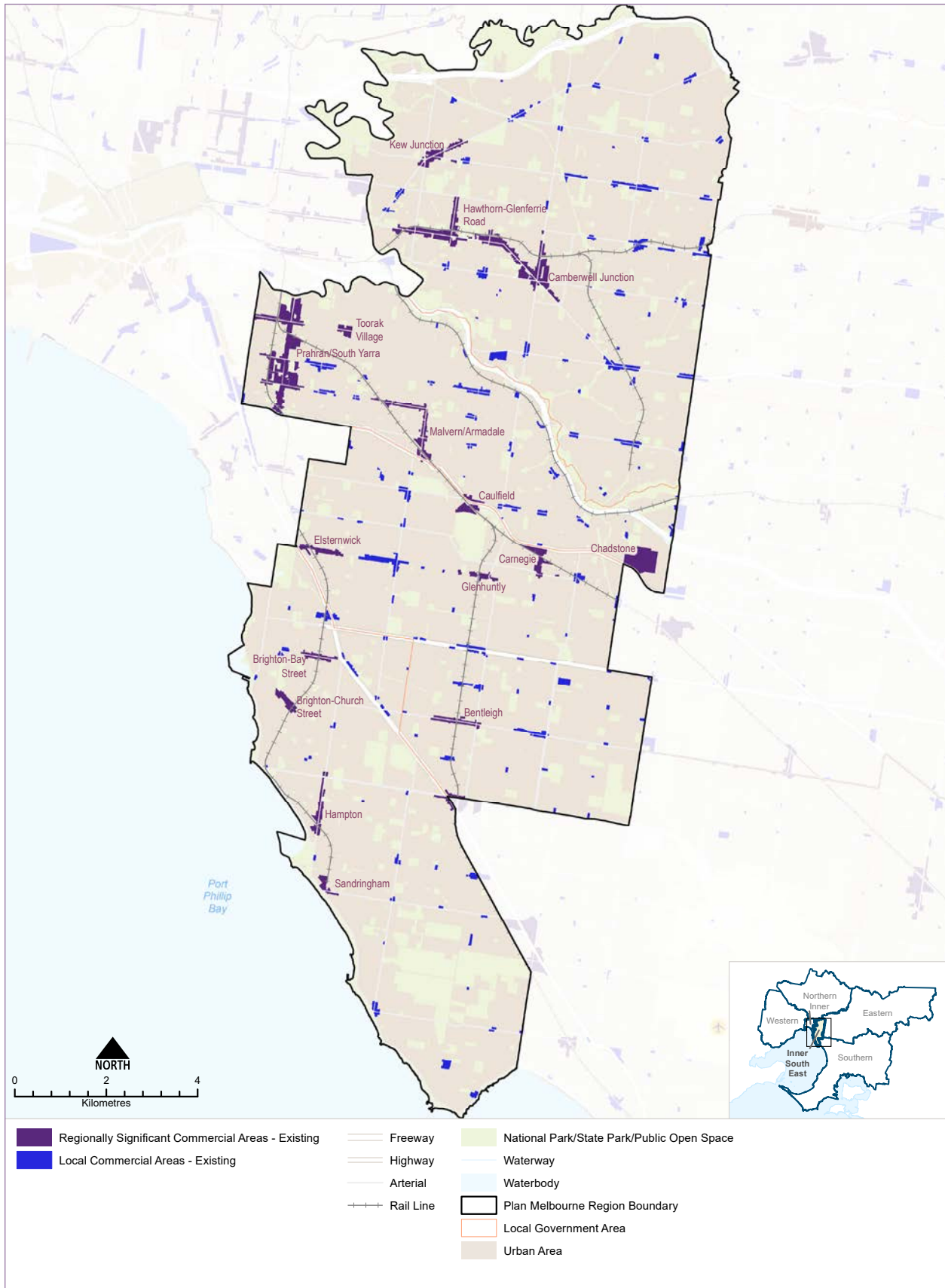
- Ensure the Bayside Business District is protected from encroachment of incompatible uses that would fragment the land and could compromise its development and efficient operation as a business location.
- Review local industrial areas and identify areas important for retention as employment land to support local communities.
- Identify activity centres where commercial development should be prioritised to accommodate future needs.
- Identify locations where there is opportunity to support increased commercial development, and particularly office-based development with an employment focus.



Map 14: Inner South East Region - industrial land



Map 15: Inner South East Region - commercial land



Source: Department of Environment, Land, Water and Planning

APPENDICES

Appendix 1 – Methodology

Industrial land supply and take-up across metropolitan Melbourne has used the Urban Development Program (UDP) as a basis. In some instances, additional areas have been identified that the UDP does not report on.

For further information on the methodology of the UDP, please visit: www.planning.vic.gov.au/land-use-and-population-research/urban-development-program

The identification of existing commercial land in metropolitan Melbourne planning schemes includes land in the following zones:

- Commercial 1 and Business 1, 2 and 5 Zones.
- Activity Centre Zone – excluding precincts identified for industrial, residential or other non-commercial purposes.
- Capital City Zone – Schedules 1, 2, 3, 4, 5 and 6 in City of Melbourne and Schedule 1 in City of Port Phillip.
- Docklands Zone – Schedules 2, 3, 5 and 6 in City of Melbourne.

Other Special Purpose Zones (such as the Comprehensive Development Zone or Special Use Zone) where the predominant use has been identified as a commercial use.

Commercial centres comprise clusters of zoned commercial land.

Commercial centre floorspace is calculated from the following sources:

- City of Melbourne Census of Land Use and Employment data provides comprehensive information about land use, employment and economic activity in the City of Melbourne and has informed the calculation of commercial centre floorspace within the City of Melbourne.
- Property Council of Australia (PCA) Shopping Centre Directory has been used to calculate net shopping centre floorspace for enclosed shopping centres. The directory includes details on centre ownership, size, management, tenancy mix and site area.

- Building footprint and height data was used to estimate commercial floor space for each building. This was calculated for commercial land located outside the City of Melbourne and commercial land not included in the PCA Shopping Centre Directory. Each storey was assumed to be 4 metres high and the estimated floor area is the product of the footprint area multiplied by the number of storeys. The estimated floor area was further refined by using one of four mutually exclusive filters.

1. Where the location of a commercial building is the same as the Housing Development Data (HDD), it is assumed that only the ground floor is available for commercial uses with the remaining storeys used for apartments.
2. If the building is less than 4 storeys high, it was assumed that only the ground floor is available for commercial uses with the remainder used for apartments.
3. If the building is taller than 4 storeys, the total floor area of the building was assumed to be used for commercial uses.
4. For the land in the City of Port Philip located on St Kilda Road, a visual inspection (using Google Street View) was used. Where a building appeared to be an apartment block the ground floor was assumed to be available for commercial uses. Where the building appeared to be a commercial use then the total floor area of the building was assumed to be used for commercial purposes.

Future commercial land includes proposed future Commercial 1 Zone land identified in PSPs and areas identified for future commercial purposes in Growth Corridor Plans.

Future Commercial 2 Zone land identified in PSPs, that is small in size and located adjacent to future Commercial 1 Zone land identified in PSPs is also identified as future commercial land.

Future 'business with residential' areas identified in Growth Corridor Plans have also been identified as future commercial land and discounted to 50 per cent of land area to account for potential residential development.

Future commercial floorspace estimates

Employment projections and floorspace per worker by industry have been developed in conjunction with the Department of Jobs, Precincts and Regions (Figure 1). These are used as the bases for determining future commercial floorspace estimates.

Commercial retail floorspace is defined as floorspace used by retail, accommodation, food and other industries.

Commercial office floorspace is defined as floorspace used by business service industries (Figure 1).

Future commercial floorspace requirements have been calculated based on the following floorspace estimates per worker.

Table 1: Floorspace per worker

6-industry classifications	Australian and New Zealand Standard Industry Classification (ANZSIC)	Floor area sqm/employee
Business Service	Administrative and support services	25
	Financial and insurance services	19
	Information media and telecommunications	24
	Professional, scientific and technical services	22
	Public administration and safety	19
	Rental, hiring and real estate services	34
Retail, accommodation, food and other	Accommodation and food services	26
	Other services	43
	Retail trade	30

Appendix 2 – Draft guidance for developing local industrial land use strategies

The key aim for developing a local industrial land use strategy is to plan for and develop a shared vision for a council's industrial land, and to identify the type and scope of change projected and anticipated over time. A local industrial land use strategy should be a tool to help manage, influence, and where appropriate, facilitate change within identified industrial precincts, in accordance with the directions of state planning policy.

What should a local industrial land use strategy include?

The strategy should be concise and relevant but detailed enough to be translated into a clear implementation program that includes statutory and strategic actions.

The strategy should address the following:

Introduction

- Outline the background, purpose and approach to the strategy.

Vision

- Develop a concise vision and framework, which sets out the objectives for industrial land, other employment areas and transitional areas.

Policy and planning context

- Clarify the role and function of industrial land in the municipality in the context of state, regional and local planning policy.

Undertake a strategic analysis and identify key issues

- Identify and analyse future population growth and employment trends at a local level and understand the regional context.
- Identify and analyse industrial and employment land supply, use and demand at a local level and understand the regional context.
- Understand the outlook for existing industries and identify any possible new employment related uses.
- Understand how much industrial land and floor space will be needed for local and regional functions and where or how this should be accommodated.
- Identify the existing and proposed transport connections, including the Principal Freight Network, that can support development of industrial precincts and determine if new access routes will be required or are planned.

- Identify any local issues, pressures, trends or opportunities. These should include:
 - Identifying the location of industrial uses that may require buffers to sensitive uses.
 - Identifying any contamination and environmental issues.
 - Identifying any waterways and habitats that require consideration or protection.
 - Identifying sites of significant industrial heritage which should be protected or incorporated into new industrial developments.
 - Identifying areas of Aboriginal Cultural Heritage significance in consultation with Traditional Owners.
 - Understanding any urban design and built form requirements for precincts and potential for landscaping, open space and amenity for workers and visitors.

Develop objectives and strategies

- Develop objectives and strategies to manage growth and change.
- Identify where industrial land should be retained for industrial purposes, where it could transition to other employment uses or where it is no longer required and could transition to non-employment uses.

Precinct plans

- Identify and assess key industrial precincts, scope existing conditions and issues, and provide guidance for future direction, land use and development.
- Develop precinct plans which clearly identify:
 - Industrial land of state, regional and local significance that is to be retained.
 - Industrial land that can transition to other employment uses.
 - Industrial land that is no longer needed or appropriate for employment activities and could be considered for other uses.

Monitoring and implementation plan

- Provide a detailed implementation program including a statutory framework and strategic initiatives.
- Develop an industrial land monitoring and evaluation strategy.

Appendix 3 – Glossary

Activity centres	Areas that provide a focus for services, employment, housing, transport and social interaction. They range in size and intensity of use from smaller neighbourhood centres to major suburban centres and larger metropolitan centres.
Australian New Zealand Standard Industry Classifications (ANZSIC)	A classification that provides a framework for organising data about businesses by grouping business units carrying out similar productive activities.
Business service industries	Includes the following ANZSIC industry classifications: administrative and support services; financial and insurance services; information media and telecommunications; professional, scientific and technical services; public administration and safety; rental, hiring and real estate services.
Census of Land Use and Employment (CLUE)	<p>Census of Land Use and Employment (CLUE) provides comprehensive information about land use, employment and economic activity across the City of Melbourne.</p> <p>Data includes:</p> <ul style="list-style-type: none"> • industry structure and type (ANZSIC code and number of establishments or business locations) • floor space type and use (office, retail, industrial, accommodation or entertainment and office vacancy rates) • employment type (full-time, part-time, casual or contractor) • building information (number of floors, year of construction, gross floor area and lettable area) • venue and capacity measures (cafe or restaurant seats, child care centre spaces, off-street car parking spaces, bicycle and shower facilities, residential dwellings, student dwellings, student beds, theatre and stadium seats, conference and meeting seats and gaming machines) • spatial distribution (maps, CLUE small areas, blocks and customised regions).
Central Business District (CBD)	Melbourne's original 'Hoddle Grid' street layout bounded by the Yarra River, Spring Street, La Trobe Street and Spencer Street, as well as the triangular area to the north bounded by Victoria, Peel and La Trobe streets.
Central City	The area within the inner region that contains key capital city functions and civic facilities, as well as several precincts identified for major and strategic change. It is a larger area than the Melbourne CBD.
Commercial floorspace	Floorspace used by retail, accommodation, food and other industries, and business service industries.
Commercial land	Land used for commercial purposes including land used for business service; retail, accommodation, food and other industries.

Community service industries	Includes the following ANZSIC industry classifications: arts and recreation services; education and training; health care and social assistance.
Creative industry	Media, digital screen, design, writing and publishing, literature, fashion, performing arts, digital games development, broadcasting, music, cultural heritage, arts, education and craft industries.
Eastern Region	Includes the municipalities of Knox, Manningham, Maroondah, Monash, Whitehorse and Yarra Ranges.
Employment land	Land that is generally zoned or otherwise identified for either industrial or commercial purposes. It generally allows for a range of manufacturing industries, the storage and distribution of goods, retail, office, business, entertainment and other associated uses.
Greater Melbourne area	Defined by the ABS, the area contains not only the urban area of the city, but also the surrounding and non-urban areas where much of the population has strong links to the capital city. It includes the 31 Local Government Areas which make up metropolitan Melbourne, plus the surrounding Statistical Areas Level 2 (SA2) of Bacchus Marsh, Gisborne, Macedon, Romsey, Riddells Creek, Wallan and Kinglake.
Green wedges	Defined under Part 3AA of the Planning and Environment Act 1987 as "land that is described in a metropolitan fringe planning scheme as being outside an urban growth boundary". There are 12 defined green wedges spanning parts of 17 municipalities.
Gross regional product (GRP)	Gross regional product is a measure of the market value of all final goods and services produced in a region over a period of time.
Gross state product (GSP)	Gross state product is defined equivalently to gross domestic product (GDP) but refers to production within a state or territory rather than to the nation as a whole. GDP is the total market value of goods and services produced in Australia within a given period after deducting the cost of goods and services used up in the process of production but before deducting allowances for the consumption of fixed capital.
Growth area business with residential precincts	Growth area business with residential precincts are large flexible multi-use areas identified in Growth Corridor Plans. They are generally located adjacent to town centres or along Principal Public Transport Network routes. These precincts are expected to deliver more intensive forms of employment generating uses in comparison to industrial areas. They will accommodate a wide range of employment generating uses including service industry, office and commercial activity, and research and development and some large format retailing.

Growth Corridor Plans	<p>The Growth Corridor Plans are high level integrated land use and transport plans that provide a strategy for the development of Melbourne's growth corridors over the coming decades.</p> <p>The Growth Corridor Plans focus on four metropolitan growth corridors (North, West, Sunbury and South East Growth Corridor) and identify broad transport networks, industrial and employment areas, residential areas and recreation precincts across the city's newest metropolitan suburbs.</p>
Industrial land	<p>Areas that are zoned for industrial purposes from the planning scheme.</p> <ul style="list-style-type: none"> • Industrial 1, 2 and 3 Zones; • Business 3 and 4 Zones; • Commercial 2; • Special Use 2, 3, 4, and 5 Zones in the City of Hobsons Bay, Special Use 1 Zone in the Shire of Mornington Peninsula (which is identified for industrial uses associated with the Port of Hastings and is not a general industrial zone) and Special Use Zone 6 in the City of Monash; • Comprehensive Development Zone 2 in the City of Hume and Comprehensive Development Zone 2 in the City of Whittlesea; • Precincts with Activity Centre Zones that are industrial in character; • Land within the Melbourne and Moorabbin Airport Business Parks; and; • Urban Growth Zone land identified as industrial in Precinct Structure Plans. <p>Also included are PSP areas where planning has not yet commenced, but the land has been identified for employment purpose.</p>
Inner Region	Includes the municipalities of Melbourne, Port Phillip and Yarra City.
Inner South East Region	Includes the municipalities of Bayside, Boroondara, Glen Eira and Stonnington.
Intermodal freight terminal	A location for the transfer of freight from one transport mode to another, for example between road and rail.
Industry value-added	The total value of goods and services produced by an industry, after deducting the cost of goods and services used in the process of production.
Knowledge-based industries and jobs	Production and services based on knowledge-intensive activities that contribute to an accelerated pace of technical and scientific advancement. Their key characteristic is a greater reliance on intellectual capabilities than on physical inputs or natural resources.
Local industrial precincts	Industrial areas that are not identified as being of state or regional significance.

Major activity centres	Suburban centres that provide access to a wide range of goods and services. They have different attributes and provide different functions, with some serving larger sub-regional catchments. Plan Melbourne identifies 121 major activity centres.
Manufacturing and industrial industries	Includes the following ANZSIC industry classifications: electricity, gas, water and waste services; manufacturing; transport, postal and warehousing; wholesale trade.
Metropolitan activity centres	Higher-order centres with diverse employment options, services and housing stock, supported by good transport connections. Existing centres include Box Hill, Broadmeadows, Dandenong, Epping, Footscray, Fountain Gate-Narre Warren, Frankston, Ringwood and Sunshine. Future centres will include Lockerie and Toolern.
Metropolitan Melbourne	The 31 municipalities that make up metropolitan Melbourne, plus part of Mitchell Shire within the urban growth boundary.
National employment and innovation clusters (NEICs)	Designated concentrations of employment distinguished by a strong core of nationally significant knowledge sector businesses and institutions that make a major contribution to the national economy and Melbourne's positioning in the global economy.
Neighbourhood activity centres	Local centres that provide access to local goods, services and employment opportunities and serve the needs of the surrounding community.
Northern Region	Includes the municipalities of Banyule, Darebin, Hume, Mitchell (part), Moreland, Nillumbik and Whittlesea.
Population serving industries	Includes the following industries: health care and social assistance, education and training and accommodation and food services.
Precinct structure plans (PSPs)	Master plans for future growth corridor developments, informed by Growth Corridor Plans. The plans identify alignments of transport routes, activity centres, open space networks, residential areas, and areas for industry and employment.
Primary industries	Includes the following ANZSIC industry classifications: agriculture, forestry and fishing; mining.
Principal Freight Network (PFN)	Part of the larger transport network over which the movement of heavy freight will be concentrated.
Principal Public Transport Network (PPTN)	A statutory land-use planning tool that supports integrated land-use and transport planning by providing certainty to land-use planners and developers around locations that are and will be served by high-quality public transport.

Regionally-significant industrial precincts	Key industrial areas that contribute significantly to local and regional economies. Some of these areas are well established and support a range of industrial uses while others are transitioning and supporting new uses. They include future employment areas have been identified through Growth Corridor Plans to support not just employment growth in outer areas, but to also meet Melbourne's longer term industrial and logistics needs. They are to be retained and planned for to allow a range of industrial uses or where appropriate new and emerging businesses that require access to affordable and well-located employment land.
Retail, accommodation, food and other industries	Includes the following ANZSIC industry classifications: Accommodation and food services; Other services; Retail trade.
St Kilda Road	A major north-south arterial spine which connects the Melbourne CBD to the suburb of St Kilda. St Kilda Road straddles the City of Port Phillip and the City of Melbourne and supports both commercial and residential apartment development.
Southern Region	Includes the municipalities of Cardinia, Casey, Frankston, Greater Dandenong, Kingston and Mornington Peninsula.
State-significant industrial precincts (SSIPs)	<p>Strategically located land available 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.</p> <p>There are five state-significant industrial precincts: Western Industrial Precinct, Northern Industrial Precinct, Southern Industrial Precinct, Port of Hastings Industrial Precinct and Officer-Pakenham Industrial Precinct.</p>
Western Region	Includes the municipalities of Brimbank, Hobsons Bay, Maribyrnong, Melton, Moonee Valley and Wyndham.
Urban Development Program (UDP)	The Urban Development Program (UDP) provides an annual assessment of supply and consumption of industrial and residential land across metropolitan Melbourne.
Urban Growth Boundary (UGB)	A management tool to contain urban areas and limit their expansion. It divides land that is urban – to be used for housing, shops, factories – from land that is non-urban and to be used for purposes such as conservation, agriculture, mineral extraction, airports and the like. An urban growth boundary encourages urban consolidation and protects valued non-urban areas from urban development.
Wallan SA2	Statistical Areas Level 2 (SA2) are medium-sized general purpose areas established by the ABS that represent a community that interacts together socially and economically. The Wallan SA2 is larger than the area in Mitchell within the UGB and generally follows the municipal boundary west of Wallan and extends north of Wandong and east into Kinglake National Park.

