Urban Development Program

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Metropolitan Melbourne Industrial 2017

Planning Division

Department of Environment, Land, Water & Planning

State Government of Victoria

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1. Summary of findings

This report provides an analysis of industrial land across metropolitan Melbourne, focussing on its supply, consumption, the size of buildings that occupy the land, the economic use of the land and an estimate of the exhaustion of vacant land in the State Significant Industrial Precincts.

**Supply**

There are 26,017 hectares of industrially zoned land across metropolitan Melbourne with 6,669 hectares vacant. Two thirds of vacant industrial land (4,433 hectares) is located within the State Significant Industrial Precincts (SSIP).

**Consumption**

Consumption of industrial land reached 280 hectares last year. Over the last three years, industrial land consumption averaged 290 hectares which is approaching the level of consumption that occurred before the Global Financial Crisis.

**Built space**

Across metropolitan Melbourne there are 59 million square metres of existing floor space within industrial zones.

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

Over the last year a net total of 960,000 square metres of floor space was developed within the SSIPs.

**Economic uses**

The three largest SSIPs support traditional “industrial” uses such as manufacturing, transport and wholesaling. The Western SSIP has a greater share of transport and warehousing work places and fewer manufacturing workplaces compared to both the Southern and Northern SSIPs.

**Exhaustion rates for vacant industrial land**

The Southern SSIP is the most constrained SSIP. Based on current rates of consumption, vacant land supply in the Southern SSIP is likely to become constrained in the 2020s.

1. 1 Introduction

## Introduction to the Urban Development Program

1. The 2017 Urban Development Program Reports provide an updated analysis of supply and demand for residential and industrial land across metropolitan Melbourne.
2. This is the fourteenth annual edition of the Urban Development Program. The program aims to ensure ongoing provision of residential and industrial land and supporting infrastructure. Information and feedback is drawn from across State and Local Government.
3. The information included within the Urban Development Program is updated annually, and during 2016-17, there were revisions to the associated databases in order to provide more accurate and up-to-date information.
4. This report outlines the main findings of the 2017 program. Comprehensive data and maps are also available from the planning portal, at [www.planning.vic.gov.au](http://www.planning.vic.gov.au)
5. The Urban Development Program consists of three components:
6. ***Major*** ***residential redevelopment projects -*** information on residential projects of 10 or more dwellings on non-broadhectare land that is either planned or considered in the longer term development pipeline.
7. ***Broadhectare residential land -*** information on the supply and construction of broadhectare land across metropolitan Melbourne, including estimated lot yields. This includes land which is either zoned or has an approved precinct structure plan, as well as land that has been identified for residential development where an approved precinct structure plan is required to commence development.
8. ***Industrial land -*** information on the supply and consumption of industrial land across metropolitan Melbourne, as well as indicators on the zoning changes of industrial land.
9. This year these components have been published in three separate reports.
10. *Plan Melbourne* *2017-2050* indicates that Melbourne’s population is expected to increase from 4.4 million to 7.9 million by 2051, requiring an additional 1.5 million homes to accommodate this growth. It also seeks to promote housing supply in areas located close to workplaces, infrastructure, facilities, services and open space.
11. The Urban Development Program will continue to report on the location and stocks of land identified for residential development, both within the established areas of Melbourne as well as its growth areas. The program will also continue to monitor and report on the supply and consumption of industrial land.
12. Expansion of the Urban Development Program in future years will also address and report on a number of additional key issues outlined within the *Plan Melbourne* *Refresh*.

## Introduction to the Industrial Report

1. As the population of Melbourne grows, industrial uses and the land they occupy are central to the future economic development of Melbourne and Victoria by providing jobs and services needed in a contemporary economy.

Over the past few years, industrial land has been developing at a rate of 290 hectares per year which is similar to the level of development prior to the Global Financial Crisis. With this rapid rate of development, it is important to monitor the supply and take-up of industrial land to ensure that there is sufficient land for future development. To this end the *Urban Development Program – Industrial 2017* reports on:

* Changes in zoning of industrial land;
* Supply of vacant industrial land;
* Net consumption of industrial land;
* The economic use of industrial land;
* Estimated exhaustion rates of vacant land in selected State Significant Industrial Precincts.

The use of industrial land is dynamic, with large developments occurring in the State Significant Industrial Precincts (SSIPs) on the fringe of the city, redevelopment for employment uses in some middle and inner suburbs, and the rezoning of land from industrial to a non-industrial zone which occurs across metropolitan Melbourne.

The definition of industrial land used in this report includes the following:

* 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 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 within the City of Casey, City of Moreland and the City of Whittlesea;
* Land within the Melbourne and Moorabbin Airport Business Parks; and;
* Urban Growth Zone land identified as industrial in Precinct Structure Plans (see definitions for a full list).

There are some 5,310 hectares of unzoned land that has been identified through the growth corridor plans and previous strategic plans which is not included as industrial land in the Urban Development Program. This land will be included in the Urban Development Program once structure planning has been undertaken and approved for these areas.

With the publication of *Plan Melbourne – 2017 to 2050*, there are some minor changes to the geography that the UDP reports on. There is a new region; Inner South East Region that is comprised of the municipalities of Bayside, Boroondara, Glen Eira and Stonnington. With the Maribyrnong becoming part of the Western Region, the Inner State Significant Industrial Precinct has been added to the Western State Significant Industrial Precinct.

*Plan Melbourne – 2017 to 2050* also reinforced the status of the State Significant Industrial Precincts as locations, “To provide strategically located land for major industrial development linked to the Principal Freight Network and transport gateways. They will be protected from incompatible land uses to allow continual growth in freight, logistics and manufacturing investment.” (page 14). Plan Melbourne – 2017 to 2050 identified five State Significant Industrial Precincts: Western Industrial Precinct, Northern Industrial Precinct, Southern Industrial Precinct, Officer-Pakenham Industrial Precinct and Port of Hastings Industrial Precinct .2 Change in the zoning of industrial land

Across metropolitan Melbourne a total of 6,294 hectares of land was zoned for industrial purposes over the last 16 years while 2,210 hectares was zoned from industrial, resulting in a net increase of 4,084 hectares. This increase occurred mainly in municipalities with a State Significant Industrial Precinct, such as Wyndham, Hume, Greater Dandenong, Cardinia, Casey, Whittlesea and Melton. Loses of industrial land were mainly in Melbourne’s inner and middle suburbs.

In the year between 2015-16 and 2016-17, there was a net increase of 329 hectares of land zoned for industrial purposes. This comprised 549 hectares of land zoned for industrial purposes while 221 hectares of industrial land was rezoned for non-industrial purposes.

Most of the 549 hectares of land zoned for industrial came from the approval of 371 hectares of industrial land in the Craigieburn North Employment Area Precinct Structure Plan (Hume) and 162 hectares of industrial land as part of the Wollert Precinct Structure Plan (Whittlesea).

Most of the 221 hectares of former industrial land was zoned for commercial and transport purposes. Land rezoned into commercial land was primarily zoned Commercial 1 zone. Most of the land zoned for transport uses reflects the existing use of the land for roads, particularly in Greater Dandenong and Cardinia. Mixed use and residential uses made up 41% of industrial rezonings (91 hectares).

For the 16 year period between 2000-01 and 2016-17, 2,221 hectares of industrial land was rezoned for other uses. A little over half of this land was rezoned for residential or mixed use purposes.

Industrial land was also rezoned to provide land for transport infrastructure, particularly in the outer suburbs and growth areas. Industrial land was also rezoned for conservation purposes, drainage reserves and other uses within the SSIPs.

Rezonings of land for industrial purposes are infrequent, however, when they do occur they usually involve very large land areas. This can be seen in Figure 5 with major rezonings in the Western, Northern, Southern and Officer/Pakenham SSIPs. Most of the land zoned for industrial purposes between 2000-01 to 2016-17 was previously identified in strategic plans as required for industrial purposes.

Rezoning of industrial land for other non-industrial uses tend to be more frequent. These rezonings, however, generally involve the rezoning of smaller parcels of land. Around 80 per cent of rezonings from industrial are between 100m2 and five hectares.

3 Supply of industrial land

## 3.1 Supply in metropolitan Melbourne

There are 26,017 hectares of industrially zoned land across metropolitan Melbourne with 6,669 hectares vacant. Two thirds of the vacant industrial land (4,433 hectares) is located within the SSIPs.

The remainder of the vacant land is located in a number of smaller industrial precincts across metropolitan Melbourne, including in Maribyrnong in the west and in the municipalities of Kingston, Knox, Frankston, Maroondah and Mornington Peninsula in the east and south east.

In addition to zoned industrial land, there are 5,315 hectares of unzoned land that has been identified as proposed future industrial land in growth corridor plans and previous strategic plans. Of this there are 1,900 hectares in Melton, 1,370 hectares in Whittlesea, 940 hectares in Cardinia, 350 hectares in Wyndham, 260 hectares in Hume, 245 hectares in Casey and 250 hectares identified in the growth area portion of Mitchell. These areas will undergo further planning processes before they are included as industrial land in the Urban Development Program. In the last year two precinct structure plans were approved: the Craigieburn North Employment Area Precinct Structure Plan (Hume) within the Northern SSIP and the Wollert Precinct Structure Plan (Whittlesea).

## 3.2 Supply in the State Significant Industrial Precincts

Of the 6,669 of vacant industrial land across metropolitan Melbourne, two thirds of vacant industrial land (4,433 hectares) is located within SSIPs. In the future, the amount of vacant land in the SSIPs will increase as Growth Corridor Plans have identified an additional 3,260 hectares of industrial land to be added to the SSIPs. This land will be zoned for industrial uses as the Precinct Structure Planning process progresses.

In terms of both vacant land and future land identified for proposed industrial uses, the Western Industrial Precinct has the greatest land capacity to support ongoing expansion of industrial and commercial uses.

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

Land in the Hastings SSIP is currently occupied by a range of non-industrial uses. It is anticipated that this land will be converted to industrial purposes if an industrial land market becomes established.

1. Consumption of industrial land

## 4.1 Average annual consumption across metropolitan Melbourne

Consumption occurs when land changes from vacant to having some form of use on it, such as a building, storage area, carpark, etc.

Prior to the GFC, industrial land consumption across metropolitan Melbourne averaged 300 hectares per year. As can be seen below, following the GFC consumption declined significantly and then begun to increase from 2011-12. Over the last three years, consumption of industrial land has increased to levels approaching those prior to the GFC.

## 4.2 Average annual consumption across the State Significant Industrial Precincts

The State Significant Industrial Precincts are where the vast majority of industrial land consumption occurs.

Within the State Significant Industrial Precincts the consumption of land is volatile. Following the Global Financial Crisis (GFC) consumption of industrial land declined within all of the SSIPs. Consumption in the Western and Southern Industrial Precincts are now returning to the rates experienced prior to the GFC.

The Western SSIP has consistently maintained the highest average levels of land consumption and is the largest and most active industrial land market in Victoria. This precinct exhibits a pronounced cyclic pattern of consumption with regular peaks and declines. Yet, even when the cycle reaches its trough, annual consumption in the Western precinct is still higher than that in other SSIPs even during their peak years. Consumption in the Western Industrial precinct last year reached 123 hectares.

The Southern SSIP has the second highest level of industrial land consumption. Since the GFC, the South SSIP has averaged 48 hectares of consumption per year, which is close to the pre-GFC average of 52 hectares per year.

1. 5 How industrial land is used

This section profiles floor space, recent additions to floor space, and how floor space is currently used. Information about current floor space is available for the SSIPs and Metropolitan Melbourne. Information on the change of floor area and land use are available only for the SSIPs.

## 5.1 Stock of floor space

Across metropolitan Melbourne there are just over 60 million square metres of industrial floor space. Within the State Significant Industrial Precincts there is 29 million square metres of industrial floor space (see Definitions section for an explanation of how this data is reported). The Western SSIP has the largest amount of floor space with 11.9 million square metres of built space.

Across the SSIPs, smaller buildings (from 1m2 to 5,000m2) make up the vast majority (close to 95%) of the stock of industrial buildings (see Table 2) but only account for 52% of the built industrial floor space while in the rest of the metropolitan area these buildings account for 98% of buildings and 72% of floor space. Of the very large buildings in excess of 25,000m2, around three quarters of these are located in the SSIPs, particularly the Western SSIP.

## 5.2 Growth in floor space

Over the last year a total of 961,900m2 of industrial floor space was constructed within the SSIPs. As can be seen in Table 3 and Figure 11, the majority of this floor space was constructed in the Western, Northern and Southern SSIPs.

The majority of new industrial floor space has been developed in buildings that are between 1,000 and 5,000m2 and buildings in excess of 25,000 m2. Five very large industrial buildings, in excess of 25,000m2, were constructed in the Western SSIP as well as an extension to an existing building that increased its floor area beyond 25,000m2. These five buildings and the extension resulted in an additional 220,200m2 of industrial floor space. It is expected that the growth of large buildings in the SSIPs will continue as land that can accommodate large industrial buildings is very restricted in the established areas of Melbourne.

## 5.3 Economic structure of the SSIPs

The location of workplaces by industry uses WorkSafe Victoria data as an indicator of the economic use of industrial land in the SSIPs and other parts of metropolitan Melbourne. There will be some work places that are not picked up in the WorkSafe data due to issues around the accuracy of geocoding the data as well as companies that are too small to be included in the WorkSafe insurance scheme as well as large businesses that arrange their own insurance (self insurers). While it is not a comprehensive measure it provides a useful indication of the uses that are located on industrial land.

The Southern, Northern and Western SSIPs are the largest employment centres with a combined total of about 10,000 workplaces identified within their boundaries. Across metropolitan Melbourne approximately 35,000 workplaces have been identified in industrial zones using the WorkSafe Victoria data.

The three largest SSIPs have a similar distribution of workplaces with relatively large amounts of traditional “industrial” uses such as manufacturing, transport and wholesaling that make up around 60% of the workplaces. There are, nonetheless, differences. The Western SSIP has a greater share of transport and warehousing workplaces and fewer manufacturing workplaces as compared to both the Southern and Northern SSIPs.

Industrial land across metropolitan Melbourne also provides accommodation for non-traditional industrial uses including population serving businesses and business services that require accommodation in industrial areas. For instance, a retailer may require a distribution centre in an industrial area or may use an industrial facility to conduct on-line retailing. Business services include firms that directly service industrial users such as labour hire firms or equipment hire businesses. This is particularly true in the Inner Metro and Inner South East Regions where population services and business and professional services make up a significant share of work places compared to the State Significant Industrial Precincts.

1. 6 Modelling exhaustion rates for vacant industrial land

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

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

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

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

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

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

## 6.1 Western Industrial Precinct

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

## 6.2 Northern Industrial Precinct

The Northern SSIP is the second largest of the State Significant Industrial Precincts and has both zoned land supply and proposed industrial land.

Pre and post GFC consumption rates in the Northern IP vary substantially. This is demonstrated in the significant difference between the pre and post GFC exhaustion scenarios. The pre-GFC scenario sees vacant land being consumed at the start of the 2040 while the post-GFC scenario sees ongoing supplies of land beyond 2050.

## 6.3 Southern Industrial Precinct

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

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

1. Appendix A - Method

The industrial land database provides an assessment of the development status of industrially zoned land as either occupied by some use or vacant based on a visual assessment of aerial photography. The aerial photography is sourced by calendar year and based on zoning by financial year. The industrial land database is date stamped as a financial year. Occupied land includes land occupied by buildings, container parks, informal carparking, quarries, agricultural uses and hard stack storage areas. Pieces of land that are unused are assessed as vacant. The assessment provides a conservative estimate of the amount of vacant land across metropolitan Melbourne. Where occupied land is under utilised for industrial purposes, such as an agricultural use, it is anticipated that it will be redeveloped for industrial purposes when local market circumstances make industrial development more valuable and attractive compared to it continuing as its current use.

There are three steps to produce this data.

1. Identify areas that are zoned for industrial purposes from the planning scheme. This provides the areas in metropolitan Melbourne that are or can be used for industrial purposes.
2. Use the industrial planning scheme zones to identify the cadastral base parcels that are zoned industrial. This provides the individual properties that are zoned for industrial purposes.
3. Make an assessment from geo-rectified digital aerial photography of the status of the land as either occupied or vacant.

This data has been collected for 1989/90 (for parts of metropolitan Melbourne), 1994/95, 2000/01 and then annually between 2004/05 and 20015/16 to produce time series that extends over 25 years. This time series data enables the amount of land taken-up or consumed over time to be determined by identifying land that changes from vacant to being occupied.

1. Appendix B - Definitions

**Building area**

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

**Exhaustion Rates**

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

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

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

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

Consumption rates are based on pre-GFC (1994-95 to 2007-08) and post-GFC (2008-09 to 2016-17) consumption rates for each SSIP. The pre-GFC consumption rates are higher than those of the post-GFC. This provides a range of potential times when vacant becomes exhausted.

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

**Land development status**

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

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

**Precinct Structure Plans with an Industrial component**

|  |  |
| --- | --- |
| **Precinct Structure Plan** | **Municipality** |
| Cardinia Road Employment Precinct Structure Plan | Cardinia |
| Cranbourne East Precinct Structure Plan | Casey |
| Cranbourne West Precinct Structure Plan | Casey |
| Craigieburn North Employment Area Precinct Structure Plan | Hume |
| Diggers Rest Precinct Structure Plan | Melton |
| East Werribee Employment Precinct | Wyndham |
| Tarneit North Precinct Structure Plans | Wyndham |
| Toolern Precinct Structure Plan | Melton |
| Truganina Employment Area Precinct Structure Plan | Wyndham |
| Westbrook Precinct Structure Plan | Wyndham |
| Wollert Precinct Structure Plan | Whittlesea |

**State Significant Industrial Precincts**

Plan Melbourne – 2017 to 2050 identified five State Significant Industrial Precincts (Western Industrial Precinct, Northern Industrial Precinct, Southern Industrial Precinct, Port of Hastings Industrial Precinct and Officer-Pakenham Industrial Precinct. See Map 1

The purpose of the State Significant Industrial Precincts are “To provide strategically located land for major industrial development linked to the Principal Freight Network and transport gateways. They will be protected from incompatible land uses to allow continual growth in freight, logistics and manufacturing investment.” (Plan Melbourne – 2017 to 2050, page 14)

**WorkSafe Victoria**

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

**Industry Type**

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

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