

yass valley council

the country the people

# INDUSTRIAL LANDS STUDY



October 2008

The Yass Valley Council Industrial Lands Study has been commissioned to identify land for employment generating development and to determine appropriate zones for this land so that it may be incorporated into a new Local Environmental Plan.

The information presented has been compiled using a variety of methods. Whilst every care has been taken to ensure its accuracy, Yass Valley Council does not warrant the information is complete or accurate. Readers must therefore exercise their own skill and discretion.

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## **1 INTRODUCTION**

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### **1.1 Background**

The Yass Valley Council Industrial Lands Study was commissioned to provide an assessment of the current employment generating land supply in the town of Yass. The study also assesses the future demand for employment generating land in and around Yass and in so doing recommends appropriate zones to ensure the ongoing viability of employment generating lands in Yass into the future.

The study was prepared by AQ Planning and will be used to guide the development of a new Local Environmental Plan (LEP) and Development Control Plan (DCP) in relation to employment generating development in and around the town of Yass.

### **1.2 Aims and objectives of the study**

The aim of the Yass Valley Council Industrial Lands Study is to provide a detailed justification for the development and sustainable management of new employment generating land in and around the town of Yass.

This information will then be used to guide the preparation of the new Yass Valley LEP and DCP.

The objectives of the study are to:

- examine the appropriateness of the existing land use zones and controls that exist in the industrial areas of the town of Yass ;
- assess the land supply, demand and likely uses for additional employment generating land in Yass (with a focus on North Yass) and identify possible locations for these additional industrial areas, including the potential relocation of the Yass Sale Yards to a more suitable location;
- develop a GIS based land capability assessment for employment generating land, together with recommended zonings and other controls for the locality;
- engage the community to identify where and how additional employment generating land could be incorporated into the Yass Valley LGA's land use patterns in order to create additional economic development opportunities;
- develop a methodology for land suitability mapping for employment generating land, based on ecological, economic and social constraints and opportunities; and
- recommend areas for rezoning based on government agency consultation, environmental impacts, demand analysis and the potential for future employment generation.

### **1.3 Study Methodology**

To meet the established aims and objectives of this study the following actions have been undertaken:

- Census data relevant to the Yass Valley LGA has been analysed in relation to the Yass resident labour force and type of employment in Yass;
- Changes in the composition of the labour force and the employment base have been compared to changes in the broader sub-region to determine whether Yass has a typical labour force and employment structure;
- Projections of population growth in Yass have been reviewed and used to prepare projections in labour force growth and estimates of the likely changes in the composition of the labour force between 2001-2032;
- Regional drivers of change have been reviewed to determine the economic condition of the sub region and identify emerging issues and potential opportunities for growth in the Yass, in the context of employment generating lands;
- Likely employment growth based on labour force growth projections and regional economic opportunities (including comparative and competitive advantage driven employment growth) have been used to estimate the likely demand for industrial land;
- Infrastructure, transport and other related service requirements of industries that have the potential to generate demand for employment generating land have been reviewed;
- The supply of industrial land within existing industrial areas has been assessed in relation to its suitability for employment generating development and its ability to cater for estimated demand;
- The potential for additional sites to cater for the estimated demand and the need to amend current land use zonings has been identified using a GIS based land capability assessment in conjunction with information gathered by engaging the community and key stakeholders; and
- Land use zones have been identified for existing and proposed employment generating lands, in accordance with the Standard Instrument.

### **1.4 Definitions of industry types**

For the purpose of this study, the following definitions are used to describe the types of industrial uses which may be referred to in this study. The definitions are taken from the Standard Instrument that Councils are required to implement when preparing new Local Environmental Plan's. The Standard Instrument will be discussed in further detail in this report.

**Table 1            Types of industries**

| <b>Industry</b>                      | <b>Industry descriptions</b>   |
|--------------------------------------|--|
| <b>Agricultural produce industry</b> | An industry involving the handling, treating, processing or packing of produce from agriculture (including dairy products, seeds, fruit, vegetables or other plant material), and includes flour mills, cotton seed oil plants, cotton gins, feed mills, cheese and butter factories, and juicing or canning plants, but does not include a livestock processing industry.   |
| <b>Bulky goods premises</b>          | A building or place used primarily for the sale by retail, wholesale or auction of (or for the hire or display of) bulky goods, being goods that are of such size or weight as to require:<br>(a) a large area for handling, display or storage, or<br>(b) direct vehicular access to the site of the building or place by members of the public for the purpose of loading or unloading such goods into or from their vehicles after purchase or hire, but does not include a building or place used for the sale of foodstuffs or clothing unless their sale is ancillary to the sale or hire or display of bulky goods. |
| <b>Hazardous industry</b>            | Development for the purpose of an industry that, when the development is in operation and when all measures proposed to reduce or minimise its impact on the locality have been employed (including, for example, measures to isolate the development from existing or likely future development on other land in the locality), would pose a significant risk in the locality:<br>(a) to human health, life or property, or<br>(b) to the biophysical environment.  |
| <b>Heavy industry</b>                | An industry that requires separation from other land uses because of the nature of the processes involved, or the materials used, stored or produced. It may consist of or include a hazardous or offensive industry or involve the use of a hazardous or offensive storage establishment.   |
| <b>Industrial</b>                    | A building or place that:  |

|                                      |   |
|--------------------------------------|---|
| <b>retail outlet</b>                 | (a) is used in conjunction with an industry (including a light industry) but not in conjunction with a warehouse or distribution centre, and<br>(b) is situated on the land on which the industry is carried out, and<br>(c) is used for the display or sale (whether by retail or wholesale) of only those goods that have been manufactured on the land on which the industry is carried out.   |
| <b>Industry</b>                      | The manufacturing, production, assembling, altering, formulating, repairing, renovating, ornamenting, finishing, cleaning, washing, dismantling, transforming, processing or adapting, or the research and development of any goods, chemical substances, food, agricultural or beverage products, or articles for commercial purposes, but does not include extractive industry or a mine.   |
| <b>Light industry</b>                | An industry, not being a hazardous or offensive industry or involving use of a hazardous or offensive storage establishment, in which the processes carried on, the transportation involved or the machinery or materials used do not interfere with the amenity of the neighbourhood by reason of noise, vibration, smell, fumes, smoke, vapour, steam, soot, ash, dust, waste water, waste products, grit or oil, or otherwise.   |
| <b>Livestock processing industry</b> | An industry that involves the commercial production of products derived from the slaughter of animals (including poultry) or the processing of skins or wool of animals, derived principally from surrounding districts, and includes such activities as abattoirs, knackeries, tanneries, woolscours and rendering plants.   |
| <b>Offensive industry</b>            | Any development for the purpose of an industry that would, when the development is in operation and when all measures proposed to reduce or minimise its impact on the locality have been employed (including, for example, measures to isolate the development from existing or likely future development on other land in the locality), emit a polluting discharge (including, for example, noise) in a manner that would have a significant adverse impact in the locality or on the existing or likely future development on other land in the |

|                        |   |
|------------------------|---|
|                        | locality.   |
| <b>Rural industry</b>  | <p>An industry that involves the handling, treating, production, processing or packing of animal or plant agricultural products, and includes:</p> <ul style="list-style-type: none"> <li>(a) agricultural produce industry, or</li> <li>(b) livestock processing industry, or</li> <li>(c) use of composting facilities and works (including to produce mushroom substrate), or</li> <li>(d) use of sawmill or log processing works, or</li> <li>(e) use of stock and sale yards, or</li> <li>(f) the regular servicing or repairing of plant or equipment used for the purposes of a rural enterprise, undertaken for commercial purposes.</li> </ul> |
| <b>Transport depot</b> | A building or place used for the parking or servicing of motor powered or motor drawn vehicles used in connection with a passenger transport undertaking, business, industry or shop.   |

## **1.5 Study Area**

The Yass Valley LGA is located in south eastern New South Wales, approximately 280 kilometres southwest of Sydney. The Yass Valley LGA adjoins the ACT to its north west with Yass town approximately 42 kilometres west of this border.

The Yass Valley LGA covers an area of approximately 3,999 km<sup>2</sup>, and is bounded by the Palerang LGA to the east, Boorowa and Upper Lachlan LGA's to the north, Tumut, Gundagai and Harden LGA's to the west and the ACT to the south.

The Yass Valley LGA is strategically located within the Southern Transport Corridor linking Melbourne and Sydney by road (Hume Highway) and rail (Main Southern Rail Line). This transport corridor also connects to Canberra by road via the Barton Highway. The Yass Valley LGA is part of a larger sub region with the Australian Capital Territory at its centre and also forms part of the southern end of the Sydney to Canberra Corridor.

The Yass Valley LGA includes the town of Yass and the villages of Bowning, Binalong, Bookham, Murrumbateman, Gundaroo, Sutton and Wee Jasper. The town of Yass has a population of 5,331 (as of the 2006 Census) and is the focal point for commercial, industrial and local government activities in the LGA.

Yass is the only urban area in the LGA which has land specifically zoned for industrial purposes, although some light industrial activities occur in the villages throughout the LGA in the 2(v) Village zone. For this reason, the study focuses on the existing industrial areas in the town of Yass and the opportunities for the future development of employment generating lands in the immediate vicinity of the town.

## **1.6 Report Structure**

The structure of this report is outlined as follows.

**Section 1** - introduces the study and outlines the background and purpose of the study.

**Section 2** - sets out the strategic and statutory planning context at the State and Local planning levels and overviews planning strategy and policy as it relates to Yass and the sub-region.

**Section 3** - provides a regional context to the key demographic and economic trends and issues affecting the broader sub-region.

**Section 4** - profiles the Yass Valley's key demographic and socio economic indicators.

**Section 5** - provides an overview of existing industrial areas, describing the existing industrial lands in and around the town of Yass, detailing land supply and availability in the sub region and estimating demand for industrial land in Yass.

**Section 6** - provides an overview of industrial land supply at a sub regional and Yass Level.

**Section 7** - describes the consultation that was undertaken as part of the process of developing the Industrial Lands Study.

**Section 8** - outlines the recommendations in relation to existing and new industrial land.



## **2 STRATEGIC AND STATUTORY PLANNING CONTEXT**

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This section of the report provides an overview of the current strategic and statutory planning framework that applies to the Yass Valley LGA at a State and Local level.

The ACT planning policy framework also has been reviewed given the synergies and the economic inter-relationships between the ACT and the surrounding LGA's.

### **2.1 State and Territory Policy**

#### **State Plan – A New Direction for NSW**

The State Plan is a new strategic initiative by the NSW Government which seeks to deliver improved Government services for the community via the identification of specific goals, priorities and targets. The objectives and priorities of the State Plan are at the core of NSW Government business and will guide its approach to Local Government, planning, transport and infrastructure.

The State Plan contains five areas of activity. These are:

1. Rights, respect and responsibility;
2. Delivering better services;
3. Fairness and opportunity;
4. Growing prosperity across NSW; and
5. Environment for Living.

The activity "Growing prosperity across NSW" addresses economic development and promotes two key goals and a number of priorities. These are:

1. NSW: open for business:
  - (a) Increased business investment;
  - (b) Maintain and invest in infrastructure;
  - (c) Cutting red tape;
  - (d) More people participating in education and training throughout their life; and
  - (e) AAA rating maintained.
2. Stronger rural and regional communities:
  - (a) Increased business investment in rural and regional NSW; and
  - (b) Better access to training in rural and regional NSW to support local economies.

## **Sydney to Canberra Corridor Regional Strategy 2006-2031**

On 10 July 2008, the NSW Department of Planning released the Sydney to Canberra Corridor Regional Strategy.

The strategy identifies the corridor between Sydney and Canberra (from the Southern Highlands to ACT border) along the Hume and Federal Highways as a region of significant potential.

The Yass Valley LGA is part of the southern sub region of the Corridor, along with the Queanbeyan and Palerang LGA's.

The strategy identifies key objectives, goals, strategic directions and policies for each of the communities of interest. These initiatives have been developed in relation to population and housing, rural lands, employment and economic activity, the environment and water.

The key strategic directions identified in the strategy are:

- Yass provides opportunities to locate employment close to the intersection of the Hume and Barton Highways, providing for local employment opportunities and regional economic growth.
- There is considerable interest in establishing freight transport and logistics hubs in several locations within the Region. Potential locations include the Moss Vale–Berrima Enterprise Corridor, Goulburn and Yass.
- Queanbeyan and Yass provide opportunities in the southern subregion for retail and business services, serving the larger Canberra–Queanbeyan metropolitan area (which has the additional locational advantage of Canberra Airport). Both areas also have good road and rail access.
- The Department of Planning will work with the Department of State and Regional Development and Yass Valley Council to identify additional employment land needs at Yass
- Whilst Yass is not identified as a major regional centre where the majority of new employment land releases will be focused it does contain potential locations for more local employment land.
- Any future proposals for significant employment lands outside of areas indicated in the draft strategy are to satisfy the Sustainability Criteria of the strategy.

A Section 117 Direction will ensure that all draft LEP's are prepared in accordance with the provisions of the Sydney to Canberra Corridor Regional Strategy. This means that any new LEP prepared by Yass Valley Council will need to be consistent with the strategy.

It is also important to point out that Yass Valley Council provided a detailed submission to the Department during the public exhibition period for the strategy and argued that the Yass Valley LGA had a greater potential for employment lands than envisioned by the draft strategy. The submission also requested that any additional employment lands in the Yass Valley LGA arise from the

recommendations of a strategy developed by Yass Valley Council, rather than the Sydney to Canberra Corridor Regional Strategy itself.

The basis of this strategy will revolve around the recommendations of the Industrial Lands Study.

### **The Canberra Plan**

The Canberra Plan 2004 is the key strategic plan for the ACT. The Plan provides a strategic framework to direct and manage the social, environmental and economic sustainability of Canberra.

*The Economic White Paper*, which outlines economic and industry policy for the ACT aims to create the environment for sustainable wealth creation by:

- supporting business - looking to the firms, industries and institutions that have already committed to the ACT and working with them to grow and develop the economy;
- capitalising on competitive advantages;
- leveraging intellectual assets - building on these assets and the related skills base to establish better links between Canberra's world-class research institutions and entrepreneurs; and
- supporting planning and infrastructure to give Canberra the image of a 21st century city.

The Spatial Plan requires that future industrial, broadacre and transport related employment growth be accommodated within existing industrial areas and the corridor comprising Majura and Symonston, including the airport and Hume.

## **2.2 Local Planning Context**

Three Local Environmental Plans (LEP's) currently operate within the Yass Valley LGA as a result of Council amalgamations on the 11<sup>th</sup> of February 2004. These amalgamations incorporated the western part of the former Yarrowlumla LGA and the south eastern part of the former Gunning LGA.

None of the land in the former Yarrowlumla and Gunning LGA's (now amalgamated with the former Yass Shire) is industrially zoned. This study therefore focuses on the town of Yass, which contains land with a current industrial zoning.

### **Yass LEP 1987**

Yass LEP 1987 applies to the former Yass Shire LGA.

Table 2 summarises the relevant zones which apply to land within the study area. These zones will be discussed in further detail in this report.

**Table 2 Rural, Business and Industrial Zones – Yass LEP 1987**

| <b>Rural Zones</b>                           | <b>Business and Industrial Zones</b> | <b>Residential and Special Uses Zones</b> |
|--|--------------------------------------|---|
| 1 (a) (Rural Agriculture Zone)               | 3 (a) (Business Zone)                | 2(a) (Residential Zone)                   |
| 1 (b) (Rural Highway Zone)                   | 3 (b) (Highway Services Zone)        | 5(a) (Special Uses Zone)                  |
| 1 (c) (Rural Residential Zone)               | 4 (a) (Industrial Zone)              |   |
| 1 (c1) (Rural Residential Zone)              |                                      |   |
| 1 (c2) (Rural Residential--Hobby Farms Zone) |                                      |   |
| 1 (d) (Rural Small Holdings Zone)            |                                      |   |
| 1 (e) (Rural Village Zone)                   |                                      |   |

### **Standard Instrument (LEP template)**

The NSW Department of Planning have in recent times instigated a large scale review of the planning system which has resulted in the release of a number of planning reforms. The introduction of the Standard Instrument for LEP's which has been designed to standardise the format and structure of LEP's across the State. All Councils are therefore required to prepare new LEP's in accordance with the Standard Instrument. The Standard Instrument sets new standard zones and definitions, as well as providing for both mandatory and optional clauses. The Standard Instrument can be obtained from [www.legislation.nsw.gov.au](http://www.legislation.nsw.gov.au).

The Standard Instrument provides a range of zones (34 in total) for residential, rural, industrial, special areas, recreation, environmental protection and waterways uses.

In using the Standard Instrument, Councils are able apply/customise/adapt the provisions of the Standard Instrument. For instance, in relation to zones, Councils will determine the application of zones to land and any additional objectives and permitted/prohibited uses beyond what is already set by the Standard Instrument.

Industrial development can be undertaken within a number of the land use zones and categories provided for by the Standard Instrument. Table 3 provides a summary of the objectives and permissible uses within each of these zones.

**Table 3 Business, Industrial and Special Area zones of the Standard Instrument**

| <b>Zone</b>                   | <b>Objectives of zone*</b>   | <b>Permitted with consent (mandatory)</b>   |
|-------------------------------|--|---|
| <b>B5 Business</b>            | To enable a mix of office, retail and warehouse uses in locations which are close to, and which support the viability of, centres. | Child care centres; Office premises; Passenger transport facilities; Retail premises; Warehouse or distribution centres     |
| <b>B6 Enterprise Corridor</b> | To promote businesses along main roads and to encourage a mix of compatible uses.  | Community facilities; Hardware and building supplies; Hotel accommodation; Landscape and garden supplies; Light industries; |

|                                    |  |   |
|------------------------------------|--|---|
|                                    | <p>To enable a mix of employment (including business, office, retail and light industrial uses) and residential uses.</p> <p>To maintain the economic strength of centres by limiting the retailing of food and clothing.</p>  | <p>Multi dwelling housing; Office premises; Passenger transport facilities; Retail premises; Warehouse or distribution centres</p>  |
| <b>B7<br/>Business Park</b>        | <p>To provide a range of office and light industrial uses.</p> <p>To encourage employment opportunities.</p> <p>To enable other land uses that provide facilities or services to meet the day to day needs of workers in the area.</p>   | <p>Child care centres; Light industries; Neighbourhood shops; Office premises; Passenger transport facilities; Warehouse or distribution centres.</p>   |
| <b>IN1<br/>General Industrial</b>  | <p>To provide a wide range of industrial and warehouse land uses.</p> <p>To encourage employment opportunities.</p> <p>To minimise any adverse effect of industry on other land uses.</p>  | <p>Depots; Freight transport facilities; Light industries; Neighbourhood shops; Warehouse or distribution centres</p>   |
| <b>IN2<br/>Light Industrial</b>    | <p>To provide a wide range of light industrial, warehouse and related land uses.</p> <p>To encourage employment opportunities.</p> <p>To minimise any adverse effect of industry on other land uses.</p> <p>To enable other land uses that provide facilities or services to meet the day to day needs of workers in the area.</p> | <p>Depots; Light industries; Neighbourhood shops; Warehouse or distribution centres</p>   |
| <b>IN3<br/>Heavy Industrial</b>    | <p>To provide suitable areas for those industries that need to be separated from other land uses.</p> <p>To encourage employment opportunities.</p> <p>To minimise any adverse effect of heavy industry on other land uses.</p>  | <p>Depots; Freight transport facilities; Hazardous industries; Hazardous storage establishments; Heavy industries; Offensive industries; Offensive storage establishments; Warehouse or distribution centres</p>  |
| <b>B1<br/>Neighbourhood Centre</b> | <p>To provide a range of small-scale retail, business and community uses that serve the needs of people who live or work in the surrounding neighbourhood.</p>   | <p>Business premises; Child care centres; Community facilities; Neighbourhood shops; Shop top housing</p>   |
| <b>B2 Local Centre</b>             | <p>To provide a range of retail, business, entertainment and community uses that serve the needs of people who live in, work in and visit the local area.</p> <p>To encourage employment opportunities in accessible locations.</p> <p>To maximise public transport patronage and encourage walking and cycling.</p>               | <p>Business premises; Child care centres; Community facilities; Educational establishments; Entertainment facilities; Function centres; Information and education facilities; Office premises; Passenger transport facilities; Recreation facilities (indoor); Registered clubs; Retail premises; Service stations; Shop top housing; Tourist and visitor accommodation</p> |
| <b>SP1<br/>Special Activities</b>  | <p>To provide for special land uses that are not provided for in other zones.</p> <p>To provide for sites with special natural characteristics that are not provided for in</p>  | <p>The purpose shown on the Land Zoning Map, including any development that is ordinarily incidental or ancillary to</p>  |

|                    |  |  |
|--------------------|--|--|
|                    | <p>other zones.</p> <p>To facilitate development that is in keeping with the special characteristics of the site or its existing or intended special use, and which minimises any adverse impacts on surrounding land.</p> | development for that purpose.                              |
| <b>SP3 Tourist</b> | To provide for a variety of tourist-orientated development and related uses.   | Food and drink premises; Tourist and visitor accommodation |

\* The Standard Instrument permits the inclusion of additional objectives and permitted/prohibited uses where deemed necessary by Councils

### **3 REGIONAL CONTEXT**

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This section considers the regional context of the Yass Valley within the broader ACT sub region and the Sydney to Canberra Corridor and provides the major economic and demographic trends of these regions.

#### **3.1 The Australian Capital Territory**

The ACT is the major economic centre for ACT sub region which includes the ACT and the Yass, Queanbeyan, Gunning, Cooma-Monaro and Palerang Local Government Areas.

##### **Population**

The population of the ACT at the 2006 Census was 327,954 persons. This is an increase of 5.1 % since 2001, or 1.02 % per annum, which represents an increase in population growth compared to the previous 5 years (0.85 % per annum). Importantly, the ACT like much of Australia, is forecast to have an ageing population with reduced rates of population growth (ACT Government, 2003, p7).

The resident labour force of the ACT in 2006 was 176,257, with an unemployment rate of 2.4 %. The workforce of the ACT is expected to grow only slightly in the next decade and then decline as a percentage of the total population. Since 1995, the ACT has experienced net outflows of working age people every year. This trend, coupled with a decline in birth rate and an ageing of the population will result in a contraction of the workforce after 2020 (ACT Government, 2003, p8). This will have serious implications for the sustainability of the population and the potential for economic development moving forward.

##### **Regional Economy**

The ACT's current economic structure reflects the history of its development as the political and government administrative capital of the nation. As such, the key driver of growth in the ACT is the Commonwealth Government. It is the biggest employer (23 % of sub-region's labour force), the major purchaser of goods and services from the private sector, and is forecast to continue to grow in the short term, particularly in the area of defence.

Other key growth areas include hi-tech support industries and regional services such as education and health, and tourism. These industries, coupled with growth in retail, property and business services are expected to generate 95 % of the jobs growth in the sub-region in the period 2001 – 2006 (SKM, 2003, p46).

In addition, the industrial areas in the ACT contribute to the government's goals of accommodating diversified economic growth and generating new employment opportunities. The main industrial areas are at Fyshwick, Hume, Mitchell and Symonston with an estimated land area of 800-900 hectares, of which approximately 300 hectares is either underutilised or vacant. These industrial areas cater to conventional industries, such as general manufacturing, processing, warehousing and storage, freight transport, urban services and food



services. They also cater to new forms of industry, in particular advanced technology, science and information-technology.

Industrial activities also occur outside of the established industrial areas with light industry permitted in commercial centres, scientific research establishments located in education precincts, offensive and hazardous industries operating at Harman and specific uses, such as landfill sites, at Mugga Lane and West Beloconnen.

Despite the number of industrial areas in the ACT, this actually only represents a relatively small industry and manufacturing base. Within the sub-region, manufacturing only accounted for 4 % of the jobs in 2001 and this is forecast to decline in the next decade to 3.7 % (although in absolute numbers of jobs it may increase marginally) given that much of the manufacturing activity only services local construction requirements (SKM, 2003, pp16-17).

In relation to economic performance, the ACT is performing well with:

- High investment in human capital – investment in education, training, knowledge and skills;
- Above average value added per head of population (20 % higher than the national average);
- High average gross household disposable income (40 % higher than the national average); and
- High rate of labour force participation and low unemployment levels.

The ACT economy provides 22,700 employment opportunities for residents in adjoining Local Government Areas (LGAs) in NSW (Macroplan, 2004, p43). Despite this, the adjoining LGAs are becoming more economically integrated with the ACT as a result of marginal expenditure. For example, for every \$1 spent in the sub-region, outside an LGA, the ACT gains 24 cents in increased gross regional product (Mitchell Resources Intelligence, u.d, p3). Accordingly, cross border agreements which enhance regional development are important to achieving economic prosperity in not only the surrounding LGAs but also the ACT given that its economy directly benefits from development in the surrounding sub-region.

In summary, the dependency of the ACT economy on the public sector, the ageing population and labour force, issues with water supply and the ability to retain and attract young, talented people in the region will be challenges for the ACT in terms of reaching its full economic potential in the future.

### **3.2 Regional Analysis of Opportunities and Constraints**

A region's capacity to encourage economic growth and development, and therefore compete, is largely related to population growth and the productive capacity of the population. It follows that the size of the population of working age persons is important to ensure that there is a sufficient workforce to sustain the population. The productivity of the population in terms of its rate of

participation in the labour force, the productivity of labour (linked to the skills and motivation of the workforce which relates to education, training and experience) and its ability to attract and retain knowledge and skill to supply labour markets, ie. young, educated people are also important factors.

In the ACT there has been a significant slowing of population growth, however, the population is still relatively young and more than 70 % are considered independent (15-64 years) (ACT Government, 2003, p14). Strong population growth in adjoining local government areas has also contributed to economic growth in the ACT region.

The ACT Government's *Economic White Paper* forms part of a broader strategy for the ACT – *The Canberra Plan* - and is aimed at promoting the sustainable economic development of the ACT and the sub region. *The Economic White Paper* highlights the need to reduce the dependency of the ACT economy on the public sector. It advocates diversification through the establishment of a strong and competitive private sector which in turn will provide the platform to develop the 'new economy' – an economy that uses knowledge to innovate and adapt technology to promote 'value adding' industries so that the economy can compete locally, regionally, nationally and globally by exporting goods and knowledge.

According to *the Economic White Paper* the ACT is well placed to succeed in developing a new economy, with:

- An above average value added per head of population (20 % higher than the national average) which accounts for around 2.0% of Australia's Gross Domestic Product;
- High quality technological infrastructure;
- Technologically sophisticated and innovative industries;
- A thriving small business sector (96 % of the private sector is made up of small businesses and represent 53 % of all private sector employment);
- Emerging industry clusters eg. ICT, space sciences, biotechnology, sport sciences and administration, defence, education, public administration;
- High levels of labour force participation (71 %);
- A low rate of unemployment (4.1 % at July 2003);
- High levels of participation in education and training;
- A highly educated labour force (63 % of ACT residents aged 25-64, hold a vocational or higher qualification);
- Strong research institutions; and
- A cohesive and supportive community (ACT Government, 2003, pp9-16).

Areas of sustainable competitive advantage for employment growth, strong economic performance and a more diverse and resilient economic base over time, include the industry networks and clusters of:

- ICT and e-government services;

- Biotechnology and medical devices;
- Education exports;
- Public administration and defence industries;
- Creative industries;
- Personal services;
- Tourism; and
- Environment industries.

These are primarily knowledge based industries which require innovation in products and delivery (ACT Government, 2003, p20).

The Discussion Paper, entitled *ACT Economic Catchment Report*, which preceded the Economic White Paper also advocates 'growing local business' to enable existing businesses to respond to opportunities as they arise in the targeted industry sectors outlined above. Of particular relevance to the Industrial Lands Study is the concept of developing of business parks, of which there are a variety in the ACT. These facilities help new companies to survive and grow in the marketplace.

Whilst industry and manufacturing account for such a small proportion of the workforce in the sub-region, moderate growth is anticipated in smart manufacturing, particularly in the machinery and equipment sector which has the ability to generate export income and includes advanced manufacturing such as the production of medical equipment which is based on research and development activity. Food and beverage production and those manufacturing services that support government activities and the construction sector are also expected to grow in the sub-region (SKM, 2003, p17). A key issue in the developmet of this "indusry" will be where to locate these smart manufacturing businesses. To this end it is worth noting that the ACT government has a large land bank of industrial land within close proximity to key industry clusters.

The economic boundaries of the region are however broader than the jurisdictional boundaries of the ACT with adjoining LGAs in NSW contributing to the strength of the economy. In this respect the ACT Government has acknowledged the importance of a co-ordinated regional approach to the planning and implementation of industry development (ACT Government, 2003, p38) and has mooted the concept of a Canberra Region Economic Area comprising the ACT, Queanbeyan, Yass and the former Yarrowlumla Local Government Areas.

The cross border issues that the ACT government considers need better management relate primarily to land supply and development, water supply and management and disaster planning and relief. The reference to land supply and development as issues that need regional co-ordination may relate to all forms of development for urban purposes, however, further reading of the Discussion Paper would tend to indicate that it relates primarily to residential settlement patterns and opportunities for recreation and leisure tourism (Mitchell Resources Intelligence Pty Ltd, pp19-20). The Discussion Paper also briefly mentions

economic development, however it relates only to the development of agribusiness and an expanded supply of business services and does not specifically tackle the need for local employment opportunities and specific economic development opportunities outside of the ACT. Furthermore, the Economic White Paper states that the ACT Government will work with the NSW Government to promote regional initiatives in the wine, tourism and television industries (Mitchell Resources Intelligence Pty Ltd, p38).

Principle 5 of the ACT-NSW Cross Border Regional Settlement Agreement states that economic development diversity will need to be supported by the provision and enhancement of employment lands to accommodate the long term needs of the region. This will be strongly linked to improved transport networks and supporting the regional value of key infrastructure assets by limiting activities that may diminish their function or ability to contribute to the Region.

Notwithstanding the adopted position of the ACT Government in the *Canberra Plan*, the rural lifestyle and natural amenity of the surrounding NSW LGAs (including the Yass Valley) has been attracting population growth as a result of out migration from the ACT. This has changed the structure of the workforce and has made it possible for the development of a “new economy” outside the borders of the ACT which is supported by a workforce of talented young people.

The potential for this “new economy” and other local knowledge based industries/facilities to develop in the Yass Valley is discussed in more detail in the following chapter.

## 4 PROFILE

This chapter provides an overview of infrastructure provision and services and the demographic and economic trends within the Yass Valley LGA.

### 4.1 Environment and land use

The Yass Valley LGA covers an area of approximately 3999 km<sup>2</sup>. It is a picturesque rural area with a diverse natural environment despite extensive land clearing (approximately 80 % of the area has been cleared to date) for agricultural purposes and urban development.

The long history of dry-land grazing has resulted in a loss of biodiversity with over 75 known endangered and vulnerable species and ecological communities. Soils across the LGA are vulnerable to erosion and salinity this combined with historic land management practices has impacted greatly on water quality. Grazing, in association with an increasing demand for viticulture, horticulture and rural residential living is also resulting in growing exploitation of ground and surface water resources.

Table 4 provides an indication of the range of land uses within Yass Valley and the land they occupy.

**Table 4 Land Use Zoning**

| Land use zoning   | Area (Ha) | % of total Yass Valley |
|---|-----------|------------------------|
| Rural Production - Agriculture  | 340418    | 93.3                   |
| Rural Living / Low Density Living   | 11343     | 3.1                    |
| Village, Commercial / Light Industrial Activities                                 | 326       | 0.1                    |
| Low, Medium and High Density Residential Housing                                  | 535       | 0.1                    |
| Business Commercial and Community Purposes  | 30        | >0.1                   |
| Industrial and Related Development  | 33        | >0.1                   |
| Open Space Parks, Playgrounds, Drainage   | 252       | 0.1                    |
| Special Uses Community uses, Pedestrian and Bicycle Paths                         | 325       | 0.1                    |
| National Park National Park and Nature Reserves                                   | 9466      | 2.6                    |
| Environmental Protection and Enhancement Nature Reserves, Parks, Recreation Areas | 2219      | 0.6                    |
| TOTAL   | 364948    | 100.00                 |

Source: Yass Valley Council

### 4.2 Population and Settlement

The population of the Yass Valley LGA at the 2006 Census was 13,135. The majority of this population (40.59%) resides within the town of Yass, 20.9% of the population reside in the villages with the remainder (38.5%) distributed across the rural areas of the LGA. Table 5 provides a breakdown of the population between the urban and rural areas of the Yass Valley.

**Table 5 Population of the Yass Valley LGA by Location**

| Town/Villages/Rural Balance | Population    | % of total Population |
|-----------------------------|---------------|-----------------------|
| Yass                        | 5331          | 40.59                 |
| Bowning                     | 166           | 1.26                  |
| Binalong                    | 267           | 2.03                  |
| Murrumbateman & district    | 1759          | 13.39                 |
| Gundaroo                    | 334           | 2.54                  |
| Sutton                      | 221           | 1.68                  |
| Rural Balance               | 5,057         | 38.5                  |
| <b>TOTAL</b>                | <b>13,135</b> | <b>100</b>            |

Source: ABS, 2006

### 4.3 Population Growth

Between 1996 and 2006 the population of the Yass Valley LGA increased from 10,708 to 13,135 people, which equates to a 23% increase over the decade (2.3% per annum). This is a significant increase in population in comparison to the overall growth rates for NSW and the ACT, which were 9.58% and 9.06% respectively over the same time period.

This significant increase in population is consistent with the high rates of population growth for the Palerang (31.07%) and Queanbeyan (27.49%) LGA's. The Goulburn Mulwaree LGA, however, recorded growth of only 4.59%. The difference in growth is likely to be attributable to the proximity of the Yass Valley, Palerang and Queanbeyan LGA's to Canberra and the employment, social and economic opportunities that the city provides.

**Table 6 Population growth 1996 – 2001**

|                          | 1996      | 2001      | 2006      | % increase<br>1996 - 2006 |
|--------------------------|-----------|-----------|-----------|---------------------------|
| <b>Yass Valley</b>       | 10,708    | 11,380    | 13,135    | 22.67                     |
| <b>Palerang</b>          | 9,450     | 10,831    | 12,386    | 31.07                     |
| <b>Queanbeyan</b>        | 28,433    | 32,464    | 36,248    | 27.49                     |
| <b>Goulburn Mulwaree</b> | 25,799    | 26,558    | 26,962    | 4.59                      |
| <b>ACT</b>               | 299,243   | 311,947   | 326,901   | 9.58                      |
| <b>NSW</b>               | 6,038,696 | 6,371,745 | 6,585,732 | 9.06                      |

### 4.4 Age

The median age of Yass Valley residents in 1996 was 35 and by 2006 it was 39, which indicates a general ageing of the population.

The most significant decrease in population occurs between the ages 20-29 as young adults leave the LGA for employment, educational and travel opportunities. From the age of 30 onwards, the population increases as people return to the LGA or are attracted to the LGA to raise families. In order to retain

young people in the area it is important to provide a range of employment opportunities.

#### **4.5 Population projections**

Population projections prepared by Yass Valley Council forecast a population of almost 23,000 persons by 2032, representing an increase of approximately 10,000 persons, or 123%. This equates to an average annual growth rate of almost 4%.

The town of Yass is projected to increase its share of the LGA's population to 51.5%, with a total town population of almost 12,000 persons by 2032. Table 7 outlines the growth anticipated per annum for the town of Yass.

It should be noted that these population projections are based on an adequate water supply being available to sustain population growth.

**Table 7 Yass Township Population Projections**

| Year | Yass Town | Year | Yass Town | Year | Yass Town |
|------|-----------|------|-----------|------|-----------|
| 2005 | 5,909     | 2015 | 8,570     | 2025 | 10,473    |
| 2006 | 6,169     | 2016 | 8,761     | 2026 | 10,663    |
| 2007 | 6,377     | 2017 | 8,951     | 2027 | 10,853    |
| 2008 | 6,507     | 2018 | 9,141     | 2028 | 11,043    |
| 2009 | 6,638     | 2019 | 9,331     | 2029 | 11,234    |
| 2010 | 7,028     | 2020 | 9,522     | 2030 | 11,424    |
| 2011 | 7,418     | 2021 | 9,712     | 2031 | 11,614    |
| 2012 | 7,808     | 2022 | 9,902     | 2032 | 11,804    |
| 2013 | 8,120     | 2023 | 10,092    |      |           |
| 2014 | 8,380     | 2024 | 10,282    |      |           |

Source: Yass Valley Council Projections July 2005

Conversely, the Department of Planning's population projections, released by the Population and Transport Data Centre in 2004, project that the Yass Valley will increase by approximately 1% per annum, to 13 500 persons by 2031. This represents an increase of only 365 persons over the next 23 years based on the 2006 Census which indicates that the Yass Valley currently has a population of 13,135. Clearly these projections have underestimated the drivers of growth within the Yass Valley.

Therefore when the recent high growth levels and ongoing demand for residential land are considered, it is anticipated that population growth will be at the higher end of expectations and will more closely match Yass Valley Council's forecast population figures.

#### **4.6 Economy**

The Yass Valley LGA is dissected by a number of major transport routes which provide links to all the major cities and towns within the southeast region of NSW and the ACT. This location makes the Yass Valley an ideal centre for business and industry that relies on dependable and ready access to markets in Sydney, Melbourne and Canberra and is supported by a group of thriving communities including Yass Town which are rich in natural resources.



The economic base of Yass Valley has traditionally been in primary production (predominantly grazing for sheep production, with limited cattle). New and emerging industries such as tourism and viticulture are now also contributing to the economic wellbeing of the LGA.

#### 4.7 Education

Approximately 35% of the population have obtained post-secondary qualifications, up from 28% in 2001 and 27% in 1996. This shows that in the last 5 years, the population of the Yass Valley LGA has become more educated. This figure is also well above the NSW state average of 17% and marginally above the national average of 31%.

#### 4.8 Labour Force

The labour force within the Yass Valley LGA increased by 1457 persons from 1996 to 2006. This represents a 26% increase, with approximately two thirds of this growth occurring during 2001 – 2006.

During this period, the unemployment rate steadily declined from a rate of 6.5% in 1996, to 4.2% in 2001 and 2.7% by 2006.

Table 8 provides a summary of the labour force statistics for the Yass Valley LGA over for the period 1996 - 2006.

**Table 8 Change in Labour Force 1996 - 2006**

| Year | Population | Employed | Unemployed | Labour force | Change |      |
|------|------------|----------|------------|--------------|--------|------|
| 1996 | 10,708     | 5,133    | 362        | 5,495        | ---    |      |
| 2001 | 11,380     | 5,722    | 252        | 5,974        | 246    | 5.3% |
| 2006 | 13,135     | 6,767    | 185        | 6,952        | 435    | 8.6% |

**Source: ABS Population and Housing Census 2006**

#### 4.9 Occupation by Industry

The highest percentage growth in occupation between 1996 and 2006 occurred in the following occupational categories:

|  |        |
|--|--------|
| Professionals                          | 64.06% |
| Community and personal service workers | 61.17% |
| Sales workers                          | 38.46% |

By comparison, there was only small growth in the number of people employed as machinery operators and drivers (8.41%), although technicians, trade workers and labourers achieved employment growth of 29.33% and 26.34% respectively.

The strongest growth in the absolute number of jobs held in the workforce between 1996 and 2006 occurred in the following sectors:

|  |     |
|--|-----|
| Professionals                          | 517 |
| Community and personal service workers | 230 |
| Clerical and administrative workers    | 220 |

**Table 9 Change in Employment by Occupation Yass Resident Workforce 1991-2001**

| Industry                               | 1996  | 2001  | 2006  | % Change 1996-2006 |
|--|-------|-------|-------|--------------------|
| Managers                               | 1,143 | 1,238 | 1,329 | 16.27%             |
| Professionals                          | 807   | 1,015 | 1,324 | 64.06%             |
| Technicians and trades workers(b)      | 733   | 806   | 948   | 29.33%             |
| Community and personal service workers | 376   | 451   | 606   | 61.17%             |
| Clerical and administrative workers    | 797   | 865   | 1,017 | 27.60%             |
| Sales workers                          | 351   | 423   | 486   | 38.46%             |
| Machinery operators and drivers        | 309   | 271   | 335   | 8.41%              |
| Labourers                              | 486   | 572   | 614   | 26.34%             |
| Inadequately described/Not stated      | 132   | 81    | 107   | -18.94%            |
| Total                                  | 5,134 | 5,722 | 6,766 | 31.79%             |

**Source: ABS Population and Housing Census 2006**

In summary, employment growth across the LGA was substantially higher in those occupations associated with office, retail and community service industries, with employment traditionally associated with industry only marginally increasing.

#### **4.10 Industry of Employment**

The highest percentage of growth in employment in the Yass Valley LGA between 1996 and 2006 occurred in the following categories:

|  |        |
|--|--------|
| Construction                           | 89.35% |
| Community and personal service workers | 73.68% |
| Health care & social assistance        | 59.42% |

Over the same time period, there was a decline in the employment in the following categories:

|  |         |
|--|---------|
| Mining                                 | -52.94% |
| Information media & telecommunications | -38.73% |
| Wholesale trade                        | -10.71% |

Whilst there has been significant growth in the number of jobs across a variety of sectors, public administration and safety (1,109 jobs) agriculture, forestry & fishing (689 jobs) and construction (640 jobs) held the largest number of jobs in the Yass Valley LGA workforce. This demonstrates the influence of government, agriculture and construction in employment across the LGA.

Table 10 provides a summary of the changes in employment by industry for the period 1991-2001.

**Table 10 Change in Employment by Industry Yass Resident Workforce 1996-2006**

| Industry                                      | 1996         | 2001         | 2006         | % Change<br>1991-2001 |
|---|--------------|--------------|--------------|-----------------------|
| Agriculture, Forestry & Fishing               | 762          | 792          | 689          | -9.58%                |
| Mining  | 17           | 11           | 8            | -52.94%               |
| Manufacturing                                 | 175          | 240          | 231          | 32.00%                |
| Electricity, Gas, Water & Waste Services      | 113          | 110          | 113          | 0.00%                 |
| Construction                                  | 338          | 430          | 640          | 89.35%                |
| Wholesale Trade                               | 168          | 161          | 150          | -10.71%               |
| Retail Trade                                  | 446          | 522          | 613          | 37.44%                |
| Accommodation & Food Services                 | 329          | 425          | 455          | 38.30%                |
| Transport, Postal & Warehousing               | 244          | 202          | 233          | -4.51%                |
| Information Media & Telecommunications        | 173          | 122          | 106          | -38.73%               |
| Financial & Insurance Services                | 100          | 101          | 101          | 1.00%                 |
| Rental, Hiring & Real Estate Services         | 79           | 92           | 95           | 20.25%                |
| Professional, Scientific & Technical Services | 304          | 414          | 528          | 73.68%                |
| Administrative & Support Services             | 91           | 142          | 136          | 49.45%                |
| Public Administration & Safety                | 647          | 694          | 1,109        | 71.41%                |
| Education & Training                          | 376          | 423          | 504          | 34.04%                |
| Health Care & Social Assistance               | 382          | 445          | 609          | 59.42%                |
| Arts & Recreation Services                    | 62           | 69           | 69           | 11.29%                |
| Other Services                                | 208          | 215          | 202          | -2.88%                |
| Not adequately described                      | 122          | 112          | 174          | 42.62%                |
| <b>Total</b>                                  | <b>5,136</b> | <b>5,722</b> | <b>6,765</b> | <b>31.72%</b>         |

Source: ABS Census of Population and Housing, 2006

It should be noted that these workforce statistics are captured at the place of residence and not the place of occupation. Therefore they are reflective of the types of jobs that residents in the Yass Valley hold and not necessarily the types of jobs on offer in the LGA.

#### 4.11 Agriculture

The total value of the agriculture sector is estimated to contribute approximately \$50 million per annum to the Yass Valley economy, with livestock production accounting for approximately 50% of this sector. Table 11 shows the breakdown of agricultural commodities per sector.

**Table 11 Value of Agricultural Commodities Produced, Yass, ACT and Sub-Region, 2001**

| SECTOR/INDUSTRY           | VALUE (\$ MILLION) |
|---------------------------|--------------------|
| Livestock Products (Wool) | 27.72              |

|                                  |              |
|----------------------------------|--------------|
| Livestock Slaughter (Meat)       | 16.16        |
| Cropping                         | 4.35         |
| Horticulture                     | 0.45         |
| <b>Total Agricultural Sector</b> | <b>49.51</b> |

#### **4.12 Infrastructure**

Transport and utilities infrastructure, along with population growth, are key to supporting economic growth, although housing, social and community services are also important elements to support the labour force. The major infrastructure in the Yass Valley LGA and the sub-region is summarised below:

##### **Major transport infrastructure**

- The Canberra international airport (proposed to be a regional freight hub);
- The Sydney to Melbourne rail line, with a disused spur line to the town of Yass;
- The Hume Highway, which is the main Sydney to Melbourne passenger vehicle and freight route;
- The Barton Highway, which connects Canberra with the Hume Highway. The Barton Highway is proposed to be upgraded to a divided dual carriageway for its entire length from Yass to Canberra; and
- The Federal Highway, which connects Canberra with the Hume Highway.

##### **Water**

- Yass is provided with water from the Yass Water Treatment Plant which sources water from the Yass River via the Yass Dam. The Yass Dam is a concrete arch dam 12 m high with a crest length of 98 metres located just upstream of the township with an effective storage capacity of 850ML. The plant is designed to treat a flow of 165 l/s or 13 ML/day.
- The Yass Water Supply is dependent on the flows in the Yass River. Under extreme drought conditions without the implementation of water restrictions, the capacity of the Yass Dam is only sufficient to supply average summer demand for a period of 8 to 9 months.
- The future of the Yass water supply is a major potential impediment to industrial and employment lands growth. Accordingly, Yass Valley Council has resolved to increase the height of the dam wall by 3m which will effectively increase the storage capacity to 2,550ML which is 3 times the dam's current volume. Construction of this upgrade is expected to be completed in 2011.
- This additional water supply will service Yass Town and the villages of Bowning and Binalong. It is also proposed to extend a reticulated service

- to the village of Murrumbateman in order to facilitate further residential and commercial development.
- It has also been argued that a regional approach is required to water provision. Cross border water provision from the ACT to NSW is contemplated by the ACT - NSW Cross Border Region Settlement Agreement. Section 8 of that agreement outlines relevant settlement principles for the region, it states:
    - “8.1. All future settlement in the ACT should occur in accordance with the Strategic Direction outlined in the Canberra Spatial Plan; future settlement in NSW should be in accordance with the Sydney-Canberra Corridor Regional Strategy.*
    - 8.2. Subject to the terms of the Memorandum of Understanding on Cross Border Water Resources, water may be supplied to any existing settlement in the Cross Border Region, or any proposed new settlement in the Cross Border Region, where both parties to this Memorandum of Understanding agree the settlement is in accordance with the following principles.*

*Principle 5: Economic development diversity will be supported by:*

    - 8.7.1 the provision and enhancement of employment lands to accommodate long term needs that will be strongly linked to transport networks. This will be the priority land used for these lands;*
    - 8.7.2 supporting the regional value of key infrastructure assets by limiting activities that may diminish their function or ability to contribute to the Region;”*

## **Sewer**

- A reticulated sewerage system services the town of Yass. The sewerage treatment plant is located in Fauldner Avenue, north west of the town. The Highway Service Centre, on the Hume Highway, is connected to the sewerage system via a private pumping station and rising main.
- The Yass STP is currently being augmented and once work is complete it will be able to service a population of approximately 12,000 people.
- A new STP to service the village of Murrumbateman is about to built with an estimated completion date of 2010.

## **Electricity**

- The town of Yass is serviced by electricity from the Yass Substation, which is located to the south of Yass. TransGrid's newest 330/132kV Substation was officially opened on 27 April 2006. It is the major

interconnection point for supply from the Snowy generators to the Sydney and Canberra regions, and for transfer of power south from the main thermal generators in New South Wales and Queensland to south-western New South Wales, Victoria and South Australia. High voltage lines (66kV – 330kV) traverse the local government area.

### **Gas**

- A major gas pipeline is located 25 kilometres north of Yass and provides reticulated natural gas supply to the town.

### **Communications**

- Telstra provides a basic telephone service to the boundary of the property within standard time frames. This service is provided under commercial consideration, and may be a combination of technologies, including copper line, a mixture of copper and fibre, or fibre or wireless. Telstra can provide an alternative service by commercial arrangement. Telstra has recently introduced a new arrangement to assist Developers and Council regarding Broadband and mobile phone coverage, and provision of a telephone service to all blocks in new developments. This arrangement is now available in all areas of NSW. The process revolves around the Developers, the Local Councils and Telstra working together to ensure a planned development with appropriate infrastructure.
- ADSL broadband is available in Yass, although cable broadband is not available. Some delays have been experienced in receiving the ADSL service due to the need to upgrade the telephone exchange.

### **4.13 Local Analysis of Opportunities and Constraints**

The Sydney to Canberra Corridor Strategy's policy in relation to economic development is to promote economic development diversity by:

- the provision and enhancement of employment lands to accommodate long term needs that will be strongly linked to transport networks. This will be the priority land use for these lands;
- supporting the regional value of key infrastructure assets by limiting activities that may diminish their function or ability to contribute to the Region.

The locational advantages of Yass add significantly to the potential for Yass to attract new development including industrial, transport and distribution related uses as it provides significant strengths and competitive advantages for attracting business development.

Opportunities for economic development in the Yass Valley include:

- Proximity to markets and transport (road and rail) links to Sydney-Canberra-Melbourne.
- Emerging industries (eg non-traditional agricultural and technological).
- Retention of youth population through increased education and employment opportunities.
- Harnessing the attributes of the Local Government Area (its environment, rural lifestyle and community support structures) in new and creative ways so as to attract people to the area, particularly the young and talented people who are the back bone of the knowledge economy.
- Improved promotion of economic development opportunities.
- Support for tourism and rural industries.

The nature and pace of future economic development in Yass will be determined by a number of factors including infrastructure investment, water supply, and population growth as well as the ability:

- of existing and emerging businesses to build on opportunities in growth sectors;
- of Yass to accommodate the changing property requirements of industry and to be able to compete with other locations along the Sydney-Melbourne freight route;
- to compete with a large land bank of industrial land in the ACT and Queanbeyan; and
- to manage possible land use conflicts.



## **5 INDUSTRIAL LAND SUPPLY**

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### **5.1 Introduction**

This section provides an overview of the existing industrial zoned land in Yass, the Highway Service Centre precinct, the area of additional land investigated for employment generating purposes and the Yass Sale Yards. It identifies the opportunities and constraints of these areas and also provides an overview of industrial land in the ACT and Queanbeyan.

### **5.2 Existing Industrial Areas in Yass**

There are two existing precincts which have industrial land use zones (either 3(b) Highway Services or 4(a) Industrial under Yass LEP 1987) within the town of Yass and they are referred to in this study as the South Yass and North Yass Business Precincts. Together these precincts comprise an area of 33 hectares or less than 0.1 % of the total land area of the Yass Valley LGA.

By way of background, the objective of the 3(b) Highway Services zone is to set aside land for the provision of services required by the travelling public and for the development of refreshment, accommodation and vehicle service facilities.

The objective of the 4(a) Industrial zone is to set aside certain land for the purpose of industry within convenient proximity to the central business district of Yass and to sources of employment. As such, residential (except in conjunction with purposes permissible within the zone) and commercial land uses are prohibited in this zone.

Whilst these zones aim to provide for manufacturing, commerce/trade, agricultural industries and services for the traveling public, a range of uses that are more appropriately categorised as business service industries, administration or government are also accommodated in these precincts.

The Yass Saleyards, to the south of Yass, and the Highway Service Centre, to the north of Yass, whilst not zoned for industrial purposes are also considered in this study as they are employment generating areas which have the potential for expansion.

It should be noted that home industries, ie. those small scale industries carried on in a dwelling, or in a building ancillary to a dwelling have been excluded from this study.

An extract from the Yass LEP 1987 which summarises the 3(b) Highway Services and 4(a) Industrial zones is provided in table 12 below.

**Table 12      Extract of Yass Local Environmental Plan 1987**

| <b>YASS LEP 1987</b>   |
|--|
| <p><b>Zone No. 3 (b) (Highway Services Zone)</b></p> <p>1 Objectives of zone</p> <p>The objective of this zone is to set aside certain land for the provision of services required by the traveling public and for the development of refreshment, accommodation and vehicle service facilities.</p> <p>2 Without development consent</p> <p>Nil.</p> <p>3 Only with development consent</p> <p>Advertising structures; bulk stores; car repair stations; dams; dwelling-houses used in conjunction with purposes permissible within the zone; helipads; heliports; hotels; light industries; liquid fuel depots; motels; recreation facilities; recreation areas; refreshment rooms; roads; road transport terminals; service stations; taverns; tourist facilities; transport terminals; utility installations; any other purpose specifically designed to cater for the traveling public.</p> <p>4 Prohibited</p> <p>Any purpose other than a purpose included in Item 3.</p> |
| <p><b>Zone No 4 (a) (Industrial Zone)</b></p> <p>1 Objectives of zone</p> <p>The objective of this zone is to set aside certain land for the purposes of industries within convenient proximity to the central business district of Yass and to sources of employment.</p> <p>2 Without development consent</p> <p>Nil.</p> <p>3 Only with development consent</p> <p>Any purpose other than a purpose included in Item 4.</p> <p>4 Prohibited</p> <p>Boarding-houses; child care centres; commercial premises; dual occupancy buildings; dwelling-houses (other than dwelling-houses used in conjunction with purposes permissible within the zone); extractive industries; feed lots; forestry; general stores; generating works; helipads; home industries; home occupations; hospitals; hotels; medium density housing; mines; motels; motor showrooms; piggeries; places of assembly; places of public workshop; poultry</p>  |

farms; professional consulting rooms; public buildings; recreation establishments; refreshment rooms; roadside stalls; rural workers' dwellings; sawmills; service stations; shops; stock and sale yards; taverns; tourist facilities; units for aged persons.

#### **Schedule 1 Development for additional purposes**

Lot 20, DP 804565 (*currently identified as Lot 100 DP 805154*) Parish of Yass, Hume Highway, Yass, as shown edged heavy black and hatched on the map marked "Yass Local Environmental Plan 1987 (Amendment No 22)" --advertising signs; advertising structures; bus stations; dwellings occupied in conjunction with uses permissible on the site; emergency repair facilities (including towing facilities); parking areas for cars, buses and trucks; playgrounds; rest areas; rest rooms; roads; road transport terminals; toilets and showers; utility installations.

Lot 24, DP 808121 and part portions 6 and 56 (*currently identified as Lots 1-5 DP 852715 and Lot 1 DP 842644*), Parish of Yass, Hume Highway, Yass, as shown in heavy black unhatched on the map marked "Yass Local Environmental Plan 1987 (Amendment No 22)" – a highway service centre.

### **5.3 South Yass Business Precinct**

The South Yass Business Precinct is zoned 4(a) Industrial under the provisions of the Yass LEP 1987. The extent of this precinct is shown in Figure 1. The precinct extends along Waroo Road, down Grand Junction Road and to Yass Valley Way and is 14.2 hectares in area. The area comprises 43 individual allotments which range in size from 600 m<sup>2</sup> to over 2 hectares.

Existing uses in the South Yass Business Precinct are predominantly light industrial or bulky goods commercial. Seven lots (approximately one hectare) are used for residential purposes while over three hectares is currently vacant. The vacant land is comprised of six separate lots ranging in size from 600m<sup>2</sup> to approximately 1.5 hectares. Table 13 provides a summary of land uses in the area, that existed at the time of the land use survey. The detailed Land Use Audit and accompanying maps are located in Appendix 1.

**Table 13 Land Uses in the South Yass Business Precinct (as of March 2006)**

| Agriculture Related         | 3  | 11  |
|-----------------------------|----|-----|
| Automotive                  | 7  | 26  |
| Building/Gardening Supplies | 6  | 22  |
| Engineering                 | 1  | 4   |
| Leisure/tourism             | 2  | 7   |
| Residential                 | 6  | 22  |
| Storage/Warehousing         | 1  | 4   |
| Vacant                      | 1  | 4   |
| Total                       | 27 | 100 |

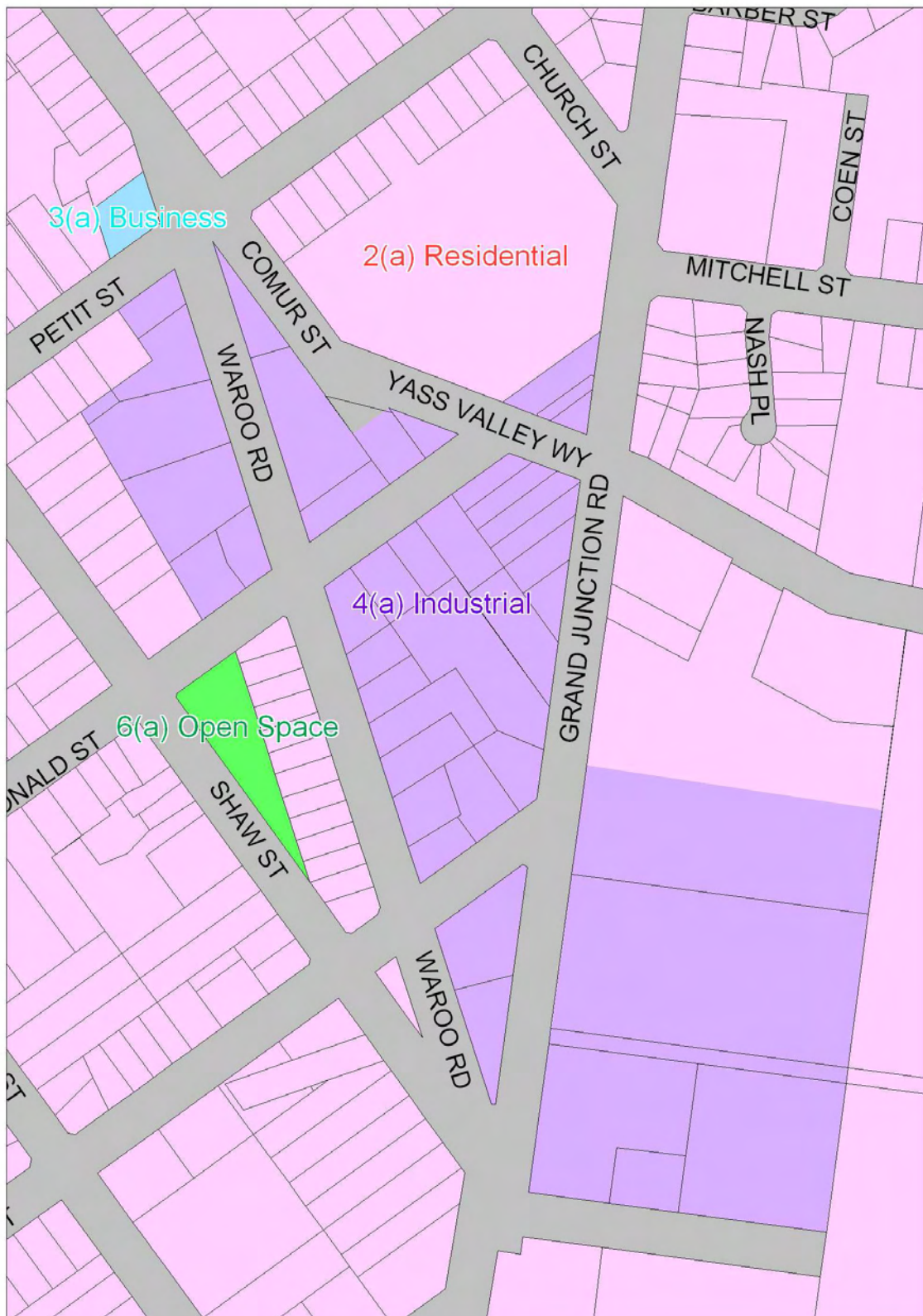
### Constraints

- The current zoning does not provide for the range uses that currently exist.
- Due to the specificity of the zones in this precinct, uses not related to industry are not permitted. This has constrained the success of the precinct.
- The precinct is surrounded by residential development and operations, particularly those of an industrial nature, could be hampered or restricted by amenity impacts on surrounding residences.
- This precinct is unable to further expand, given that its location is surrounded by residentially zoned land.
- The allotment sizes are small on average and do not facilitate the location of industry which requires larger allotment sizes.

### Opportunities

- This precinct has excellent access to existing infrastructure and services, such as Yass Valley Way.
- A zone which enabled a broader range of uses would benefit this precinct by providing scope to attract new businesses to the precinct whilst enabling existing businesses to expand their operations.
- A more flexible land use zone would also enable the smaller allotments located within the precinct to be more appropriately developed for employment generating purposes.

**Figure 1** Existing zones in the South Yass Business Precinct



#### 5.4 North Yass Business Precinct

The North Yass Business Precinct is located at the northern end of the town of Yass. This precinct is zoned both 3(b) Highway Services Zone and 4(a) General Industry under the provisions of the Yass LEP 1987. The North Yass Business Precinct adjoins Yass Valley Way, and extends into Laidlaw, Reddall, Orion, and Pollux Streets. Figure 2 shows the extent of the precinct and the surrounding area.

The North Yass Business Precinct caters primarily for light industrial, service industry and warehousing uses. Table 14 outlines the land uses that existed at the time of the land use survey. The detailed Land Use Audit and accompanying maps are located in Appendix 1 of this report.

**Table 14 Land Uses in the North Yass Business Precinct (as of March 2006)**

| Land Use                    | Number | % of total |
|-----------------------------|--------|------------|
| Agriculture Related         | 2      | 6          |
| Automotive                  | 4      | 11.5       |
| Building/Gardening Supplies | 2      | 6          |
| Commercial/Service          | 5      | 15         |
| Engineering                 | 3      | 9          |
| Residential                 | 7      | 20         |
| Retail                      | 2      | 6          |
| Storage/Warehousing         | 4      | 11.5       |
| Transport                   | 2      | 6          |
| Vacant                      | 3      | 9          |
| Total                       | 34     | 100        |

The North Yass Business Precinct, currently contains 21.61 hectares of land zoned 4(a) Industrial. This area comprises four lots ranging in size from two hectares to 10 hectares. Two of these lots are currently utilised for residential purposes, one lot is vacant (two hectares in size) although a Development Consent has been issued for the construction of a concrete casting facility whilst the remaining lot (4 hectares in size) has also been purchased for the construction of a concrete casting facility. Importantly, no industrial uses are currently being carried out in the 4(a) Industrial zone at present however it is understood that construction of the approved concrete casting facility will commence in the near future.

16.2 hectares of the North Yass Business Precinct is also zoned 3(b) Highway Services and comprises 27 lots, ranging in size from approximately 700 m<sup>2</sup> to one hectare. Approximately one hectare is used for residential purposes (six lots) while almost two and a half hectares is currently vacant, with the remainder used for a range of industrial/trade uses.

The most common land use in this precinct is currently residential, followed by commercial/service, automotive, storage/warehousing, engineering and vacant land.

### **Constraints**

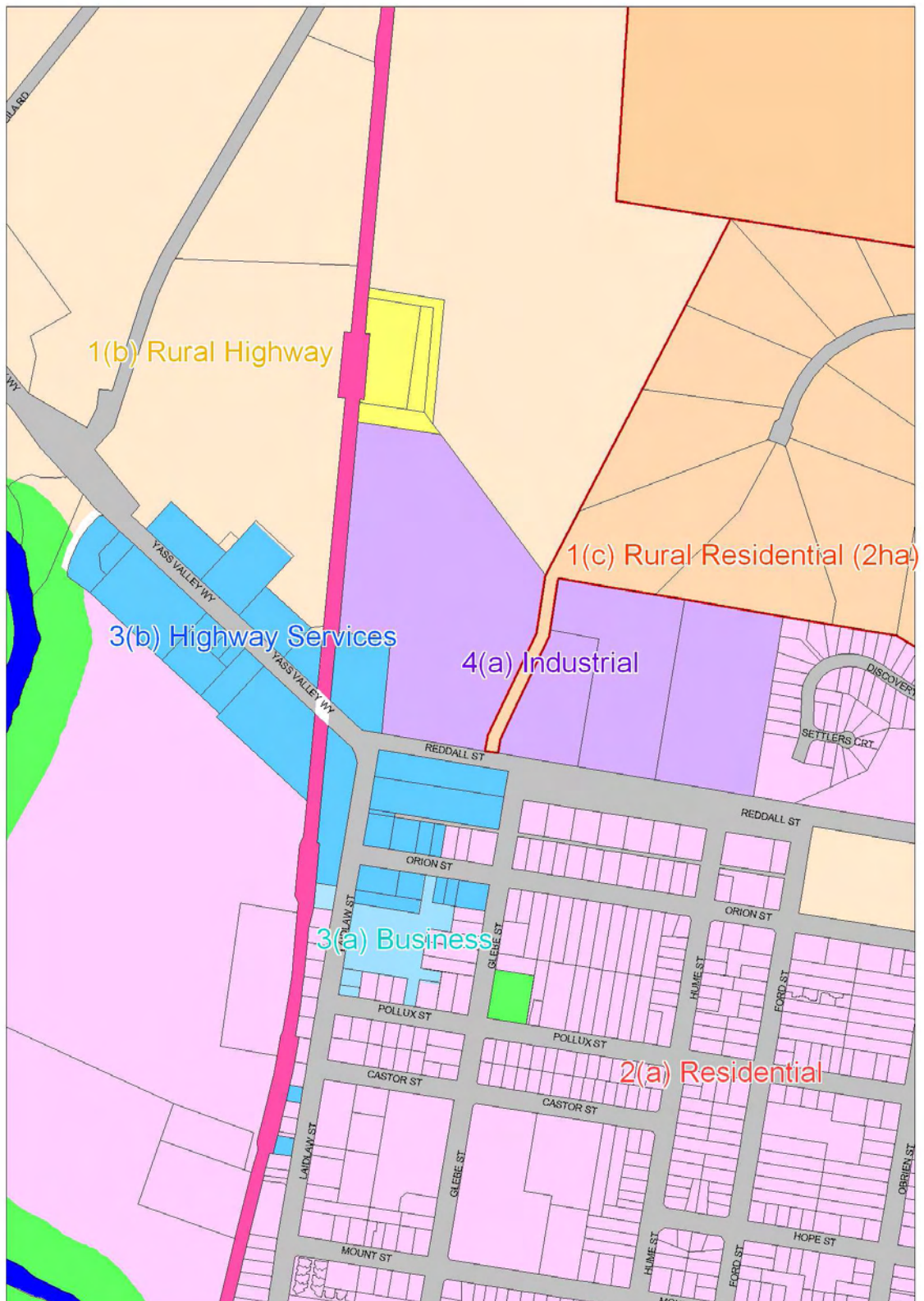
- The current land use zonings do not provide for the range uses that currently exist.
- Due to the specificity of the zones in this precinct, uses not related to industry and the traveling public are not permitted. This has constrained the success of the precinct.
- The precinct is surrounded by residential and rural residential development. Therefore uses of an industrial nature, could be hampered or restricted by amenity impacts on surrounding residences.
- The allotment sizes, particularly in the areas zoned 3(b) Highway Services are generally small and do not facilitate the location of industry which requires larger allotment sizes.

### **Opportunities**

- This precinct has excellent access to existing infrastructure and services, such as the Hume Highway.
- This precinct also has surrounding areas, zoned 1(b) Rural Highway, which it could expand into which are unconstrained by surrounding land uses and biophysical / slope issues.
- A zone which enabled a broader range of uses would benefit this precinct by providing scope to attract new businesses to the precinct whilst enabling existing businesses to expand their operations.
- A more flexible land use zone would also enable the smaller allotments located within the precinct to be more appropriately developed for employment generating purposes.



**Figure 2 Existing zones in the North Yass Business Precinct**





## **5.5 Yass Sales Yards**

The Sale Yards are owned and operated by Yass Valley Council and are located on Yass Valley Way to the south of the town of Yass. The Sale Yards are currently zoned 1(c) Rural Residential under Yass LEP 1987. Figure 3 shows the extent of the Sale Yards and the surrounding area.

The site is approximately two hectares in size and caters for both cattle and sheep sales and the resting of traveling stock. The Sale Yards have a capacity in the order of 600 head of cattle and 10,000-12,000 sheep, however, in recent times it is more usual for the Sale Yards to process, on average, 150-250 head of cattle and 3,000-4,000 sheep at any sale. Cattle sales are held fortnightly on Tuesdays while sheep sales are held on alternate Wednesdays.

Whilst sales are held on only one day of the week, stock is transported to the site on the day prior to the sale and often collected the day after a sale, although stock can be retained on site for some days. Traveling stock that is being rested, watered and fed can be accommodated on site on any day of the week.

The Sale Yards are individually fenced and concreted with refuse cleaned regularly to ensure site is kept clean and to minimise odours. Stock are transported by truck to the site (transport varies from small rigid truck to B-Double) with access from the Hume Highway and Yass Valley Way, which allows trucks to bypass the central business district of Yass.

While the Sales Yards are located on the outskirts of town, the zoning of adjoining lands to the north, west and south allow for residential development. Development to the east comprises rural lifestyle blocks. The continued operation of the Yards in their current location will therefore result in future land use conflicts if adjoining lands are developed for residential purposes.

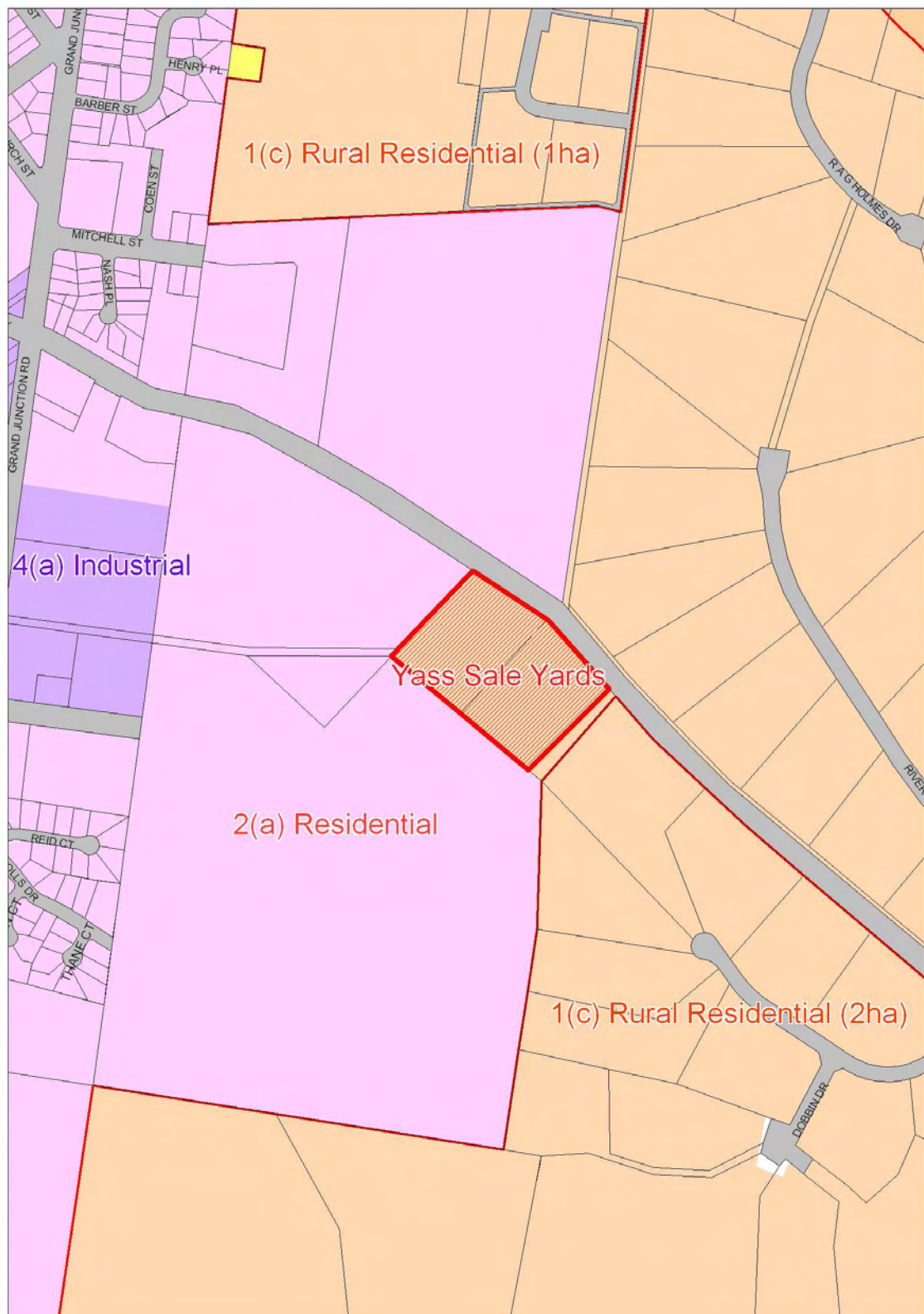
### **Constraints**

- The land is highly constrained by its location in relation to the surrounding rural and rural residential land and the potential for amenity impacts (noise, odour, traffic), particularly after the surrounding residential land is developed.

### **Opportunities**

- The Yass Sale Yards has excellent access to Yass Valley Way and the Hume Highway.

**Figure 3 Existing zone for Yass Sale Yards**



## **5.6 Highway Service Centre, Hume Highway**

The Highway Service Centre and surrounding land subject to Amendment 22 to Yass LEP 1987 is strategically located at the junction of Yass Valley Way and the Hume Highway to capture transport services and the general motoring public.

The area is zoned 1(b) Rural Highway under Yass LEP 1987, the object of which is to maintain a corridor along major National and State transport routes so as to protect them from traffic generating developments which may affect the safe and efficient movement of traffic and protect the amenity of the rural countryside.

Agriculture is permissible without development consent in the zone and is the predominant use, notwithstanding the Highway Service Centre at the junction of the Hume Highway and Yass Valley Way. Industries and road transport terminals amongst other uses are expressly prohibited in the zone. The minimum subdivision size permitted is 40 hectares.

The uses that exist at the highway service centre are a service station with eating facilities, McDonalds and KFC. The surrounding land (subject to Amendment 22 of the Yass LEP 1987) is currently vacant.

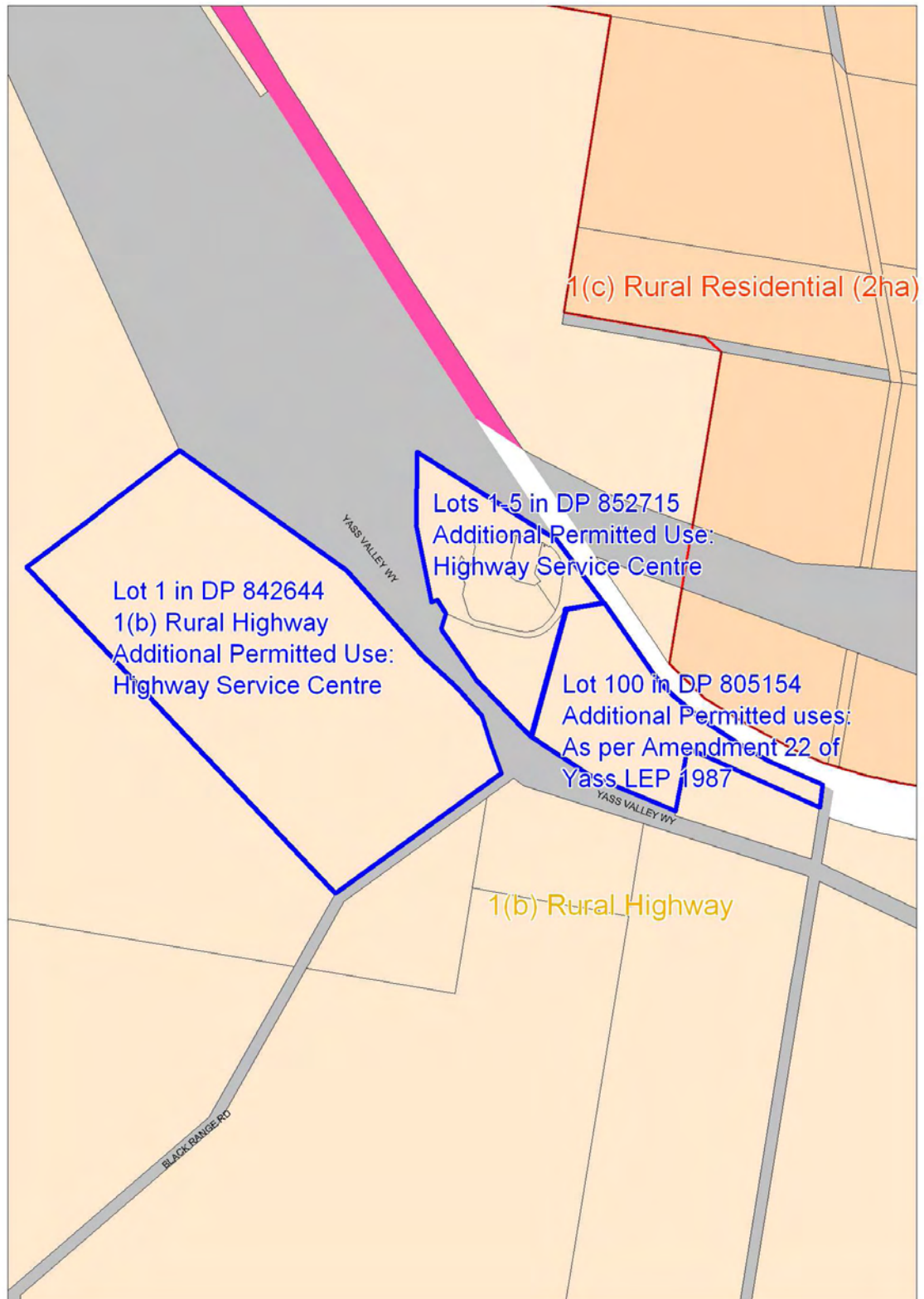
### **Constraints**

- The Highway Service Centre is already well serviced by facilities for the traveling public. This may explain why the surrounding land remains vacant.

### **Opportunities**

- This site already takes advantage of its strategic location and ability to service the traveling public.

**Figure 4** Existing Zones around Highway Service Centre and surrounds



## **5.7 Additional Land Investigated for Employment Generation**

In 1999, the then Yass Shire Council commissioned the *Land Capability Study 2000* for the area of land north west of the town of Yass. The study area comprised approximately 300 hectares and focused on the land from the North Yass Business Precinct to beyond the junction of Yass Valley Way and the Hume Highway, including land to the north and south of the Hume Highway.

The study examined the capability of this land for general industrial, transport and distribution uses and recommended that the corridor between Yass and the Highway Service Centre be designated a growth corridor. The growth corridor would provide a range of industrial, transport and distribution related uses which build on the strategic local and regional contexts.

In 2003, the then Yass Shire Council undertook an additional study to specifically investigate the zoning options for land adjacent to, and including, the existing Highway Service Centre. The aim of the study was to identify the range of land uses that could best take advantage of the location, given the landscape and environmental features and constraints of the area, whilst also ensuring that the service role of the town of Yass would not be compromised.

The study identified the area as ideal for the development of a regional transport precinct comprising general industrial, transport and distributional uses. These uses would capitalize on the regional importance of the junction of the Hume Highway and Yass Valley Way.

Council resolved to proceed with the preparation of a draft LEP to rezone this area to 4(b) Regional Transport Industrial Zone in late 2003. It was then decided to incorporate this rezoning into a broader review of industrial land in Yass which is being undertaken by this study.

The land within the Investigation Area is zoned either 1(a) Rural Agriculture or 1(b) Rural Highway and is primarily used for agricultural purposes with ancillary residential development.

### **Opportunities**

- The land within this precinct is very well located in relation to Yass and the Hume Highway.
- The area is mainly devoid of constraints such as slope and biophysical features.
- The lot sizes are generally large and held by a small number of landholders, enabling easier development of the land if this is deemed appropriate.

## Constraints

- There are areas within the investigation area which have slopes in excess of 5% or have native vegetation which are inappropriate for employment generating development.

### 5.8 Regional Industrial Land Availability

In reviewing the existing industrial areas within the Yass Valley LGA, it is also relevant to consider the broader regional industrial land availability. The major industrial areas proximate to the Yass Valley are located within the ACT and the Queanbeyan LGA.

#### Queanbeyan

Queanbeyan has two predominant industrial areas namely East Queanbeyan (Yass Road) and West Queanbeyan (Gilmore Road). These industrial areas employ more than 3900 people and are important to the local and regional economy. There is no discernible pattern to industry location, but rather a mix of transport, engineering, cabinet making, motor repair and vehicle wreckers with state-of-the-art technology.

Queanbeyan Council's 2005 Economic Strategy *Beyond the Horizon* states that while there are a number of vacant premises and sites in the industrial areas, a supply of substantial quality premises is limited and Queanbeyan has almost exhausted the available space for quality industrial development. The document also states that West Queanbeyan is not ideally suited for industrial purposes as much of the land is located on a steep incline which can make operations and access by large vehicles very difficult. The report concludes that limited options exist for industrial development in Queanbeyan unless more suitable land is made available.

The East Queanbeyan (Yass Road) and West Queanbeyan (Gilmore Road) industrial areas occupy 161 hectares of land of which only 21.17 hectares is currently vacant. Queanbeyan Council has advised that this land supply may be exhausted in just over five years.

The *Queanbeyan Residential and Economic Strategy 2031* was endorsed by the Minister for Planning in April 2007. This Strategy proposes an additional 130 hectares of land to the south of the city to cater for existing demand and demand from future populations associated with new residential development.

#### ACT

The industrial areas of the ACT are located in Fyshwick, Hume, Mitchell and Symonston.

The Hume industrial estate is zoned IZ1 General Industrial and has a total site area of 318.4 hectares of which approximately 156 hectares (49%) is currently

unleased. It provides for regional manufacturing, sawmilling, warehousing, storage and recycling business on large blocks. Industrial enterprises requiring rail access and service industries for the residents of the Tuggeranong District.

The Fyshwick industrial area is zoned primarily IZ2 Mixed Industrial with some IZ1 General Industrial land. Fyshwick provides for mixed commercial, motor vehicle sales, service and home improvement businesses and bulky good retailing with a metropolitan catchment. There are 220 hectares of land zoned for industrial purposes in Fyshwick, of which 43 hectares (19.%) are currently vacant. Colliers International (2006, p7) claim that with the increase in land values over the last five years it is no longer economically viable for large scale warehousing and industrial uses to locate within Fyshwick and that the pressure on land will likely see the relocation of lower order uses to more traditional industrial areas.

The Mitchell industrial area is zoned IZ2 Mixed Industrial and largely caters for warehousing, service trades and light industry. Of the 114 hectares zoned for industrial purposes 34 hectares (29.9%) is currently vacant.

It should also be noted that the Canberra Spatial Plan, released in 2005, identifies a 1500 hectare north-south corridor along Majura Road and the Monaro Highway for potential future industrial uses, particularly lower order and land extensive uses.

### **Industrial Land Take Up Rates**

A number of studies have been undertaken regarding industrial land take up rates within the ACT. Based on previous studies the ACT industrial land take up rate is considered to be between 5ha and 11ha per annum.

Given the variations in annual industrial land take up rates within the region, table 15 below adopts a low (5ha), medium (8ha) and high (11ha) approach to take up rates per annum.

**Table 15 Industrial land supply – ACT and Queanbeyan**

| Location   | Area    | Vacant/under utilised | % vacant | Low    | Med    | High   |
|------------|---------|-----------------------|----------|--------|--------|--------|
| Queanbeyan | 161.1ha | 29.17%                | 18%      | 6 yrs  | 4 yrs  | 3 yrs  |
| Hume       | 318.4ha | 155.9ha               | 49%      | 31 yrs | 19 yrs | 14 yrs |
| Fyshwick   | 220ha   | 43.3ha                | 19.7%    | 8 yrs  | 5 yrs  | 4 yrs  |
| Mitchell   | 114ha   | 34.1ha                | 29.9%    | 7 yrs  | 4 yrs  | 3 yrs  |
| Symonston  | n/a     | 23.5ha                | n/a      | 5 yrs  | 3 yrs  | 2 yrs  |

The attractiveness of Yass as an alternative industrial area to the ACT and Queanbeyan may be impacted on by the proposed rezoning of approximately 130 hectares of employment lands in Queanbeyan and 1500 hectares of industrial land within the north-south corridor along Majura Road and the Monaro

Highway. The impacts of this proposed rezoning are however likely to be off-set by lower land prices in Yass, therefore it is important to provide for a range of zones and opportunities for industrial and bulky goods / commercial development to take full advantage of this opportunity.

Yass is also well placed to maintain a competitive advantage over other areas within the region given its skilled workforce, proximity to related industry sectors (e.g agricultural production) and preferred locational and lifestyle choices.

Accordingly, it is suggested that industry will continue to seek to locate within Yass which further adds to the importance of providing a suitable land supply choice which builds on the towns proximity to the Hume Highway and important agricultural activities.

## 5.9 Land Suitability

The characteristics which determine the suitability of land for employment generating development have been considered in assessing the quality of both existing Industrial Land and potential Employment Generating Land in and around Yass. These characteristics are highly dependant on the type of industry that is to be accommodated. As such, the land suitability criteria that may be applied may vary depending on whether the land is to be used for manufacturing, transport/warehousing, service industry; agricultural industry, livestock sales yards, etc.

The following table illustrates some of the criteria that may be applied when assessing land's suitability for employment generating uses.

**Table 16 Examples of Land Suitability Criteria**

| Desirable attributes            | Absolute constraints              | Relative constraints                                      |
|---------------------------------|-----------------------------------|---|
| Distance from highway           | Land use zones                    | 1:100 flood event   |
| Distance from residential areas | Critical habitat                  | Salinity recharge/discharge areas                         |
| Services                        | SEPP 14 wetlands                  | Endangered ecological communities, threatened species etc |
| Shops                           | Agricultural land classifications |   |

The suitability of land for employment generating development is discussed in further detail with reference to Figure 5 which depicts the slope and biophysical constraints of the land.

### South Yass Business Precinct

This precinct is considered to be generally suitable for employment generating uses given that it has:

- A suitable slope;
- No biophysical constraints;



- Opportunities for the expansion of industrial uses; and
- Good arterial road access.

This precinct does however adjoin residential development and in some instances the zone boundaries are situated on property boundaries as opposed to roadways which do not provide adequate buffers between residential and industrial development.

During the public consultation stage the issue of industrial development at town gateways was also identified as a constraint in relation to South Yass given the possible impact this may have on the rural image of Yass.

### **North Yass Business Precinct**

This precinct is considered to be generally suitable for employment generating uses given that it has:

- A suitable slope;
- No biophysical constraints;
- Opportunities for the expansion of industrial uses; and
- Good arterial road access.

This precinct is however surrounded by residential and rural residential development and is constrained by the Yass Sewerage Treatment Plant (STP) which limits the suitability of the land for residential or other sensitive uses.

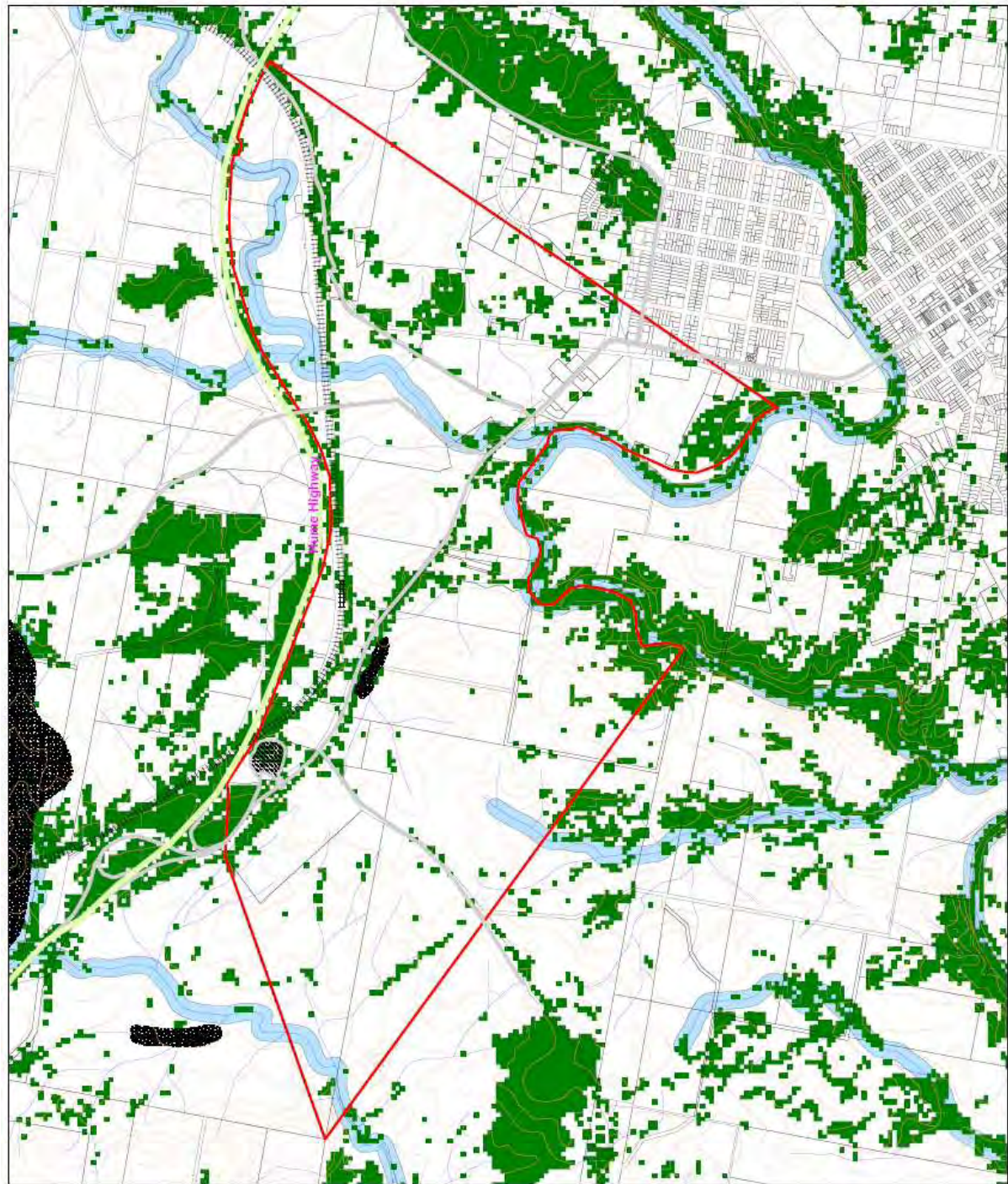
During the public consultation stage the issue of industrial development at town gateways was raised as a constraint due to the possible impact this may have on the rural atmosphere and image of Yass. More importantly however, significant comment was received from surrounding residential and rural residential landholders which questioned the suitability of the existing industrially zoned land for employment generating purposes. The basis of this discussion essentially detailed the incompatibility of employment generating land uses with residential land uses and highlighted the potential for adverse amenity impacts.

### **Highway Service Centre and Land Investigated for Employment Generation**

A number of studies have previously undertaken detailed site suitability assessments for land adjoining the Highway Service Centre and within the Employment Generating Land Investigation Area including David Richardson Environmental Planning, 2003, *Regional Transport Industrial Land Use Rezoning Report*, and David Richardson Environmental Planning, 2000, *Land Capability Study*.

Following an analysis of background information and GIS data utilised in the production of Figure 5 it is agreed that land within this area is generally suitable for industrial development subject to adherence to the recommendations comprised within the background studies.

Figure 5 Slope and Biophysical Constraints Mapping - Potential Employment Generating Land



yass valley council  
the country the people

## Biophysical Constraints

### Yass Valley Industrial Lands Study

#### LEGEND

- Highway Services Zone
- Riparian Zone
- Cadastre
- Nature Vegetation
- Salinity Outcrops
- Railway
- Road
- Highway
- Study Area



Proposed Study Area

0 250 500  
Metres

Scale 1:20,000 @ A3

## 6 INDUSTRIAL LAND DEMAND

This section outlines the assessment undertaken to determine the need for additional industrial land and considers employment opportunities by industry sector and related growth forecasts for employment generating land demand.

### 6.1 Employment Growth

To determine demand for employment generating land within Yass it is necessary to firstly consider the prospects for employment growth within Yass and the broader region. Sections 2 and 3 of this study have outlined the profile of the Yass Valley and the regional drivers of change.

In a study commissioned by the NSW Department of Planning (*MacroPlan Australia, Investigations of the Drivers of Change in the Sydney-Canberra Corridor, 2004*) employment forecasts were prepared based on labour force participation and unemployment rates. Macroplan forecast employment rates assuming that the participation rate remained fixed, the employment rate is held constant, and growth in population yields labour force based on the fixed participation rate. On this basis the employment forecasts outlined in Table 17 below were derived. For comparison purposes Queanbeyan and the total for the southern sub region of the Sydney – Canberra Corridor (including the local government areas of Yass, Queanbeyan and Palerang) have been included.

**Table 17 Employment Forecast (2001 – 2021)**

|                        | 2001  | %    | 2006  | %    | 2011  | %    | 2016  | %    | 2021  | %    |
|------------------------|-------|------|-------|------|-------|------|-------|------|-------|------|
| <b>Yass</b>            | 6635  | 6.5  | 6938  | 6.4  | 7441  | 6.3  | 7980  | 6.1  | 8559  | 6    |
| <b>Queanbeyan</b>      | 20594 | 20.3 | 22653 | 20.9 | 25350 | 21.4 | 28369 | 21.8 | 31747 | 22.3 |
| <b>Southern Sector</b> | 35839 | 35.3 | 39093 | 36   | 43384 | 36.6 | 48170 | 37.1 | 53509 | 37.6 |

**Source: ABS Census of Population and Housing 2001 & MacroPlan Australia**

The above forecast indicates growth in resident employment of around 17,670 jobs for the Southern Sector of the Corridor and 1924 for Yass over the 20-year period to 2021. This equates to approximately 900 new jobs per year in the Southern Sector (which excludes the ACT).

It should be noted that Macroplan's employment estimates are based on their future population estimates which suggest that the Yass Valley LGA would have a population of 13,269 by 2021.

Macroplan's employment estimates however did not account for the Council amalgamation in 2004 which increased the population. Therefore Macroplan's estimates are considerably lower than those forecast by Jackson whose estimates are supported by more recent Census data which indicates that in 2006 the Yass Valley LGA had a population of 13,135.

Accordingly, table 18 below provides more accurate population estimates for the Yass Valley Local Government Areas from 2005 to 2031.

**Table 18 Forecast Growth in population of the Yass Valley LGA, 2005-2034**

| <b>Year</b> | <b>Total population</b> | <b>Percentage change (%)</b> | <b>Rural population</b> | <b>Percentage change</b> |
|-------------|-------------------------|------------------------------|-------------------------|--------------------------|
| 2005        | 12,938                  | 3.4%                         | 4,207                   | 1.3%                     |
| 2006        | 13,361                  | 3.3%                         | 4,263                   | 1.3%                     |
| 2007        | 13,712                  | 2.6%                         | 4,318                   | 1.3%                     |
| 2008        | 13,958                  | 1.8%                         | 4,374                   | 1.3%                     |
| 2009        | 14,205                  | 1.8%                         | 4,429                   | 1.3%                     |
| 2010        | 14,804                  | 4.2%                         | 4,484                   | 1.3%                     |
| 2011        | 15,401                  | 4.0%                         | 4,540                   | 1.2%                     |
| 2012        | 15,995                  | 3.9%                         | 4,590                   | 1.1%                     |
| 2013        | 16,482                  | 3.0%                         | 4,640                   | 1.1%                     |
| 2014        | 16,900                  | 2.5%                         | 4,691                   | 1.1%                     |
| 2015        | 17,221                  | 1.9%                         | 4,741                   | 1.1%                     |
| 2016        | 17,544                  | 1.9%                         | 4,791                   | 1.1%                     |
| 2017        | 17,874                  | 1.9%                         | 4,849                   | 1.2%                     |
| 2018        | 18,204                  | 1.8%                         | 4,907                   | 1.2%                     |
| 2019        | 18,535                  | 1.8%                         | 4,965                   | 1.2%                     |
| 2020        | 18,865                  | 1.8%                         | 5,023                   | 1.2%                     |
| 2021        | 19,192                  | 1.7%                         | 5,080                   | 1.2%                     |
| 2022        | 19,533                  | 1.8%                         | 5,146                   | 1.3%                     |
| 2023        | 19,871                  | 1.7%                         | 5,211                   | 1.3%                     |
| 2024        | 20,209                  | 1.7%                         | 5,276                   | 1.3%                     |
| 2025        | 20,547                  | 1.7%                         | 5,342                   | 1.2%                     |
| 2026        | 20,885                  | 1.6%                         | 5,407                   | 1.2%                     |
| 2027        | 21,223                  | 1.6%                         | 5,473                   | 1.2%                     |
| 2028        | 21,561                  | 1.6%                         | 5,538                   | 1.2%                     |
| 2029        | 21,900                  | 1.6%                         | 5,603                   | 1.2%                     |
| 2030        | 22,238                  | 1.5%                         | 5,669                   | 1.2%                     |
| 2031        | 22,576                  | 1.5%                         | 5,734                   | 1.2%                     |
| 2032        | 22,914                  | 1.5%                         | 5,799                   | 1.1%                     |
| 2033        | 23,252                  | 1.5%                         | 5,865                   | 1.1%                     |
| 2034        | 23,590                  | 1.5%                         | 5,930                   | 1.1%                     |

*Source: Based on Jackson (2004). Note that all populations in the table are projections not actual figures and may not correspond to actual figures.*

Notwithstanding this, it was generally considered that employment growth patterns in the corridor have and will continue to replicate State industry trends, with the Government, Administration and Defence Sector an exception, due to the proximity of the Corridor to Canberra.

The key industry trends and indicators include:

- In 2001, the four largest industries of employment in NSW were Retail Trade (14.2%), Property and Business Services (12.2%), Manufacturing (11.5%) and Health and Community Services (9.4%).
- Since 1996 there has been an increase in the proportions of persons working in Property and Business Services (to 12.2% from 10.6%) and Retail Trade (to 14.2% from 13.3%), while there was a decline in the proportion of persons working in Manufacturing (to 11.5% from 12.2%) and Wholesale Trade (to 5.6 % from 6.3 %).
- Most primary industries saw employment decline over the period, with strong employment gains in the services industries.
- The area that recorded the strongest employment growth was Property and Business Services followed by Cultural and Recreational Services.
- Manufacturing and agriculture appear to have more limited growth opportunities and are unlikely to be major drivers of growth.
- The Southern sub region experienced the least decline in Electricity, Gas & Water Industry. Increases in Government related jobs, was limited to only the Southern Sector, given the proximity to ACT. The Central Sector in particular saw declines in Transport and Storage, Communication Services and Finance and Insurance Sectors.
- The region appears to be highly reliant on the Government, Administration and Defence Sector (due to its location within the Sydney to Canberra Corridor).
- Past studies have highlighted fluctuations in the level of employment in this sector, depending on the government of the day. More recently this sector has grown with an increased focus on defence as a result of international conflict.

The document *Drivers of Growth in the ACT and Sub-Region* (SKM, 2003, p4) forecast the growth of industry sectors in the ACT and sub-region adopting a national forecast prepared by Access Economics.

Table 19 shows the population of the Yass Valley LGA and the town of Yass, the number of Yass residents employed and the number of Yass residents employed in the town of Yass in 2001 and 2006. This data is obtained from 2001 and 2006 Census data.

The population projections to 2031 are provided by Jackson in Table 18. The employment projections for the town of Yass to 2031 in Table 19 assume that approximately 62% of the number of employed residents in Yass, are actually employed in the town itself and that this will remain constant to 2031. Therefore, on the basis of these assumptions, an additional 971 jobs will need to be located in or around the town of Yass by 2031.



**Table 19 Population and employment growth for the Yass Valley LGA and the town of Yass to 2031**

|   | <b>2001</b> | <b>2006</b> | <b>2031</b> |
|---|-------------|-------------|-------------|
| <b>Yass Valley LGA population</b>             | 11,380      | 13,135      | 22,576      |
| <b>Population of town of Yass</b>             | 4,909       | 5,331       | 8,742       |
| <b>Number of employed residents in Yass</b>   | 2,189       | 2,439       | 3,999       |
| <b>Number of jobs located in town of Yass</b> | 1,484       | 1,518       | 2,489       |

The rate of employment generation ultimately achieved in Yass will however depend on a number of factors, including:

- investment and location policies of Commonwealth and State Governments
- the success of existing enterprises in serving their markets and in capturing new markets
- the ease with which new investment is able to establish in Yass

Consideration of appropriate locations for these jobs within the town of Yass will be a key outcome of this study.

## **6.2 Industry Requirements**

The requirements in terms of infrastructure, transport and other related needs for a range of industries which could contribute to employment demand in Yass during the period 2001-2031 have been considered drawing on a variety of sources. These requirements are summarised as follows:

- Manufacturing - relatively flat land, access to high capacity electricity and water supplies, accessibility for B-doubles, reasonable proximity to arterial road network.
- Construction - no particular requirements, however, some construction-related enterprises with a display function require sites with relatively high visibility to surrounding roads.
- Bulky Goods - require frontage to arterial or sub-arterial roads.
- Utilities - no particular requirements with location often determined by compatibility with adjacent land uses.
- Wholesaling - requires close proximity to arterial roads, B-double access and prefers lower cost industrial sites.
- Transport - prefers lower cost industrial land and reasonable access to arterial road network.
- Communications - location is usually determined in relation to access to telecommunications linkages particularly broadband cable and fibre optic cable location.

In relation to all of the above uses it is understood that there is a growing requirement on the part of modern employment generating activities for access to broadband cabling. This is not only the case for so-called hi-tech industrial enterprises but is increasingly a requirement of modern manufacturing and wholesaling operations,

The NSW Government seeks to ensure that regions are positioned to take advantage of emerging industries where high quality, stable staff and reasonably priced land are key commercial drivers. This will ensure continued business investment in rural and regional areas. In the South East region the NSW government will continue to support diversification and new business development to replace jobs lost from the fishing, forestry, agricultural and manufacturing industries, in order to ensure a growing economy and employment opportunities into the future.

The NSW Government has recently moved to implement one of the key goals of its City of Cities Metropolitan Strategy by approving construction of the \$200 million Southern Sydney Freight Line. This project is a key part of the NSW Government's plan to maximise the efficiency of freight transport in the Sydney region. The project is also intended to improve the reliability and travel times of rail freight services in the Melbourne-Sydney-Brisbane corridor.

As Yass is within the Sydney to Canberra corridor which is a nationally important route for the movement of goods and services Yass should be positioned to take advantage of NSW Government initiatives to attract emerging industries and to bolster existing industries in regional areas. The existing industrial areas within Yass are unlikely to be in a position to take advantage of this opportunity and as such greenfield employment generating land without the constraints of the existing industrial areas and proximity to major transport routes, is recommended in Section 8.

For new industries to be attracted to Yass, they need to be supported by low cost employment land, a suitably qualified and willing local labour market and freight opportunities. The proximity of Canberra is an advantage, as Yass may be able to offer cheaper flexible land and building packages. The range of landuses to be permitted should be as broad as possible, without permitting undesirable activities.

Technology and research industries should be encouraged, which will also complement the ACT industries and provide a diversification in base industries in Yass. This may also generate successful clustering via research and development functions.

Growth in tertiary industries linked to population flows from Sydney and Canberra will ensure higher levels of education in Yass and the lifestyle benefit of living in a rural environment, may result in the attraction of technology and research industries. Other industries such as high technology manufacturing/warehousing and ancillary office, storage, distribution, research and development, chemical

and pharmaceuticals, textiles, clothing, footwear and leather, and engineering and design could be attracted to the area.

Therefore, it is extremely important to preserve a supply of light and heavy industrial land within Yass to support the long-term need for employment generating lands at a reasonable cost to industry.

### 6.3 Demand Assessment

To determine the area of land required to accommodate the additional 971 jobs to 2031, it is important to consider the amount of floor space required based on industry averages.

In the study, *Employment Monitoring of Commercial Centres and Industrial Areas*, Jones Lang Wootton (JLW) collected data on employment densities in a range of employment areas in Sydney and found that employment per gross hectare varied with respect to particular industrial areas as outlined in Table 20 below.

**Table 20 Comparison of Employment Densities – Industrial Areas**

| Industrial Area                              | Persons Per Hectare |
|--|---------------------|
| Auburn/Silverwater                           | 24                  |
| Botany                                       | 18                  |
| Central Industrial Area (Alexandria/Zetland) | 42                  |
| Moorebank                                    | 22                  |
| Wetherill Park                               | 21                  |

**Source:** *Employment Monitoring of Commercial Centres and Industrial Areas*, Jones Lang Wootton (JLW).

For the purposes of this study an average occupancy rate of approximately 25 jobs per gross industrial hectare is adopted which is derived from the study, *Employment Monitoring of Commercial Centres and Industrial Areas*, by the Department of Planning in 1991.

Therefore, at a rate of 25 jobs per hectare, 971 jobs will require approximately **40 hectares** of additional available employment generating land.

As this analysis relies on previous trends in population and employment growth within the town of Yass, the employment growth forecasts are underestimated due to the lack of available employment generating land and activity in the town of Yass over a number of years. This means that the number of forecasted jobs to 2031 are actually lower than what they might have been had there been sufficient land supply over the years to meet demand.

The low levels of industry growth over the years have been due to a number of factors, including:

- a lack of available high quality, unconstrained industrial land;



- constrained population growth in the town of Yass due to water shortage issues; and
- the unwillingness of landholders to develop their existing zoned employment generating land for industrial purposes.

As a result, employment growth figures to 2031 have no regard for the “latent” demand for low cost employment generating land which has been unable to be realised in Yass as result of limited supply and thus opportunities for the establishment of employment generating development.

This “latent” demand is further enhanced by soaring land prices in adjoining LGA’s such as Queanbeyan where employment generating land is now at a premium. Low cost industrial land shortages in the Mitchell and Hume suburbs of the ACT have also been recognised by the ACT Planning and Land Authority who as stated previously in this study are currently undertaking significant studies to increase the area of employment generating land in Hume and around the Canberra Airport.

Irrespective of these studies, the low cost of employment generating land combined with a suitably qualified and willing local labour market makes Yass extremely attractive for employment generating development. This position is generally supported by the NSW Government which seeks to ensure that towns are positioned to take advantage of employment generating opportunities where a high quality, stable staff and reasonably priced land are key commercial drivers.

Accordingly, it is these drivers and the “latent” demand for low cost employment generating land in Yass that has been used to identify land for future employment generating purposes.

## **7 CONSULTATION**

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This section of the study describes the consultation process undertaken in the development of the recommendations and its outcomes. In summary, the aim of the consultation process was to engage key stakeholders to assist in identifying the issues facing employment generating development in Yass at present, and to identify opportunities for economic further employment generating development through the release of additional employment generating land into the future, having due regard to economic, social and environmental considerations.

### **7.1 Consultation Process**

The consultation process was based on questionnaires, workshops and meetings with key stakeholders and was run from June to July 2006.

The process included the:

- Preparation and distribution of a questionnaire to all local businesses operating within the existing industrial areas;
- Placement of notices and media advertisements about the consultation activities on Council's website and in the local newspaper (14 July 2006);
- Individual invitations to key stakeholders to attend the stakeholder and community workshops;
- A State Government Agency workshop (held on 21 June 2006 ); and
- A key stakeholder and community workshop (held on 25 July 2006).

### **7.2 Consultation Outcomes**

#### **Local Business Questionnaire**

In June 2006, a questionnaire was distributed to all business owners within the existing industrial areas of Yass and the Study Area. The purpose of the questionnaire was to identify the likely demand for employment generating land by existing business operators into the future and to explore the opportunities for further employment generating development across the LGA. A copy of the questionnaire is provided in Appendix 4.

A total of 18 questionnaires were completed, five (5) from the North Yass Business Precinct, twelve (12) from the South Yass Business Precinct and one (1) from the Highway Service Centre. In addition, two written submissions were received during this time from landowners in the Study Area.

The majority of respondents indicated that they are satisfied with their current business operations. Table 23 provides a summary of the issues raised by the respondents.

**Table 23 Summary of Questionnaire Issues**

| <b>Location</b>                       | <b>Business Operation</b>  | <b>Strengths/Opportunities</b>                          | <b>Weaknesses/Threats</b>   |
|---------------------------------------|--|---|---|
| South Yass Business Precinct          | Satisfied with existing operations and 100% intend to retain location<br>25% require additional land<br>25% would consider relocating to a new industrial estate | High visibility<br>Level land<br>Flood free             | Existing industrial zoning restrictive<br>Industrial development should not be located at town gateways<br>Adjoining residential areas are considered to be incompatible  |
| North Yass Business Precinct          | Satisfied with existing operations and lot size<br>100% intend to retain location  | Good proximity to Hume Highway<br>Affordability of land | Adjoining rural-residential zoning not compatible<br>Impact on Yass River and need for appropriate buffer zones<br>Water supply<br>New industrial development at town gateways may impact on rural atmosphere and image |
| Highway Service Centre and Study Area | Satisfied with existing operations and lot size<br>Intend to retain location   | No comments   | No comments   |

Where respondents indicated that they would consider relocating to a new employment generating estate, they highlighted a preference for:

- Level land;
- Ease of access for trucks with roads of sufficient width;
- Good location/presentation and proximity to main roads;
- Flood free land;
- Large lots;
- Segregation from residential land uses.

Furthermore, the business operators indicated that they considered that future employment generating opportunities in Yass lay in the areas of:

- Manufacturing
- Transportable home manufacture;
- General construction;
- Wholesale;
- Furniture production; and

- General industries.

### **Government Agency Workshop**

A State Government Agency workshop was held in June 2006, which was attended by representatives from the following agencies:

- Department of Planning;
- Department of Environment and Conservation;
- Department of Natural Resources;
- Department of Primary Industries;
- Roads and Traffic Authority;
- Catchment Management Authority;
- Department of State and Regional Development; and
- Premiers Department.

The key issues raised in the workshop are summarised as follows:

### **Highway Service Centre**

- New industrial development in this locality should be complementary to existing industries and should not duplicate existing services

### **Infrastructure**

- The Barton Highway is being duplicated to provide 32 kilometres of dual carriageway and includes a bypass of Murrumbateman. The aim of the upgrade is to improve vehicular safety by improving the grades and alignment of the road.
- The duplication of the Barton Highway will improve accessibility to Yass, which will provide greater opportunities for industrial and tourism related development. This improved accessibility, will increase the demand for lifestyle living opportunities in the Yass Valley from people employed in the ACT and result in greater levels of commuting.
- The Barton Highway is one of only a few rural highways that experience AM and PM traffic peaks.
- Traffic growth on parts of the Barton Highway, particularly near the ACT border, is in the order of 6 %, whereas average growth for rural highways is approximately 3 %.
- High voltage electricity, natural gas supply, main road access (with provisions for B-double truck access) and reliable water supply are key requirements for industrial development.
- The current rail infrastructure is not heavy industry capable

## **Environment**

- Dryland salinity affects large areas of the LGA.

## **Water**

- Given the water supply issues in the region the appropriateness of certain industries needs to be considered.
- Yass Valley Council recognises that the future of the Yass water supply is a major potential impediment to industrial and employment lands growth. Accordingly, Yass Valley Council has resolved to increase the height of the dam wall by 3m which will effectively increase the storage capacity to 3 times the dam's current volume.
- Following the completion of this upgrade it is considered that Yass would be appropriate for the development of all industry.

### **7.3 Community and Key Stakeholder Workshop**

In late July 2006, a workshop for interested community members, industry groups and business owners and landowners was held. The purpose of the workshop was to provide an overview of the intent of the Industrial Lands Study; to establish an economic context at both a regional and local level. The workshop also provided an open forum for discussion on the challenges and opportunities for economic development in Yass as they relate to employment generating development.

Approximately 40 participants attended the community workshop. The key issues raised by participants are summarised as follows:

#### **Transport related industries**

- Opportunity for redistribution industry to be located adjacent the Hume Highway as B-double (possibly B-triple) access is available and land price increases in Sydney make decentralised locations more appealing.
- Yass has traditionally been a transport focus for the region and it makes sense to locate warehousing opportunities within close proximity to the Hume Highway.
- Rezoning of land in the vicinity of the Hume Highway for industrial uses will increase rates.
- Industry is seeking large lots for development.

#### **'New Economy'**

- Yass is at a cross roads as many of the 'smart and talented' people work in Canberra but live in surrounding locations, including Yass. This opportunity needs to be built upon so that jobs are provided where people live.
- Concern was raised that professionals living in Yass will drive up house

prices and make housing unaffordable for blue collar workers.

### **Current Industrial Zones**

- Current industrial zones prohibit 'true' industrial uses and are more akin to 'business generating' or 'light industrial' zones under the Standard Instrument.
- There is a need to provide flexibility for businesses to enable them to expand without risk of conflicting with adjoining land uses.

### **Written Submissions**

Several written submissions were received in lieu of attendance at the workshop or completion of the questionnaire. The main issues raised are as follows:

- Lot 1, DP 842644 (located on the southern side of Yass Valley Way, adjacent the existing Highway Service Centre), should be included as the priority future industrial area for the Yass Valley.
- Lots 1-5, DP 852715 and Lot 1, DP 842644 (adjacent the existing Highway Service Centre) are all serviced by a private sewer pumping station and are therefore available for immediate development.

## **8 INDUSTRIAL LAND RECOMMENDATIONS**

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This chapter recommends changes to the zoning of current commercial and industrial land as well as the establishment of new employment generating areas in and around the town of Yass.

### **8.1 Recommendations**

This study has established that there is significant demand for additional employment generating land in and around Yass. This section makes recommendations for the rezoning of land for employment generating purposes on the basis of this demand and identifies appropriate locations for new employment generating land.

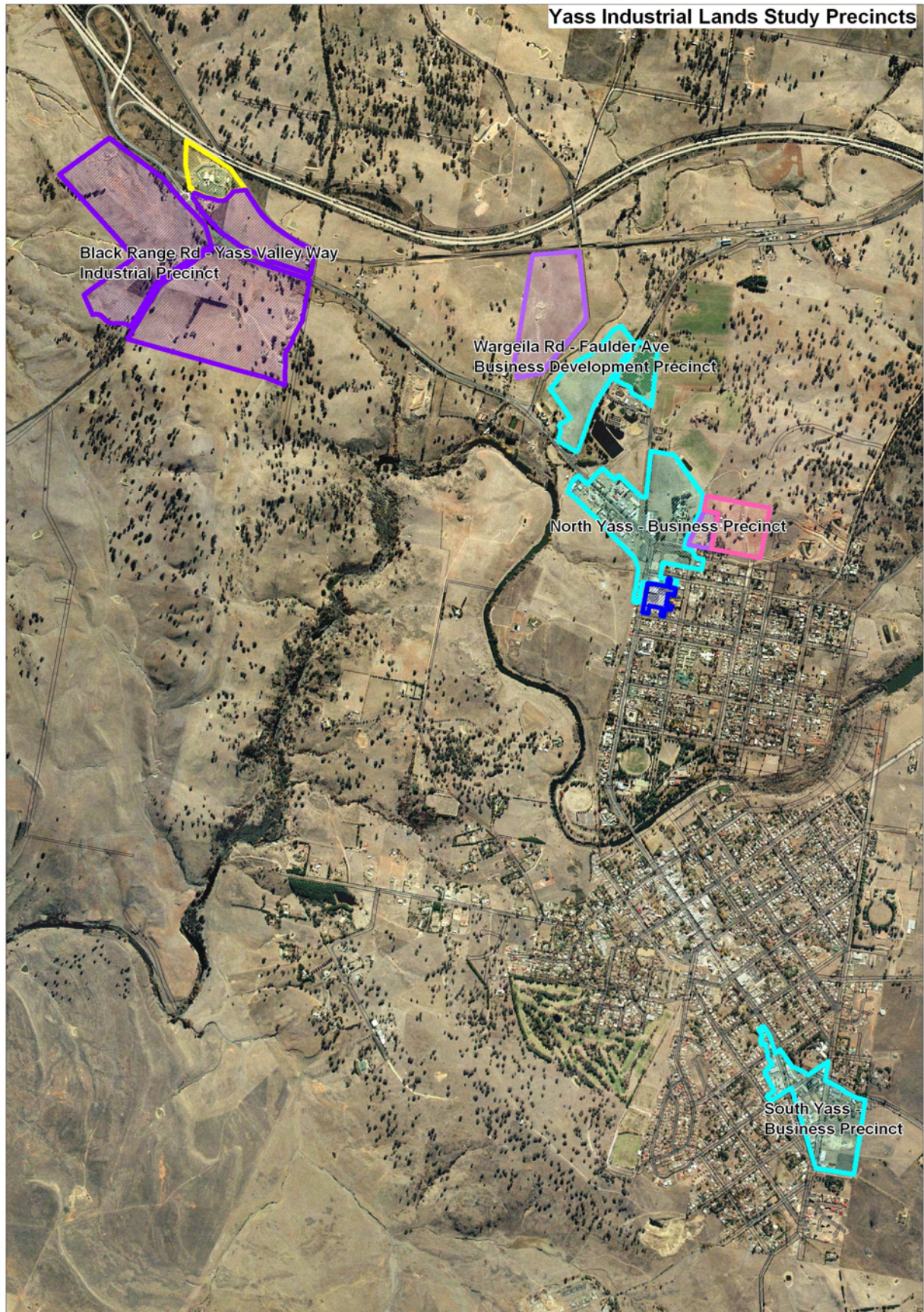
Accordingly, four (4) specific employment generating precincts which have a total area of 188 ha have been identified. Each of these precincts have the potential to be further developed or re-developed for employment generating purposes. These precincts are shown in figures 6 and 7 below.

Importantly, two (2) of the precincts (the South Business Precinct and the North Yass Business Precinct) are already zoned for either commercial or industrial purposes. When combined with the existing Yass Service Centre these precincts have a total area of 57 ha. This leaves 131 ha of proposed employment generating land over a number of unconstrained greenfield sites, each of which has excellent access to major transport routes.

Each of the four (4) employment generating precincts are discussed separately below with additional comment provided in relation to the Yass Service Centre and the Yass Sale Yards. It should also be noted that two (2) separate options have been included for the North Yass Business Precinct, given that the north eastern sector of this precinct is subject to potentially significant land use conflicts between proposed employment generating developments and adjoining residential and rural residential land uses.



**Figure 6     Aerial Overlay of Yass Industrial Lands Study Precincts**





**Yass Industrial Lands Study Precincts**

The map displays several industrial and business development precincts in Yass:

- Black Range Rd - Yass Valley Way Industrial Precinct**: Located in the upper left, outlined in purple.
- Wargeila Rd - Faulder Ave Business Development Precinct**: Located in the upper center, outlined in cyan.
- North Yass - Business Precinct**: A large central area outlined in green, containing orange-shaded land parcels.
- South Yass - Business Precinct**: Located in the lower right, outlined in blue, covering a dense urban grid.

The map also shows various zoning codes such as 1(c)1, 1(b), 1(c)2, 1(d), 1(e), 1(f), 1(g), 1(h), 1(i), 1(j), 1(k), 1(l), 1(m), 1(n), 1(o), 1(p), 1(q), 1(r), 1(s), 1(t), 1(u), 1(v), 1(w), 1(x), 1(y), 1(z), 1(aa), 1(ab), 1(ac), 1(ad), 1(ae), 1(af), 1(ag), 1(ah), 1(ai), 1(aj), 1(ak), 1(al), 1(am), 1(an), 1(ao), 1(ap), 1(aq), 1(ar), 1(as), 1(at), 1(au), 1(av), 1(aw), 1(ax), 1(ay), 1(az), 1(ba), 1(bb), 1(bc), 1 bd), 1(be), 1 bf), 1(bg), 1(bh), 1 bi), 1 bj), 1 bk), 1(bl), 1(bm), 1 bn), 1 bo), 1(bp), 1 bq), 1(br), 1(bs), 1(bt), 1 bu), 1 bv), 1 bw), 1 bx), 1 by), 1 bz), 1(ca), 1(cb), 1(cc), 1(cd), 1 ce), 1(cf), 1 cg), 1(ch), 1 ci), 1(cj), 1 ck), 1(cl), 1(cm), 1(cn), 1(co), 1(cp), 1 cq), 1(cr), 1(cs), 1(ct), 1(cu), 1(cv), 1 cw), 1(cx), 1 cy), 1 cz), 1(da), 1(db), 1(dc), 1(dd), 1(de), 1(df), 1 dg), 1(dh), 1(di), 1(dj), 1(dk), 1(dl), 1(dm), 1(dn), 1(do), 1(dp), 1 dq), 1(dr), 1(ds), 1(dt), 1 du), 1 dv), 1 dw), 1(dx), 1(dy), 1 dz), 1(ea), 1 eb), 1(ec), 1(ed), 1 ee), 1 ef), 1 eg), 1 eh), 1 ei), 1 ej), 1 ek), 1(el), 1(em), 1(en), 1 eo), 1(ep), 1 eq), 1(er), 1(es), 1(et), 1 eu), 1 ev), 1 ew), 1(ex), 1 ey), 1 ez), 1 fa), 1 fb), 1(fc), 1(fd), 1 fe), 1 ff), 1 fg), 1 fh), 1 fi), 1 fj), 1 fk), 1 fl), 1(fm), 1(fn), 1 fo), 1(fp), 1 fq), 1(fr), 1(fs), 1(ft), 1 fu), 1 fv), 1 fw), 1 fx), 1 fy), 1 fz), 1 ga), 1 gb), 1(gc), 1(gd), 1 ge), 1 gf), 1 gg), 1 gh), 1 gi), 1 gj), 1 gk), 1 gl), 1 gm), 1 gn), 1 go), 1(gp), 1 gq), 1(gr), 1(gs), 1(gt), 1 gu), 1 gv), 1 gw), 1 gx), 1 gy), 1 gz), 1 ha), 1 hb), 1 hc), 1 hd), 1 he), 1 hf), 1 hg), 1 hi), 1 hj), 1 hk), 1 hl), 1 hm), 1 hn), 1 ho), 1 hp), 1 hq), 1(hr), 1 hs), 1 ht), 1 hu), 1 hv), 1 hw), 1 hx), 1 hy), 1 hz), 1 ia), 1 ib), 1 ic), 1 id), 1 ie), 1 if), 1 ig), 1 ih), 1 ii), 1 ij), 1 ik), 1 il), 1 im), 1 in), 1 io), 1 ip), 1 iq), 1(ir), 1(is), 1(it), 1 iu), 1 iv), 1 iw), 1 ix), 1 iy), 1 iz), 1 ja), 1 jb), 1 jc), 1 jd), 1 je), 1 jf), 1 jg), 1 jh), 1 ji), 1 jj), 1 jk), 1 jl), 1 jm), 1 jn), 1 jo), 1 jp), 1 jq), 1 jr), 1 js), 1 jt), 1 ju), 1 jv), 1 jw), 1 jx), 1 jy), 1 jz), 1 ka), 1 kb), 1 kc), 1 kd), 1 ke), 1 kf), 1 kg), 1 kh), 1 ki), 1 kj), 1 kl), 1 km), 1 kn), 1 ko), 1 kp), 1 kq), 1 kr), 1 ks), 1 kt), 1 ku), 1 kv), 1 kw), 1 kx), 1 ky), 1 kz), 1 la), 1 lb), 1 lc), 1 ld), 1 le), 1 lf), 1 lg), 1 lh), 1 li), 1 lj), 1 lk), 1 ll), 1 lm), 1 ln), 1 lo), 1 lp), 1 lq), 1(lr), 1(ls), 1 lt), 1 lu), 1 lv), 1 lw), 1 lx), 1 ly), 1 lz), 1 ma), 1 mb), 1 mc), 1 md), 1 me), 1 mf), 1 mg), 1 mh), 1 mi), 1 mj), 1 mk), 1 ml), 1 mm), 1 mn), 1 mo), 1 mp), 1 mq), 1 mr), 1 ms), 1 mt), 1 mu), 1 mv), 1 mw), 1 mx), 1 my), 1 mz), 1 na), 1 nb), 1 nc), 1 nd), 1 ne), 1 nf), 1 ng), 1 nh), 1 ni), 1 nj), 1 nk), 1 nl), 1 nm), 1 nn), 1 no), 1 np), 1 nq), 1(nr), 1(ns), 1 nt), 1 nu), 1 nv), 1 nw), 1 nx), 1 ny), 1 nz), 1 oa), 1 ob), 1 oc), 1 od), 1 oe), 1 of), 1 og), 1 oh), 1 oi), 1 oj), 1 ok), 1 ol), 1 om), 1 on), 1 oo), 1 op), 1 oq), 1(or), 1(os), 1 ot), 1 ou), 1 ov), 1 ow), 1 ox), 1 oy), 1 oz), 1 pa), 1 pb), 1 pc), 1 pd), 1 pe), 1 pf), 1 pg), 1 ph), 1 pi), 1 pj), 1 pk), 1 pl), 1 pm), 1 pn), 1 po), 1 pp), 1 pq), 1(pr), 1(ps), 1(pt), 1 pu), 1 pv), 1 pw), 1 px), 1 py), 1 pz), 1 qa), 1 qb), 1 qc), 1 qd), 1 qe), 1 qf), 1 qg), 1 qh), 1 qi), 1 qj), 1 qk), 1 ql), 1 qm), 1 qn), 1 qo), 1 qp), 1 qq), 1 qr), 1 qs), 1 qt), 1 qu), 1 qv), 1 qw), 1 qx), 1 qy), 1 qz), 1 ra), 1 rb), 1 rc), 1 rd), 1 re), 1 rf), 1 rg), 1 rh), 1 ri), 1 rj), 1 rk), 1 rl), 1 rm), 1 rn), 1 ro), 1 rp), 1 rq), 1(rr), 1(rs), 1(rt), 1 ru), 1 rv), 1 rw), 1 rx), 1 ry), 1 rz), 1 sa), 1 sb), 1 sc), 1 sd), 1 se), 1 sf), 1 sg), 1 sh), 1 si), 1 sj), 1 sk), 1 sl), 1 sm), 1 sn), 1 so), 1 sp), 1 sq), 1(sr), 1(ss), 1(st), 1 su), 1 sv), 1 sw), 1 sx), 1 sy), 1 sz), 1 ta), 1 tb), 1 tc), 1 td), 1 te), 1 tf), 1 tg), 1 th), 1 ti), 1 tj), 1 tk), 1 tl), 1 tm), 1 tn), 1 to), 1 tp), 1 tq), 1(tr), 1(ts), 1(tt), 1 tu), 1 tv), 1 tw), 1 tx), 1 ty), 1 tz), 1 ua), 1 ub), 1 uc), 1 ud), 1 ue), 1 uf), 1 ug), 1 uh), 1 ui), 1 uj), 1 uk), 1 ul), 1 um), 1 un), 1 uo), 1 up), 1 uq), 1(ur), 1(us), 1 ut), 1 uu), 1 uv), 1 uw), 1 ux), 1 uy), 1 uz), 1 va), 1 vb), 1 vc), 1 vd), 1 ve), 1 vf), 1 vg), 1 vh), 1 vi), 1 vj), 1 vk), 1 vl), 1 vm), 1 vn), 1 vo), 1 vp), 1 vq), 1 vr), 1(vs), 1 vt), 1 vu), 1 vv), 1 vw), 1 vx), 1 vy), 1 vz), 1 wa), 1 wb), 1 wc), 1 wd), 1 we), 1 wf), 1 wg), 1 wh), 1 wi), 1 wj), 1 wk), 1 wl), 1 wm), 1 wn), 1 wo), 1 wp), 1 wq), 1 wr), 1(ws), 1 wt), 1 wu), 1 wv), 1 ww), 1 wx), 1 wy), 1 wz), 1 xa), 1 xb), 1 xc), 1 xd), 1 xe), 1 xf), 1 xg), 1 xh), 1 xi), 1 xj), 1 xk), 1 xl), 1 xm), 1 xn), 1 xo), 1 xp), 1 xq), 1 xr), 1(xs), 1 xt), 1 xu), 1 xv), 1 xw), 1 xx), 1 xy), 1 xz), 1 ya), 1 yb), 1 yc), 1 yd), 1 ye), 1 yf), 1 yg), 1 yh), 1 yi), 1 yj), 1 yk), 1 yl), 1 ym), 1 yn), 1 yo), 1 yp), 1 yq), 1 yr), 1 ys), 1 yt), 1 yu), 1 yv), 1 yw), 1 yx), 1 yy), 1 yz), 1 za), 1 zb), 1 zc), 1 zd), 1 ze), 1 zf), 1 zg), 1 zh), 1 zi), 1 zj), 1 zk), 1 zl), 1 zm), 1 zn), 1 zo), 1 zp), 1 zq), 1 zr), 1 zs), 1 zt), 1 zu), 1 zv), 1 zw), 1 zx), 1 zy), 1 zz).

## **8.2 South Yass Business Precinct**

The South Yass Business Precinct currently caters for bulky goods retailing, light industry and building/gardening supplies. Some land in this precinct however is also used for residential and commercial purposes. This precinct is discussed in further detail in Section 5.

The precinct (18.72 ha) is recommended to be zoned B5 Business Development (see Figures 8 and 9) under the new LEP as this zone will better reflect the existing land uses in the precinct and provides greater scope for a range of uses than is currently permitted by the 4(a) Industrial zone.

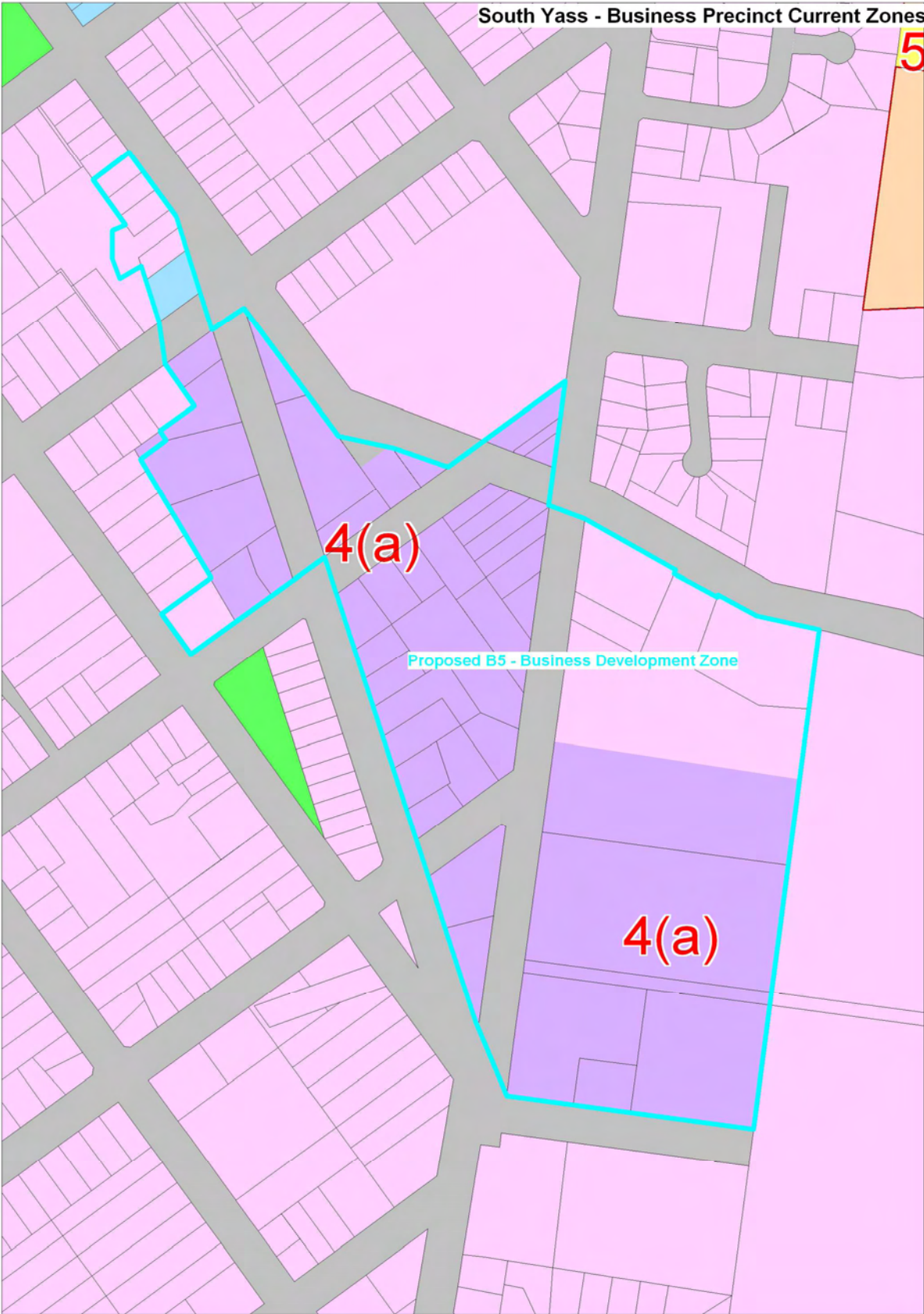


Figure 8 Aerial Overlay of Proposed South Yass Business Precinct





Figure 9 Current Zones - South Yass Business Precinct



### **8.3 North Yass Business Precinct (Option 1)**

The North Yass Business precinct currently caters for light industry, service industry and warehousing which is discussed in further detail in Section 5. The land is currently zoned:

- 4(a) Industrial;
- 3(a) Business; and
- 3(b) Highway Services.

On the basis of the analysis undertaken in this study two options have been identified for this precinct. Option 1 is preferred over option 2 as it better addresses potential landuse conflicts with adjoining residential and rural residential land uses. Accordingly, the following recommendations are presented as Option 1 for this precinct. These recommendations are shown in Figures 10 and 11 below.

#### **B2 Local Centre**

“Irvines Square” (1.9 ha) is currently zoned 3(a) General Business and comprises a shopping centre with selected retail outlets. Given its existing uses, it should be rezoned to B2 Local Centre given that it currently provides a range of retail opportunities which service more than the surrounding neighbourhood.

#### **B5 Business Development zone**

The land along Yass Valley Way which is currently zoned 3(b) Highway Services zone is recommended to be zoned to B5 Business Development. This zoning is also proposed to extend over Lot 4 in DP 255064 which is currently zoned 4(a) Industrial but is used for residential purposes.

This new zone acknowledges that the 3(b) Highway Services zone as it currently exists is no longer relevant to the town of Yass since the Hume Highway bypass a number of years ago.

The zoning will enable a greater range of uses than is currently permitted under the 3(b) Highway Services zone. Given that at present the zone only allows for development which services the travelling public. Anecdotally, this zone has constrained businesses' ability to find suitable locations for their bulky commercial/retail enterprises in Yass.

A new B5 Business Development zone (28.51 ha) will encourage a range of business, warehouses and specialised retail uses that could provide additional services to the town of Yass and be more complimentary to surrounding land uses. The change in zoning should provide adequate provision for a range of commercial/retail enterprises in this precinct and will foster further economic development.

## **IN2 Light industrial**

The area of land currently zoned 4(a) Industrial along Reddall Street was rezoned from land zoned 1(a) Rural Agriculture and 1(b) Rural Highway to 4(a) Industrial by Amendment 25 to the Yass LEP 1987 in 1994.

This land is either currently vacant or used for primarily for residential purposes. It is important to note however that a development application for a two lot subdivision and concrete casting facility was approved on Lot 31 DP 843365 in June 2006. Accordingly, the IN2 Light Industrial zone is considered to be the most appropriate zone for this site (1.9 ha).

The majority of the land along Reddall Street however, is in close proximity to more sensitive urban uses located on adjoining residential and rural residential land. It is therefore proposed to change the zoning of this land in an attempt to limit potential land use conflicts.

## **R1 General Residential**

As previously stated, the land currently zoned 4(a) Industrial along Reddall Street is bordered by either residential or rural residential land on virtually all sides. The potential for land use conflict between employment generating land uses and adjoining land is therefore high.

Therefore it is proposed to rezone Lots 32 & 33 DP 843365 to R1 General Residential (8.2 ha) to minimise potential land use conflicts. This proposed zoning not only reflects the current use of the land but also provides further development opportunities for current landholders which could incorporate significant buffers to ensure that the current potential for land use conflict does not re-occur.

This option however does suit landholders along Reddall Street who have purchased land currently zoned 4(a) Industrial in good faith for the purpose of developing employment generating land uses. Therefore in order for this option to work alternative sites for employment generating land uses would need to be found in a timely manner.



Figure 10 Aerial Overlay of Proposed North Yass Business Precinct (Option 1)

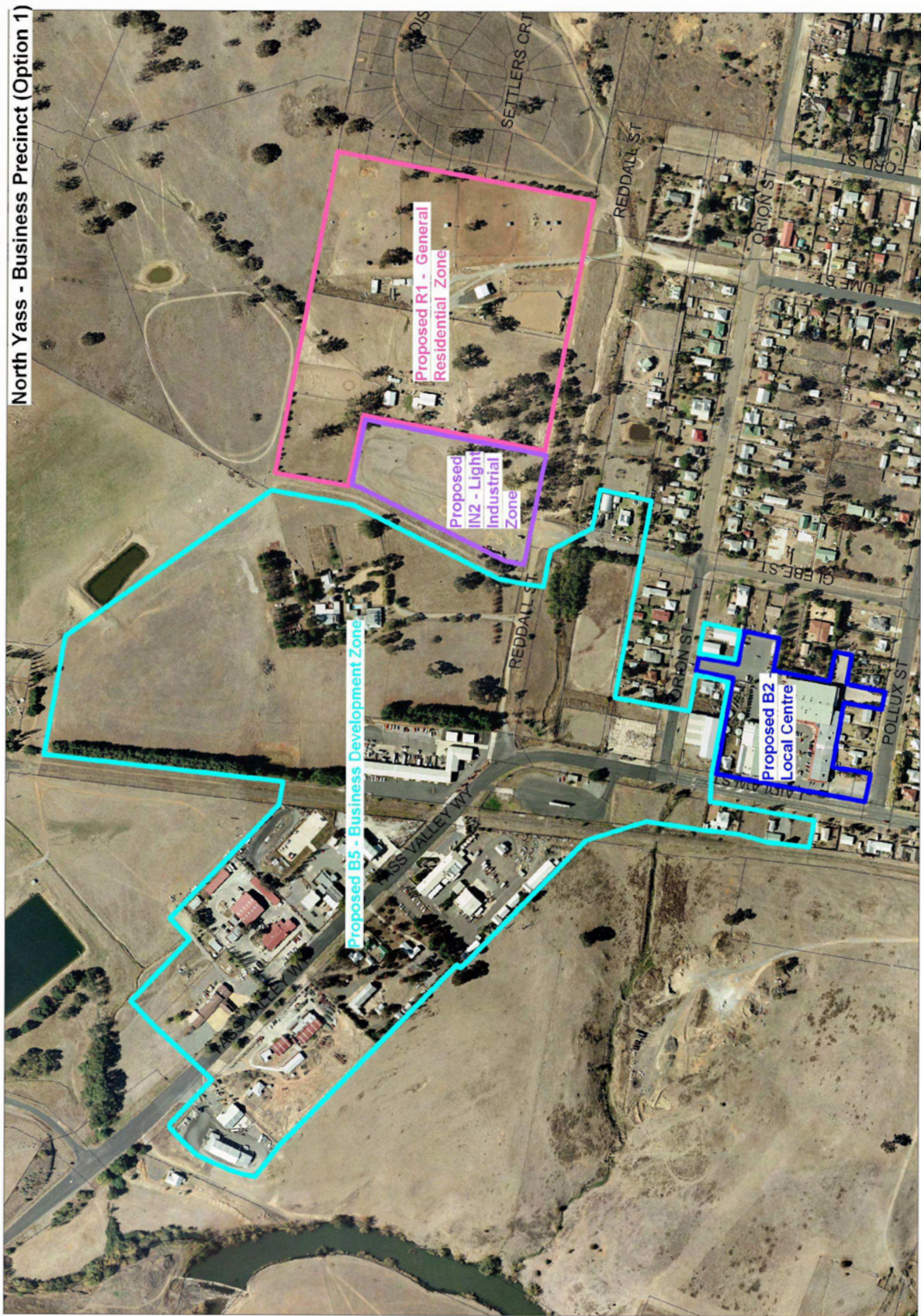
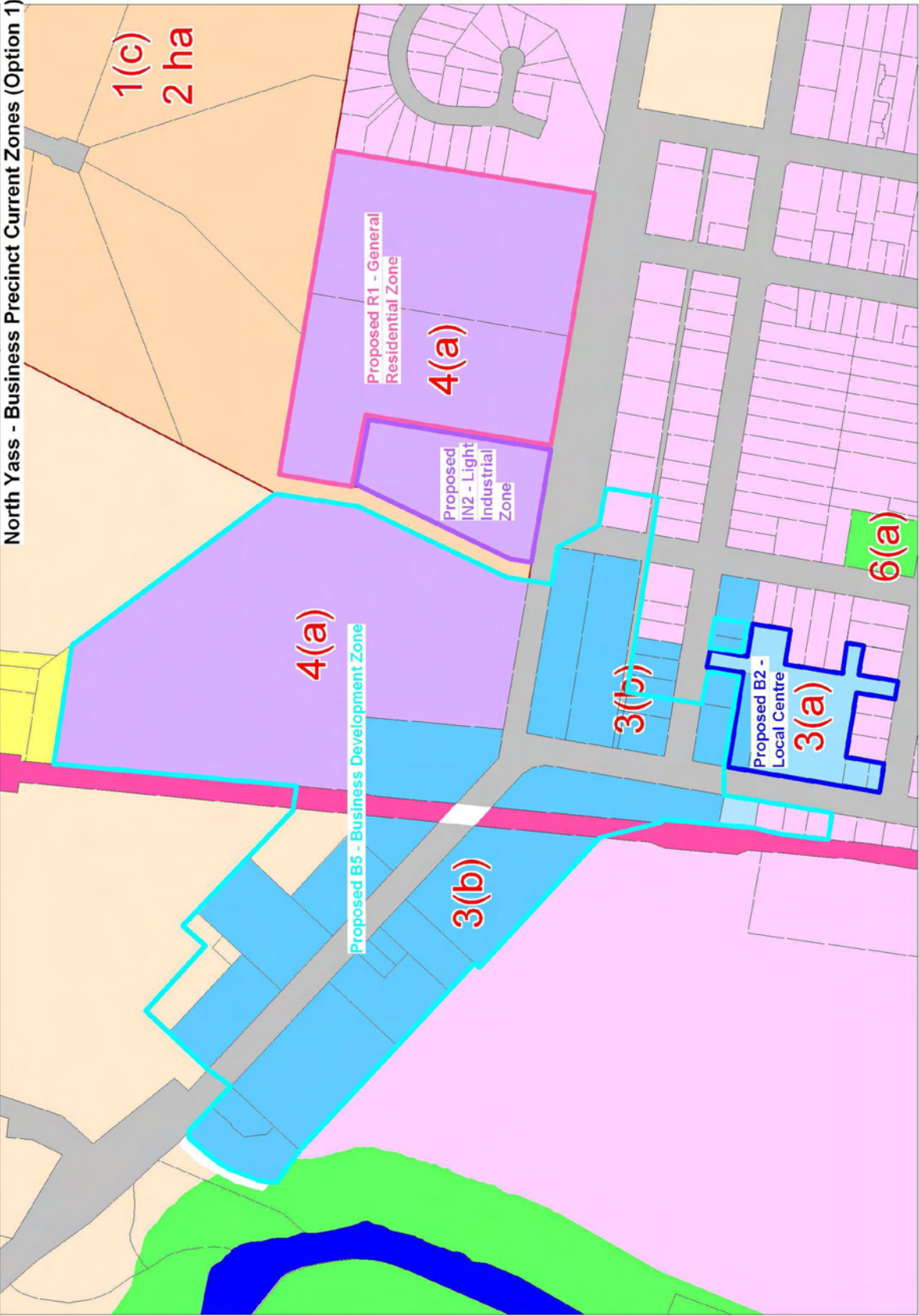




Figure 11 Current Zones - North Yass Business Precinct (Option 1)





#### **8.4 North Yass Business Precinct (Option 2)**

The second option for the North Yass Business Precinct although less desirable can still provide for viable employment generating land.

In this option, both the proposed B2 Local Centre and B5 Business Development zones remain unchanged.

The significant change in this option is that the proposed IN2 Light Industrial and R1 General Residential zones are combined to form a large IN2 Light Industrial zone along Reddall Street. This zone would cover 3 lots (Lots 31-33 DP 843365) each of which are currently zoned 4(a) Industrial (10.34 ha). These recommendations are shown in Figures 12 and 13 below.

This option, whilst creating more employment generating land fails to significantly address the potential for conflict with adjoining landuses. The issue of landuse conflict would therefore need to be addressed individually when each of these allotments were developed as part of the development assessment process.

Option 2 does however better suit landholders along Reddall Street who have purchased land currently zoned 4(a) Industrial in good faith for the purpose of developing employment generating land uses.

Figure 12 Aerial Overlay of Proposed North Yass Business Precinct (Option 2)

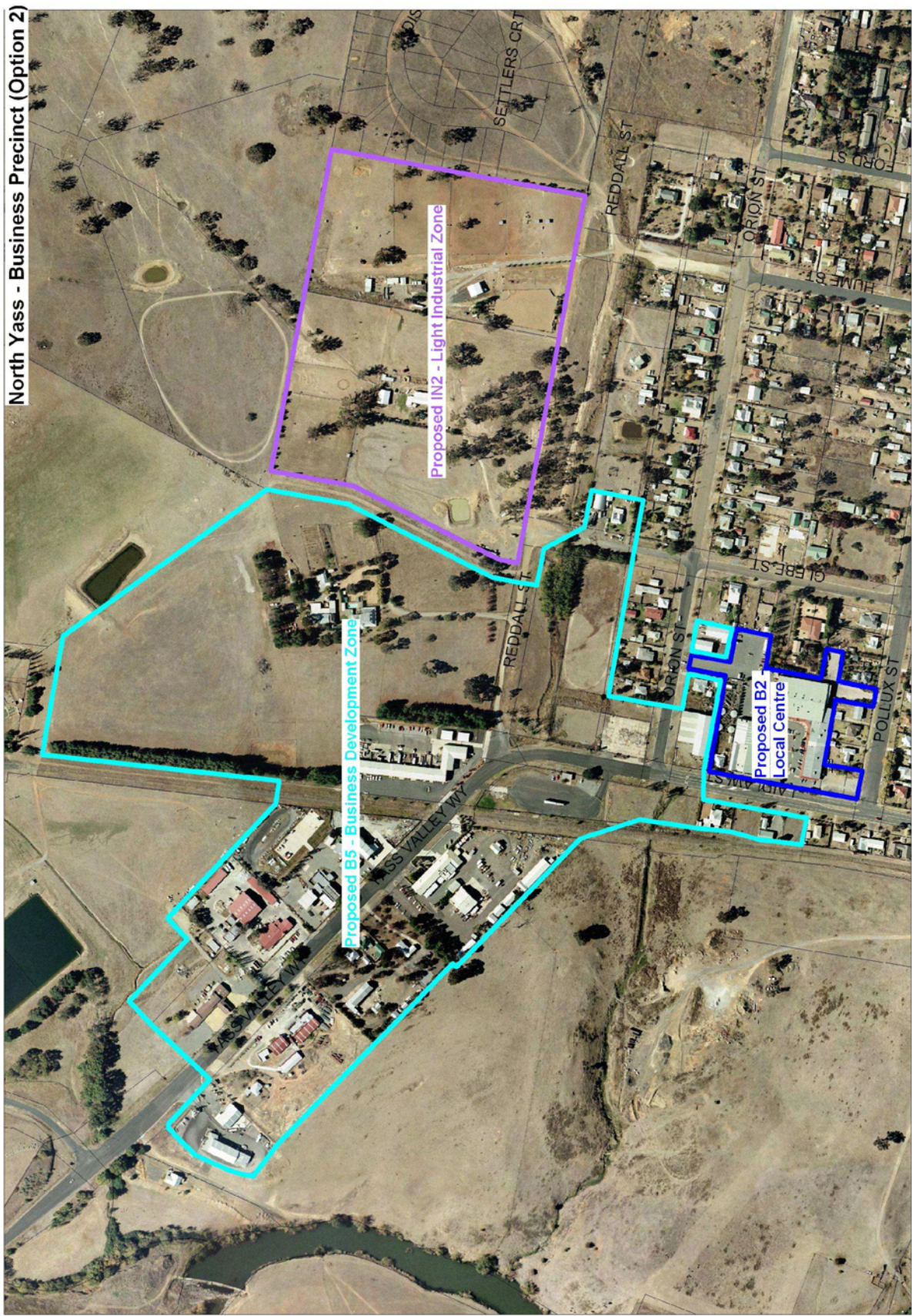
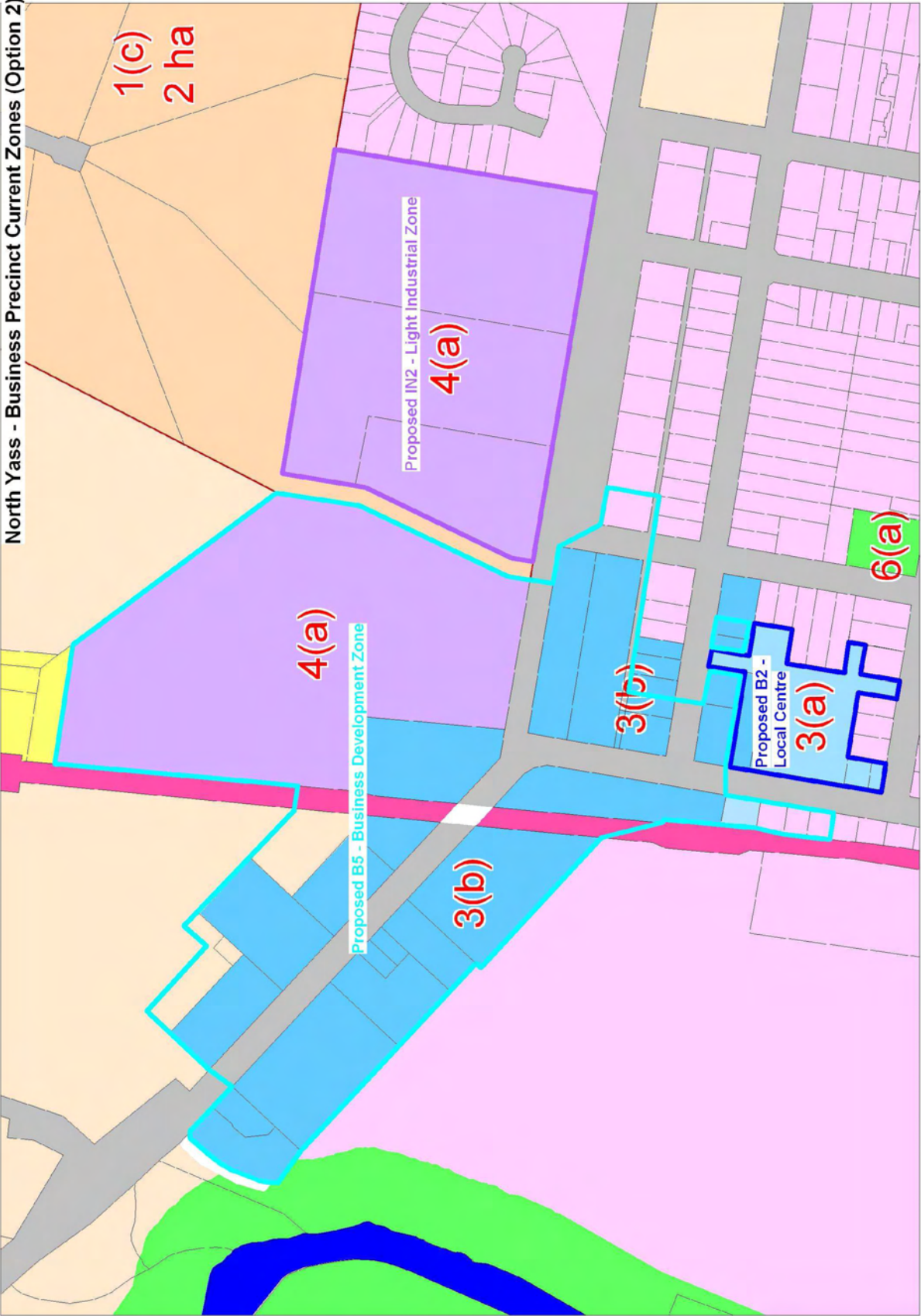




Figure 13 Current Zones - North Yass Business Precinct (Option 2)



### **8.5 Wargeila Road - Faulder Ave Business Development Precinct**

This study has established the need to ensure the provision of a range of employment generating lands to retain, expand and attract businesses to the Yass Valley LGA. In this regard, it is important to ensure the availability of a range of employment generating zones in the Yass Valley LGA.

It is therefore recommended to rezone the land on the northern side of Wargeila Road to IN2 Light Industrial (18.62 ha). Similarly, it is recommended to rezone the land on the northern side of Faulder Avenue to B5 Business Development Zone (12.11 ha) whilst incorporating a 40 m buffer to Bango Creek which flows through the site. This B5 zoning is also recommended to be applied to the land (4.55 ha) between the existing Waste Transfer Station and the disused railway line which is currently zoned 1(b) Rural Highway

This precinct has good access to Yass Valley Way and the Hume Highway, making it highly accessible to Canberra, Sydney and Melbourne.

The land has been extensively cleared for agriculture and is therefore generally unconstrained by native vegetation. The slope of the land is suitable for employment generating development and all services (power, telecommunications, etc) are easily able to be extended to the land.

This lack of constraint makes the land highly suitable for the development of a range of employment generating activities that could be centred around warehousing, office and light industrial uses.

These recommendations are shown in Figures 14 and 15 below.



Wargeila Rd - Faulder Ave Business Development Precinct

Proposed IN2 - Light Industrial Zone

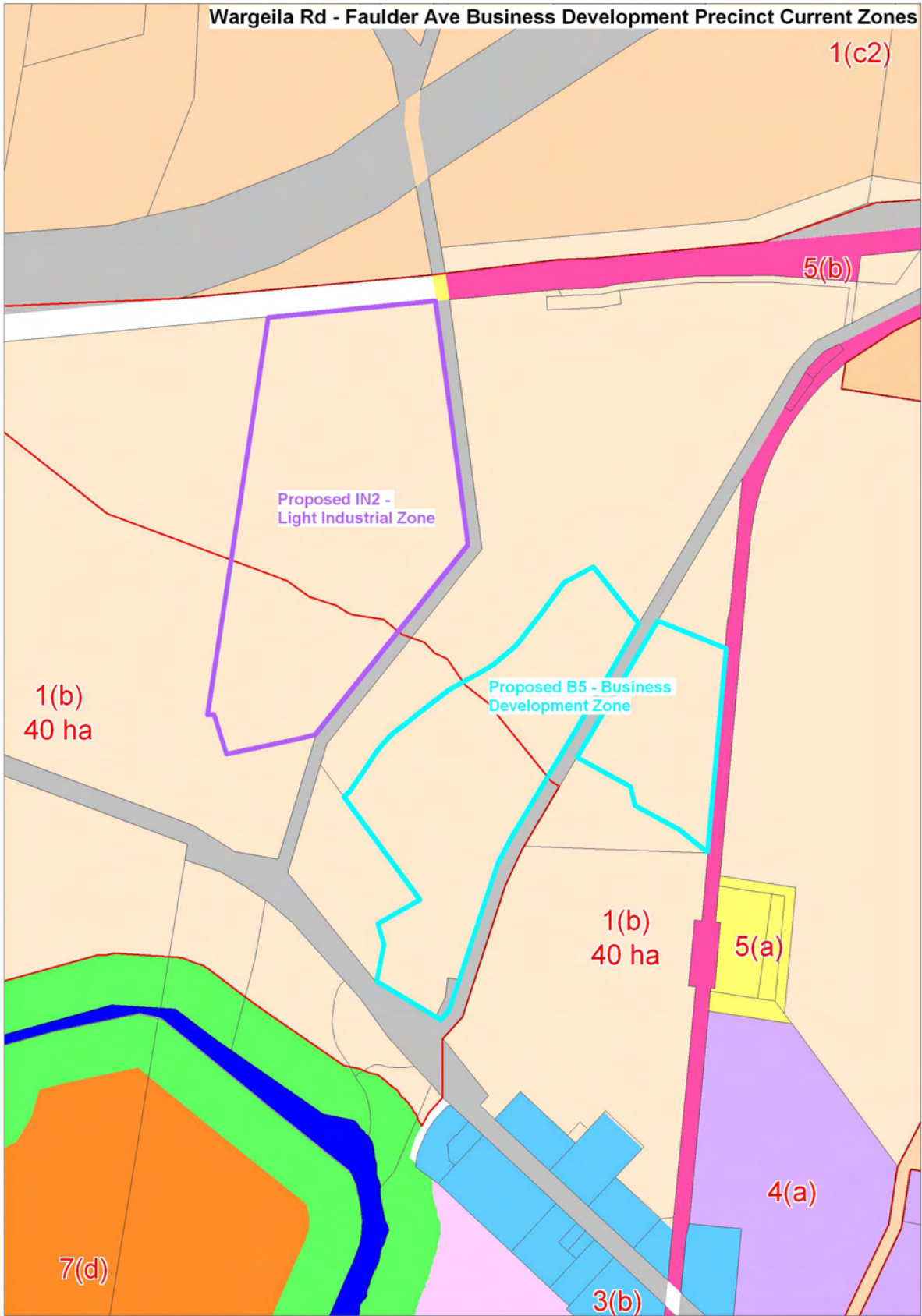
Proposed B5 - Business Development Zone

WARGEILA RD

YISA VALLEY WAY



Figure 15 Current Zones - Wargeila Rd - Faulder Ave Business Development Precinct



## **8.6 “Black Range Rd - Yass Valley Way Industrial Precinct**

The land surrounding the Highway Service Centre has also been investigated for potential industrial uses.

The land is currently zoned 1(a) Rural Agriculture and 1(b) Rural Highway, with some lots having additional permitted uses as a result of the Highway Service Centre enabling clauses in YLEP 1987.

On the basis of this study, the land in Figures 16 and 17 is recommended to be rezoned to IN1 General Industrial (96.42 ha).

This land has been identified in previous studies as being suitable for a range of industrial uses and this study supports those previous recommendations.

The land is ideally situated to take full advantage of a key transport corridor, being located on the junction of the Hume Highway and Yass Valley Way.

Its location outside of the town of Yass ensures that residential amenity will not be affected by industrial operations.

The precinct is relatively unconstrained biophysically and has a slope suitable for industrial development.

The proposed precinct covers an area of large allotments with a limited number of owners which should more easily facilitate the development of the land for industrial purposes.

The precinct also takes advantage of the excellent access to major infrastructure, such as high voltage electricity, natural gas supply, main road access and reliable water supply. State Government agencies have identified these attributes as key requirements for industrial development.

### **Transport and highway services precinct**

Previous amendments 8 and 22 of Yass LEP 1987 identified the current Highway Service Centre and Lots 1 DP 842644, Lot 5 DP 852715, Lot 1 DP 541974 and Lot 100 DP 805154 as suitable for highway service and transport related uses. Amendment 8 and 22 applied additional permitted uses to these lots to enable a range of transport and highway service uses.

The transport and highway services precinct is still relevant to the area today and therefore in addition to a zoning of IN1 General Industrial, it is recommended that these lots have a range of additional permitted uses to encourage the development of a transport and highway services precinct within the broader industrial area.

The additional permitted uses will include: highway service centre, hotel or motel accommodation, restaurant, take away food and drink premises and truck depot.

## **8.7 Highway Service Centre**

The Highway Service Centre is located to the north of Yass at the junction of the Hume Highway and Yass Valley Way and is discussed in further detail in Section 5.

It is recommended that the Highway Service Centre (Lots 1-4 DP 852715)(5.8 ha) be rezoned to SP1 Special Activities – Highway Service Centre (refer to Figures 16 and 17).

This zone and permitted use will recognise the existing uses of this land.



Figure 16 Aerial Overlay of Proposed Black Range Rd - Yass Valley Way Industrial Precinct

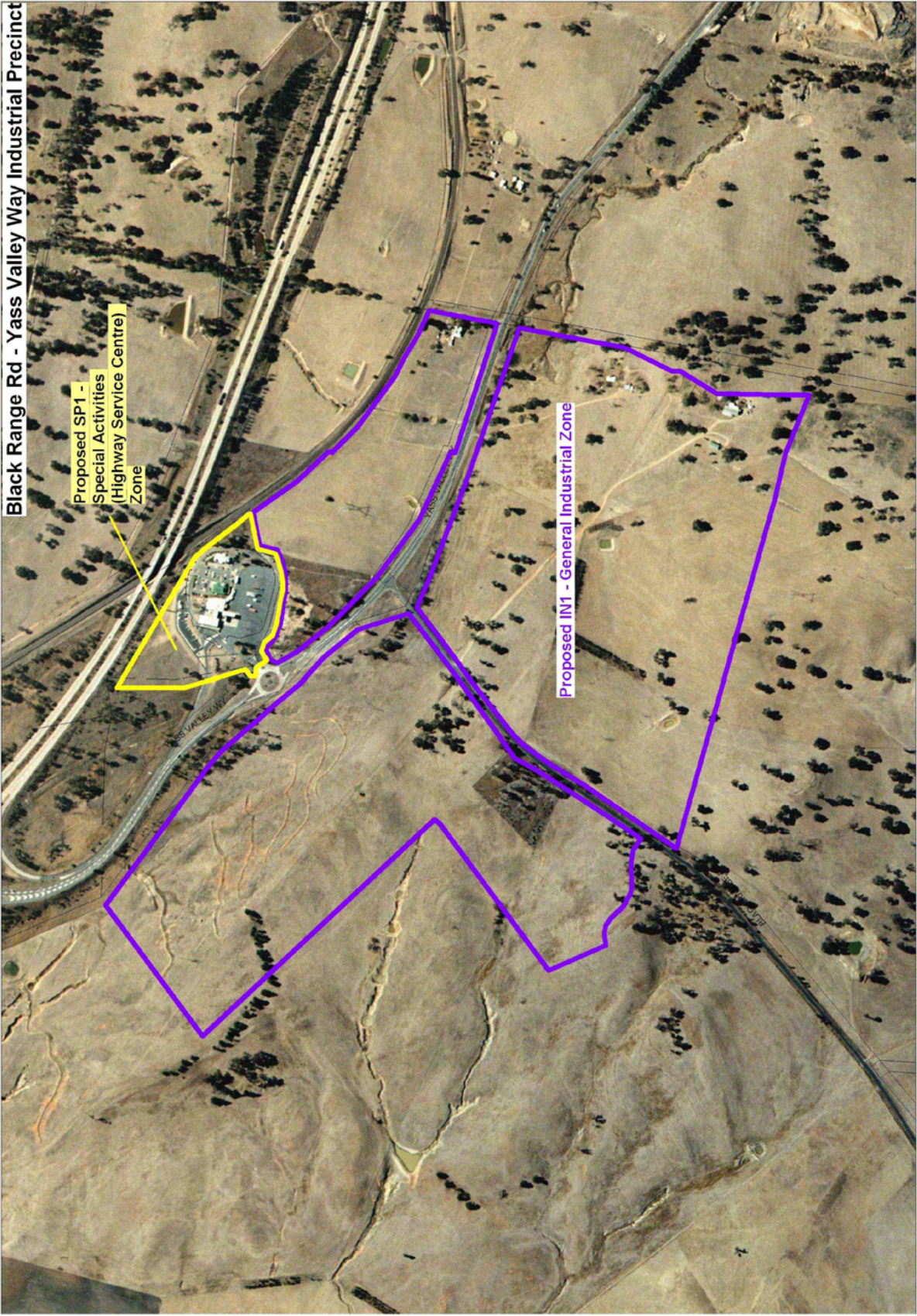
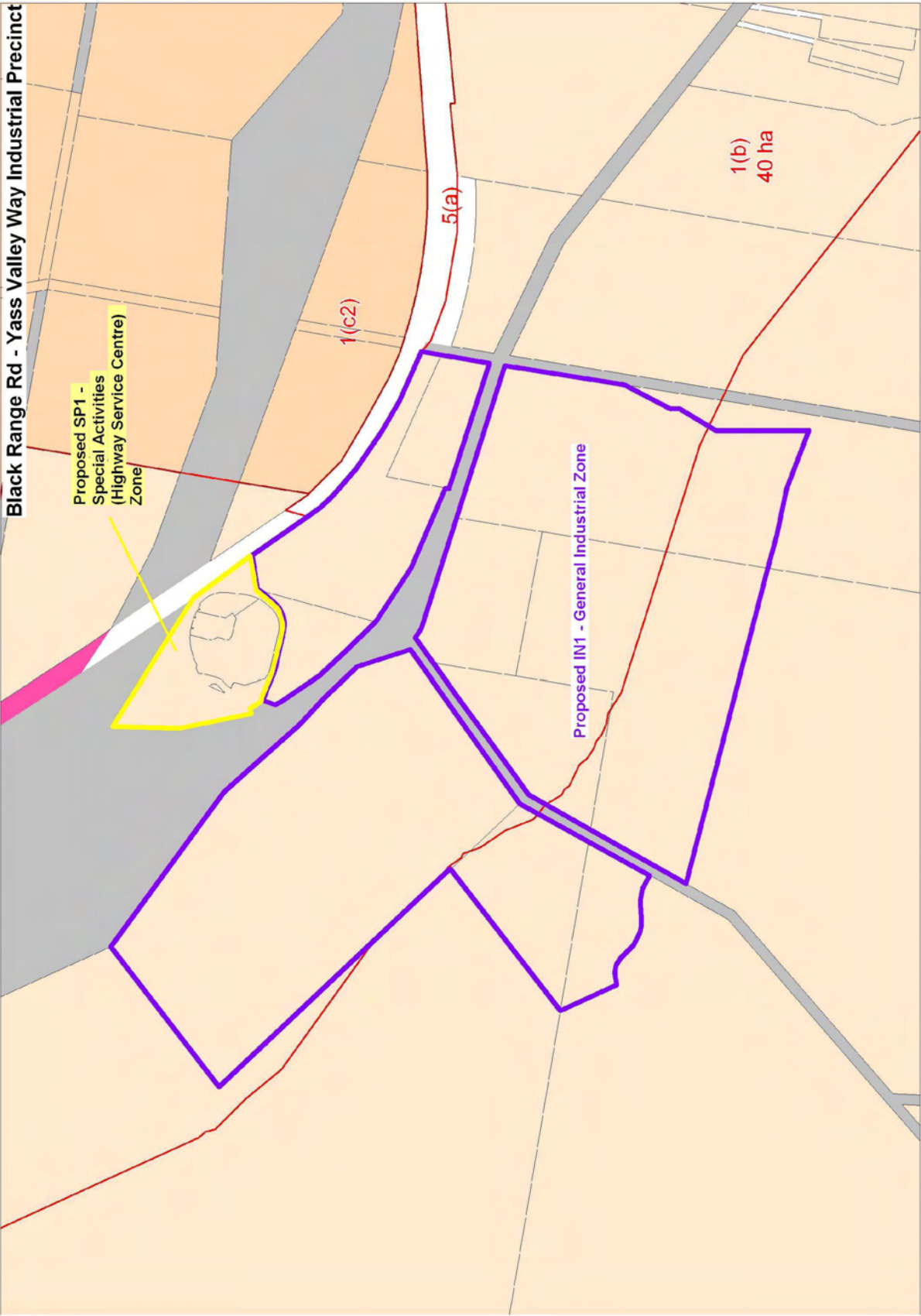




Figure 17 Current Zones - Black Range Rd - Yass Valley Way Industrial Precinct



## **8.8 Yass Sale Yards**

The Yass Sale Yards are located on the eastern edge of town on Yass Valley Way. The Sale Yards are currently located on land which is zoned 1(c) Rural Residential. At this point in time, Yass Valley Council does not have a position in relation to the long term location of the Yass Sale Yards.

Thought however does need to be given to the Sale Yard's long term future. A development application has been recently lodged for a large residential subdivision directly to the north and west of the Sale Yards. If this subdivision is approved, the ability of the sale yards to operate effectively without creating amenity impacts for surrounding residences may diminish.

In this case, the relocation of the sale yards to a more appropriate location would be both warranted and desirable. The most appropriate location for the sale yards would be to the north of Yass in the proposed Black Range Rd - Yass Valley Way industrial precinct (see Figures 18 and 19).

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## APPENDIX 1

### Industrial Area Land Use Audit

| Industry Sector                            | South Yass  | North Yass   |
|--|---|--|
| <b>Agriculture, Forestry and Fishing</b>   | Dairy Farmers Milk<br>Filtration Systems & Tractor<br>Farm Machinery Sales<br>Fertiliser, Firewood and<br>Building Supplies*<br>Wool              | Machinery  |
| <b>Mining</b>                              | Nil   | Nil  |
| <b>Manufacturing</b>                       | Engineering<br>Concrete Plant<br>Premixed Concrete  | Saddlery<br>Engineering<br>Leather<br>Welding  |
| <b>Electricity, Gas and Water Supply</b>   | Nil   | Nil  |
| <b>Construction</b>                        | Fertiliser, Firewood and<br>Building Supplies*<br>Landscape Supplies  | Mitre 10 Hardware<br>Steel Supplies and Fabrication  |
| <b>Wholesale</b>                           | Nil   | Trade Supplies   |
| <b>Retail</b>                              | Fertiliser, Firewood and<br>Building Supplies*<br>Firewood Supplies   | Disused Service Station  |
| <b>Accommodation/Cafés and Restaurants</b> | Motel   | Nil  |
| <b>Transport and Storage</b>               | Automotive Detailing<br>Towing Service<br>Tyre Sales<br>Windscreen and Glass<br>Service<br>Vehicle Repairs<br>Storage Units<br>Automotive Repairs | Vehicle Repair<br>Truck Parking<br>Concrete Storage<br>Auto Electrical<br>Storage Units<br>Muffler Supply<br>Unknown Storage<br>Global Track Warehouse<br>(Tractor Storage/Supplies) |
| <b>Communication Services</b>              | Nil   | Nil  |

|  |     |   |
|--|-----|---|
| <b>Finance &amp; Insurance</b>                 | Nil | NRMA  |
| <b>Property &amp; Business Services</b>        | Nil | Nil   |
| <b>Government Administration &amp; Defence</b> | Nil | RTA Motor registry<br>Rural Fire Service<br>Department of Natural Resources<br>Murrumbidgee CMA<br>Yass Council Works Depot |
| <b>Education</b>                               | Nil | Nil   |
| <b>Health &amp; Community Services</b>         | Gym | Nil   |
| <b>Other</b>                                   | Nil | Nil   |

## APPENDIX 2

### Business Community Questionnaire

# YASS INDUSTRIAL STUDY

BUSINESS OWNER SURVEY

JUNE 2006

Owner/Business Name:

Type of Business:

Street Address:

How long has the business been here? How long have you owned/leased the property?

What factors contributed to your decision to establish/purchase a business/property in this locality?

How effectively does your business operate in terms of goods delivery, customer parking, available land area, and size of premises?  
Do the current premises/site restrict or limit your business in any way?

Does your business require additional land to expand? If so, what is your timeframe for expansion and how much additional land would you require?



**Do you intend to retain your current business location for the long term/develop the land? Would you be interested in relocating to a modern industrial estate if one were to be developed in Yass?**

**Do you live in the Yass Valley local government area?  
What percentage of your staff lives in the Yass local government area?**

**What is your customer base and where do they come from?**

**What things might influence your decision to move to other premises/locality?**

**What do you think are the requirements for a good industrial/business?**

**What other types of industry or business could Yass Valley support?**

**Other comments?**

**Please Return Completed Form to:**Yass Valley Council  
Strategic Planning Department  
PO Box 6  
Yass NSW 2582

Email [strategic.planning@yass.nsw.gov.au](mailto:strategic.planning@yass.nsw.gov.au)

Fax