

CANTERBURY BANKSTOWN

Employment Lands Strategy

June 2020



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EXECUTIVE SUMMARY

1.0 EXECUTIVE SUMMARY

1.1 Introduction

Canterbury Bankstown is a diverse Local Government Area, with a strong economy gained originally through a strong manufacturing sector. More recently multinational companies such as Volkswagen have based Australian operations in the LGA. There is also major investment by local and foreign companies in the aviation, print media and retail sectors, whilst significant investment by Government has been planned or committed to.

The biggest commercial areas in the Canterbury-Bankstown area are located at Bankstown and Campsie - both being identified by the Greater Sydney Commission as Strategic Centres for greater Sydney. Bankstown is the largest central business district in the region and features a large shopping centre and growing commercial office market. Leveraging these strategic centres can bring long term gains to the local economy.

Neighbourhood Centres also make an important contribution to the local economy. Supporting the economic performance of these centres establishes economic resilience and ensure the commercial and retail needs of the community are met at a localised level. Collectively Neighbourhood Centres play an important role in the economic activity across the LGA. The Canterbury Bankstown's strengths are its connectivity, a diverse economy, and a skilled workforce. It has a reputation for multicultural goods and cuisine, and specialised hubs such as the Bankstown Aviation and Technology hub, centred around Bankstown Airport and Milperra.

Delivering long term economic and employment growth to the LGA requires a strategic approach that capitalises on opportunities to attract investment and jobs growth. Canterbury Bankstown's strong local identity and existing businesses provide a firm foundation for the city's long-term economic success.

This Strategy will guide Council's decision making to ensure that there is an adequate and appropriate supply of employment land that is serviced to meet the needs of businesses and employees.

Canterbury Bankstown Local Government Area has 965.9 ha of employment land. These lands comprise employment precincts (i.e. traditional industrial and urban services land), retail and business centres and enterprise corridors along main roads. This Strategy deals with both employment and business precincts.

1.2 Strategic policy context

The Greater Sydney Commission's *South District Plan* identifies Bankstown and Campsie as strategic centres. The Commission foreshadows that the planned metro line will deliver improved frequency and reduced travel time between both centres and the Sydney CBD and beyond to Chatswood, Macquarie Park and Norwest Business Park. This will result in a strengthening of the economic links between Bankstown and Sydney's key economic centres, with potential to stimulate economic opportunities to attract jobs to Bankstown and Campsie.

Employment targets set by the Greater Sydney Commission

Target	Bankstown	Campsie
2016 estimate	12,100	4,800
2036 baseline target	17,000	7,000
2036 higher target	25,000	7,500

Source: South District Plan, Greater Sydney Commission

The *South District Plan* identifies a new **Bankstown Health and Education Precinct** in Bankstown underpinned by the opening of a new Western Sydney University campus and an opportunity for a new hospital which, together with the existing TAFE, will introduce a new vibrancy to the centre through an enhanced education function.

Collectively, the University and TAFE will result in 18,000 students in the City Centre, in addition to 2,000-3,000 school students in six schools within the City Centre. Further investment in tertiary and vocational education could bring this figure to 25,000 by 2036. This will have an economic flow-on effect, creating opportunities for more local jobs, including knowledge-intensive jobs, as well as creating new opportunities to upskill the local workforce.

The *South District Plan* sets out the NSW Department of Planning, Industry and Environment retain and manage approach to industrial and urban service land. The retain and manage approach prevents employment land from being transformed into residential or mixed-use precincts. Council supports this position in principle, however, given the scale of the LGA and quantum employment land, by 2036 there is likely to be some removal or addition to industrial and urban service land uses. Such change will need to demonstrate that the economic implications of any change is not detrimental to the economic reliance of the city.

The **Bankstown Health and Education Precinct** and the **Bankstown Airport and Milperra Industrial Area** have been identified as a Collaboration Area to be planned collaboratively between the NSW Department of Planning, Industry and Environment, Canterbury– Bankstown Council, the Greater Sydney Commission, Bankstown Airport Limited and State agencies. A place-based approach is to be used to plan for the strategic transformation of the centre. This includes resolving impediments to the delivery of coordinated investment and ensuring infrastructure alignment through a whole-of-government consideration.

CBCity 2028 is Canterbury Bankstown Council's 10-year plan to *"guide the city of Canterbury Bankstown on its journey to become a thriving, dynamic city."* The plan promotes embracing change to attract high value jobs and investment. The plan commits Council to support and promote private investment employment and growth to make CBCity a destination. "Buy local and employ local" is promoted and actions to support new businesses are being explored.

1.3 Economic indicators

The City of Canterbury Bankstown generated \$14.48 billion in Gross Regional Product (GRP) in 2017/18 and supported 118,450 jobs. This represents almost 3% of the State of NSW's economy. Analysis of business counts in Canterbury Bankstown revealed that between 2014 and 2018 identified an additional 11,812 businesses were recorded. Over this period almost all industry categories experienced an increase in the number of businesses present.


In 2018 there were a total of 38,337 active and registered for GST businesses. Population serving industries make up the largest share.

Canterbury Bankstown Economic Indicators

	Gross regional product	Industry value added
	\$14.48 billion (2017/18)	\$1,1382.3 M (2017/18)
Local sales	Number of businesses	Output
\$18,411.0 M (2017/18)	38,337 (Dec 2018)	\$2,6735.7M (2017/18)

Although the total proportion of people employed within the LGA was higher than Greater Sydney, the number of people in full time employment (56.8 per cent) was lower than Greater Sydney (61.2 per cent).

The working population

	Employed in full time work (2016)	Employed in part time work (2016)	Total labour force (2018)	Unemployment rate (Dec 18)	Live and work in CBCity (2016)	Jobs to workers ratio (2017/18)
Canterbury Bankstown	61.9%	30.9%	150,619	7.19%	28.5% (2016)	0.73

Between 2014 and 2018 an additional 6,771 jobs were created in Canterbury Bankstown. The top three industry sectors for jobs growth between 2014 and 2018 were; Health Care and Social Assistance (+2.3 per cent and 3,503 additional jobs); Education and Training (+1.4 per cent and 2,248 additional jobs), Transport, Postal and Warehousing (+.6 per cent and 1,080 additional businesses) and Accommodation and Food Services (+.8 per cent and 1,358 additional jobs).

Employment by industry type

	Health Care-Social Assist.	Retail Trade	Manufacturing	Construction	Transport, Postal and Warehousing	Accommodation and Food Services	Education and training
Canterbury Bankstown	10.8%	10.4%	6.6%	9.5%	7.7	7.3%	7.3%
Greater Sydney	11.6%	9.3%	5.8%	8.2%	5%	6.7%	8%

Source: .ID Canterbury Bankstown Economic Profile

1.4 Industry trends and drivers

Local, regional and global trends, combined with future drivers, affect employment generating land uses, their success and economic productivity. Some of the trends that will impacts on the City's future are outlined below.

Local, regional and global trends and drivers

Sector	Industry Trends
Knowledge intensive jobs	<p>A growing demand for knowledge intensive jobs</p> <p>The global market</p> <p>Flexible workspace boom</p>
Population serving	<p>Retail and commercial uses</p> <p>New format supermarkets</p> <p>Better eating experiences</p>
Health and education	<p>Automation</p> <p>Lifelong learning</p>

Sector	Industry Trends
	Higher education institutions Opportunities of aging
Industrial	Sector restructuring

1.5 Key employment anchors

Anchor institutions, such as universities, hospitals and airports, play a vital role in their communities and economies. Anchor institutions are very unlikely to move location, even during adverse events like an economic downturn. They provide employment and stimulate the local economy. The stability of anchor institutions attracts local businesses, which position themselves to provide goods and services to the institution and its employees¹. The key employment anchors for Canterbury Bankstown are:

- Western Sydney University
- Potential new Bankstown Hospital
- Bankstown Airport
- Population serving centres.

1.6 Overall employment outlook

The table below combines the job projections for commercial centres, major developments (UWS and potential new hospital) and employment precincts to give job projections for the LGA under various scenarios. Up to 44,200 jobs could be created in the LGA to 2036. This is highly dependent upon the delivery of employment growth from planned projects in Bankstown CBD and Bankstown Airport. Without these major projects to stimulate employment generation, around 24,000 additional jobs would be expected.

Employment projections

Employment scenario	2016	2026	2036	Net change	% Increase
Business as usual growth (employment precincts + business centres)	111,034	122,985	135,247	24,214	22%
Business as usual growth (employment precincts + business centres), plus Bankstown Airport Master Plan forecast growth	111,034	127,940	140,508	29,474	27%
Growth with intervention (employment precincts + business centres + Bankstown Airport Master Plan), using low growth scenarios for Bankstown and Campsie as per the South District Plan	111,034	137,773	146,748	35,715	32%
Growth with intervention (employment precincts + business centres + Bankstown Airport Master Plan), using high growth scenarios for Bankstown and Campsie as per the South District Plan	111,034	142,023	155,248	44,215	40%

1.7 Vision

By 2036 Canterbury Bankstown's employment lands will be a network of places engaged in business, production and knowledge advancement, connected to a thriving Bankstown City Centre. Collectively this network will deliver a diversity of jobs in a prosperous local economy that services Australian and global markets.

¹ Maurrasse, D. Anchor Institutions and Employment, Earth Institute Columbia University, October 31, 2016

Ongoing revitalisation of employment lands will prioritise uses which generate new jobs. Vibrant local centres will provide a diverse range of goods and services to meet the needs of their community and provide a high level of amenity to encourage social interaction.

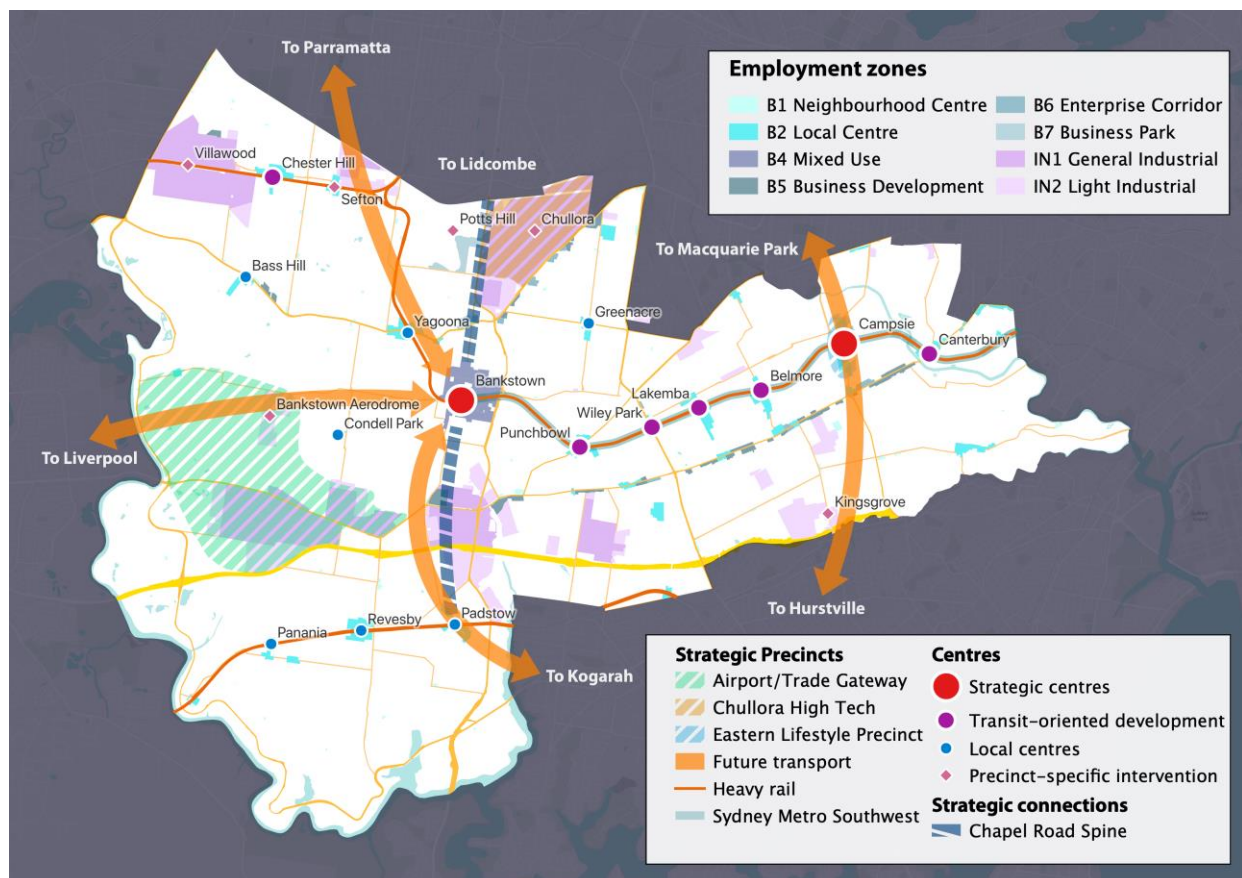
1.8 Strategies to deliver jobs growth

Delivering jobs in Canterbury Bankstown LGA means building on the LGA's existing strengths – a strong local economy, a skilled workforce and a strategic location. The key land use strategies to deliver jobs growth include:

- Grow Bankstown CBD
- Increase knowledge intensive jobs
- Connect places of work
- Improve the amenity of employment precincts
- Enhance industrial business centres as places – a greater focus on employee amenity
- Deliver a lifestyle and medical precinct at Campsie
- Protect employment lands for employment uses
- Leverage infrastructure that supports jobs growth.

Key strategies for employment lands

The figure below provides an overview of the key strategic directions that will influence the growth and development of employment precincts – industrial and business, across the City. The overarching strategy is to 'retain and manage' industrial lands, whilst supporting significant employment growth in Bankstown and Campsie, adopting the upper job targets of the South District Plan – consistent with the draft Local Strategic Planning Statement and *Bankstown CBD and Bankstown Airport Place Strategy*.



INTRODUCTION

2.0 INTRODUCTION

This Employment Lands Strategy will be the basis of a planning framework that proactively guides future growth and supports the delivery of employment to the LGA.

The Strategy provides a comprehensive pathway to attract and accommodate employment growth and the foundation for Council to exercise strong leadership in planning and facilitating future growth in employment lands in the LGA. The Strategy presents research findings and projects future demand for employment land in Canterbury Bankstown LGA.

2.1 Purpose

This Strategy presents information on the following:

- Current policy and statutory context applying to employment lands within the LGA
- Key strategic drivers for economic growth and emerging industries
- Availability of employment lands
- Projections of future demand for employment lands
- Adequacy of existing employment lands to accommodate future growth and change
- Additional employment land supply needed in terms of employment type, timing and location
- Key findings
- Overarching strategies for employment growth over the next 20 years.

The accompanying Employment Lands Strategy provides strategic directions and an action plan to support the economic development and prosperity of the Canterbury Bankstown LGA.

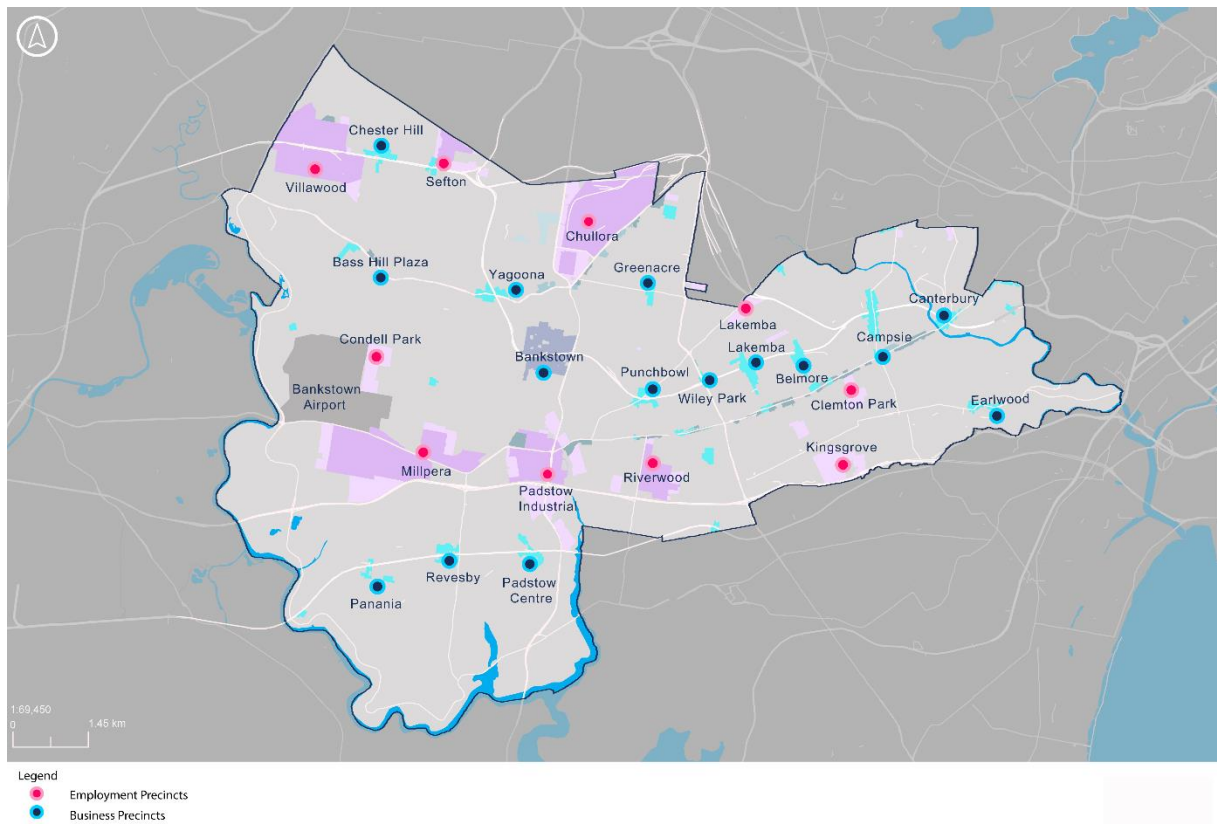
2.2 Study area

This Background Report and the Employment Lands Strategy focuses on employment land that lies within the Canterbury Bankstown LGA, which includes land that is predominantly used for commercial or industrial activities resulting in employment. Table 1 identifies the specific land zones applicable as identified under the Bankstown Local Environmental Plan (LEP) 2015 and the Canterbury LEP 2012. The maps below indicate the location of the employment precincts and business centres.

Table 1: Employment lands defined

Business centre precincts	Employment precincts
B1 Neighbourhood Centre	IN1 General Industrial
B2 Local Centre	IN2 Light Industrial
B4 Mixed Use	B5 Business Development
	B6 Enterprise Corridor
	B7 Business Park

Figure 1: Location for business centres and employment land



2.3 Report structure

This Strategy is structured into a number of key sections as follows:

Section 3 - Strategic policy context

Provides a summary of the recent and relevant state and local policies that would influence employment land.

Section 4 – Demographic context

Identifies the latest (2016) population and employment characteristics of the LGA.

Section 5 – Economic context

Identifies the economic and employment characteristics of the LGA.

Section 6 – Trends and drivers

Explores broader trends and drivers that may influence the type and operation of employment land in the future.

Section 7 – Demand assessment

Builds on the information provided in Section 3 and 4 to forecast growth and change in Canterbury Bankstown LGA over three time periods (2021, 2026 and 2036). The section seeks to identify demand for employment related floorspace to identify the needs for land, appropriate zones and development controls.

Section 8 – Planning control review and recommendations

An overarching review of employment land development controls, constraints and opportunities.

Section 9 – Strategic Centres analysis – Bankstown and Campsie

A strategic analysis of the Strategic Centres of Bankstown and Campsie, including the results of a floorspace survey.

Section 10 – Business Centres

A review of business centres, including SWOT Analysis.

Section 11 – Employment precincts

The precinct profiles identify the economic, planning and employment characteristics of each centre, including capturing floor space information.

Section 12 – Summary of findings

Highlights and summaries the key findings of from the preceding sections.

Section 13 – Strategy

Identifies the overarching vision, aims and land use strategies to support job growth into the future.

STRATEGIC POLICY CONTEXT

3.0 STRATEGIC POLICY CONTEXT

This section outlines the existing planning and policy context at a state and local level, relevant to the growth and direction for employment land within Canterbury Bankstown LGA.

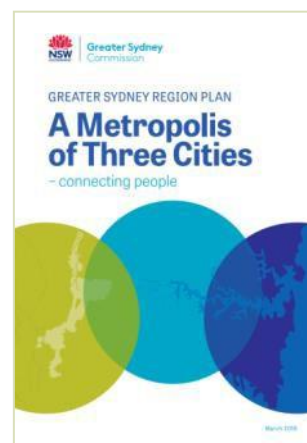
3.1 State policy context

3.1.1 Greater Sydney Region Plan

The Greater Sydney Region Plan – A Metropolis of Three Cities (Region Plan) was finalised in March 2018 by the Greater Sydney Commission. The plan applies to the Greater Sydney Region and sets the planning framework for five districts.

A core intent of the Region Plan is to give people more housing choice and establish more jobs closer to where people live, to develop a more accessible and walkable city and create conditions for a stronger economy.

The Region Plan provides a future vision of three cities where most residents live within 30 minutes of the jobs, education and health facilities, services and greater places. Canterbury Bankstown LGA is divided across the Central River City and the Eastern Harbour City. Together with Georges River and Sutherland LGA, Canterbury Bankstown LGA is located within the South District.



The Region Plan identifies Bankstown and Campsie as 'strategic centres'. The Plan identifies Collaboration Areas including the Bankstown Health and Education Precinct and the Bankstown Airport and Milperra industrial area. It also recognises the opportunities afforded by the Sydenham to Bankstown Southwest metro line.

Bankstown Airport currently caters for significant aviation and non-aviation related businesses within its 313 hectares. Up to 130 hectares of the site are occupied by a mix of industrial, commercial and retail tenancies as well as vacant and under-utilised sites. The Plan recognises the importance of protecting the site's operational activities.

In the future, economic activity will be enhanced surrounding Greater Parramatta through investment in links to surrounding strategic centres, including Bankstown CBD.

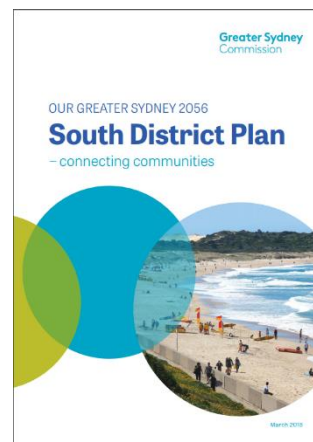
This Plan seeks to improve the capacity of the South District's employment lands to contribute towards employment targets in the South District Plan. At the same time, it will balance the need to maintain appropriately zoned land to accommodate traditional industrial uses that service the local population and key state infrastructure.

The Plan identified a benchmark requirement of three-square metres of industrial land per capita for urban services activities. Urban services include a collection of industries that enable the city to develop and its businesses and residents to operate. The per capita level of provision in the South District is already well below three square metres per capita. There may be a need to provide additional industrial and urban services in the South District to accommodate population growth beyond 2036.

3.1.2 South District Plan

The South District Plan is a 20-year plan to manage growth in the context of economic, social and environmental matters. It is a guide for implementing the Greater Sydney Region Plan at a district level and is a bridge between regional and local planning. The District Plan informs local strategic planning statements and environmental plans, the assessment of planning proposals as well as community strategic plans and policies.

The plan identifies that recent jobs growth has been predominately in the health and education industry sector and that population-serving industries such as retail and construction are also key drivers of the District's economy. Increasing the number of jobs in health and education and population-serving industries is particularly important as the District's historically strong industrial base is in decline.



The South District Plan sets job targets for the strategic centres. Campsie has a target range between 7,000-7,500 jobs. Bankstown has a target range between 17,000-25,000 jobs by 2036. Although the Plan does not provide targets specifically for the areas that fall outside of strategic centres, it does recognise the need to harness opportunities and support economic growth by ensuring adequate stocks of well-located industrial and business zoned land.

The South District Plan identifies a total of 1,666 hectares (140 undeveloped, 1,526 developed) of employment land within the South District. This accounts for 12 per cent of all employment land within Greater Sydney. The Plan identifies that manufacturing dominates the South District's urban services precinct with a relatively even distribution of other industries.

The District Plan identifies that almost 58 per cent of the District's industrial and urban services land falls within Canterbury Bankstown LGA. Manufacturing is the largest employment sector, dominated by food product, furniture, machinery and equipment and polymer product and rubber product manufacturing. Other activities include freight and logistics (transport, postal and warehousing), construction and wholesale trade are also represented. Activities at the Bankstown Airport trade gateway are freight activities and advanced manufacturing, in the form of transport equipment manufacturing. These two industry sectors provide two-thirds of the employment at the Bankstown Airport trade gateway.

The retention, growth and enhancement of industrial and urban services should provide land for a wide range of businesses to support Greater Sydney's productivity and integrated economy. The District Plan identifies that industrial and urban services land within Canterbury Bankstown LGA should be retained and managed and safeguarded from competing pressures, especially residential and mixed-use zones. While this is strongly supported as a general policy position, Council has identified a small number of situations in the LGA which warrant further investigation. In particular, isolated industrial parcels of land that are within residential areas could be investigated for alternative uses as the sites are vacated, subject to a strategic merit assessment and the availability of an adequate supply of employment land. These sites include:

- 4-10 Gunya Street and 20-24 Auburn Road, Regents Park
- 149-165 Milton Street, Ashbury
- 15-29 Brighton Street, Croydon Park.

The District Plan identifies that the district is transitioning from manufacturing to professional, high-tech, scientific and creative industries, and ancillary distribution and warehousing. Locations for local urban services must also be protected. The plan identifies the importance of protecting industrial and urban services land in the

Canterbury Bankstown LGA. In addition, the plan identifies the following planning priorities to improve productivity:

- Growing and investing in the Bankstown-Lidcombe health and education precinct
- Growing and investing in Bankstown Airport trade gateway as an economic catalyst for the District
- Growing investment, business opportunities and jobs in strategic centres, being Bankstown and Campsie
- Retaining and managing industrial and urban services land
- Supporting growth of industry sectors
- Delivering integrated land use and transport planning and a 30-minute city.

These planning priorities are intended to inform the development of local employment lands strategies. Council will need to work with the NSW Government and industry to ensure these principles result in tangible outcomes that improve the economic functioning, viability and vibrancy of Canterbury Bankstown's centres.

The District Plan identifies Bankstown and Campsie as strategic centres. The planned metro line will deliver improved frequency and reduced travel time between both centres and the Sydney CBD and beyond to Chatswood and Macquarie Park. This will result in a strengthening of the economic links between Bankstown and other employment precincts across Sydney. This has potential to stimulate economic opportunities to attract jobs to Bankstown and Campsie. In Bankstown, the opening of a Western Sydney University campus, together with the existing TAFE, will introduce a new vibrancy to the centre. This will have an economic flow-on effect, creating opportunities for more local jobs, including knowledge-intensive jobs.

Table 2: Targets set by the Greater Sydney Commission

Target	Bankstown	Campsie
2016 estimate	12,100	4,800
2036 baseline target	17,000	7,000
2036 higher target	25,000	7,500

Source: South District Plan, Greater Sydney Commission

The South District Plan identifies a new Bankstown Health and Education Precinct and that the Greater Sydney Commission will plan the Bankstown City Centre and Bankstown Airport and Milperra industrial area with the NSW Department of Planning, Industry and Environment, Canterbury– Bankstown Council, Bankstown Airport Limited and State agencies.

A Place Strategy has been prepared by the relevant stakeholders, which provides a shared vision between agencies to build Bankstown's profile as a Health, Academic, Research and Training precinct and support growth of Bankstown Airport and the surrounding employment lands. The Greater Sydney Commission, Council and key stakeholders will work together on developing an ongoing governance framework. The plan sets the aspiration for Bankstown to achieve the higher target 25,000 jobs by 2036. In addition, the Place Strategy notes a target of 25,000 students by 2036 – with TAFE and Western Sydney University expected to deliver up to 18,000. It is anticipated that the potential for a future new City Centre based hospital will further enhance health and education opportunities in the centre to support the realisation of these targets.

3.1.3 The metropolis that works

The discussion paper *Metropolis that Works* is centred on the concept that strategic industrial lands are integral to the 30-minute City. The location and proximity of industrial precincts to local labour markets, a local

distribution network is crucial to making efficient connections between suppliers, employees and end users. The report acknowledges the increasing pressure on industrial areas to be substituted or developed into other uses, namely residential development. The paper specifically encourages innovative zoning to adapt to a shift in demand for various uses, but to beware of mixed use and the usurping of industrial land to make way for residential land. Place based approaches are encouraged to think more about public realm with built form, considering thoughtful transitions between the industrial zones and residential zones to create precincts that have an agglomeration of activities, and the benefits of interdependency (e.g. transport connectivity, shared public space, proximity to human services).

Some key considerations relevant for Canterbury Bankstown LGA worth highlighting are:

- The value of industrial and urban services land should not be based only on the volume and types of jobs generated, but to the operational role and function it plays throughout the city.
- Industrial precincts should be identified as valuable as strategic places in the Region, District and Environmental Plans
- Flexible planning controls and increased densities can allow existing industrial sites to evolve to support emerging industries, however caution should be exercised in allowing small/scale live/work permissible uses, or more pervasive actions such as rezoning to B4 mixed use can act as a stepping stone to uses which in the longer term are not in the best interests of maintaining a productive industrial and urban services area.

3.1.4 Draft Sydenham to Bankstown Urban Renewal Corridor Strategy 2017

The draft Sydenham to Bankstown Urban Renewal Corridor Strategy (the draft Strategy) provides a framework for development, sets out actions for implementation and provides a detailed list of infrastructures required to support urban renewal. The overarching aim of the draft Strategy is to encourage more jobs, housing and supporting infrastructure to meet the demands of the growing population. The Strategy proposes changes to land use and built form controls that would provide over 35,000 dwellings and 8,700 jobs over the next 20 years along the Sydenham to Bankstown Corridor. In July 2018, the Department of Planning, Industry and Environment noted that the draft Strategy would no longer be made in its exhibited form, and instead, a high-level principle-based strategy would be developed. Notwithstanding, the draft Strategy is considered below with respect to the employment aspirations for each precinct.

The draft strategy identifies the following:

- a detailed response to the issues raised in public submissions and community design workshops
- a revision for land use and development in each station precinct, including the supporting context analysis and planning rationale
- twenty-year population, housing and employment forecasts
- key infrastructure required to support growth in the corridor and how it will be delivered
- key actions for each station precinct (including statutory planning deliverables)
- the required regional and State infrastructure in the corridor
- the implementation, monitoring and review process for on-going community consultation.

The draft Strategy identifies eleven station precincts along the corridor and identifies ways to enhance the precincts by valuing neighbourhood character, renewing town centres, providing improved open spaces and community services and facilities. Table 3: Visions for station precincts identifies the visions, identified for the station precincts located within the Canterbury Bankstown LGA.

Table 3: Visions for station precincts

Station Precinct	Implications
Bankstown	<ul style="list-style-type: none"> Bankstown will continue to provide shops, jobs and community services for the wider corridor to support the Greater Sydney Commission's District Centre's employment target A potential station square will be the heart of the Bankstown Station Precinct enhancing pedestrian activity and providing new north-south connections Future development around the station will provide a visual marker for Bankstown Station Precinct Bankstown CBD will be renewed and modernised as it redevelops for increased jobs and homes.
Belmore	<ul style="list-style-type: none"> Burwood Road will continue to be a vibrant, popular eat street Belmore Sportsground will be better connected to the station via a potential new linear park along the rail corridor. Open space around the sportsground will be upgraded New apartment development will deliver improved streetscapes, new pedestrian connections and more green and urban open space Belmore Station will be connected to neighbouring Campsie and Lakemba Station Precincts via improved streets and shared pedestrian/ cycle paths.
Campsie	<ul style="list-style-type: none"> Promote growth to reinvigorate the centre and support the role of Campsie as a District Centre within the Greater Sydney Commission's Sydney South District Future development is designed well and positively contributes to the public domain Beamish Street will benefit from streetscape improvements New opportunities for open space and community facilities to support the growing population Anzac and Carrington Squares are protected as part of the future growth of the Campsie Station Precinct Enhance connections between Campsie's Centre, the Cooks River and Tasker Park A potential new park along the rail line could provide a new and interesting place for leisure and recreation.
Canterbury	<ul style="list-style-type: none"> A reinvigorated town centre that supports the role of Canterbury Station Precinct as a local centre that supports the productivity of the Greater Sydney Commission's South District Establish a new retail strip along Robert and Jeffrey Streets extending from Canterbury station New open space areas and community facilities that will support the growing population, particularly along the Cooks River foreshore Protect and establish a built form that respects existing and potential heritage items Enhance connections between Canterbury Town Centre and Cooks River A proposed new park along the rail line could provide a new and interesting place for leisure and recreation.
Hurlstone Park	<ul style="list-style-type: none"> Retain existing valued neighbourhood character Protect identified heritage values Improved streetscape along Crinan Street and station forecourt to reinvigorate the shopping area, while retaining and enhancing its village-like character Improved public and active transport connections as a result of shared pedestrian/cycle paths and parks along the rail line Encourage appropriate development for the surrounding low-density neighbourhood character.

Station Precinct	Implications
Lakemba	<ul style="list-style-type: none"> • A centre that capitalises on its vibrant shopping strip with great places to shop, eat and socialise • Increased housing options with pockets of modern residential development around the station • Retain architecture along Haldon Street that contributes to its character and ensure that new development is complementary • Improved station entry and potential urban plaza providing a new public space • A proposed linear park along the train line could provide a new and interesting place for leisure and recreation.
Punchbowl	<ul style="list-style-type: none"> • A centre that is better connected to its well-loved cosmopolitan shopping strip with great places to shop, eat and socialise – day and night • Retail and commercial land uses to form part of any new renewal in the town centre to maintain vibrancy and activity • The potential for a new linear park along the metro line and new access to school grounds could create new and interesting places for leisure and recreation
Wiley Park	<ul style="list-style-type: none"> • A great place for families with a range of new and existing housing, good access to schools and improved public open space • New and improved pedestrian and cycle access to Lakemba and Punchbowl will be facilitated by the revitalisation of The Boulevard • New high-quality showroom developments on King Georges Road will provide an alternative focus more suited to heavy vehicular traffic • The potential for a new linear park along the rail line could provide a new and interesting place for leisure and recreation.

Canterbury Bankstown Council subsequently adopted the following position on the strategy:

*Council's position is the Draft Urban Renewal Corridor Strategy **cannot be supported** at this time due to the significant number of unresolved issues, particularly concerning infrastructure, open space, urban design and funding.*

The Draft Strategy is narrowly focussed on delivering housing, without considering the capacity of the existing and proposed infrastructure required to support it. Critically, the Draft Strategy is inconsistent with the Greater Sydney Commission's Draft Greater Sydney Region Plan and Draft South District Plan.

Prior to finalising the Draft Strategy, Council's submission identifies the need for the Department of Planning and Environment to undertake more detailed studies and analysis to address certain fundamental issues and to review the implementation process. This additional planning work will enable Council to provide more detailed comments on the Draft Strategy in relation to land uses, building envelopes and infrastructure.

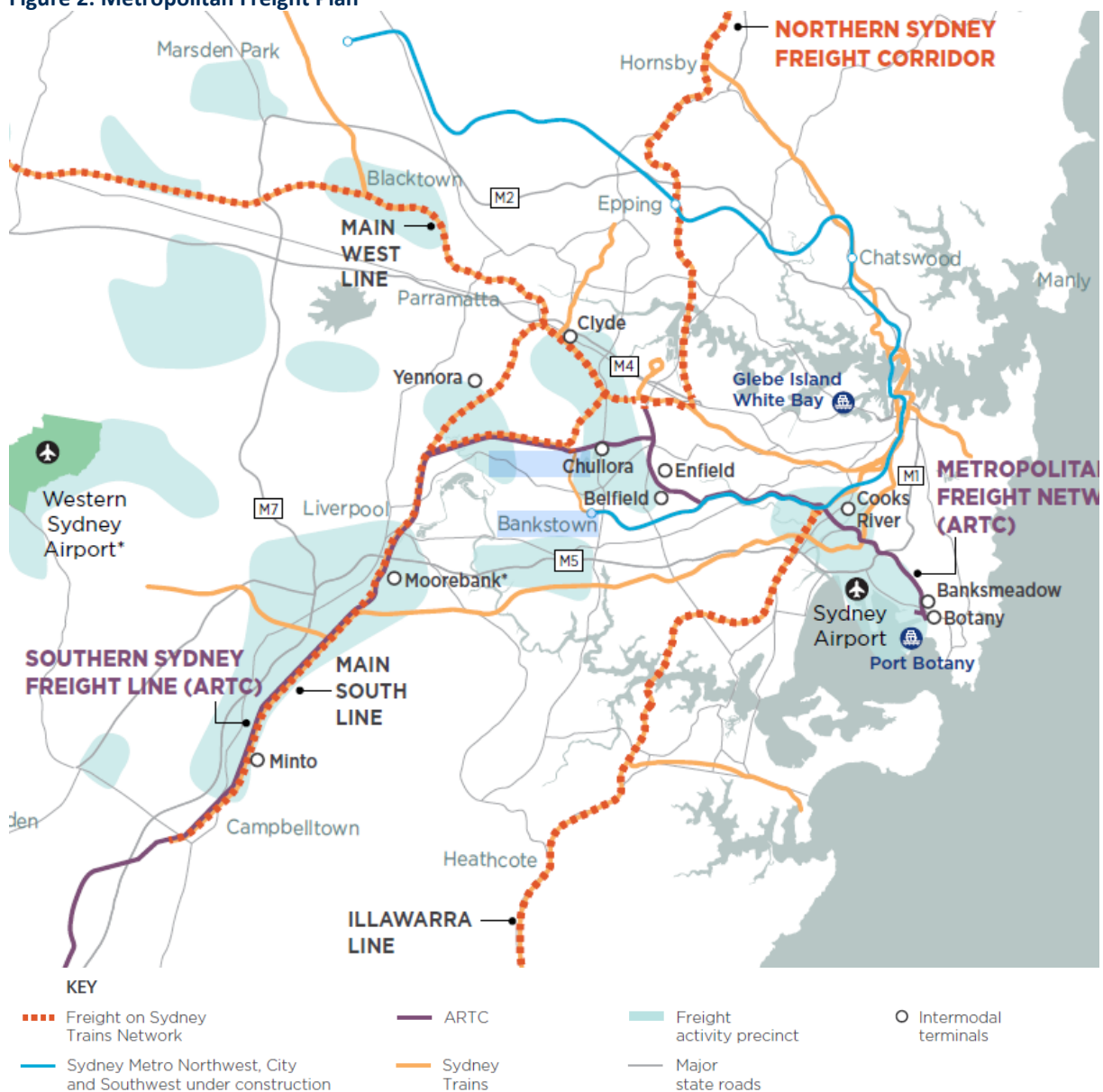
At the time of writing, planning for the renewal corridor is a continuing project and has not yet been finalised. Future rezoning proposal may be considered following the production of master plans for public exhibition.

3.1.5 NSW Freight and Ports Plan

The NSW Freight Plan 2018-2023 sets out the NSW Government's priorities for the sector over the next five years. It is a supporting document to the Future Transport 2056. The plan recognises the role of Bankstown Airport in domestic interstate parcel delivery and the importance of the Chullora Intermodal Terminal to the metropolitan freight network. The LGA's employment land in the vicinity of the M5 West are recognised as being strategically important freight activity precinct.

The freight plan recognises that traffic congestion on the M5 West, which carries large volumes of both passenger and freight traffic is contributing to the cost of moving freight. It also indicates that it will be necessary to manage traffic congestion around the Chullora Intermodal.

Figure 2: Metropolitan Freight Plan



3.2 Local policy context

The Canterbury Bankstown LGA was formed in May 2016 from a merger of the Canterbury and Bankstown LGAs. This policy review has included relevant strategies from both of the former LGAs and the current LGA.

3.2.1 Canterbury Bankstown Council's Community Strategic Plan, CBCity 2028



Canterbury Bankstown Council's Community Strategic Plan, *CBCity 2028* is a 10-year plan set out to shape the Canterbury Bankstown Local Government Area's future. *CBCity 2028* is Canterbury Bankstown's highest-level plan and translates the community's desired outcomes for the city into key strategies. *CBCity 2028* includes community suggested actions which can be tested in the development of all other plans. Canterbury Bankstown LGA's community strategic plan, *CBCity 2028* was prepared in 2018 based on extensive community input. The plan will guide social, cultural and financial investment to deliver on the Plan's vision for a City that is *Thriving, Dynamic and Real*. Better designed and well-managed development, including affordable

housing, enough off-street car parking and not too much high density or overcrowding is the housing vision for the LGA.

People said they want *CBCity 2028* to be: A destination City, heritage-protected, having quality social interactions, clean, cosmopolitans, full of markets, arts and culture, safe, affordable and diverse when it comes to housing, having good amenities and open spaces.

The Plan includes seven 'destinations'

1. Safe and strong
2. Clean and Green
3. Prosperous and Innovative
4. Moving and Integrated
5. Health and Active
6. Liveable and Distinctive
7. Leading and engaged.

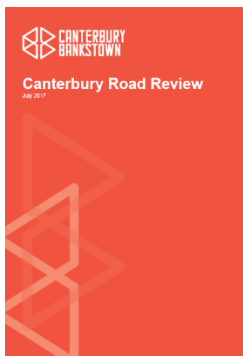
The economic and employment lands related actions include:

- Embracing change to attract future high-value jobs and investment
- Focussing on well-managed, well-executed change and growth that is supported by regional and local level infrastructure
- Provide opportunities for a cosmopolitan, vibrant and dynamic City
- Pursue Smart City innovations
- Promote long term economic and employment growth
- Provide and promote artistic and cultural opportunities
- Facilitate improved movement around the City for all users
- Provide convenient, equitable and accessible parking
- Promote life-long learning
- Deliver an attractive, sustainable, affordable built environment
- Ensure compliance with, and understanding of, local laws
- Engage, involve and empower the community to participate in decisions that affect them
- Deliver local and state services through shared facilities
- Be innovative, responsive forward-thinking leaders providing well managed, open government

- Understand and manage vulnerabilities, interdependencies and risks for a more resilient City.

Strategic planning in the area is focused on maximising long-term growth in the economy and improving access to education and employment whilst creating social uplift and celebrating the LGA's diverse culture and creativity.

3.2.2 Canterbury Road Review, July 2017



In 2017 Canterbury Bankstown Council undertook a review of planning controls on Canterbury Road. The project was in response to concern at the scale and quantum of development. In particular, there were concerns that development was inconsistent with Council's adopted strategic direction and dissatisfaction that some development was of a bulk and size that does not balance amenity and solar access or provide best practice in relation to urban renewal along busy roads.

In this regard, the Canterbury Road Review was prompted by:

- Issues and impacts associated with additional development and resulting dwelling yield from approved developments that exceed the height and floor space ratio (FSR) controls that were not contemplated when the LEP was made or by the RDS.
- The lack of an FSR control has resulted in large bulky overly-dense built forms that negatively impact on the corridor amenity and the quality of life for residents in proximity to these buildings.
- A comprehensive submission from Roads and Maritime Service (RMS) expressing concerns about cumulative traffic impacts from the proposed rezoning of land to B5 Business Development under the LEP for residential uses with increased yields in Canterbury Road.
- A large number of privately led planning proposals that seek to increase the development potential of numerous development sites with site specific amendments to the LEP.
- The release of government strategies and infrastructure projects such as the draft South District Plan, the draft Sydenham to Bankstown Urban Renewal Strategy and WestConnex.
- The relatively low level of development occurring in the R3 Medium Density Residential and R4 High Density Residential zones under the LEP.

The review involved, economic, urban design and traffic investigations. The review report recommends concentrating development in locations that will provide opportunities for the creation of open space, pedestrian connectivity, take advantage of north/south bus links and result in lower levels of additional traffic congestion. It also recommends excluding multi-storey housing from all other land fronting Canterbury Road in order to concentrate dwellings in these junctions and localities. Residential development is to be concentrated west of the Cooks River at seven junctions at the intersection of Canterbury Road and identified north running streets. Additional residential development should be permitted at localities, predominantly on the northern side of the road, between the seven Junctions.

As most of the development activity has been occurring in the eastern portion of Canterbury Road, it is considered that work on defining the junctions and localities between Canterbury and Campsie should be undertaken as a priority over the other junctions and localities in the review. This includes the Wonga Road Junction, the Robertson Street – Canton Street Locality and Beamish Street Junction.

In accordance with the recommendations, further actions to define the boundaries of the junctions and localities will include undertaking, involving further studies to determine appropriate zoning, height and FSR provisions.

In addition, any future applicant initiated planning proposals within the Canterbury Road Review area will need to demonstrate consistency with the review and undertake a traffic impact assessment based on the transport and traffic study prepare as part of the review.

3.2.3 Bankstown CBD and Bankstown Airport Collaboration Area

The Greater Sydney Commission has identified Bankstown CBD and Bankstown Airport Milperra as a collaboration area. Collaboration Areas offer a place-based, multi-stakeholder approach to solving complex urban issues. Collaboration Areas deliver coordinated planning in locations that have great potential to grow their vibrancy, diversity and productivity, with improved employment and education opportunities, enhanced liveability and sustainability. They are led by the Commission and support councils, state agencies and stakeholders to address major issues and achieve better outcomes for an area.

Canterbury Bankstown Council has been proactive in establishing a vision and priorities for the area which will inform the Local Strategic Planning Statement. A key priority for the area is to increase business activity by building on the area's locational advantages and unique specialisations in advanced manufacturing, multi culturalism, global trade and aviation. An opportunity is identified to establish better linkages between Bankstown CBD and Bankstown Airport through spaces for meetings, events and conferences, tourist accommodation and cross business and institutional relationship building – including with other employment hubs such as Chullora.

Connectivity to other regional and global destinations was also identified as a priority with 30-minute connections to Sydney CBD Parramatta and Liverpool seen as key. The Sydney Metro South West will be the first import links. Calls are being made to fast track the north-south metro link between Kogarah and Parramatta via Bankstown.

The potential relocation of the Bankstown Hospital into Bankstown CBD will provide an opportunity to develop a state-of-the-art hospital which will support training provided by University of New South Wales, University of Western Sydney and TAFE. Opportunities for an expanded specialist and emergency health role at Bankstown Airport and the Royal Flying Doctor Service could build on relationships between the various institutions.

Building on Bankstown's role in gateway education for new migrants and youth will involve establishment of higher order and specialised training. Closer collaboration between education institutions would support local industries and businesses.

Since December 2018, the GSC has facilitated a series of State Government and key stakeholder workshops to develop a Place Strategy, which will establish a shared vision, priorities and actions for the Collaboration Area. The Place Strategy will set the foundations for the Bankstown City Centre and employment lands place plans and provides the opportunity for ongoing engagement of the collaborating partners.

3.2.4 Bankstown Airport 2019 Preliminary Draft Master Plan

This draft masterplan was publicly exhibited from October 2018 to January 2019. The Master Plan aims to deliver significant growth in investment and employment and development of both aviation and non-aviation commercial activities.

Bankstown Airport is the third busiest airport in Australia and the second busiest general aviation airport. The Airport operates on a 24/7 basis and serves as a flying base for Emergency Services, major flying schools and small to medium-size air freight, aircraft maintenance, charter and private business flights. It is also home to more than 160 businesses.

Bankstown Airport plays an important role as a major commercial centre within the Canterbury Bankstown region. Airport operations currently contribute almost \$1 billion annually and over 6,000 jobs to the NSW economy. This includes \$697 million and nearly 4,500 jobs to the local Canterbury-Bankstown economy. Bankstown Airport accommodates an average of 700 aircraft movements each day.

The Master Plan forecasts new businesses and services associated with the Airport contributing \$1.64 billion annually to the NSW economy, and generating 1,709 jobs over the next five years and nearly 4,000 jobs over the

next 20-year planning horizons. General aviation is forecast to grow by 3.8 per cent per annum over the next five years. Helicopters will form an increasingly important part of the aviation mix at the Airport, with helicopter movements forecast to grow by 4.6 per cent per annum during this period.

Investment in facilities and infrastructure is necessary to facilitate continued growth in air traffic. New investment is planned to upgrade runways, taxiways, pavement, and airfield lighting. The Master Plan retains the opportunity for a future extension of the Centre Runway, subject to aircraft operational demands, cost benefit analysis and relevant approvals. It also retains the opportunity for limited regular public transport services at Bankstown Airport in the future.

The capacity of an airport to operate and respond to growth in the aviation sector is directly impacted by what occurs on and surrounding the airport. Long-term and effective protection and safeguarding of Bankstown Airport is critical to ensuring ongoing aviation operations and safety. The masterplan states that consideration needs to be given to:

- Land use planning around the Airport, to minimise development which may be impacted by aircraft noise and operations
- Siting, location and design of buildings and structures which may impact windshear and turbulence, affecting aircraft operations
- Managing wildlife on and surrounding the Airport
- Minimising impacts from ground lighting that may distract or confuse aircraft pilots
- Protecting the airspace surrounding the Airport from buildings and structures, which may impinge on the safe arrival and departure of aircraft
- Protecting aviation facilities from development encroachment
- Protecting areas at the end of runways, through public safety areas

These factors need to be considered in future planning for employment lands in Canterbury Bankstown.

3.2.5 Former City of Bankstown Economic Development Strategy 2014-17

The Economic Development Strategy 2014-17 examines challenges and opportunities facing the economy and local businesses within the former Bankstown LGA. The Strategy examines the key trends and drivers which have resulted in changes in the environment in which business operated. These include:

- Economic: Including the increased volatility and uncertainty in the global economy, the beginning of the 'Asian Century', the development of the 'two-speed' economy, the growing need for investment in Australia's physical infrastructure and emerging labour and skills shortages in Australia
- Political: Budgetary pressures at Commonwealth, State and Local Government level, the National Broadband Network, vocational education and training, and industry policy generally and pressure for local council mergers/amalgamations
- Socio-demographic: Relatively high population growth, the ageing population, changes in consumption trends and the importance of migration.
- Technology: Continuing development of intelligent or 'smart' systems, a National Broadband Network, increasing use of mobile communications technology, and the importance of e-commerce and digital media
- Physical environment: Impacts of climate change, and the policy responses developed to address them.

The Strategy identifies ten Strategic Directions which frame and organise the economic development actions. These are; enhancing the Bankstown 'brand'; building management capabilities; boosting competitiveness through innovation; creating local market opportunities; encouraging international business linkages; attracting

and facilitating investment; strengthening our workforce; improving eco-efficiency; planning for growth and leveraging business tourism opportunities.

3.2.6 Former City of Bankstown Employment Lands Strategy 2009

The Strategy examines demographic and employment data, employment lands and strategic policy within the former Bankstown LGA. This Strategy examines the shift in the nature of land use in employment lands and identifies a combination of ‘planning actions’, focusing on land use management and controls, and ‘economic development actions’ which are about ‘softer’ initiatives to support and attract industry across the LGA.

The Strategy identifies three Strategic Directions which frame and organise the planning and economic development actions. These are:

- Enhance amenity while accommodating growth and change – This is about positioning Bankstown for future residential investment and renewal. Rather than reacting to change it is important to set up design standards and guidelines to ensure that the LGA is an exemplar of high amenity and sustainable development. New and higher value economic opportunities will follow this amenity upgrade
- Develop strategic assets – UWS (now WSU), the Airport and the key transport corridor of the M5 are important strategic assets for the LGA. Planning should recognise and seek to maximise economic outcomes from the presence of these assets. Other assets are in or near the CBD, such as the Hospital and leisure, civic and education precincts. In the east the Enfield Intermodal Terminal will be a focus for new investment in freight and distribution technologies. Large businesses, such as Fairfax and Primo Smallgoods, play an important role in the local economy. These can also be the basis for additional economic development and renewal
- Modernise and Reposition Industry to build on Locational Advantage – The LGA is strategically located in the metropolitan area – with good rail access to the Sydney CBD and 15 – 20 minutes from Sydney Airport on the M5. The southern and western parts of the LGA have areas with high natural amenity. Such advantages will become important as energy and fuel costs rise and higher amenity renewal opportunities further east diminish. Bankstown can be a focus for more sustainable, modern industries.

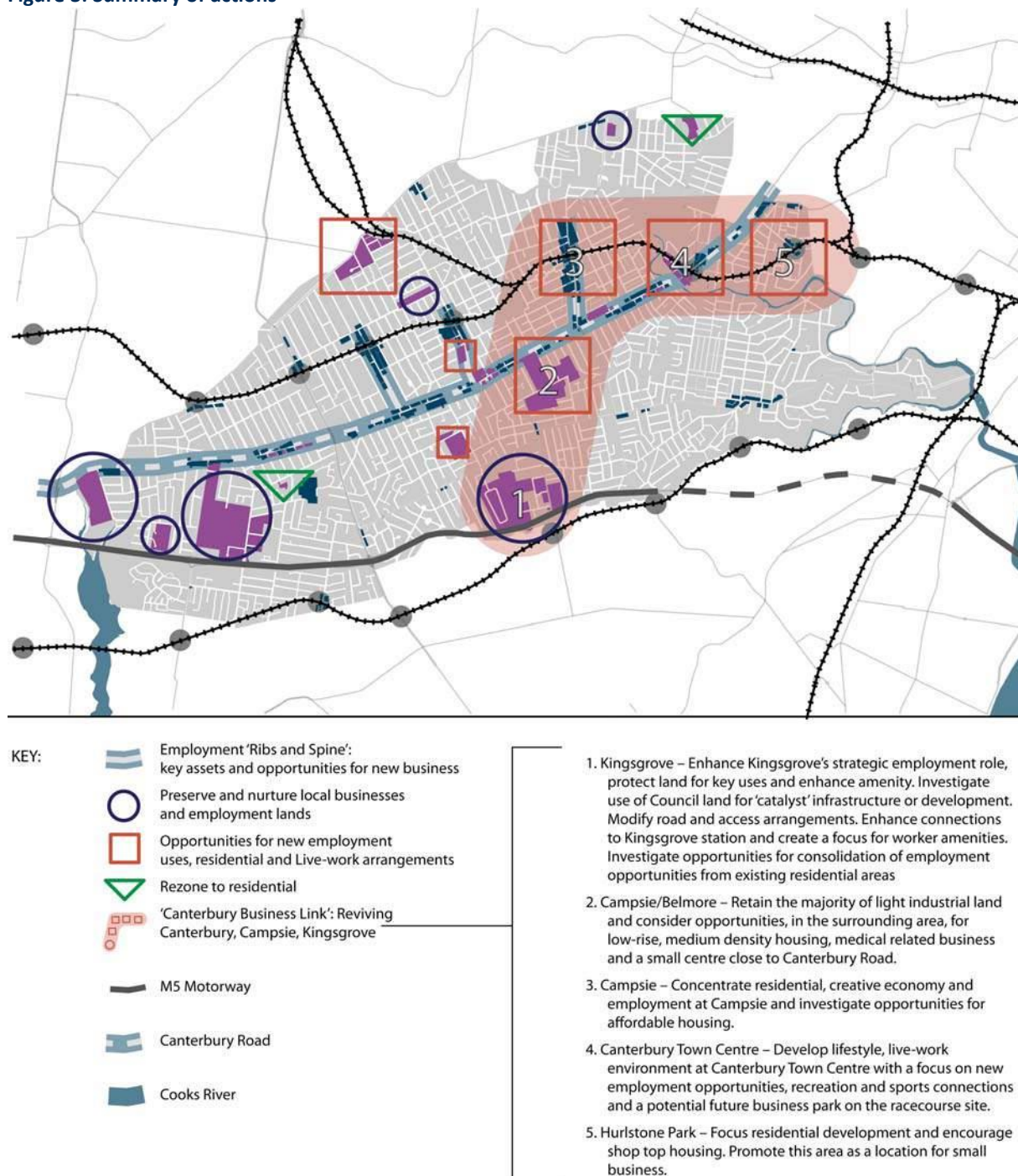
The Strategy was adopted by Council on the 22nd of September 2009.

3.2.7 Former City of Canterbury Economic Development and Employment Strategy 2009

The Strategy examines employment, and employment lands within Canterbury LGA and recommends future economic development and employment generation strategies. The strategy informed Council policies, procedures and projects to stimulate and facilitate further job and economic growth across the LGA. It was adopted by Council in 2006.

The strategy identifies key actions to reinforce the existing employment related land use structure within the LGA, protect well-functioning employment lands and strengthen the existing and future centres. A summary of the strategic directions for the Planning Actions are illustrated in Figure 3.

Figure 3: Summary of actions



Source: SGS Economics and Planning

3.3 Planning controls overview

3.3.1 Local Environmental Plans

3.3.1.1 Bankstown Local Environmental Plan 2015

Bankstown LEP was gazetted in June 2015, it replaced Bankstown LEP 2001. The LEP is made in the standard instrument prescribed template. It applies eight employment lands zonings.

- B1 Neighbourhood centre;
- B2 Local centre;
- B4 Mixed use;
- B5 Business Development;
- B6 Enterprise Corridor;
- B7 Business Park;
- IN General Industrial and
- IN2 Light Industrial.

Under the LEP, for industrial zoned land no height limits are prescribed. Both FSRs and Heights are prescribed for all Business zones.

The LEP has two special provisions relating to business premises and restrictions on mixed use development. For business premises, the special provision permits home-based small business on the fringe of Bankstown CBD. The B4 mixed use zone requires the ground floor and first floor of the building to be used for the purposes of commercial premises or other non-residential purposes.

3.3.1.1 Canterbury Local Environmental Plan 2012

Canterbury LEP was gazetted in 2012, it replaced five separate precinct-specific LEPs. The LEP is made in the standard instrument prescribed template. It applies six employment lands zones:

- B1 Neighbourhood centre;
- B2 Local centre;
- B5 Business Development;
- B6 Enterprise Corridor;
- IN General Industrial and
- IN2 Light Industrial.

Business zones in Canterbury LEP do not have a prescribed FSR with the exception of Canterbury. The LEP includes a local provision which allows medical centres on the ground floor of shop top housing developments. Another local provision allows for the adaptive reuse of a buildings with a residential zoning that was originally built as a shop. A summary of the planning parameters for Canterbury Bankstown LGA (across both LEPs) is provided for each of the centres in under Sections 6.0 and 7.0.

3.3.2 Development Control Plans

As with the Local Environmental Plans Canterbury Bankstown LGA is still working to harmonise the two development control plans of the amalgamated councils.

3.3.2.1 Bankstown DCP 2015

Bankstown DCP was adopted in 2014, and then updated in 2015 to align with the gazettal of the LEP. The DCP was written to provide additional objectives and development controls to enhance the function, appearance and amenity of development within the then LGA.

For commercial centres that DCP is structured around the types of centres (reflective of business land use zones). The DCP sets desired character objectives to complement the LEP objectives. The overarching objective for centres is to encourage employment opportunities in accessible locations, maximise public transport patronage and encourage walking and cycling. Traditionally in local centres there have been two storeys of commercial with residential above. Along the enterprise corridors commercial development is encouraged however residential is also allowed. Generally, the function and future uses of the centres needs to respond to the centres hierarchy set by the land use zoning. The minimum primary frontage for commercial development, shop top housing (containing a single dwelling), and mixed-use development (that do not contain dwellings) with 2 or more storeys is 6 metres. The minimum primary frontage for shop top housing and mixed-use development including residences with three or more storeys is 26 metres.

Industrial precincts are covered in a separate section. The section provides building envelopes, design requirements and specifically identified Chullora Technology Park and a key site in Greenacre. The DCP supplements the LEP by providing additional objectives and development controls for development within the IN1 and IN2 zones to enhance the function and appearance of industrial precincts in the Former Bankstown LGA. The development controls include setbacks and building design.

3.3.2.2 Canterbury DCP 2012

Canterbury DCP was adopted in 2012 to align with the gazettal of the LEP. The DCP's purpose is to provide detailed objectives and controls to guide the form of development across the former Canterbury LGA. The overall objectives of the DCP are focused on enhancing amenity, ensuring development is well-designed, compatible with its context and protection of natural features and the environment. Most of the centres retain the fine grain character that comes from consistent building scale, proportions and materials in the narrow frontages and strong parapet shopfronts. The DCP states that the community generally values these attributes that contribute to the character of Canterbury's centres.

The DCP provides a section that provides objectives and controls for business centres. The DCP, as written in 2012 specifies that most neighbourhood centres will not experience significant growth or change, and the DCP controls are aimed at minimising any impacts of development on adjacent low-density residential areas. The DCP provides specific controls for key centres that can accommodate residential accommodation.

The DCP includes a requirement for minimum frontage. This control specifies that where redevelopment is proposed in a B1 or B2 zone a minimum frontage of 18m and in B5 zone 30m shall be provided. The value of the traditional shop fronts is recognised within the controls and demolition of shops dated prior to the 1950s is discouraged. Shop top housing is to be set behind the traditional shop front. The Industrial development section of the DCP provides setback, height plane and site coverage controls.

3.3.3 Preliminary analysis

The planning controls are reviewed in detail in section 7. This preliminary assessment has highlighted the following implications:

- The use of the zones differs between the two LEPs. Implementing a hierarchy of centres may require a review of zoning
- There is an inconsistent application of FSR and height controls across the two LEPs
- There is an inconsistent approach for minimum lot widths across the two former LGAs
- The value of the traditional fine grain shops along the commercial strips of the centres is recognised and should form part of the future character of these centres
- Objectives within the DCPs do not reflect contemporary approaches to increasing development within the centres

- Density controls across the two LEPs differ between consistent centre types. A review of densities is required
- The DCP controls are not focused on encouraging employment uses in each zone. There is a tendency to encourage residential uses over employment lands
- The wording of LEP Local Provisions within the LEP for ground floor uses is not consistent
- There is inconsistency between the permitted uses within the B and IN zones across the two LEPs.
- Overall, alignment of the two LEPs and two DCPs into consolidated planning controls for the LGA will require some balances and trade-offs. This is explored further in section 7.

3.4 Implication and opportunities

Key findings from the review of strategic planning and policy documents, that will impact on the future of the LGA's employment lands, are summarised below.

3.4.1 Transport infrastructure

Planned infrastructure delivery to the LGA will have a significant impact on future productivity. Key implications are identified in Table 4.

Table 4: Planned delivery of catalytic infrastructure

Project	Timeframe	Status and implications
Sydney Metro Sydenham to Bankston	2024	<p>Train every four minutes to Sydney CBD at all stations – turn up and go service</p> <p>Direct fast service to Martin Place, Barangaroo, North Sydney Chatswood and Macquarie Park</p> <p>Lift access at all stations</p> <p>Additional capacity for 100,000 commuters providing increased access to jobs, services and education</p> <p>Increased demand for goods and services at stations and surrounds.</p> <p>Likely increase in jobs located near stations – Hurlstone Park, Canterbury, Campsie, Belmore, Lakemba, Wiley Park, Punchbowl and Bankstown</p> <p>Potential revitalisation of centres stimulated by Increase in demand.</p> <p>Potential for high impact on land uses as this typically occurs with new mass transit connections, although this may be tempered by the existing rail line being on the same route</p>
Parramatta to Kogarah mass transit	For investigation 10-20 years	<p>Long term planning timeframe. Delivery by 2056.</p> <p>No formal commitment to delivery</p> <p>Would deliver a vital connection to Parramatta CBD, strengthening the LGAs connection to jobs and services</p> <p>Mass transit interchange in Bankstown CBD</p> <p>Would support the elevation of Bankstown CBD to a regionally significant CBD</p>

Project	Timeframe	Status and implications
		<p>Reduced commute times and associated increases in efficiency</p> <p>Opportunities for new stations in LGA to better connect places of work and strengthen Bankstown as a CBD with regional links</p> <p>Potential interchange at Kingsgrove station likely to have significant land use implications.</p>
Bankstown to Liverpool mass transit	40 years	<p>Mass transit route identified for investigation. Delivery by 2056.</p> <p>City-serving corridors have a medium to high impact on land use. High frequency and high capacity services have the ability to support higher density land use</p> <p>Increased role of Bankstown CBD as a mass transit interchange</p> <p>Would support the continued growth of Bankstown CBD to a regionally significant CBD</p> <p>Reduced commute times and associated increases in efficiency.</p>

3.4.2 New and changing employment anchors

Anchor institutions, such as universities, hospitals and airports, play a vital role in their communities and economies. Anchor institutions are unlikely to move location, even during adverse events like an economic downturn. They provide employment and stimulate the local economy. The stability of anchor institutions attracts local businesses, which position themselves to provide goods and services to the institution and its employees².

Canterbury Bankstown LGA is fortunate to have two new anchor institutions in the planning phase. They along with Bankstown Airport would provide transformative opportunities if realised.

Western Sydney University's Bankstown City Campus

Bankstown CBD and the airport have been identified as a Collaboration Area where a place-based approach is to be used to plan for the strategic transformation of the centre. This is to include resolving impediments to the delivery of coordinated investment and ensuring infrastructure alignment through a whole-of-government consideration.

Western Sydney University's (WSU) city campus, which will also have the presence of the University of Technology, Sydney (UTS) in the Bankstown CBD will bring 7,000-10,000 students and new research capability to Bankstown City Centre in 2022. Canterbury-Bankstown Council should foster interaction between the universities and small businesses. This interaction may include consultancy and contract research specific to business need; continued professional development; and graduate start-ups. There is also potential for WSU to support local businesses and these relationships may assist the university to attract local students and open up opportunities for short-courses. There is also opportunity for WSU to offer, or facilitate, different types of management and leadership development support. Synergies between the university and the potential hospital will accelerate opportunities for medical research and support the development of a Health, Academic, Research and Training Precinct in Bankstown and help the realisation of the job and student targets for Bankstown.

² Maurrasse, D. Anchor Institutions and Employment, Earth Institute Columbia University, October 31, 2016

Bankstown Hospital

The NSW Government has committed \$1.3 billion for a potential new Bankstown Hospital. There is opportunity for development of the hospital close to the Bankstown City Centre, which could attract investment in private health services, facilities and hospitals. Co-location would support the growth of an allied health and research sector which ties in with education and would accelerate the creation of an innovation precinct

Bankstown Airport

Home to more than 160 businesses, Bankstown Airport plays an important role as a major commercial centre within the Canterbury Bankstown region.

Bankstown Airport currently provides direct employment for more than 3,000 people, making this one of the key employers in the LGA. In addition, the airport also underpins significant employment in the neighbouring employment lands. Airport operations currently contribute almost \$1 billion annually and over 6,000 jobs to the NSW economy. This includes \$697 million and nearly 4,500 jobs to the local Canterbury-Bankstown economy.³

By 2024, on-site employment at the airport is expected to increase by more than 1,700 jobs. The Bankstown Airport Masterplan 2019 (preliminary draft) envisages an increase in employment activities on the airport site. Current proposals include the following:

- The consolidation of existing NSW Police Force Aviation Support Branch (NSW Police Air Wing) operations into a new purpose-built integrated facility in the north-western portion of the Airport (within the Aviation Zone). The development consists of a two-storey office building, hangar and maintenance areas to accommodate the helicopter and fixed-wing operations.
- Development of a warehouse within the south-western part of the Airport (within the Commercial Zone) to operate as a major industrial, logistics and innovation precinct, with retail gateways. It includes a light industrial development of up to 40,000 square metres (gross leasable floor area).

The expansion to airport capacity and operations is expected to support the expansion of the airport and surrounds as a trade gateway.

Given the strategic opportunities associated with Bankstown Airport and Milperra industrial area, it has been identified as a Collaboration Area. This will:

- improve transport connections
- integrate planning for the airport with planning of surrounding lands
- coordinate infrastructure delivery
- facilitate advanced manufacturing and innovation
- expand opportunities stemming from Western Sydney University Bankstown Campus and the University of NSW Aviation School.

3.4.3 Repositioning Bankstown CBD

The catalytic transport infrastructure proposed Western Sydney University and a potential new hospital will provide new employment anchors that reinforce and accelerate the transition that has already commenced in Bankstown CBD.

Historically, new hospitals typically attract development for related activities including student accommodation, hospital accommodation, allied health services, medical specialist suites and the like. Universities attract visiting academics to events and conference, growing student populations and a comprehensive range of business services (e.g. printers). Once established for a period, universities and hospitals can collaborate, with each

³ https://www.sydneymetroairports.com.au/wp-content/uploads/2018/10/181018_Bankstown-Airport-Masterplan_PDMP.pdf cited on 6 July 2019.

institution contributing specialist skills to engage in various forms of medical research. Hence the job creation likely to result from the co-location of the new university and potential new hospital will, in time, far exceed initial student and staffing numbers. Canterbury Bankstown Council estimates that over the coming 20 years Bankstown will almost double the number of students, jobs and residents to 25,000, 25,000 and 40,000 respectively⁴.

There is an enormous opportunity for Bankstown CBD to leverage off the investment in the new Metro, potential hospital and university campus to capitalise on the benefits of co-location and potential for collaboration. Providing sufficient capacity in the centre for growth will be key to allowing new businesses and development to source appropriate sites, facilitating jobs growth. A range of accommodation forms located close to the CBD will also be important to all the employment anchors to attract talent and support its visitors and students – student accommodation, hotels, serviced apartment and mix of dwelling sizes and price points.

Council predicts that the daily population in Bankstown CBD will increase from 43,500 to more than 80,000 by 2036⁵. This scale of growth necessitates careful planning of the CBD.

Planning for the Bankstown CBD will need to ensure that the required infrastructure is in place to accommodate future growth. This will include public infrastructure upgrades such as the grade separation of Stacey Street and the Hume Highway. Master planning will be required to clearly define the structural needs of the centre in order to unlock its potential and deliver growth.

3.4.4 Jobs targets

The Greater Sydney Commission's strategic planning has set the broad parameters for the delivery of employment lands and jobs in Canterbury Bankstown Council. This includes the identification of seven 'strategic centres' within the South District, being Bankstown, Campsie, Hurstville, Kogarah, Miranda and Sutherland.

Bankstown and Campsie strategic centres have been allocated a minimum target of 17,000 and 7,000 additional jobs, respectively, between 2016 and 2036.

Table 5: Targets set by the Greater Sydney Commission

Target	Bankstown	Campsie
2016 estimate	12,100	4,800
2036 baseline target	17,000	7,000
2036 higher target	25,000	7,500

Source: South District Plan, Greater Sydney Commission

The Greater Sydney Commission has not set targets for the areas outside of strategic centres. However, it does recognise the need to harness opportunities and support economic growth by ensuring adequate stocks of well-located industrial and business zoned land.

⁴ Canterbury Bankstown Council (2018), Greater Bankstown Collaboration Area Bankstown City Centre and Bankstown Airport -Milperra, Draft Vision and priorities, November 2018.

⁵ *Ibid.*

DEMOGRAPHIC CONTEXT

4.0 DEMOGRAPHIC CONTEXT

The section provides a snapshot of the socio-economic characteristics of the study area to better understand the underlying and emerging social needs of the community and potential social impacts of the proposed development.

4.1 Resident population characteristics

4.1.1 Resident population and age composition

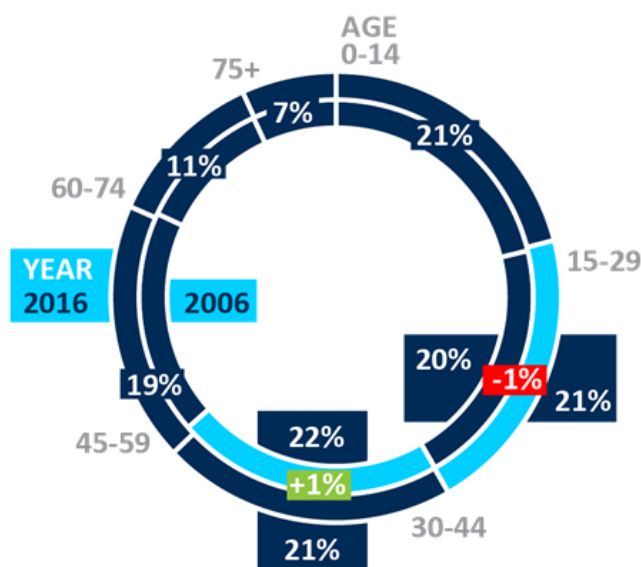
The resident population refers to persons living within the study area, regardless of their age.

Between 2006 and 2016, the population of Canterbury Bankstown LGA increased from 300,452 residents to 346,296. This equalled an annual compound increase of 1.5 per cent which was higher than that for Greater Sydney over the same period (0.02 per cent).

Figure 4 shows resident population age composition for the period, the LGA's age profile remained relatively the same. There was minimal change in the percentage of people aged 0-14 years, 45-59 years, 60-74 years and 75+ reflected in the percentage remaining consistent (no change) between 2006 and 2016. Proportionally, parents and homebuilders (30-44 years) experienced positive growth (1 per cent), while the young working age cohort of 15-29 years decreased by 1 per cent.

Increased employment opportunities in the study area and locality, might help address the leakage of young residents while also providing increased services for an activation for the other resident age groups.

Figure 4: Resident population and age composition



Source: ABS, Census 2006 and 2016

Table 6: Residential population

Service age group (years)	2016			2006			CB Change
	CB		GS	CB		GS	
	No.	%	%	No.	%	%	
Babies and pre-schoolers (0 to 4)	24,976	7.2	6.4	22,289	7.4	6.6	+2,687
Primary schoolers (5 to 11)	33,298	9.6	8.8	29,637	9.9	9.1	+3,660
Secondary schoolers (12 to 17)	25,698	7.4	6.9	24,077	8.0	7.9	+1,621
Tertiary education and independence (18 to 24)	33,419	9.7	9.6	28,528	9.5	9.9	+4,890
Young workforce (25 to 34)	53,063	15.3	16.1	42,393	14.1	15.3	+10,669
Parents and homebuilders (35 to 49)	68,868	19.9	21.1	64,692	21.5	22.5	+4,175
Older workers and pre-retirees (50 to 59)	41,898	12.1	12.2	34,304	11.4	12.2	+7,594
Empty nesters and retirees (60 to 69)	30,915	8.9	9.5	24,000	8.0	7.8	+6,915
Seniors (70 to 84)	26,674	7.7	7.5	25,834	8.6	7.3	+840
Elderly aged (85 and over)	7,487	2.2	2.0	4,491	1.5	1.6	+2,996
Total	346,296	100	100	300,249	100.0	100.0	+46,047

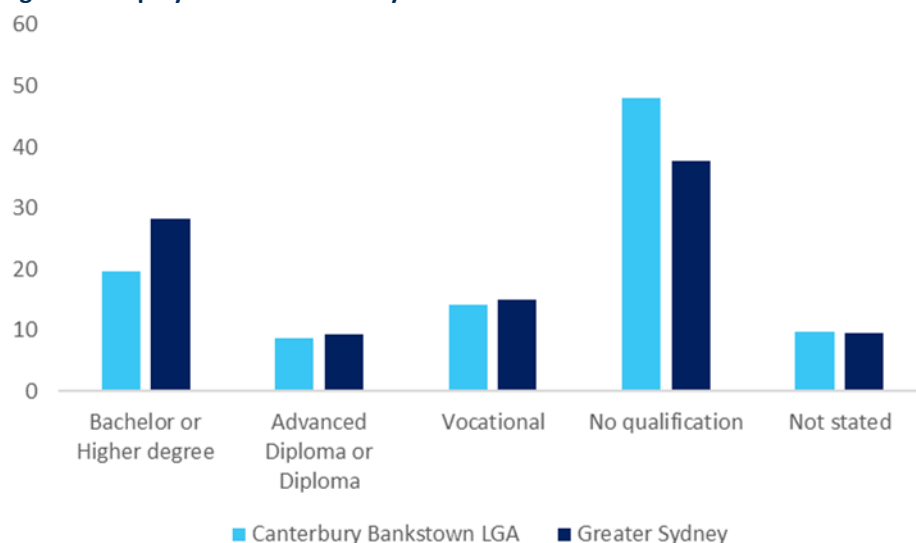
Source: profile.id; ABS Census 2006, 2016

4.1.2 Qualifications

An analysis of the qualifications held by the population of Canterbury Bankstown LGA is important for determining the levels of demand for certain industry employment. Labour force is an important factor for economic development, the availability of a skilled labour force is important for businesses and access to employees is a critical factor in investment decisions.

Figure 5 identifies the qualifications of the population in the LGA in 2016 compared to Greater Sydney and shows that there was a lower proportion of people holding formal qualifications (Bachelor or higher degree; Advanced Diploma or Diploma; or vocational qualifications), and a similar proportion of people with no formal qualifications.

Figure 5: Employment in Canterbury Bankstown LGA



Source: ABS Census 2016

Overall, 42 per cent of the population aged 15 and over held educational qualifications, and 48 per cent had no qualifications, compared with 53 per cent and 38 per cent respectively for Greater Sydney. The major difference between the qualifications held by the population of the Canterbury Bankstown LGA and Greater Sydney NSW is a smaller percentage of persons with Bachelor or Higher degrees (20 compared to 28 per cent).

The largest changes in the qualifications of the population in Canterbury Bankstown LGA between 2006 and 2016 were in those with:

- Bachelor or Higher degrees (+24,997 persons)
- Advanced Diploma or Diplomas (+8,260 persons)
- Vocational qualifications (+5,909 persons)
- No qualifications (+7,993 persons).

4.1.3 Field of qualifications

Table 7 identifies the fields of qualifications of the residents living in Canterbury Bankstown LGA. The three largest fields of qualification in 2016 were:

- Management and Commerce (13,904 people or 14.7 per cent)
- Engineering and Related Technologies (10,774 people or 11.4 per cent)
- Society and Culture (7,319 people or 7.7 per cent).

The major differences between the fields of qualifications of the workforce in City of Canterbury Bankstown and Greater Sydney were:

- A larger percentage of local workers qualified in the field of Education (7.0 per cent compared to 5.0 per cent)
- A larger percentage of local workers qualified in the field of Engineering and Related Technologies (11.4 per cent compared to 9.5 per cent)
- A smaller percentage of local workers qualified in the field of Management and Commerce (14.7 per cent compared to 19.9 per cent)

- A smaller percentage of local workers qualified in the field of Creative Arts (1.7 per cent compared to 3.7 per cent).

The largest changes in fields of qualifications of the workforce in Canterbury Bankstown LGA between 2011 and 2016 were:

- Management and Commerce (+2,455 local workers)
- Society and Culture (+1,766 local workers)
- Health (+1,170 local workers)
- Engineering and Related Technologies (-920 local workers).

Table 7: Qualifications by industry

Industry	2016			2011			Change		
	CB		GS	CB		GS	CB		GS
	Nu	%	%	Nu	%	%	Nu	%	%
Natural and Physical Sciences	1,520	1.6	2.5	1,294	1.4	2.4	226	-0.8	0.1
Information Technology	2,118	2.2	3.9	1,728	1.9	3.5	390	-1.3	.4
Engineering and Related Technologies	10,774	11.4	9.5	11,694	13.1	10	-920	1.4	0.5
Architecture and Building	3,508	3.7	3.6	3,023	3.4	3.2	485	0.5	0.4
Agriculture, Environmental and Related Studies	669	0.7	0.9	565	0.6	0.9	104	-0.2	0
Health	5,931	6.3	6.7	4,761	5.3	6.2	1,170	0.1	0.5
Education	6,591	7	5	5,686	6.4	4.9	905	2.1	0.1
Management and Commerce	13,904	14.7	19.9	11,449	12.8	18.4	2,455	-3.7	1.5
Society and Culture	7,319	7.7	9.4	5,553	6.2	8.5	1,766	-0.8	0.9
Creative Arts	1,631	1.7	3.7	1,381	1.5	3.3	250	-1.6	0.4
Food, Hospitality and Personal Services	2,787	2.9	3	2,571	2.9	3	216	-0.1	0
Mixed Field Programmes	126	0.1	0.1	86	0.1	0.1	40	0	0
Not stated or inadequately described	2,705	2.9	2.6	3,951	4.4	3.5	-1,246	-0.6	-0.9
No qualification	35,197	37.1	29.1	35,654	39.9	32.2	-457	4.9	-3.1
Total	94,780			89,396			5,384		

Source: economy.id; ABS Census 2016

4.1.4 Household and individual incomes

An analysis of income data is important in order to determine the relative wealth of the Canterbury Bankstown LGA this will also assist in determining whether there is the potential for significant capital investment by people within the LGA or whether external investment should be sought.

Households in Canterbury Bankstown have lower incomes than households in Greater Sydney. Canterbury Bankstown has a higher proportion of low-income households⁶ (20.6 per cent) compared to Greater Sydney (15.1

⁶ Households are classified as low income if they earn less than \$650 per week.

per cent). Similarly, Canterbury Bankstown had a lower proportion of high-income households⁷ (20.6 per cent) compared to Greater Sydney (28.3 per cent).

Table 8: Household incomes

	Weekly income	Number	%	Greater Sydney %
Low	Neg/Nil Income	2,390	2.2	1.9
	\$1 - \$149	924	0.9	0.7
	\$150 - \$299	2,938	2.7	1.8
	\$300 - \$399	3,716	3.4	2.4
	\$400 - \$499	7,374	6.8	4.9
	\$500 - \$649	4,964	4.6	3.4
Medium	\$650 - \$799	8,273	7.6	5.5
	\$800 - \$999	7,562	7	5.4
	\$1,000 - \$1,249	8,984	8.3	6.9
	\$1,250 - \$1,499	7,914	7.3	6.4
	\$1,500 - \$1,749	6,254	5.8	5.6
	\$1,750 - \$1,999	5,810	5.4	5.5
High	\$2,000 - \$2,499	10,372	9.6	11.1
	\$2,500 - \$2,999	6,553	6	7.1
	\$3,000 - \$3,499	4,286	4	5.1
	\$3,500 - \$3,999	3,168	2.9	5.3
	\$4,000 - \$4,499	1,755	1.6	2.7
	\$4,500 - \$4,999	1,532	1.4	2.6
	\$5,000 - \$5,999	1,418	1.3	2.7
	\$6,000 - \$7,999	866	0.8	2.5
	\$8,000 or more	138	0.1	0.3
	Not stated	11,182	10.3	10.2
Total households		108,373	100	100

Source: profile.id; ABS Census 2016

The Individual Income levels of the local resident workers is often closely linked to their knowledge, experience, qualifications, occupation, skills level and an indication of the economic opportunities and socio-economic status of Canterbury Bankstown LGA. This provides a good insight into what knowledge and skills level existing and future industries can draw upon.

As seen in Table 9, when compared with Greater Sydney, personal incomes in 2016 were low (10.1 per cent less) there were also a low proportion of high personal incomes (those earning \$1,750 or more) and a higher (+3.7 per cent more) proportion of low income households (those earning less than \$500 per week).

⁷ Households are classified as high income if they earn more than \$2,500 per week.

Table 9: Personal incomes

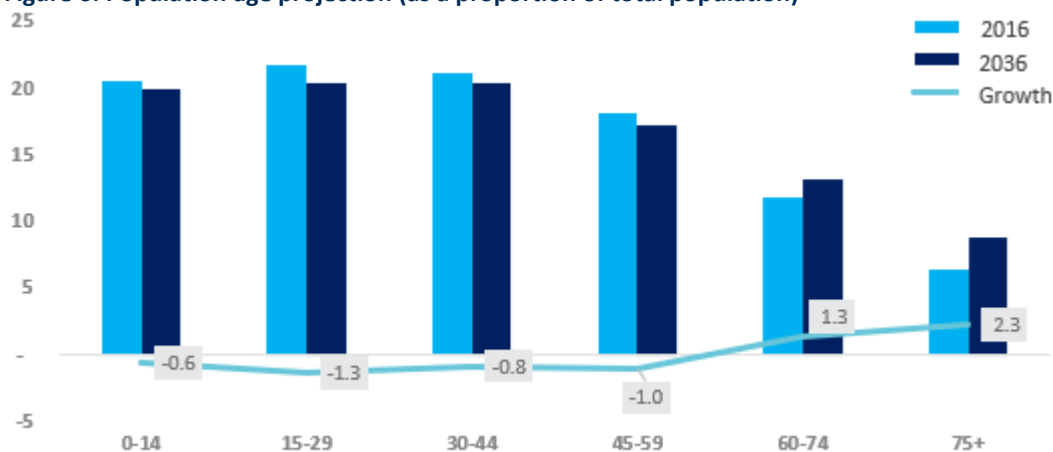
Income group	Income band	Canterbury Bankstown		Greater Sydney
		\$	%	%
Low	Negative Income/ Nil income	1,019	0.7	0.7
	\$1 - \$149	3,675	2.7	2.8
	\$150 - \$299	6,002	4.3	3.6
	\$300 - \$399	7,401	5.4	4
	\$400 - \$499	8,823	6.4	4.7
Medium	\$500 - \$649	13,285	9.6	7.2
	\$650 - \$799	16,679	12.1	9.3
	\$800 - \$999	19,538	14.1	11.8
	\$1,000 - \$1,249	19,602	14.2	13.1
	\$1,250 - \$1,499	12,599	9.1	9.6
	\$1,500 - \$1,749	9,450	6.8	8.4
High	\$1,750 - \$1,999	6,320	4.6	6.1
	\$2,000 - \$2,999	8,296	6	10
	\$3,000 or more	3,159	2.3	7.1
Other	Not stated	2,331	1.7	1.5
Total		138,179	100	100

Source: profile.id; ABS Census 2016

4.2 Population projections

On behalf of Canterbury Bankstown LGA, the .id demographic consultants project that the LGA's resident population will increase to around 499,890 persons over the twenty-year period to 2036. The age structure forecasts for Canterbury Bankstown LGA indicates a 14.1 per cent increase in population of working age and 16.1 per cent increase in population under working age and 32.7 per cent increase in population of retirement age. These changes in the age profile are reflective of an ageing population.

Figure 6: Population age projection (as a proportion of total population)



Source: forecast.id

Table 10 Population age projection

Age Distribution	2016		2036		Change between 2016 and 2036
	Number	%	Number	%	Number
0-14	74,198	21	36,498	20	- 37,700
15-29	78,469	22	98,532	20	+ 20,063
30-44	76,779	21	65,422	20	- 11,357
45-59	65,727	18	99,239	17	+ 33,512
60-74	42,992	12	116,487	13	+ 73,495
75+	23,387	6	83,712	9	+ 60,325
Total	361,552	100	499,890	100%	+ 138,338

Source: TfNSW – Travel Zone Projections 2016 (TZP16 v1.5) (SGS)

4.3 Dwelling characteristic

The Canterbury Bankstown LGA had approximately 121,315 residential dwellings in 2016. The land area was 11,029 with a population density of 31.3 persons per hectare, which was significantly high compared to Greater Sydney at 4.1. The total dwelling stock in Canterbury Bankstown LGA accounted for 6 per cent of all dwellings in Greater Sydney.

The Canterbury Bankstown LGA had an average occupancy rate of 2.9 persons per house which was high compared to Greater Sydney at 2 persons per household and this has not changed since 2006. A stable household size may indicate that family formation and birth rates have remained relatively stable or a lack of affordable housing opportunities for young people.

Table 11: Private dwellings

Dwelling type	Canterbury Bankstown
Dwelling density	31.3 persons per hectare
Average occupancy rate	2.9
Total private dwellings	121,315

Source: Census 2016

4.3.1 Dwelling typology

The majority of dwellings located in the study area were classified as low density (68 per cent) which was comparable to Greater Sydney at 55 per cent.

The proportion of medium density dwellings in the study area was significantly higher than that recorded for Greater Sydney (28 per cent and 20 per cent respectively). Whilst the proportion of low-density dwellings in the study area was lower than that recorded for Greater Sydney (14 per cent and 24 per cent respectively).

Table 12: Dwelling typology

Dwelling type	Canterbury Bankstown		Greater Sydney	Change from 2011	
Dwelling type	Number	%	%	Number	%
Low density	68,071	56.1	55.0	-958	-1%
Medium density	34,472	28.4	20.3	+3,227	9%
High density	17,515	14.4	23.5	+4,829	28%
Other	807	0.7	0.7	+166	21%
Not stated	450	0.4	0.4	+189	42%
Total	121,315	100	100	+7,453	6%

Source: profile.id; ABS Census 2011, 2016

4.3.2 Tenure

The majority of houses in the Canterbury Bankstown LGA were purchased or owned (57 per cent) which was comparable to Greater Sydney at 55 per cent. Of all houses in the study area, 36 per cent were rented privately. This was relatively high compared to Greater Sydney, in which 28 per cent of houses were rented privately,

Table 13: Tenure

Tenure type	Canterbury Bankstown		Greater Sydney	
	No.	%	No.	%
Fully owned	32,638	28.7	475,996	27.7
Mortgage	32,031	28.2	542,273	31.5
Renting - Total	39,499	34.8	560,074	32.6
Other tenure type	739	0.7	14,560	0.8
Not stated	8,667	7.6	126,775	7.4
Total households	113,574	100.0	1,719,678	100.0

Source: profile.id; ABS Census

4.3.3 Average rents

Although dwellings within the study area had a greater propensity to be larger detached style dwellings, the percentage cent of households paying high rental payments was lower than that recorded for Greater Sydney (35 per cent and 51 per cent respectively).

The relatively large proportion of people paying medium (42 per cent) and low (23 per cent) rental repayments highlight the attractiveness and affordability of the LGA to residents.

Table 14: Rental payments

	Canterbury Bankstown		Greater Sydney	
	No.	%	No.	%
Low (>\$249)	9,242	23	89,365	15
Medium (\$250-449)	16,609	42	183,569	33
High (\$450)	13,672	35	287,133	51

Source: profile.id; ABS Census 2016

4.4 Residential employment

4.4.1 Workforce participation

As of 2016, 91.8 per cent of residents within the LGA that were in the labour force were employed. Although the total proportion of people employed within the LGA was higher than Greater Sydney the number of people in full time employment (56.8) was lower than Greater Sydney (61.2).

Table 15: Workforce participation

	2016			2011			Change	
	CB		GS	CB		GS	CB	G S
	No.	No.	%	No.	%	%	%	%
Total labour force (Participation rate)	150,619	54.7	61.6	135,125	53.5	61.7	+1.2	+0.1
Not in the labour force	108,214	39.3	32.3	100,608	39.8	32.4	+0.5	+0.1
Labour force status not stated	16,433	6.0	6.1	17,070	6.8	5.9	+0.8	+0.2

Source: profile.id; ABS Census 2011, 2016

4.4.2 Industry of employment

A breakdown of the industry sectors in which residents are employed is shown in

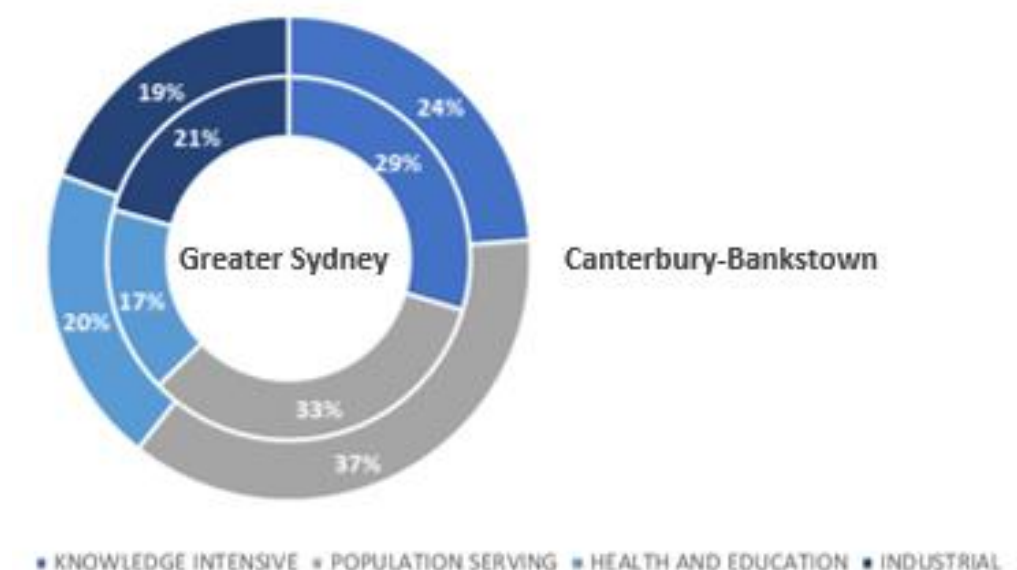
Table 16. An analysis of the jobs held by the resident population in Canterbury Bankstown LGA in 2016 shows the top industries of residential employment were:

- Health Care and Social Assistance – 10.8 per cent
- Retail Trade – 10.4 per cent
- Manufacturing – 10.3 per cent
- Construction – 9.5 per cent
- Transport, Postal and Warehousing – 7.7 per cent
- Accommodation and Food Services – 7.3 per cent

The major differences between worker productivity by industries in Canterbury Bankstown LGA and Greater Sydney in 2016 were:

- A higher proportion of people working in transport, postal and warehousing (7.7 per cent compared to 5.0 per cent) and construction (9.5 per cent compared to 8.2 per cent)
- A smaller proportion of people employed in the knowledge intensive industries, particularly, professional, scientific and technical services (6.3 per cent compared to 9.8 per cent) and financial and insurance services (5.0 per cent compared to 6.4 per cent).

Figure 7: Resident employment by industry sector



Source: ABS Census

Table 16: Resident workforce by industry

Industry	2017/18			Change 2012/13-2017/18		
	CB		GS	CB		GS
	No.	%	%	No.	%	%
Knowledge Intensive						
Professional, Scientific and Technical Services	4,451	3.8	10.7	714	0.4	0.6
Financial and Insurance Services	1,579	1.3	6.4	-4	-0.1	-0.2
Administrative and Support Services	3,549	3	3.5	405	0.1	-0.2
Information Media and Telecommunications	1,034	0.9	2.8	-362	-0.4	-0.5
Public Administration and Safety	4,956	4.2	5.6	275	-0.1	-0.2
Population Serving						
Construction	13,083	11	9.5	-2,417	-3.1	1.3
Rental, Hiring and Real Estate Services	1,534	1.3	1.9	115	0	0
Retail Trade	12,120	10.2	9.6	1,162	0.2	0.1
Accommodation and Food Services	7,638	6.4	7.1	1,239	0.6	0.6
Arts and recreation	1,381	1.2	1.7	276	0.2	-0.1
Other Services	5,321	4.5	3.6	602	0.2	-0.2
Industrial						
Wholesale Trade	5,429	4.6	3.7	-1,169	-1.4	-1.1

Industry	2017/18			Change 2012/13-2017/18		
	CB		GS	CB		GS
	No.	%	%	No.	%	%
Manufacturing	16,302	13.8	6.3	-1,745	-2.6	-1.5
Transport, Postal and Warehousing	9,908	8.4	5.2	1,396	0.7	-0.5
Agriculture, Forestry and Fishing	174	0.1	0.4	18	0	0
Electricity, Gas, Water and Waste Services	1,149	1	0.8	59	0	-0.2
Mining	120	0.1	0.3	84	0.1	0
Health and Education						
Health Care and Social Assistance	16,496	13.9	12.3	4,821	3.3	1.3
Education and Training	12,226	10.3	8.8	3,013	1.9	0.9

Source: economic.id, National Institute of Economic and Industry Research (NIEIR), 2018

4.4.3 Employment self-containment rate

Employment self-containment is a measure of the proportion of the employed population that work in Canterbury Bankstown LGA, providing an indicator of the proximity of employment opportunities to residential areas. In 2016, 28.5% of the LGA's resident workers were employed locally. Figure 8 identifies the number of people working within each industry sector and the number working within Canterbury Bankstown. Analysis of containment rates by industry for the LGA reveals the top five industries with the highest self-containment rate were:

- Construction- with 35.2 per cent of those working within the industry working in Canterbury Bankstown LGA
- Education and Training- with 34.6 per cent of those working within the industry working in Canterbury Bankstown LGA
- Manufacturing - with 34.4 per cent of those working within the industry working in Canterbury Bankstown LGA
- Retail Trade - with 33.3 per cent of those working within the industry working in Canterbury Bankstown LGA
- Accommodation and Food Services - with 32.2 per cent of those working within the industry working in Canterbury Bankstown LGA.

The five industries with the lowest containment rate were in 2016 were:

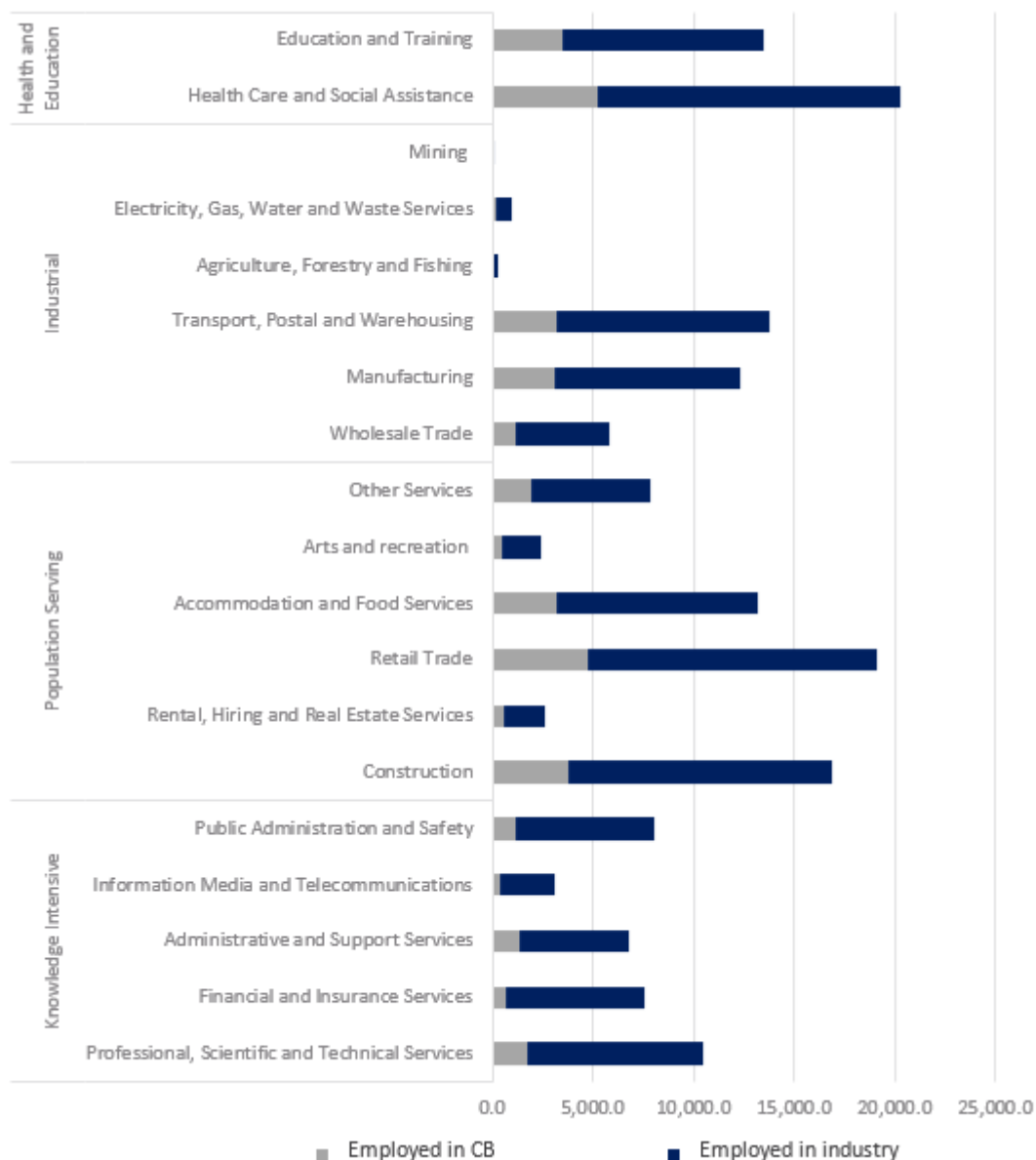
- Financial and Insurance Services - with 9.4 per cent of those working within the industry working in Canterbury Bankstown LGA
- Information Media and Telecommunications- with 12.9 per cent of those working within the industry working in Canterbury Bankstown
- Public Administration and Safety - with 16.4 per cent of those working within the industry working in Canterbury Bankstown LGA

- Agriculture, Forestry and Fishing - with 19.2 per cent of those working within the industry working in Canterbury Bankstown LGA
- Professional, Scientific and Technical Services with 20.3 per cent of those working within the industry working in Canterbury Bankstown LGA.

Based on this, manufacturing; education and training; retail trade, accommodation and food services are among the largest industries of employment with the largest containment rates and reflect a likely greater demand for local employment floor space than other sectors.

When looking to the future, how these industries will fare over the longer term and how industry performance translates into a demand for employment lands will be key.

Figure 8: Employment within industry



Source: ABS Census

4.5 Key findings

- Canterbury Bankstown is the State's largest LGA by population, being home to approximately 360,000 people in 2016. Between 2006 and 2016 LGA had an annual compound increase of 1.5 per cent which was significantly higher than Greater Sydney over the same period.
- The LGA's age profile has remained relatively the same between 2006 and 2016. There was a minimal change in the percentage of people aged 0-14 years (20 per cent), 45-59 years (19 per cent), 60-74 years (11 per cent) and 75 years and over (7 per cent). Proportionally, parents and homebuilders (30-44 years) experienced a 1 per cent growth from 21 per cent in 2006 to 22 per cent in 2016. During the same period the young working age cohort of 15-29 years decreased by 1 per cent from 21 per cent to 20 per cent
- Canterbury Bankstown LGA's population is forecast grow to 499,890 persons over the next 20 years adding over 112,869 people by 2036. There is projected to be an under-representative share of residents of working age which impacts labour force participation, dependency rates and income streams
- The age structure forecasts for Canterbury Bankstown LGA are reflective of an ageing population, which would impact the local employment pool and is likely to see a growth occur in the residential care industry in coming years
- A smaller proportion of people in Canterbury Bankstown LGA (52 per cent) aged 15 and over held higher education qualifications compared to Greater Sydney (62 per cent). The number of people in Canterbury Bankstown LGA obtaining a bachelor or higher degree grew by 4.1 per cent between 2011 and 2016
- Canterbury Bankstown had a larger percentage of local workers qualified in the field of Education (7.0 per cent) and Engineering and Related Technologies (11.1 per cent) and compared to Greater Sydney (5.0 per cent and 9.5 per cent retrospectively)
- Canterbury Bankstown had a higher number of low-income households (less than \$650 per week) 18.2 per cent and people with low personal income (less than \$500 per week) 19.5 per cent compared to Greater Sydney (15.1 per cent and 15.8 per cent retrospectively). This is indicative that the LGA may need outside investment
- Although the total proportion of people employed within the LGA was higher than Greater Sydney the number of people in full time employment (56.8) was lower than Greater Sydney (61.2). Health Care and Social Assistance (10.8 per cent) and Retail Trade (10.4 per cent) were the highest industries of residential employment in 2016
- Canterbury Bankstown LGA has a long-standing specialisation in Manufacturing. However, the proportion of local residents working in Manufacturing experienced a decline of 3.7 per cent between 2011 and 2016
- Between 2006 and 2017 An increase in the proportion of residents working in construction (1.5 per cent), education and training (.7 per cent) and health care and social assistance (.4 per cent)
- Canterbury Bankstown is one of the nation's most culturally diverse LGAs with a very large 44 per cent of residents stating they were born overseas in 2016 and over 60 per cent confirming they don't speak English at home.

ECONOMIC CONTEXT

5.0 ECONOMIC CONTEXT

The section profiles the economic characteristics of the study area to better understand the underlying role and function from an economic and spatial context. The composition and strength of the study area's economic profile is likely to influence future employment levels, demand from employment floor space and future land use.

The Australian Business Register is a register of all business entities and sole traders in Australia, based on Australian Business Numbers (ABNs), maintained by the Australian Taxation Office. Data from the ABR is useful in planning and economic development, to identify the spatial patterns of businesses across the LGA, clusters and change in business growth patterns across the area.

This report use data from the Australian Business Register sourced from economy.id and the Australian Bureau of Statistics' 2016 Census data.

5.1 Gross Regional Product (GRP)

Gross Regional Product (GRP) is a measure of size or net wealth generated by the local economy. Changes in this figure over time can represent changes in employment, productivity or the types of industries in the area. In 2018, Canterbury Bankstown's Gross Regional Product (GRP) was \$14.48 billion, representing an 18 per cent increase from that generated in 2002 (\$11.87 billion). During the same period, Canterbury Bankstown LGA shrank as a percentage of GRP for NSW from 3.68 per cent to 3.06 per cent. Canterbury Bankstown placed it as the 8th largest economy out of all NSW LGAs.

Local Industry GRP shows the value of the local economy, generated by the local workers within the area regardless of where they live, after taxes and dividends leave the area. It is best thought of as GRP produced by local industries. In 2018, Canterbury Bankstown's Local Industry GRP was \$13.18 billion, representing a 29.4 per cent increase from that generated in 2002 (\$9,546 billion).

Local Residents' GRP refers to the economic output of the residents of the area regardless of where they work. It is best thought of as the income received by people in the LGA. In 2018, Canterbury Bankstown's Local Residents GRP was \$16.3 billion, representing a 32.8 per cent increase from that generated in 2002 (\$9,546 billion).

In Canterbury Bankstown residents GRP was higher than local industry GRP and experienced a higher growth rate since 2002. This indicates that residents are contributing their economic productivity to other areas.

Table 17: Gross regional product

Year ending June	Headline GRP \$m	Change	% change	Local industry GRP \$m	Change	% change	Local residents GRP \$m	Change	% change
2018	14,479	1,050	7.3	13,187	969	7.3	16,306	1,999	12.3
2014	13,429	1,373	10.2	12,218	1,526	12.5	14,307	1,769	12.4
2010	12,056	205	1.7	10,692	443	4.1	12,538	951	7.6
2006	11,851	-26	-0.2	10,249	703	6.9	11,587	628	5.4
2002	11,877			9,546			10,959	10,959	

Source: ABS Census

5.1.1 Value added by industry

The metric of ‘Industry Value Added’ (IVA) refers to the total value of goods and services produced by an industry, minus the cost of goods and services used in the production process. IVA is a more refined measure of economic contribution than gross output as some industries have higher levels of output but require large amounts of input expenditure to achieve that (e.g. mining versus retail sales).

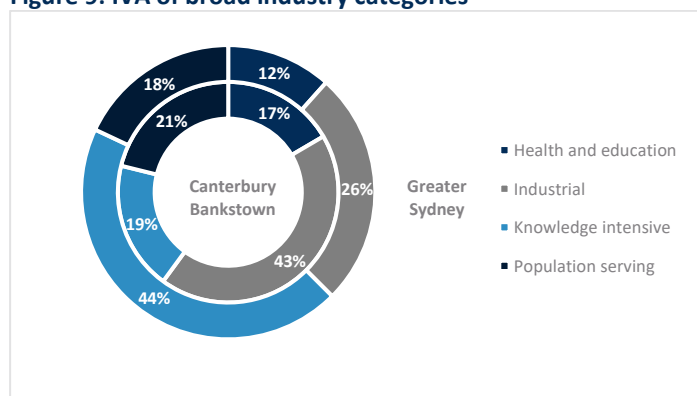
Industries have been categorised into four broad industry themes as outlined in Table 18.

Table 18: Industry categories

Industry category	ANSCIS industry classification
Knowledge intensive	<ul style="list-style-type: none"> Information Media and Telecommunications Financial and Insurance Services Professional, Scientific and Technical Services Administrative and Support Services Public Administration and Safety
Population serving	<ul style="list-style-type: none"> Retail trade Accommodation and Food Services, Arts and Recreation Services Other Services Construction Rental, Hiring and Real Estate Services
Health and education	<ul style="list-style-type: none"> Education Health Care and Social assistance
Industrial	<ul style="list-style-type: none"> Manufacturing Mining Electricity, Gas, Water and Waste Services Wholesale Trade Transport Postal and Warehousing Agricultural, Forestry and Fishing

Figure 9 shows the total IVA per broad industry category compared to Greater Sydney. Population serving (31 per cent), industrial (28 per cent) and health and education (16 per cent) industries all had a higher IVA compared to Greater Sydney (21 per cent, 12 per cent and 23 per cent, respectively). Knowledge intensive (25 per cent) was the only industry that was less than Greater Sydney at (44 per cent).

Figure 9: IVA of broad industry categories



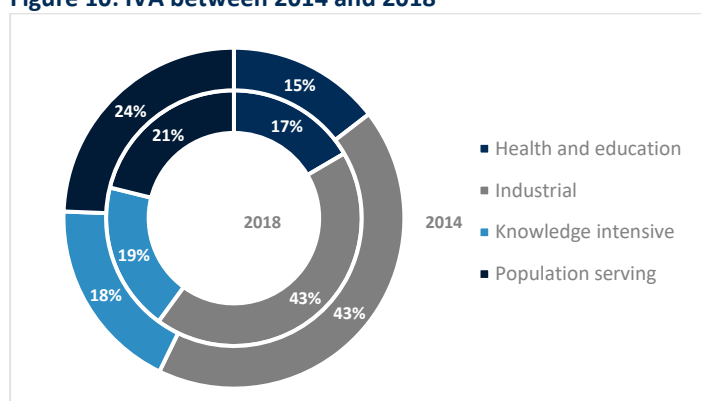
Source: economy.id, 2018

Figure 9 compares the IVA of each industry sector to Greater Sydney, this identifies the structure of Canterbury Bankstown's local economy. Using this approach, Canterbury Bankstown LGA was found to generate around \$1,827 million of IVA per year in 2018. In 2017/18, the four largest industries, by IVA were:

- Manufacturing (\$1,827 million or 16 per cent)
- Transport, Postal and Warehousing (\$1,140 million or 10 per cent)
- Healthcare and Social Assistance (\$1,093 million or 9.6 per cent)
- Wholesale Trade (\$936 million or 8.2 per cent).

Analysis of IVA in Canterbury Bankstown revealed that between 2014 and 2018 the economy grew by \$758 million. As Figure 10, the broad industry category that experienced the most during this time was health and education (+2 per cent) growth in IVA whereas population serving industries experience a 3 per cent decline in IVA.

Figure 10: IVA between 2014 and 2018



Source: economy.id, 2018

As identified in Figure 10, during this period the industry sectors which experienced the most growth between 2014 and 2018 were; Transport, Postal and Warehousing (+3.8 per cent and 2,175 additional businesses); Construction (+0.8 per cent and 1,579 additional businesses) and Professional, Scientific and Technical Services (+0.5 per cent and 632 additional businesses). The largest changes in worker productivity by industries between 2014 and 2018 in City of Canterbury Bankstown were for:

- Mining (+\$1,188,297)
- Electricity, Gas, Water and Waste Services (+\$50,090)
- Wholesale Trade (+\$42,687)
- Information Media and Telecommunications (+\$30,530).

Table 19: Industry Value Added

	Industry	2018			2014			Change		
		CB		GS	CB		GS	CB		GS
		Number	%	%	Number	%	%	Number	%	%
Knowledge Intensive	Professional, Scientific and Technical Services	497	4.4	11.4	422	4.0	10.7	75.4	7.4	0.7
	Financial and Insurance Services	538	4.7	18.1	501	4.7	17.9	36.8	13.4	0.2
	Administrative and Support Services	368	3.2	4.6	358	3.4	5.0	9.5	1.2	-0.4
	Information Media and Telecommunications	190	1.7	5.3	191	1.8	5.1	-1.0	3.5	0.2
	Public Administration and Safety	551	4.8	5.1	495	4.7	5.2	55.9	0.4	-0.1
Population Serving	Construction	840	7.4	7.2	1,083	10.2	6.7	-242.1	-3.0	0.5
	Rental, Hiring and Real Estate Services	377	3.3	4.7	338	3.2	4.6	38.9	1.5	0.1
	Retail Trade	786	6.9	5.0	725	6.8	5.1	60.9	1.8	-0.1
	Accommodation and Food Services	386	3.4	3.0	331	3.1	2.9	55.2	-0.1	0.1
	Arts and recreation	86	0.8	1.0	87	0.8	1.0	-1.2	0.2	0.0
	Other Services	307	2.7	1.8	317	3.0	2.1	-9.3	-1.2	-0.3

	Industry	2018			2014			Change		
		CB		GS	CB		GS	CB		GS
		Number	%	%	Number	%	%	Number	%	%
Industrial	Wholesale Trade	936	8.2	5.6	856	8.1	5.6	80.1	-2.5	0.0
	Manufacturing	1,827	16.0	6.4	1,792	16.9	6.8	35.0	-10.5	-0.4
	Transport, Postal and Warehousing	1,140	10.0	6.3	1,107	10.4	6.6	33.0	-4.1	-0.3
	Agriculture, Forestry and Fishing	18	0.2	0.4	15	0.1	0.4	3.2	0.3	0.0
	Electricity, Gas, Water and Waste Services	457	4.0	1.9	384	3.6	2.2	72.7	-1.7	-0.3
	Mining	195	1.7	0.6	32	0.3	0.5	162.6	0.3	0.1
Health and Education	Health Care and Social Assistance	1,093	9.6	6.5	902	8.5	6.4	191.1	-2.0	0.1
	Education and Training	792	7.0	5.1	692	6.5	5.1	99.6	-1.4	0.0
Total		11,382	100	100	10,626	100	100	756	100	100

5.1.2 Industry specialisation

The local economy has developed specialisations in key industries based on competitive advantages and local physical and human capital characteristics. The top ten sub-sector specialisations include:

- Preschool and School Education - 5.2 per cent of IVA
- Public Administration and Safety - 4.8 per cent of IVA
- Financial and Insurance Services - 4.7 per cent of IVA
- Construction Services - 4.4 per cent of IVA
- Professional, Scientific and Technical Services - 4.4 per cent of IVA
- Road Transports - 4 per cent of IVA
- Electricity, Gas, Water and Waste Services - 4 per cent of IVA
- Other Store-Based Retailing - 3.9 of IVA
- Finance - 3.7 of IVA
- Social Assistance Services - 3.4 of IVA.

These sub-sectors account for over 45 per cent of Canterbury Bankstown total IVA. These specialised sub industries have experienced significant change between 2014 and 2018. The five sub-sectors that experienced the most proportionate growth in IVA this period include:

- Oil and Gas Extraction - 1.4 per cent growth
- Health Care and Social Assistance - 1.1 per cent growth
- Social Assistance Service- .6 per cent growth
- Water Supply, Sewerage and Drainage Service - .6 per cent growth
- Warehousing and Storage Services - .5 per cent growth.

The five sub-sectors that experienced the most proportionate decline in IVA this period include:

- Construction Services – 1.6 per cent decline
- Heavy and Civil Engineering Construction - 0.9 per cent decline
- Postal and Courier Pick-up and Delivery Services – 0.5 per cent decline
- Transport Equipment Manufacturing – 0.4 per cent decline
- Transport Support Services – 0.4 per cent decline.

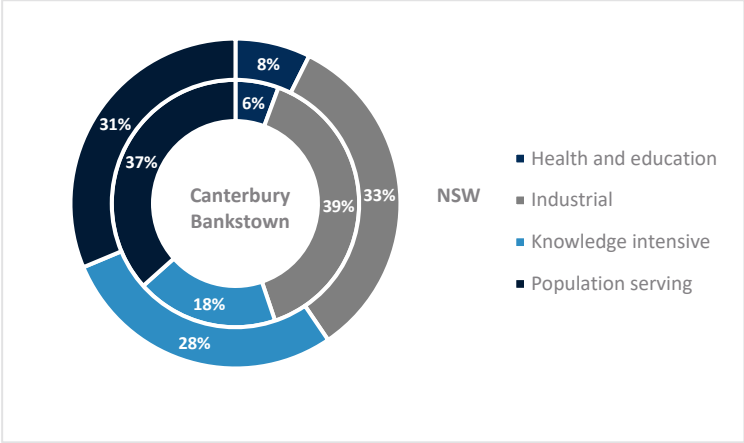
5.2 Businesses counts

5.2.1 Business by industry sector

The Australian Business Register (ABR) is a register of all business entities and sole traders in Australia, based on Australian Business Numbers (ABNs), maintained by the Australian Taxation Office (ATO). As of December 2018, there were a total of 38,337 active and registered for GST businesses in the Canterbury Bankstown LGA.

Figure 11 shows the number of businesses in each industry category. Population serving industries make up the largest share with 46 per cent of businesses falling under this category, this is followed by knowledge intensive industries making up 31 per cent of the total and industrial industries making up 17 per cent of businesses.

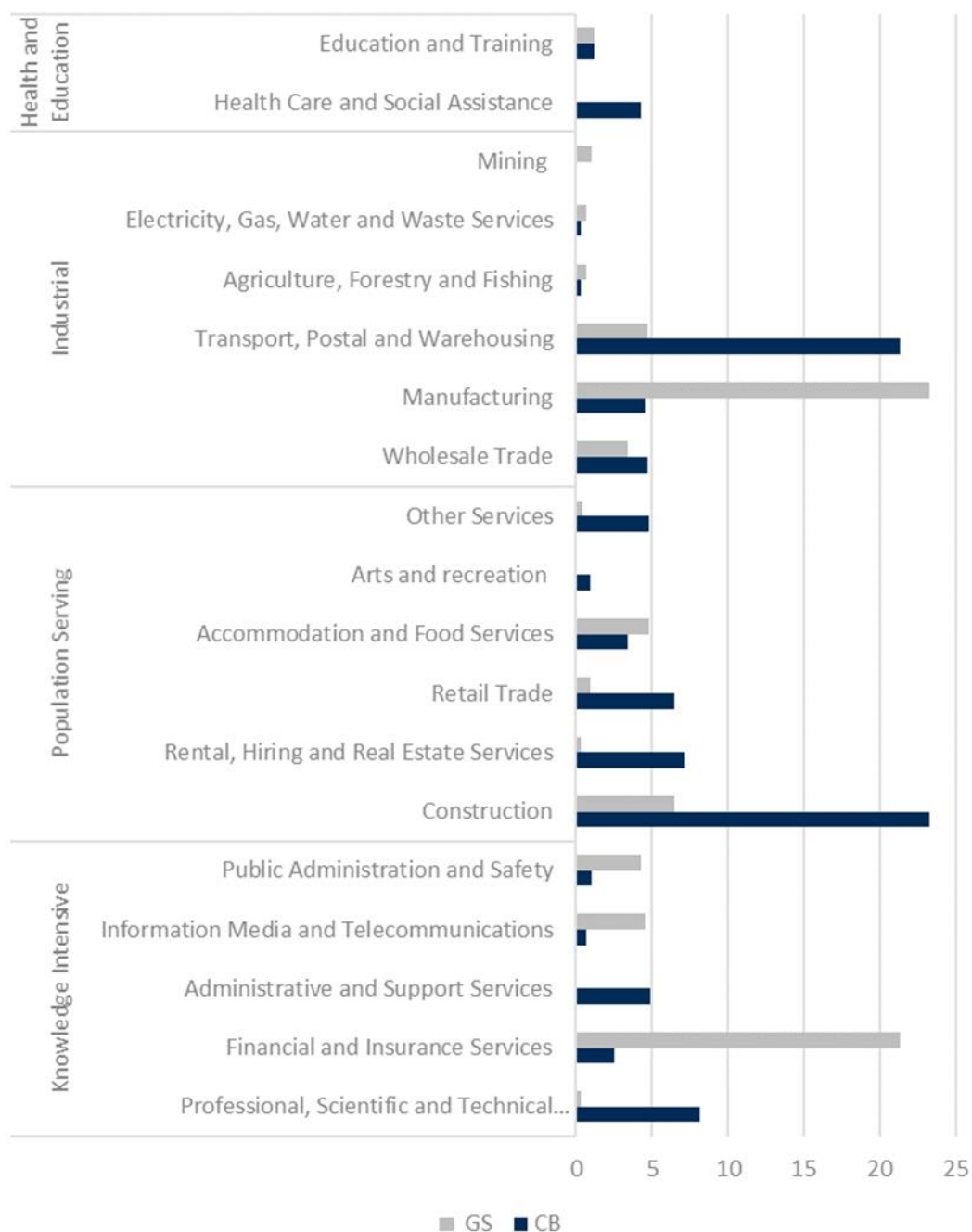
Figure 11: Businesses by Industry



Source: Australian Business Register – economy.id, 2018

Figure 11 shows the total IVA per broad industry category compared to Greater Sydney. Knowledge intensive (29 per cent) and health and education (21 per cent) industries had a higher number of businesses compared to Greater Sydney (17 per cent and 6 per cent, respectfully). Population serving (34 per cent) and industrial (16 per cent) industries both had a fewer number of businesses than Greater Sydney (at 46 per cent and 31 per cent, respectfully).

Figure 12: Number of businesses in industry in Canterbury Bankstown and Greater Sydney in 2018



Source: Australian Business Register – economy.id (3rd Dec 2018)

Table 20: Businesses by industry in Canterbury Bankstown

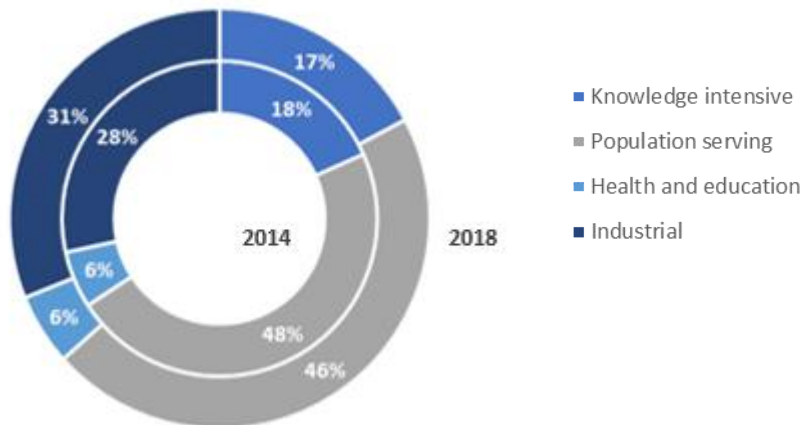
	Industry	Canterbury Bankstown		Greater Sydney
		No.	%	%
Knowledge Intensive	Professional, Scientific and Technical Services	3,117	8.1	10.7
	Financial and Insurance Services	962	2.5	6.4
	Administrative and Support Services	1,867	4.9	3.5
	Information Media and Telecommunications	260	0.7	2.8
	Public Administration and Safety	386	1.0	5.6
Population Serving	Construction	8,940	23.3	9.5
	Rental, Hiring and Real Estate Services	2,747	7.2	1.9
	Retail Trade	2,477	6.5	9.6
	Accommodation and Food Services	1,311	3.4	7.1
	Arts and recreation	353	0.9	1.7
	Other Services	1,853	4.8	3.6
Industrial	Wholesale Trade	1,785	4.7	3.7
	Manufacturing	1,735	4.5	6.3
	Transport, Postal and Warehousing	8,177	21.3	5.2
	Agriculture, Forestry and Fishing	119	0.3	0.4
	Electricity, Gas, Water and Waste Services	129	0.3	0.4
	Mining	19	0	0.3
Health and Education	Health Care and Social Assistance	1,654	4.3	12.3
	Education and Training	446	1.2	8.8

Source: Australian Business Register – economy.id (3rd Dec 2018)

5.2.2 Businesses growth over time

Analysis of business counts in Canterbury Bankstown revealed that between 2014 and 2018 identified an additional 11,812 businesses were recorded. Over this period almost all industry categories experienced an increase in the number of businesses present. The exception was Financial and Insurance Services, which experienced a decline of 204 businesses between 2014 and 2018, this industry forms a small part of the economy (4.8 per cent) of Canterbury Bankstown.

Figure 13: Businesses by Industry Sector in 2014 to 2018



Source: Australian Business Register – economy.id, 2018

Table 21: Business counts by industry

	Industry	2018		2014		Change	
		Number	%	Number	%	Number	%
Knowledge Intensive	Professional, Scientific and Technical Services	3,117	8.1	2,037	7.5	1,080	0.6
	Financial and Insurance Services	962	2.5	1,166	4.3	-204	1.8
	Administrative and Support Services	1,867	4.9	1,306	4.8	561	0.1
	Information Media and Telecommunications	260	0.7	143	0.5	117	0.2
	Public Administration and Safety	386	1	229	0.8	157	0.2
Population Serving	Construction	8,940	23.3	5,564	20.6	3,376	2.7
	Rental, Hiring and Real Estate Services	2,747	7.2	2,537	9.4	210	2.2
	Retail Trade	2,477	6.5	2,083	7.7	394	1.2
	Accommodation and Food Services	1,311	3.4	948	3.5	363	0.1
	Arts and recreation	353	0.9	199	0.7	154	0.2
	Other Services	1,853	4.8	1,220	4.5	633	0.3
Industrial	Wholesale Trade	1,785	4.7	1,417	5.2	368	0.5
	Manufacturing	1,735	4.5	1,483	5.5	252	1.0
	Transport, Postal and Warehousing	8,177	21.3	4,473	16.5	3,704	4.8
	Agriculture, Forestry and Fishing	119	0.3	101	0.4	18	0.1
	Electricity, Gas, Water and Waste Services	129	0.3	67	0.2	62	0.1
	Mining	19	-	12	0.0	7	0.0
Health and Education	Health Care and Social Assistance	1,654	4.3	1,290	4.8	364	0.5
	Education and Training	446	1.2	250	0.9	196	0.3

Source: Australian Business Register – economy.id (3rd Dec 2018)

5.3 Employment characteristics

Employment refers to persons aged 15 years and over working in the study area regardless of their place of usual residence. The Canterbury Bankstown LGA is largely residential in nature, however there are significant employment areas based around Bankstown Airport-Milperra, Villawood, Chullora, Revesby and Padstow.

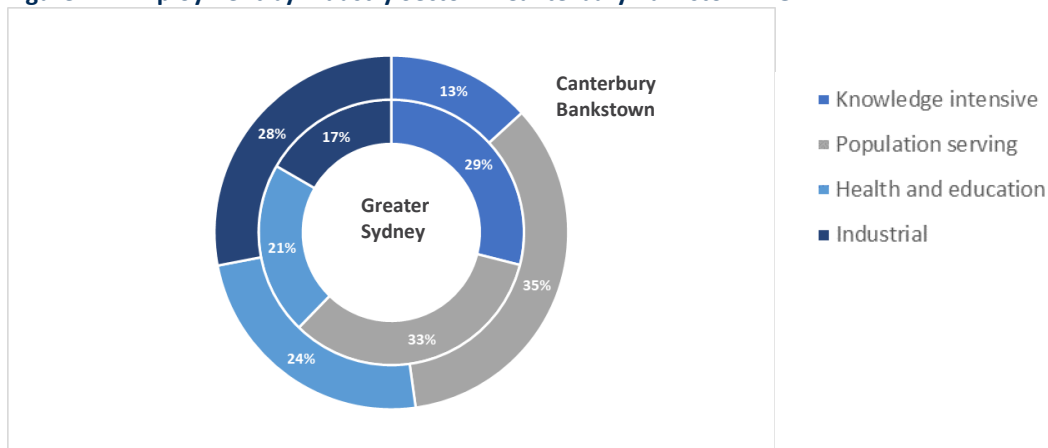
In 2017/2018 there were approximately 118,450 jobs within the Canterbury Bankstown LGA.

5.3.1 Employment generation by industry

Employment (total) is the most accurate and up to date measure of the total number of people employed in City of Canterbury Bankstown. The statistics are modelled by National Economics (NIEIR). They estimate the total number of persons employed in an industry sector (full-time and part-time) in the Canterbury Bankstown LGA regardless of where they live. They are updated annually.

Figure 14 shows the number of jobs in each industry category within Canterbury Bankstown and Greater Sydney. Population serving industries make up the largest share with 35 per cent of businesses falling under this category, which marginally higher than Greater Sydney (33). Industrial industries (28 per cent of the total jobs) was significantly higher than Greater Sydney (17 per cent) and health and education industries making up 24 per cent of businesses. It is interesting to note that knowledge intensive industries made up approximately 13 per cent of all businesses which is significantly lower than Greater Sydney (29 per cent).

Figure 14: Employment by Industry Sector in Canterbury Bankstown LGA



Source: Australian Business Register – economy.id, 2018

Error! Reference source not found. identifies the total employment by industry in the LGA in 2017/2018 compared to Greater Sydney. The top four employing industries were:

- Healthcare and Social Assistance - 16,496 jobs or 13.9 per cent
- Manufacturing – 16,302 jobs or 13.8 per cent
- Construction – 13,083 jobs or 11 per cent
- Education and Training – 12,226 jobs or 8.4 per cent.

It is no surprise, given the predominate residential role of a large part of the LGA, that household service sectors such as Health Care and Social Assistance (13.9 per cent), Retail (10.2 per cent), and Education and Training (10.3 per cent) are also over-represented when compared to Greater Sydney averages.

Canterbury Bankstown LGAs local economy has historically specialised in Manufacturing and Logistics based industries, these industries are still prevalent today. Manufacturing comprised 13.8 per cent of all jobs in 2018, which was more than double that of Greater Sydney (6.3 per cent). The LGA is the largest location for Manufacturing jobs in the whole of NSW, and fourth largest for Transport, Postal and Warehousing jobs (8.4 per cent).

In contrast, the local economy is far under-represented when it comes to Knowledge Intensive industries; Professional, Scientific and Technical Services (5.1 per cent less than Greater Sydney), Financial and Insurance Services (6.7 per cent less than Greater Sydney) and Information Media and Telecommunications (1.9 per cent less than Greater Sydney) and Public Administration and Safety (1.4 per cent less than Greater Sydney). This is largely due to the dominance of Sydney's CBD in this sector. However, there may be potential for growth.

Table 22: Employment figures for Canterbury Bankstown and Greater Sydney in 2018

	Industry	CB		GS
		Nu	%	%
Knowledge Intensive	Professional, Scientific and Technical Services	4,451	4.0	10.7
	Financial and Insurance Services	1,579	1.3	6.4
	Administrative and Support Services	3,549	3.0	3.5
	Information Media and Telecommunications	1,034	0.9	2.8
	Public Administration and Safety	4,956	4.2	5.6
Population Serving	Construction	13,083	11.0	9.5
	Rental, Hiring and Real Estate Services	1,534	1.3	1.9
	Retail Trade	12,120	10.2	9.6
	Accommodation and Food Services	7,638	6.4	7.1
	Arts and recreation	1,381	1.2	1.7
	Other Services	5,321	4.5	3.6
Industrial	Wholesale Trade	5,429	4.6	3.7
	Manufacturing	16,302	13.8	6.3
	Transport, Postal and Warehousing	9,908	8.4	5.2
	Agriculture, Forestry and Fishing	174	0.1	0.4
	Electricity, Gas, Water and Waste Services	1,149	1.0	0.8
	Mining	120	0.1	0.3
Health and Education	Health Care and Social Assistance	16,496	13.9	12.3
	Education and Training	12,226	10.3	8.8

Source: Australian Business Register – economy.id (3rd Dec 2018)

5.3.2 Industry growth over time

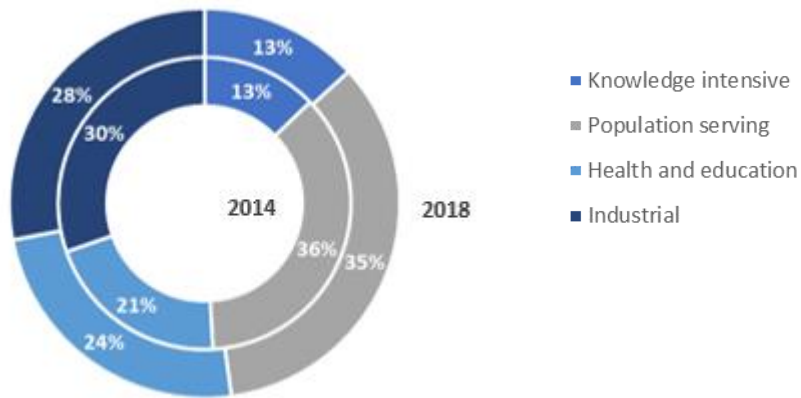
Analysis of employment by industries NEIR in Canterbury Bankstown revealed that between 2014 and 2018 an additional 6,771 jobs were recorded. The distribution of these jobs was not evenly spread across all industries. During this period Industrial and population serving jobs declined by 1-2 per cent whereas the number of Health and Education jobs grew by 3 per cent.

During this period, the top three industry sectors which experienced the most growth between 2014 and 2018 were; Health Care and Social Assistance (+2.3 per cent and 3,503 additional jobs); Education and Training (+1.4

per cent and 2,248 additional jobs), Transport, Postal and Warehousing (+.6 per cent and 1,080 additional businesses) and Accommodation and Food Services (+.8 per cent and 1,358 additional jobs).

Table 23 identifies the change across all industries between 2014 and 2018, the top three industry sectors that experience the largest decline during this period were; Construction (-2.8 per cent and -2,329 jobs), Manufacturing (-1.5 per cent and -817 jobs) and Wholesale Trade (-0.7 and -507 jobs).

Figure 15: Jobs by Industry Sector in 2014 to 2018



Source: Australian Business Register – economy.id, 2018

Table 23: Jobs by industry type

Industry Sector	Industry	2018		2014		Change	
		No.	%	No.	%	No.	%
Knowledge Intensive	Professional, Scientific and Technical Services	4,451	4	3,788	3.4	663	0.4
	Financial and Insurance Services	1,579	1.3	1,531	1.4	48	-0.1
	Administrative and Support Services	3,549	3.0	3,281	2.9	268	0.1
	Information Media and Telecommunications	1,034	0.9	1,165	1.0	-131	-0.1
	Public Administration and Safety	4,956	4.2	4,617	4.1	339	0.1
Population Serving	Construction	13,083	11.0	15,412	13.8	-2,329	-2.8
	Rental, Hiring and Real Estate Services	1,534	1.3	1,467	1.3	67	0.0
	Retail Trade	12,120	10.2	10,996	9.8	1,124	0.4
	Accommodation and Food Services	7,638	6.4	6,280	5.6	1,358	0.8
	Arts and recreation	1,381	1.2	1,303	1.2	78	0.0
	Other Services	5,321	4.5	5,038	4.5	283	0.0
Industrial	Wholesale Trade	5,429	4.6	5,936	5.3	-507	-0.7
	Manufacturing	16,302	13.8	17,119	15.3	-817	-1.5
	Transport, Postal and Warehousing	9,908	8.4	9,440	8.5	468	-0.1
	Agriculture, Forestry and Fishing	174	0.1	139	0.1	35	0.0
	Electricity, Gas, Water and Waste Services	1,149	1.0	1,140	1.0	9	0.0
	Mining	120	0.1	56	0.1	64	0.0
Health and Education	Health Care and Social Assistance	16,496	13.9	12,993	11.6	3,503	2.3
	Education and Training	12,226	10.3	9,978	8.9	2,248	1.4

Source: Australian Business Register – economy.id (3rd Dec 2018)

5.4 Key findings

- The City of Canterbury Bankstown generated \$14.48 billion in GRP in 2017/18 and supported 118,450 jobs. This represents almost 3 per cent of the State of NSW's economy.
- In 2018, Canterbury Bankstown's Local Residents GRP was \$16.3 billion, this was higher than local industry GRP. This indicates that residents are contributing their economic productivity to other areas.
- In 2018 there were a total of 38,337 active and registered for GST businesses. Population serving industries make up the largest share. Between 2014 and 2018 an additional 11,812 businesses were recorded, over this period almost all industry categories experienced an increase in the number of businesses present. The industry sector which experienced the most growth were; Transport, Postal and Warehousing (+4.8 per cent and 3,704 additional businesses); Construction (+2.7 per cent and 3,376 additional businesses) and Rental, Hiring and Real Estate Services (+2.2 per cent and 1,080 additional businesses).
- Canterbury Bankstown has a strong residential role function that has shaped its economy, resulting in an over-representation of employment in population servicing sectors such as Retail, Health Care and Social Assistance, and Health and Education - the majority of which is concentrated into centres like Bankstown CBD and Campsie.
- Canterbury Bankstown has an under-representation of knowledge-based sectors such as Professional and Technical Services and Information, Media and Telecommunications. This is likely due the low bachelor or higher degree levels of its resident base (close to 10 per cent less than Greater Sydney) and the strong transport connections to Sydney CBD.
- Canterbury Bankstown LGA has a long-standing specialisation in Manufacturing representing the largest portion (16 per cent) of Canterbury Bankstown's IVA with a specialisation in Food Production Manufacturing and Machinery and Equipment Manufacturing. Manufacturing has continued to restructure, experiencing a 10.5 per cent decrease IVA between 2014 and 2018. Over the same period employment in manufacturing also decreased by 1.5 per cent and the proportion of local residents working in Manufacturing experienced a decline of 3.7 per cent between 2011 and 2016.
- Health and Social Assistance is the largest source of employment and third largest of IVA. With an ageing population and an NSW Government commitment to invest \$1.3 billion into a redeveloped Bankstown-Lidcombe Hospital, the Health industry is an opportunity area.
- Transport, Postal and Warehousing is the second largest generator of value added with specialisations in Road Transport (Taxis and Buses), Warehousing and Storage Services and Postal and Courier Pick-up and Delivery Services.
- The local economy has developed specialisations in key industries based on competitive advantages and local physical and human capital characteristics. The largest sub-sector IVA contributions are by Preschool and School Education, Public Administration and Safety, Financial and Insurance Services, Construction Services and Professional, Scientific and Technical Services.

INDUSTRY TRENDS AND DRIVERS

6.0 INDUSTRY TRENDS AND DRIVERS

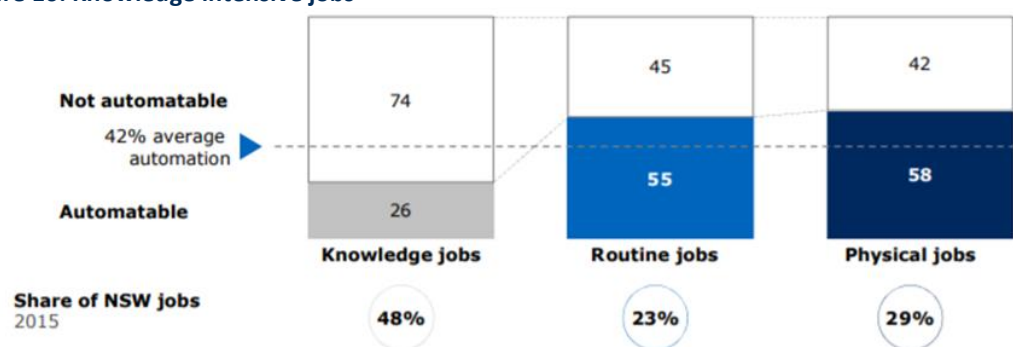
This section analyses industry trends at a macro and in some cases a micro level, in order to better understand the LGA. Local, regional and global trends, combined with future drivers, affect employment generating land uses, their success and economic viability.

6.1 Knowledge intensive sector

6.1.1 Increased demand for knowledge intensive jobs

Knowledge-intensive jobs involve both specialist and interactive skills and draw on a person's experience and context as well as specialist knowledge. The biggest trend over the last 20 years has been the shift towards knowledge-intensive jobs, with eighty per cent of all new jobs being of this type. Knowledge intensive jobs now make up almost half of NSW's workforce (48 per cent), almost a quarter of the workforce (23 per cent) have routine jobs, and 29 per cent of NSW have physical jobs⁸. This shift in demand for jobs is the result of globalisation, affluence, automation, digitisation and rising demand for services. As identified in section Figure 16, in 2015 the share of knowledge jobs was 48 per cent of all NSW jobs.

Figure 16: Knowledge intensive jobs



SOURCE: ABS 6306, ABS1220, ABS 6129 table EQ08 (employed persons by ANZSCO—data excludes non-matching categories between 1996 and 2015), McKinsey Global Institute (MGI)

Source: Jobs NSW, Jobs for our future, 2016

This trend is reflective in Canterbury Bankstown's local economy. The industries that experienced the most growth were: Health Care and Social Assistance (+2.3 per cent and 3,503 additional jobs) and Education and Training (+1.4 per cent and 2,248 additional jobs) which require non-routine cognitive based skills. While, the two industries that experienced the largest decline in employment were; Construction (-2.8 per cent and -2,329 jobs) and Manufacturing (-1.5 per cent and -817 jobs) both of which rely on physical and routine work.

This trend is likely to continue in the future as knowledge-intensive jobs are more resilient to displacement, either by automation or globalisation. The rising demand for interactive skills is reflected in the increase in graduates from higher education in Canterbury Bankstown LGA.

The knowledge economy also contributed to 44 per cent of Greater Sydney's IVA almost 20 per cent higher than Canterbury Bankstown LGA at 19 per cent. Almost a third of jobs (29 per cent) in Greater Sydney were knowledge intensive industries, while in Canterbury Bankstown LGA only 13 per cent of the workforce were employed in these industries. According to the 2016 census 30,746 (22 per cent) residents in Canterbury Bankstown were employed in knowledge intensive industries, however 82 per cent of these residents worked outside of the

⁸ Jobs NSW, Jobs for our future, 2016

Canterbury Bankstown LGA. There is a lot of potential to draw these highly skilled resident workers away from Sydney CBD and improve the LGAs employment self-containment rates.

Canterbury Bankstown LGA is strategically located close to Sydney CBD and within proximity to the established population catchment of southwest Sydney. The availability of the train and future Metro services also makes it highly accessible to workers and customers alike. Owing to its locational characteristics, precincts within the LGA may attract knowledge intensive industries (particularly service industries i.e. financial services) that seek access to highly skilled workers, good communication infrastructure, large population catchments, and locations with clusters of other businesses. Knowledge intensive industries have the opportunity to tap into a local, highly skilled labour pool as well as locate nearby to customers and suppliers.

6.1.2 A global market

Globalisation has resulted in a global labour and capital market. With the entry of China, India and eastern Europe into the global economy the global market has doubled the size of the labour market, resulting in a downward pressure on average wages (relative to the return of capital) across the world.

Globalisation has also resulted in massive changes in the labour market: ‘companies now have a broader range of options for ‘getting the job done’, from automation and offshoring to using self-employed workers and crowdsourcing⁹. Companies have moved from an inward focus of creating a talented workforce to an outward focus on consuming work. This has resulted in increasing global trade in the knowledge economy.

Trade increasingly comprises information flowing across the global internet rather than physical merchandise flows. Globally, this trade in knowledge-intensive goods and services is growing faster than labour or capital intensive trade. Companies can now compete more easily across borders. As the global knowledge economy grows, industries are becoming more skilful at chasing growth opportunities, wherever they are.

It is important that Canterbury Bankstown remains competitive in a global market and is well placed to take advantage of global opportunities. Some of the ways this could be achieved include through encouraging innovation within employment lands including building the technology-based industries within Chullora Technology Park, creating a role for Canterbury Bankstown as a trade gateway through Bankstown Airport to connect with the global market and the knowledge economy and creating an innovation precinct through the Bankstown Health and Education precinct.

6.1.3 Boom of the flexible workspace industry

The past decade has witnessed major changes in the Australian workforce and wider society. Shifts in technological capabilities and working habits are driving traditional workplaces to transform. Technology and globalisation have resulted in an increase in the demand for flexible work arrangements and spaces. Workers are becoming increasingly mobile, with the choice to work from home often made by people who need to balance work and other commitments (i.e. care for family), those who are establishing up their own businesses or professionals who do not need to physically be in the office.

This is reflective in the 2016 Census, which identifies that the number of people working from home in Greater Sydney rose from 3.9 per cent in 2006 to 4.4 per cent in 2016. Similarly, Canterbury Bankstown experienced a .6 per cent growth over the same period.

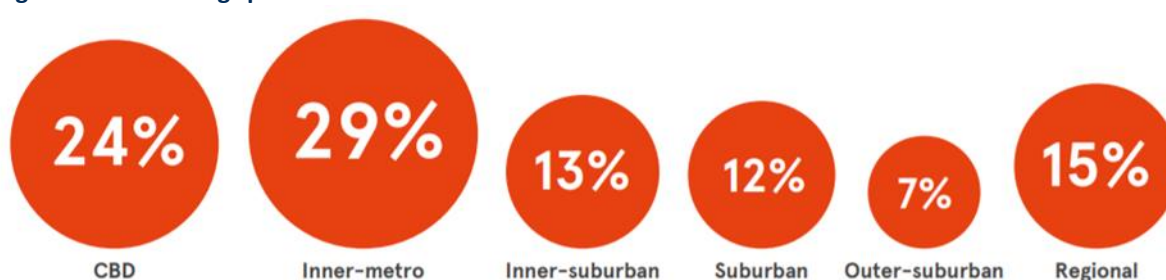
Technological advances give people the opportunity to work from anywhere. An increasing number of people working remotely provides clear productivity gains, with staff spending less time travelling and in unnecessary meetings, and more time performing their roles resulting in significant economic benefits for organisations, and

⁹ The Economist (2018), Learning and earning

cultural and economic gains for the economy. The traditional desire for prime location is no longer everything, with businesses increasingly looking for adaptable office space, coupled with quality lifestyle opportunities.

Co-working or shared office spaces are also a growing workplace trend with an increasing number of sole traders or small businesses choosing to share office space with other entrepreneurs and small businesses. Co-working spaces themselves have experienced exceptional growth in Australia in recent years with the number operating growing by 297 per cent between 2013 and 2017 to reach 309¹⁰. Figure 17 identifies where Australian coworking spaces are located. It shows that 29 per cent of coworking spaces in 2017 were located in inner metro areas. Canterbury Bankstown LGA has limited coworking options, with one recently opened shared workspace and start up support operation in Canterbury and a new co-working space in Bankstown. Rubberdesk also operates in the LGA which allows individuals to list their office space for rent.

Figure 17: Coworking spaces



Source: Mahlberg, Tim; Riemer, Kai (2017) "Coworking Spaces Australia: The new places where people work, businesses grow, and corporates connect." Sydney Business Insights

The way we rent office space is evolving, and we are starting to see more flexibility and transparency in the office rental market. These trends have also resulted in an increasing demand for more flexible and co-located industrial units and warehouses where small businesses and start-ups can experiment. Industrial units that are available on flexible term leases, similar to co-working office spaces, can encourage innovation and provide affordable options for new business operators.

Canterbury Bankstown LGA has the opportunity to target, attract and cater for the needs of the growing flexible market and foster innovation.

6.2 Population serving sector

6.2.1 Retail and Commercial Uses

The retail sector is an important contributor to the NSW economy, contributing \$95.6 billion in annual retail turnover in NSW, equivalent to 32 per cent of Australia's retail turnover¹¹. In 2018 retail accounted for 6.9 per cent of Canterbury Bankstown's local economy and 6.5 per cent of businesses within the LGA. However, retail had a relatively larger impact on employment with retail accounting for 10.2 per cent of all jobs and 10.4 per cent of residents within the LGA working in retail. The retail industry also has a significant impact on other sectors, including manufacturing, and logistics and freight.

Demand for retail is closely linked to population growth and increasing wealth and perhaps more specifically, the associated increased level of expenditure. As identified in section 4.1 Canterbury Bankstown has been experiencing a steady growth in population which is predicted to continue. Recent mixed-use developments and population growth within the Canterbury Bankstown LGA have resulted in increased retail demand across the centres of the LGA including Canterbury and Campsie. The retail market in Campsie and Bankstown are the strongest retail precincts in Canterbury Bankstown LGA. The presence of the Campsie Shopping Centre,

¹⁰ Kight Frank (2017), Culture Clash: Flexible Workspace Coworking the Future

¹¹ Retail Expert Advisory Committee 2017, Independent Recommendations Report- June 20)

Roselands Shopping centre Bankstown Central contributes to the area's 'pull' as a major retail destination. Other centres which also have strong retail offerings include Bass Hill Plaza, Revesby Village Centre and Chullora Marketplace and provide retailing that is more locally serving.

Over the past three decades, significant change has occurred in the retail industry, of which online retailing has caused the largest disruption. The emergence of online retailing has affected land use and building requirements. In the last year, online purchases have increased by 11.5 per cent compared to 2016, with many shoppers switching to online sources due to better prices, more variety, easier comparisons and convenience¹². The future of retail is shifting towards experience and convenience with technology driving change⁸.

There is an increasing need for engaging shopping experiences, stores are less likely to be able to compete on price comparative to the internet but by promoting shopping as an enjoyable experience through, amenity, customer service, attractive storefronts, instore entertainment and interactive design. In NSW, consumers travelling to retail destinations make up more than 3.3 million trips per average working day.

There is an emerging trend of virtual multi-media with the in-store and in-centre experience enabling customers to check prices and product ranges on smartphones in real time (e.g. augmented reality technology).

Click and collect is also a trend which improves convenience. Click and collect allows a shopper to pay for goods online but collects goods from a local store or drop-off point. This is expected to grow with the positioning of centres as convenient hubs.

The online retail trend is supporting growth in out-of-centre retailing for retail that has a primary orientation to bulky goods retailing or online retailing outlet spaces.

These changes will place increased pressure on centres within Canterbury Bankstown to either adapt or lose market share.

6.2.2 New format supermarkets

There has been an increase in demand for larger format retail space and other new format supermarkets in smaller centres (i.e. greater than the traditional retail small centre floor plates of 400-600m²). There has been an increase in demand to develop supermarkets of around 1,000m² to 1,500m² in smaller retail centres where previously smaller supermarkets or convenience stores may have prevailed.

This trend has been reflected in the NSW DPIE's recent amendments to the definition of a neighbourhood supermarket in the standard local environmental plan template. This change in land use definition permits the development of small-scale supermarkets up to 1,000m² in size in the B1 - Neighbourhood Centre zones.

It is anticipated that this trend will continue, due to:

- A growing demand for additional supermarket facilities as a result of urban regeneration
- A decline in vehicle ownership/usage and increased demand for walkable neighbourhoods
- Changes in consumer habits, people are favouring multiple smaller convenience shopping trips rather than one large trolley load
- Difficulties in accommodating full-line supermarkets due to land scarcity
- Increasing demand for food and beverages outside of traditional trading hours
- Strong activity from smaller supermarket operators increasing market competing.

¹² The Department of Planning NSW 2018, Planning for the Future of Retail, Discussion paper 2018

The restricted size of a maximum gross floor area (GFA) of 1,000m² is intended to ensure compatibility with the scale and nature of the surrounding, predominately residential, area while also allowing for the development of essential services to serve the needs of people who live and work in the surrounding neighbourhood.

Larger supermarkets (over 1,000m²) in smaller centres can have both a negative and positive impact. On the one hand a larger supermarket can increase competition and negatively impact smaller speciality shops, such as, bakeries and butchers. However, on the other hand, the presence of a supermarket can also increase the attractiveness of a centre to its surrounding community, thereby increasing passing trade and the number of people who choose to shop there. This increased foot traffic or number of persons visiting the centre has positive effects for other shops in the centre. This is mainly through increased opportunity for capturing passing trade.

The recent development of Woolworths near the Canterbury Town Centre is an example of the above. The Woolworths has generated significant interest from other retail tenancies looking to co-locate with the new anchor.

6.2.3 Better designed eating experiences

NSW has witnessed strong growth in café culture and the provision and turnover of cafes, restaurants and takeaway food services industry in recent years. This is evident in the industry experiencing a \$645 million or 49 per cent increase in turnover over the last eight years¹³.

With the rise of home delivery services such as Uber Eats and Deliveroo the eating experience has become increasingly important. As the range of foods available to eat at home are expanding, customers that decide to eat out are seeking more than good food but also an interesting and enjoyable eating environment. Venues that create a “point of difference” or unique experiences can evoke an emotional response and attachment from customers that will have them talking and referring friends and family.

This “experience” has seen increased demand for comfortable outdoor dining options with centres needing to respond through providing improved centre amenity. Venues can also extend their trading hours, provide natural themes or taking advantage of existing natural assets or open space, where venues open onto scenic views or green spaces can also create a connection to the land, increasing dining experience. It is important that centres within Canterbury Bankstown LGA create a unique sense of place in order to attract and retain cafés and restaurants.

With an increase in options and prevalence of food delivery services Council may wish to consider the design options to facilitate ‘drop off’ deliveries with vehicle bays located on busy roads, main streets, within large developments and dedicated car spaces at restaurants and cafes. These delivery bays could also be utilised with other home delivery services such as with the increase in parcel and grocery deliveries.

6.2.4 Out-of-centre retailing

Over the last three and a half decades all retail industry groups have recorded positive growth in turnover. However, food retailing has out-performed all other industries over this period, recording a \$3 billion or 709 per cent growth in turnover. Of this growth, around \$2.5 billion was attributed to supermarket and grocery stores with this subcategory comprising 83 per cent of the turnover recorded for food retailing in 2018¹⁴.

Land use and floorspace constraints and high land value in urban centres has resulted in pressure from supermarkets (and other bulky goods retailers) to develop out-of-centre industrial and employment sites.

The development of out-of-centre retailing, especially those with supermarkets, has the potential to affect the continued economic viability of the established centres across the LGA. For example, an international study

¹³ ibid

¹⁴ ABS Cat. 8501.0 Retail Trade, Australia Table 13

found that the presence of out-of-centre retailing can negatively affect retail activity in nearby centres by around 12 per cent¹⁵.

Although new centres should be allowed to form and develop, especially in areas with justified demand, existing centres should be protected and enhanced as the primary location for commercial and retail floorspace. This could be achieved by tightening the sequential approach assessment, reducing barriers to in centre development such as development contribution levels, adherence to certain design requirements and retail demand and impact assessments, as well as providing disincentives for out-of-centre investment.

If demand cannot be met within or on the edge of centres a clear process is required to facilitate the development of new centres in appropriate locations which are well connected to public transport and consumer markets. This is especially relevant for Canterbury Bankstown LGAs as population growth and investment. In the Canterbury Bankstown context, it is important to encourage bulky goods and supermarkets to locate along Canterbury Road to avoid encroachment onto industrial precincts that should otherwise be utilised for higher productivity uses.

6.2.5 Driverless cars and retail

The coming age of autonomous or driverless cars are expected to have a significant impact on the shopping experience and retail and commercial floorspace. Driverless cars are expected to decrease congestion, reducing noise and air pollution and in turn improve a centres amenity. This can benefit retailers by making the area more attractive for social interactions, outdoor dining and more increasing the opportunity for the capture of passing traffic for shops.

As driverless cars become more prevalent overtime, the demand for car parks may reduce and therefore increased opportunities for in centre redevelopment and urban renewal. There is also the potential for increased public realm improvements, such as better landscaping opportunities, though the repurposing of on-street car parking spaces

Underground parking may be more complex; however, these spaces have the potential to be repurposed for alternative uses such as storage, retail, entertainment or even new age light manufacturing areas. It is important that new car parking areas within Canterbury Bankstown LGA are designed with greater flexibility to ensure that they can easily and efficiently be transitioned into alternative uses that either enhances the productivity of the centre or its community identity.

This reduced traffic congestion and time spent looking for parking may also reduce travel times. Travel time savings may increase the distance a customer is willing travel to undertake shopping activities or access services. This could lead to increased competition among local centres, resulting in some benefiting from increased trade and other centres being bypassed. The viability of a centre within Canterbury Bankstown will benefit less from its strategic location and trade catchments and become more reliant on positive shopping experiences, diverse eating options and an attractive public domain.

6.3 Health and education sector

6.3.1 Automation and the drive for education

Automation refers to the linking of systems and software in such a way that they become self-acting or self-regulating. Automation has a major influence on employment and the economy, and its influence is predicted to grow. Some of the key benefits of automation include:

- Enabling significant economies of scale and the production of goods for lower costs

¹⁵ Land Use Policy, The impact of out-of-town shopping centres on town-centre retailers and employment: The case of the Region of Murcia. Armando Ortuño Padilla; Antonia Alarcón Hermosillab; and Olga Tomás Ozoresc 2017

- Growth in GDP
- Shorter production times, quicker delivery and more efficient use of stock and cash flow
- Automation enables a greater economy of scope and customisation of products
- Improve efficiency by reducing the number of workers required
- Lower costs of production enable lower prices, leading to more disposable income to be spent on a wider range of services
- The creation of new kinds of jobs, which are generally more creative, less repetitive and enable more flexible labour markets.

However, the equality of these benefits is widely noted as a concern. Some companies and people will gain significantly from automation whereas others will not. Increased automation will result in a wide range of occupations being at high risk of potential automation and therefore cause redundancies and job polarisation.

Job polarisation refers to where middle-skill jobs (such as those in manufacturing) are declining but both low-skill and high-skill jobs are expanding. In effect, the workforce splits into two groups doing non-routine work: highly paid, skilled workers (such as architects and senior managers) on the one hand and low-paid, unskilled workers (such as cleaners) on the other¹⁶. What determines vulnerability to automation is not so much whether the work concerned is manual or white-collar but whether or not it is routine.

Predictions that automation will result in a jobless future have been made since the Industrial Revolution. Yet in the past, technology has always ended up creating more jobs than it destroys. That is because automating a particular task, so that it can be done more quickly or cheaply, increases the demand for human workers to do the other tasks around it that have not been automated.

One recent study analysed jobs that made use of computers between 1982 and 2012, the study found that employment grew significantly faster in occupations that made more use of computers (for example, graphic design), as automation sped up one aspect of a job, enabling workers to do the other parts better. The net effect was that more computer-intensive jobs within an industry displaced less computer-intensive ones¹⁷. Automation reallocates rather than displace jobs, requiring workers to learn new skills.

Automation also impacts some job types more than others. Knowledge-intensive jobs are the most resilient, with only 26 per cent of their aggregate time currently at risk. More than half of the time spent in routine jobs (55 per cent) and physical jobs (58 per cent) are at risk¹⁸.

Going forward, displaced workers may need to reskill to be integrated into a different labour market. During previous waves of automation, workers could switch from one kind of routine work to another; however, in today's economy it is likely that workers will have to switch from unskilled to skilled non-routine employment.

To date, NSW jobs market has responded well, with 80 per cent of jobs growth in NSW being higher paying, resilient knowledge intensive jobs¹⁹. Canterbury Bankstown has also responded well with an overall growth 6,771 jobs between 2014 and 2018. However, as identified in section 4.4 the low skills base of Canterbury Bankstown's workforce and ageing demographic positions the LGA poorly to meet future job requirements.

To ensure Canterbury Bankstown's local economy is able to adapt, it is important to ensure local workers, of all ages, have the ability to continue to up skill and re-skill. It is important that people of all ages living and working in Canterbury Bankstown can do things machines cannot do, drawing on broader problem solving and social-emotional skills, and on their experience and context.

¹⁶ The economist 2016, The impact on jobs automation and anxiety

¹⁷ The economist 2016, The impact on jobs automation and anxiety

¹⁸ Jobs NSW, Jobs for our future, 2016

¹⁹ Jobs NSW, Jobs for our future, 2016

Western Sydney University will establish a world-class teaching and research campus in the Bankstown strategic centre, the campus will potentially accommodate up to 7,000 students and make a significant contribution towards improving accessibility to education and reskilling.

6.3.2 Lifelong learning

One aspect of forced change is the necessity of lifelong learning. In many occupations it has become essential to acquire new skills as established ones become obsolete. The composition of new jobs is also changing rapidly.

As populations are ageing, career spans are lengthening. This has also contributed to a change in Australia's labour market. A university degree at the beginning of one's career is no longer considered sufficient, there is increasing pressure for the continuous acquisition of new skills. This has been reflected in Canterbury Bankstown where the number of people in Canterbury Bankstown LGA obtaining a bachelor or higher degree grew by 4.1 per cent between 2011 and 2016.

The NSW State government recognises the role the education industry has in driving economic growth and its importance in ensuring its population has the opportunity for success. Canterbury Bankstown LGA houses the Bankstown Campus of the University of Western Sydney. Canterbury Bankstown Council has the opportunity to collaborate with the Western Sydney University and other key stakeholders to help match the local economy's skills flow with industry needs.

6.3.3 Higher education institutions

Higher education institutions perform an anchor role through their activities in research, the provision of knowledge-focused services to businesses and other employers. They educate people to support the labour requirements of innovative local employers. They can also provide management and leadership development to local firms who are important providers of goods and services, employment and income.

Western Sydney University's (WSU) city campus in the Bankstown CBD will bring 7,000-10,000 students and new research capability to Canterbury Bankstown LGA in 2021. Alongside the TAFE - Bankstown population the two institutions will have a collective student population of up to 18,000. Bankstown has been identified as a Health and Education precinct, with future student target of 25,000 for tertiary and vocational education within the city centre is being considered through the Bankstown Collaboration Area process. This can be achieved by leveraging the opportunities of a potentially co-located Hospital and University, which will attract further growth in research and interest from other educational institutions.

Canterbury Bankstown Council should foster interaction between the University and TAFE and small businesses. This interaction may include consultancy and contract research specific to business need; continued professional development; and graduate start-ups. There is also potential for WSU to support local businesses and these relationships may assist the university to attract local students and open up opportunities for short-courses. There is also opportunity for WSU to offer, or facilitate, different types of management and leadership development support.

6.3.4 The opportunity of ageing

The population dynamics of a location have a significant influence on economic development patterns. Some locations age faster than others. Australia's high standard of living and excellent healthcare system has resulted in longer life expectancy. Government data estimates that by 2055, average life expectancy will be 95.1 years for men and 96.6 years for women. The country also has low infant mortality, with the number of infant deaths falling from 1,264 in 2002 to 1,094 in 2013. This trend is also forecast to continue. Canterbury Bankstown LGA

will see the highest growth in older people in the South Precinct, with 35,900 additional people aged 65 or over by 2035.

High old-age dependency ratios (the over 65s as a share of the population aged 15-64) present significant social-economic risks; which may include slower economic growth, financial-market instability and difficulties in providing adequate health care and social services. An older population will inevitably put more demand on the healthcare system, with an increase in the number of people with chronic illness and degenerative diseases. These patients are more likely to require longer hospital stays and more follow-up care. Private healthcare figures show that customers ages 60 to 79 are the group that receives the largest payout of hospital benefits.

However, an aging population also presents new opportunities for business and economic development. 'The ageing of the world's population, owing to increased life expectancy and reduced fertility, will undoubtedly help to inflate demand for healthcare products and services'²⁰.

The NSW Government has committed \$1.3 billion budget for a potential new Bankstown-Lidcombe Hospital close to the Bankstown CBD. Building on this investment, private health services/facilities/hospitals could be co-located and would support the growth of an allied health and research sector which ties in with education and helps with the creation of an innovation precinct.

The healthcare and social assistance industry – which includes doctors, nurses, dentists, physiotherapists, childcare workers and aged care providers – has made the largest contribution to the nation's jobs growth over the past 15 years. It now employs more than 1.5 million people. It was the largest industry by employment in the 2016 Census of Population and Housing. Spanning sectors such as hospitals, GPs and aged and child care, the industry grew by around 16 per cent and now accounts for 12.6 per cent of Australia's working population, increasing from 11.6 per cent in 2011 and 10.5 per cent in 2006 (ABS Census 2016).

This trend is reflected in Canterbury Bankstown LGA with recent job growth being predominantly in the health and education industry sector. As outlined the Greater Sydney Region Plan, Bankstown is an emerging health and education precinct with a hub of medical expertise. Growth of the health and education sectors will boost the District's skills base and economic contribution and increase opportunities for access to high-wage local employment for residents.

6.4 Industrial sector

6.4.1 Demand for industrial floorspace

The demand for industrial floorspace is influenced by trends such as globalisation and the use of information technology. Our economy comprises sophisticated linkages between businesses, which are adept in the efficient sharing of information and the delivery of goods through a global supply chain. This supply chain, once thought of as the flow of goods through production to the end user, is now seen as an alignment of firms that design, develop, market and produce goods and services, and deliver them to the customer when needed.

The globalisation and the free movement of people, goods and services have increased the amount of competition and resulted in a decline in the proportion of jobs within manufacturing industries.

Industrial floorspace used primarily for business related storage is in decline, whereas space built for the transferral of goods is increasing. This 'high throughput distribution' space is essentially designed to facilitate the rapid movement of goods through the supply chain. Businesses with low inventory turnover are gravitating to inexpensive land and low-cost buildings.

²⁰ The Economist Intelligence Unit 2006, Forecast 2020

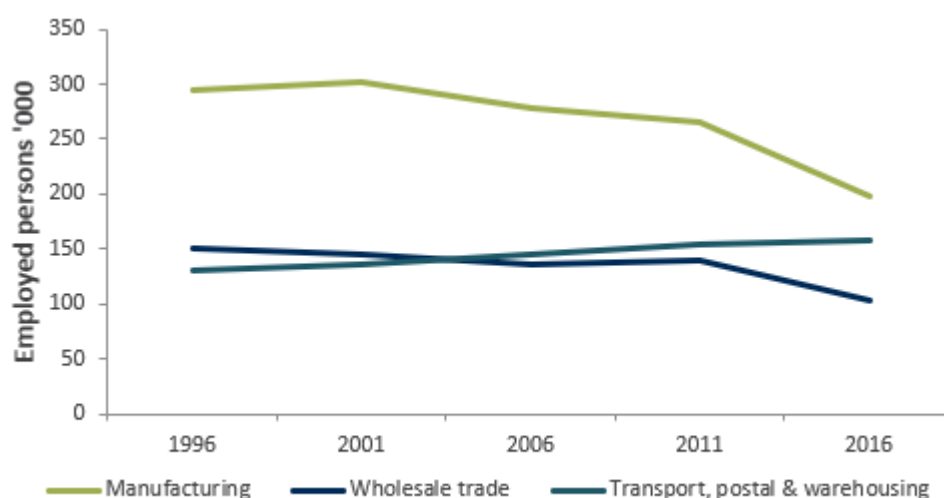
In contrast, businesses that have high inventory turnover and high value products, and typically provide value added functions (including product customisation, packaging and customs) are more prepared to pay a premium for excellent access to a large customer base and proximity in time and space to roads, ports and airports.

As a result of the industrial trends described above, over the past three decades, the development of industrial land and floorspace in NSW has generally occurred at a rate slower than employment growth. This, however, has varied considerably between specific sectors of activity. In manufacturing and wholesale trade, employment growth has steadily decreased over the last 20 years (overall employment down 33 per cent and 31 per cent respectively). Contrasting this pattern has been the performance of transport and storage, which has shown strong growth with a 21 per cent increase in employment. This is partly a result of increased demand for “last mile” delivery and storage spaces close to where customers reside.

This economic trend may be summarised by the fact that traditional manufacturing is changing and becoming more efficient in its processes as a result of the use of new technologies and equipment. These greater efficiencies in many cases have not resulted in a decline in output but rather a reduction in the number of staffs required.

While Canterbury Bankstown LGA still has a strong manufacturing base, it is to be anticipated that the trend of this industry reducing will continue. A redistribution of industrial floor space is to be anticipated however the increasing demand for transport and logistics means that urban services land will be in high demand, especially to support ‘last mile’ deliveries. Canterbury Bankstown LGA is well positioned to meet this demand as it has large tracts of industrial zoned land as well as smaller parcels through-out the LGA.

Figure 18: Employed persons by selective industry, NSW



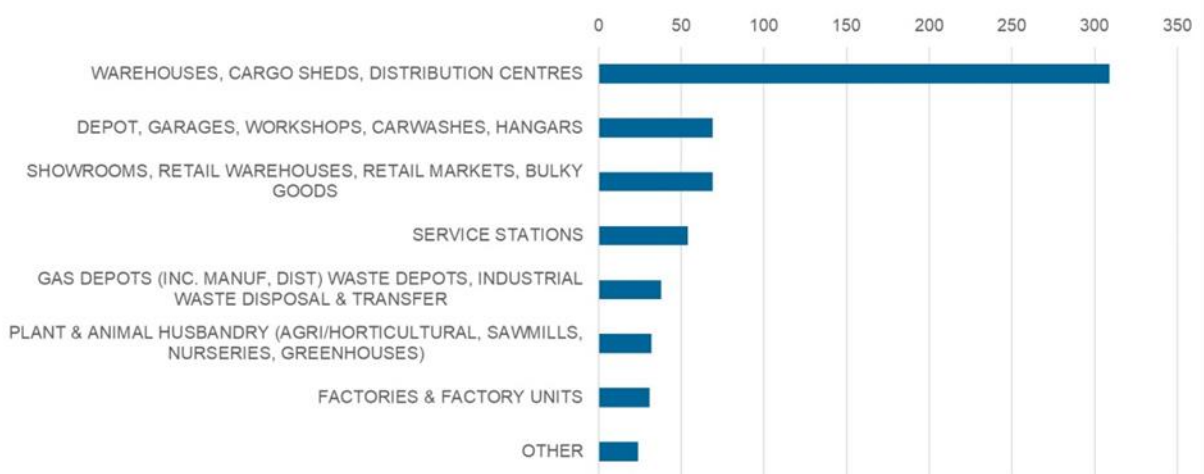
Source: ABS

6.4.2 Transport and logistics

The growth of online retailing is driving changes in transport and logistics, warehousing and supply chains. Convenience and price have been a core factor driving consumer demand, with more people willing to trade the bricks and mortar experience for convenience²¹. As seen in Figure 19 warehousing, cargo sheds and distribution centres have seen exponential growth across Australia, triggering a need to rethink the delivery approach and location of industrial development. This growth is having a significant impact on building typologies and land use planning across Australia.

²¹ JLL 2017, M-Commerce becomes part of the shopping experience

Figure 19: Type of industrial projects under construction - April 2018



Source: CoreLogic 2018

Industrial floor space used primarily for business related storage is in secular decline, whereas demand for space built for the transfer of goods is increasing. This ‘high throughput distribution’ space is essentially designed to facilitate the rapid movement of goods through the supply chain. In essence, businesses with low inventory turnover are gravitating to inexpensive land and low-cost buildings.

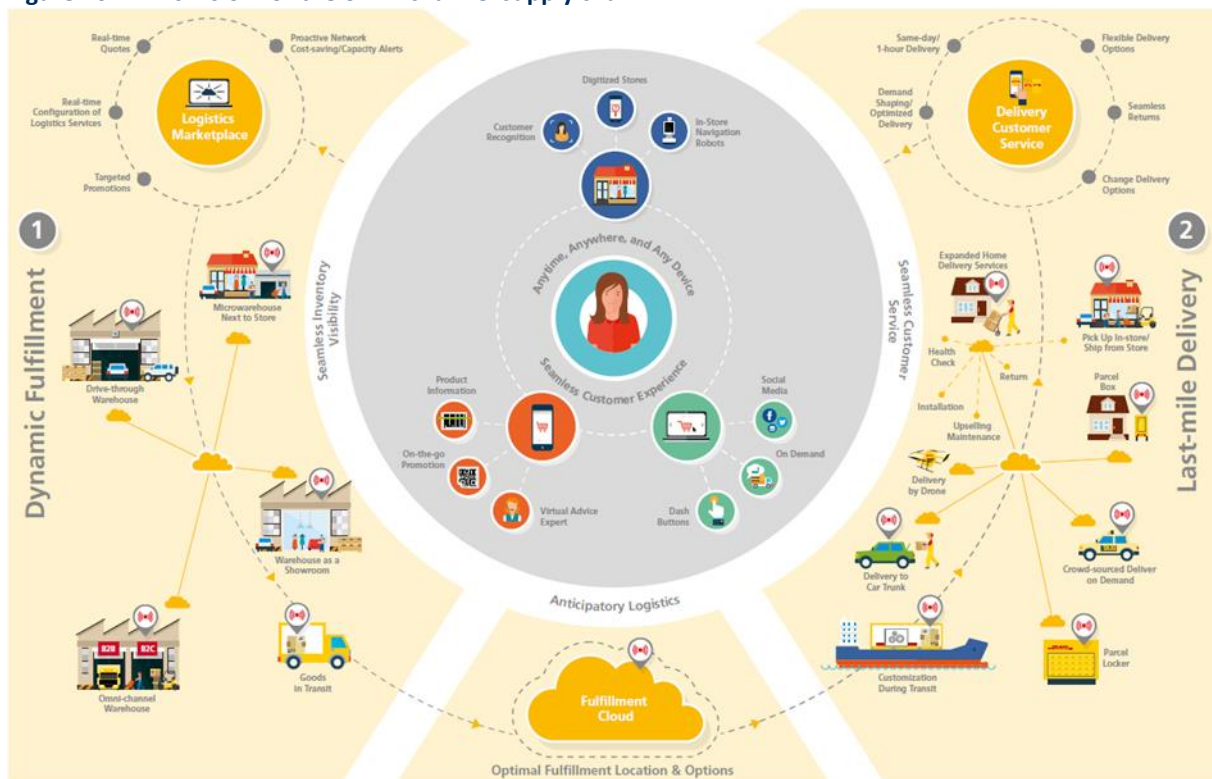
Retail and industrial operations are becoming increasingly aligned. Supply chain efficiencies are key for the success of the retail sector. The increase in online retailing is driving demand for warehousing and distribution centres. Proximity to key transport routes is one of the priorities for industrial occupiers due to supply change efficiencies and the increasing geographic division between consumption and production.

Traditional single and multi-channel logistics are being replaced by omni-channel logistics offering availability 24 hours a day online, with multiple methods of delivery, at the convenience of the customer²². This means that there has been an emergence of last mile warehousing (for product delivery efficiency), smart warehousing, showrooms and customer pickup warehouses and micro-warehouses²³. Figure 20 illustrates the omni-channel supply chain highlighting the enhanced role of transport and logistics in meeting customer expectations.

²² Transport and Logistics IRC Key Findings Paper, February 2018, Australian Industry Standards Ltd

²³ Daniel Kraemer, 2015 ‘Omni-channel logistics’, DHL Trend Research

Figure 20: DHL's vision for the omni-channel supply chain



Source: Daniel Kraemer, 2015 'Omni-channel logistics', DHL Trend Research

With this enhanced demand for supply chain efficiency, comes the need for different models of warehousing and distribution hubs. Integrated transport facilities (ITF) are beginning to be developed to receive, process and store goods and dispatch in one unified facility²⁴. Canterbury Bankstown's strategic connections to Bankstown Airport, Port Botany and major motorways, provide opportunities for efficient delivery of goods across the network.

Canterbury Bankstown's strategic location to highly dense and populated locations also has it well placed to service demand for product distribution and deliver positive economic outcomes for the future.

6.4.3 Aviation

Aviation is no longer merely a transport service provider to other industries and the public, but a key driver of economic and social growth and prosperity in its own right²⁵. Aviation, including airports, have a number of economic impacts on the economy including:

- Direct – through employment, income and GDP associated with operation and management of activity on site and airport related businesses as well as aviation education
- Indirect – the employment, income and GDP generated from down-stream industries that supply and support the airport such as, food catering, travel agent bookings, oil refining for flights etc.
- Wider economic benefits – Air transport facilitating the employment and economic development through trade (export markets), investment, tourism and productivity.

Bankstown Airport is a trade gateway, used largely for general aviation, parcel freight, aviation education and recreational flying. It fulfils an important role for fixed-wing and helicopter flight training and as a base for

²⁴ Transport and Logistics IRC Key Findings Paper, February 2018, Australian Industry Standards Ltd

²⁵ InterVISTAS Consulting Ltd (2015) Economic Impact of European Airports, prepared for Airports Council International Europe

emergency services. The airport site occupies 313 hectares and adjoins the Milperra industrial area, one of the most important centres of economic activity in the South District.

The Bankstown Airport Masterplan 2014 anticipates aircraft movements at Bankstown Airport to increase to approx. 282,000 per year by 2036. The Airport is anticipated to have capacity for a further 450,000 movements per year over this time period. The Masterplan also sets aside 130 hectares of land adjacent to Milperra for future development for non-aviation uses, with the aim of developing an industrial economic and employment hub. This area is well located with access to air transport, the road and rail freight network; the proposed Moorebank intermodal terminal; Liverpool; Bankstown; and the Liverpool health and education precinct. The principles around what land uses can be co-located around airports can be separated into two tiers:

- Primary industries: Industries such as defence and aerospace, agricultural processing and exports, advanced manufacturing and logistics.
- Secondary industries: Education institutes focused on the aerospace and aviation industries, high technology, research and development associated with food production and processing and tourism and the visitor economy²⁶.

In the case of Bankstown Airport, the industries such as education, aerospace and aviation industries, advanced manufacturing and logistics and tourism and the visitor economy would all be appropriate. The important aviation education role of Bankstown Airport is recognised and that it be supported.

Should the aviation sector grow into the future, especially through the Bankstown and Bankstown Airport and Milperra Collaboration Area process, then there will be land use implications for this sector as demand for land will directly compete with housing around the Airport.

6.4.4 Growth in high-tech manufacturing

The evolution of production and manufacturing technology has resulted in a shift in the scale and land requirements of businesses and the trend for high-tech manufacturing is expected to continue to grow. While the size of distribution and warehousing increases, manufacturing will become more automated reducing floorspace and car parking requirements.

Recent research by Colliers International identified that technology is disrupting and reshaping the location, fit-out and use of industrial properties, challenging the traditional perceptions of industrial assets. High-tech units which incorporate high-end design finishes and high-tech features to create a collaborative and bespoke working hub are emerging as a popular format²⁷. There is opportunity for these advanced manufacturing and high-tech units to be delivered in airport precincts, leveraging the direct access to larger city markets and opportunity to facilitate high-speed data connections. Bankstown Airport provides an opportunity to leverage this emerging trend.

6.4.5 Changing nature of industrial development

Historically, industrial developments typically have been single level, on large lots, with at grade parking and on relatively level ground. However, this development model has been challenged in recent years resulting from limited land stocks, high land values and rents.

These market trends have resulted in “vertical” industrial development being explored within Sydney practically by Goodman. This model has been successfully delivered in Asia by Goodman with a company spokesperson "Scarcity of sites in infill areas close to urban centres and consumers, combined with competing demand for

²⁶ Department of Planning and Environment 2018, Western Sydney Aerotropolis – Land Use and Infrastructure Implementation Plan

²⁷ Michael Crombie - Colliers International Industrial Director, 2018, Technology driving emergence of high end mixed-use industrial assets, Jagonal

quality locations is creating land use intensification. We are increasingly seeing a shift towards multi-storey industrial facilities or changes of use to commercial and residential²⁸.”

If this trend was duplicated within Canterbury Bankstown it would imply that its employment precincts would have additional capacity through “upward redevelopment” over provided in its current undeveloped land supplies.

6.4.6 Motorway accessibility

The proximity of employment precincts to key transport routes has recently emerged as a key concern and priority for industrial occupiers. The preference for industrial tenants to be located close to a motorway was evident in recent CBRE research which found that for every additional minute drive closer to a motorway equated to a 2.1 per cent spike in rent. With occupiers paying on average \$3 per square metre more than those further away from a motorway²⁹.

The reasons for this locational preference stems from transport costs typically comprising a large share of an industrial businesses’ operational cost base compared to its rental cost. As such, an industrial business makes costs savings by locating themselves nearer to key infrastructure.

Canterbury Bankstown’s employment precincts are well positioned to leverage of this trend with all of the centres being located in close proximity to existing and planned transport corridors, particularly the M5 Motorway and major arterial east-west and north-south roads such as Henry Lawson Drive, Stacey Street/Rookwood Road, King Georges Road, the Hume Highway and Canterbury Road/Milperra Road.

²⁸ Goodman looks to go vertical, Carolyn Cummins – the Sydney morning herald

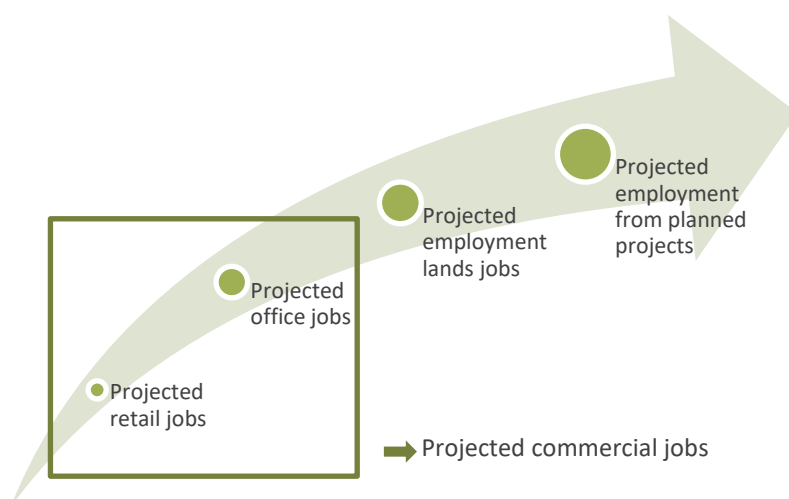
²⁹ CBRE - Motorway access drives rental shift in Sydney’s industrial powerhouse market, Natasha Pierson 2018

FUTURE DEMAND AND EMPLOYMENT

7.0 FUTURE DEMAND AND EMPLOYMENT

A staged approach has been adopted to projecting future demand for employment floorspace and job creation. Each stage relates to a different source of demand and employment as indicated in Figure 21.

Figure 21: Approach to employment projections



7.1 Projected commercial employment and floorspace

This section presents forecasts of the amount of additional retail and commercial office space that will be needed in the centres to support the current and future resident and worker population. The forecasts are based on recent trends. The forecasts do not include demand arising from major projects in the planning phase such as the planned University of Western Sydney campus in Bankstown and the potential relocation and expansion of Bankstown Hospital to Bankstown CBD. Employment from these projects is considered in section 7.1.

7.1.1 Methodology

The forecasts of demand for retail space by centre have been derived using resident and worker expenditure modelling. At a high level, the steps in the methodology include:

- Defining small geographical areas. In this case, Population id (small area boundaries) were used as this is the smallest area that the latest population forecasts for Canterbury Bankstown LGA that could be attained. Each small area approximately corresponds to a suburb or similar size
- Deriving expenditure data from MDS Marketinfo 2017 and forecasting expenditure generated by residents by small geographical area to 2026 and 2036
- Applying varying capture rates for each small geographical area to the strategic and local centres in relation to food expenditure (including food and groceries, liquor, fast-food and meals on premises) and non-food expenditure
- Making an allowance for expenditure derived from workers in the centres
- Dividing total estimated retail sales by industry benchmark turnover rates (which varies by centre size and by retail store type) to derive overall floorspace required.

The following was applied to estimate the growth in employment in each commercial centre:

- Employment projections for Canterbury Bankstown LGA prepared by Transport Performance and Analytics (TPA) were reviewed and assessed at ANZSIC 1-digit codes

- The ANZSIC 1-digit industry codes into broad industry sectors (as identified by the GSC)
- Retail employment from the population serving sector were subtracted
- Employment directed towards commercial centres, by broad industry sector, based on the current proportion generated by the combined commercial centres was estimated
- Estimate employment directed to individual centres based on their current proportion of employment by industry sector
- Applied observed and industry standard employment densities to individual industry sectors employment to estimate floorspace.

7.1.2 Retail

Demand for retail space is derived mainly from three sources being residents (household expenditure), workers and visitors or tourists. The vast majority of retail sales in the Canterbury Bankstown LGA are derived from residents. For the purpose of the modelling, interstate and international tourists have been excluded as the numbers are not significant, but some expenditure in some of the centres is captured from outside the LGA. Likewise, some resident expenditure escapes the LGA.

Table 24 Average expenditure per capita

	Food, Groceries & Liquor*	Drinks & Meals out**	Apparel	Bulky Goods***	Other Goods	Personal Services#	Total
Ashbury	5,181	2,214	2,244	2,138	2,264	460	14,501
Bankstown Balance	4,334	1,675	1,546	1,245	1,427	247	10,474
Bankstown CBD	4,502	1,688	1,660	1,512	1,832	284	11,479
Bass Hill - Lansdowne	4,701	1,373	1,496	1,606	1,998	280	11,455
Belfield	4,771	1,994	1,904	1,622	1,986	373	12,650
Belmore	4,671	1,817	1,711	1,326	1,651	291	11,468
Birrong, Regents Park, Potts Hill	4,388	1,663	1,641	1,396	1,700	272	11,060
Campsie - Clemton Park	4,390	1,893	1,653	1,251	1,469	274	10,929
Canterbury	4,905	2,416	2,071	1,637	2,155	400	13,584
Chester Hill	4,425	1,567	1,643	1,400	1,754	275	11,063
Condell Park - Aerodrome	4,399	1,671	1,607	1,481	1,697	295	11,150
Croydon Park (part)	5,038	2,259	2,092	1,800	2,148	430	13,768

	Food, Groceries & Liquor*	Drinks & Meals out**	Apparel	Bulky Goods***	Other Goods	Personal Services#	Total
Earlwood	5,112	2,170	2,115	1,932	2,208	426	13,963
Georges Hall	4,755	1,870	1,868	1,734	1,964	339	12,530
Greenacre, Mt Lewis, Chullora	4,381	1,561	1,615	1,374	1,589	286	10,806
Hurlstone Park	5,181	2,420	2,339	2,048	2,398	488	14,873
Kingsgrove	4,950	2,040	2,008	1,759	2,085	389	13,232
Lakemba	3,944	1,470	1,276	1,037	1,178	192	9,098
Milperra	5,369	2,276	2,261	2,093	2,646	428	15,073
Narwee - Beverley Hills	4,818	2,130	1,998	1,752	2,001	394	13,092
Padstow - Padstow Heights	5,038	2,140	2,029	1,807	2,206	396	13,616
Panania - East Hills	4,960	2,037	2,006	1,872	2,253	393	13,522
Picnic Point	5,324	2,357	2,303	2,187	2,526	458	15,156
Punchbowl	4,302	1,547	1,529	1,240	1,482	244	10,344
Revesby - Revesby Heights	4,776	1,973	1,945	1,679	2,058	370	12,802
Riverwood	4,502	1,657	1,784	1,387	1,746	299	11,376
Roselands	4,697	1,901	1,818	1,597	1,892	335	12,241
Sefton	4,299	1,549	1,579	1,428	1,622	264	10,740
Villawood	4,209	1,242	1,482	1,071	1,553	195	9,752
Wiley Park	4,228	1,672	1,444	1,168	1,308	224	10,044
Yagoona	4,466	1,662	1,638	1,435	1,685	281	11,167
TOTAL	4,756	1,878	1,812	1,563	1,860	325	12,193

* Includes take-away liquor

** Includes fast foods and meals and drinks in restaurants, clubs and hotels

*** Includes furniture, electrical goods, hardware, domestic appliances and the like

includes hair and beauty, clothing alterations, video hire and optical dispensing but does not include travel, real estate, financial and medical services

Sources: MDS Marketinfo 2017, ABS Household Expenditure Survey 2015-16

Converting household expenditure by small geographical area into retail sales at each centre is done by assuming varying capture rates. The next two tables below show the assumed capture rates for food, grocery and liquor (FGL) shopping and non-FGL shopping. Totals will generally be 90 per cent or less because residents' shop outside the LGA, close to work and when they are away (travelling).

Table 25 Assumed capture rates for FGL household expenditure

	DESTINATION RETAIL CENTRE																		
TRAVEL ZONE	Banks-town	Rose-lands	Campsie	Earlwood	Canter-bury	Clemton Park	Belmore	Lakemba	Punch-bowl	Green-acre	Chullora	Chester Hill	Bass Hill	Georges Hall	Revesby	Padstow	Panania	Other	TOTAL
Ashbury			30%		25%													8.5%	64%
Bankstown Balance	75%									10%								8.5%	94%
Bankstown CBD	85%																	8.5%	94%
Bass Hill - Lansdowne	15%												70%					8.5%	94%
Belfield			20%				30%	25%										8.5%	84%
Belmore			10%				45%	25%										8.5%	89%
Birrong - Regents Park - Potts Hill	40%											10%	20%					8.5%	79%
Campsie - Clemton Park			60%			20%	5%											8.5%	94%
Canterbury			25%		55%													8.5%	89%
Chester Hill	10%											70%						8.5%	89%
Condell Park - Bankstown Aerodrome	70%																	8.5%	79%
Croydon Park (part)			40%															8.5%	49%
Earlwood			5%	60%		5%												8.5%	79%
Georges Hall	5%												25%	50%				8.5%	89%
Greenacre - Mount Lewis - Chullora										35%	50%							8.5%	94%
Hurlstone Park			10%		30%													8.5%	49%
Kingsgrove			10%			20%	20%											8.5%	59%
Lakemba		10%						60%	10%									8.5%	89%
Milperra	20%														20%		15%	8.5%	64%
Narwee - Beverley Hills		15%																8.5%	24%
Padstow - Padstow Heights															30%	50%		8.5%	89%
Panania - East Hills	10%														35%		35%	8.5%	89%
Picnic Point	10%														70%			8.5%	89%
Punchbowl	5%	10%							60%	10%								8.5%	94%
Revesby - Revesby Heights	5%														70%			8.5%	84%
Riverwood	10%	15%																8.5%	34%
Roselands		70%																8.5%	79%
Sefton	30%											50%						8.5%	89%
Villawood												35%	35%					8.5%	79%
Wiley Park		15%						20%	40%	10%								8.5%	94%
Yagoona	40%												40%					8.5%	89%
From Beyond and from local Workers	7.5%		4%	12%	12%	5%	5%	11%	5%	4%	40%	4%	4%	4%		4%	4%		

Table 26 Assumed capture rates for Non-FGL household expenditure

TRAVEL ZONE	DESTINATION RETAIL CENTRE																		
	Banks-town	Rose-lands	Campsie	Earlwood	Canter-bury	Clemton Park	Belmore	Lakemba	Punch-bowl	Green-acre	Chullora	Chester Hill	Bass Hill	Georges Hall	Revesby	Padstow	Panania	Other	TOTAL
Ashbury			25%		8%													4.5%	38%
Bankstown Balance	60%								5%	3%	5%							4.5%	78%
Bankstown CBD	65%																	4.5%	70%
Bass Hill - Lansdowne	45%												30%					4.5%	80%
Belfield			25%				10%	14%										4.5%	54%
Belmore			30%				20%	14%										4.5%	69%
Birrong - Regents Park - Potts Hill	45%											15%	10%					4.5%	75%
Campsie - Clemton Park			50%			8%	5%											4.5%	68%
Canterbury			30%		18%													4.5%	53%
Chester Hill	45%											30%						4.5%	80%
Condell Park - Bankstown Aerodrome	55%																	4.5%	60%
Croydon Park (part)			30%															4.5%	35%
Earlwood			20%	20%		3%												4.5%	48%
Georges Hall	45%												10%	20%				4.5%	80%
Greenacre - Mount Lewis - Chullora	20%	20%							5%	12%	25%							4.5%	86%
Hurlstone Park			20%		10%													4.5%	35%
Kingsgrove		20%	10%			8%	7%											4.5%	49%
Lakemba		40%	5%					20%	10%		5%							4.5%	85%
Miperra	45%														7%		5%	4.5%	61%
Narwee - Beverley Hills		40%																4.5%	45%
Padstow - Padstow Heights	45%														10%	17%		4.5%	76%
Panania - East Hills	45%														12%		12%	4.5%	73%
Picnic Point	45%														23%			4.5%	73%
Punchbowl	25%	30%							25%	3%								4.5%	88%
Revesby - Revesby Heights	45%														23%			4.5%	73%
Riverwood		50%																4.5%	55%
Roselands		70%																4.5%	75%
Sefton	45%											25%						4.5%	75%
Villawood	45%											12%	15%					4.5%	76%
Wiley Park		50%						7%	20%	3%								4.5%	85%
Yagoona	55%												18%					4.5%	78%
From Beyond and from local Workers	7.5%	5%	4%	12%	12%	5%	5%	11%	5%	4%	50%	4%	5%	4%		4%	4%		67%

Some level of retail sales in the centres is expected to come from non-resident workers. A recent survey by Urbis found that workers in CBD locations like Sydney, North Sydney and Parramatta spend close to \$10,500 per annum on retail goods and services close to their workplace. CBDs have a much stronger and wider retail offer and hence you would expect lower spend levels in the Canterbury Bankstown LGA. For the purpose of the modelling, a lower rate from \$2,000 to \$4,000 per worker based on the size of the retail offer in the centres has been adopted.

A lower capture rate of 22 per cent was applied to bulky goods stores (furniture, large electrical appliances, hardware, etc) as the majority of this expenditure is captured by bulky goods outlets in out-of-centre locations.

Combining the captured retail sales from expenditure generated by residents, from residents outside the LGA and workers at each of the major and local centres are shown in the table below.

Table 27 Estimated Retail Sales (\$m in 2018 dollars)

Centre	Food, grocery & liquor Stores	Meals out Restaurants take-aways, etc	Department and Apparel Stores	Bulky Goods Stores	Other Non-Food Goods	Selected Personal Services	TOTAL
Bankstown	281.2	106.2	185.4	36.3	197.3	33.0	839.4
Roselands	72.9	28.7	68.1	12.5	66.7	11.6	260.5
Campsie	129.5	56.4	59.4	10.6	57.1	10.7	323.7
Earlwood	64.7	27.5	8.9	1.8	9.3	1.8	114.0
Canterbury	40.6	19.5	5.8	1.1	6.0	1.2	74.1
Clemton Park	38.6	16.5	6.4	1.1	6.0	1.1	69.7
Belmore	53.2	21.4	9.7	1.7	9.3	1.7	96.9
Lakemba	84.8	32.5	11.8	2.1	11.2	1.9	144.4
Punchbowl	86.5	31.9	18.0	3.2	17.1	2.9	159.5
Greenacre	62.6	22.7	7.6	1.4	7.3	1.3	102.9
Chullora	79.7	28.4	19.2	3.6	18.7	3.3	152.8
Chester Hill	63.6	22.3	11.1	2.1	11.7	1.8	112.6
Bass Hill	91.0	31.0	14.1	2.9	16.0	2.5	157.4
Georges Hall	23.3	9.2	3.7	0.7	3.8	0.7	41.3
Revesby	138.0	58.0	18.9	3.7	20.5	3.7	242.9
Padstow	45.9	19.5	6.2	1.2	6.7	1.2	80.6

Panania	32.9	13.5	4.4	0.9	5.0	0.9	57.6
OTHER	146.2	57.7	29.5	5.6	30.3	10.0	279.2
TOTAL	1535.0	602.7	488.1	92.5	500.1	91.2	3309.6

Source: estimate from expenditure data

In forecasting expenditure, it was assumed that real expenditure per capita on food, groceries and food services would increase at 1 per cent per annum and non-food goods would increase at 0.5per cent per annum. This generally accords with the long-term trend since 1986 (sourced from various data sources including ABS retail sales, population and CPI rates). From population growth and forecast growth in jobs the following forecast of expenditure was derived.

Table 28 Forecast Potential Retail Sales (\$m in 2036 dollars)

Centre	Food, grocery & liquor Stores	Meals out Restaurant s take-aways, etc	Department and Apparel Stores	Bulky Goods Stores	Other Non-Food Goods	Selected Personal Services	TOTAL	Forecast Growth from 2018
Bankstown	443.4	167.5	230.5	43.6	255.5	46.6	1187.0	41%
Roselands	104.3	41.0	86.6	15.7	88.3	16.8	352.8	35%
Campsie	192.7	84.0	76.4	13.5	76.4	15.7	458.7	42%
Earlwood	79.2	33.6	9.6	1.8	10.4	2.2	136.8	20%
Canterbury	67.3	32.4	8.4	1.4	9.1	1.9	120.6	63%
Clemton Park	54.2	23.2	7.8	1.4	7.6	1.6	95.7	37%
Belmore	77.1	30.9	12.5	2.1	12.4	2.5	137.4	42%
Lakemba	119.5	45.7	14.7	2.4	14.6	2.7	199.7	38%
Punchbowl	131.3	48.3	23.4	4.2	23.2	4.3	234.7	47%
Greenacre	88.4	32.1	9.4	1.7	9.5	1.8	143.0	39%
Chullora	108.6	38.7	23.3	3.0	23.5	4.6	201.7	32%
Chester Hill	81.4	28.5	12.8	2.4	14.0	2.4	141.5	26%
Bass Hill	113.8	39.1	15.6	3.2	18.3	3.1	193.0	23%
Georges Hall	28.7	11.3	4.0	0.8	4.3	0.8	49.8	21%
Revesby	174.5	73.3	20.9	4.3	23.8	4.6	301.5	24%

Centre	Food, grocery & liquor Stores	Meals out Restaurants take-aways, etc	Department and Apparel Stores	Bulky Goods Stores	Other Non-Food Goods	Selected Personal Services	TOTAL	Forecast Growth from 2018
Padstow	59.2	25.1	7.0	1.4	7.9	1.6	102.1	27%
Panania	42.2	17.4	5.0	1.0	5.9	1.1	72.6	26%
OTHER	206.9	81.7	36.6	7.2	39.0	7.4	378.9	36%
TOTAL	2172.6	853.8	604.4	111.3	643.8	121.6	4507.5	36%

Source: Estimate based on expenditure data and population forecasts

The above table shows that significant growth is expected in the areas of planned high growth – mainly the train station sites of Canterbury, Campsie, Punchbowl and Bankstown.

Required floor space was calculated from dividing potential retail sales by target Retail Turnover Density (RTD) levels (\$/m²). Target RTDs are industry benchmark levels and vary depending on the size and location of centres (higher RTDs are required in areas of higher real estate values) and the type of retail store (higher RTDs are required for stores with higher cost of goods, operating costs and lower margins such as supermarkets). Average assumed RTDs are shown in Table 29.

Table 29 Average required retail turnover density

Store Type	Average Target RTD
Super-markets	11,323
Specialty Foods	9,964
Take-away Foods	8,603
Cafes, restaurants, clubs, etc	4,976
Department Stores	3,250
Apparel Stores	6,495
Bulky Goods	3,253
Other Non-Food Goods	5,578
Selected Personal Services	4,143
TOTAL	6,773

7.1.3 Office

This section forecasts the demand for additional employment space in offices in the commercial centres of Canterbury Bankstown LGA over the next 17 years (2019-2036).

The basis for these projections has been the Transport Performance Analytics (TPA) 2016 employment forecasts.

The following methodology was applied to estimate the growth in employment, by broad industry sectors, for each commercial centre:

1. Assessed TPA employment projections by ANZSIC 1-digit codes for the LGA
2. Grouped the ANZSIC 1-digit industry codes into broad industry sectors
3. Estimate employment directed towards commercial centres, by broad industry sector, based on the current proportion generated by the combined commercial centres
4. Subtract retail employment from the population serving sector
5. Estimate employment directed to individual centres based on their current proportion of employment by industry sector
6. Apply observed and industry standard employment densities to individual industry sectors employment to estimate floorspace.

Over the next 18 years, total employment in the LGA is projected to increase by around 24,200 jobs. However, not all of these jobs would be directed or accommodated within the commercial centres.

Table 30 TPA employment projections 2019-2036, Canterbury Bankstown LGA

Industry	2019	2026	2036	Change 2019-36	% Commercial Centres	Increase in Jobs
Agriculture, Forestry and Fishing	91	88	85	-6	50%	-3
Mining	46	50	56	10	25%	3
Manufacturing	17,890	17,990	17,925	34	0%	-
Electricity, Gas, Water and Waste Services	1,219	1,455	1,698	479	10%	48
Construction	11,882	13,040	14,845	2,963	50%	1,481
Wholesale Trade	6,279	6,153	6,211	-68	30%	-20
Retail Trade	13,059	13,994	15,649	2,590	85%	2,202
Accommodation and Food Services	7,006	7,758	8,944	1,938	95%	1,841
Transport, Postal and Warehousing	8,211	7,651	6,553	-1,658	0%	-
Information Media and Telecommunications	1,570	1,595	1,551	-18	95%	-18
Financial and Insurance Services	1,990	2,149	2,383	394	95%	374

Industry	2019	2026	2036	Change 2019-36	% Commercial Centres	Increase in Jobs
Rental, Hiring and Real Estate Services	1,749	1,951	2,237	488	70%	342
Professional, Scientific and Technical Services	4,927	5,561	6,577	1,650	90%	1,485
Administrative and Support Services	3,060	3,242	3,431	371	95%	353
Public Administration and Safety	4,989	5,527	6,233	1,244	95%	1,181
Education and Training	10,191	11,726	14,042	3,851	35%	1,348
Health Care and Social Assistance	13,960	15,991	19,251	5,291	35%	1,852
Arts and Recreation Services	1,180	1,287	1,454	273	70%	191
Other Services	5,576	5,774	6,122	546	50%	273
Total	114,875	122,985	135,247	20,373	63%	12,933

Source: TPA 2016 employment projections

At an assumed average of 18m² per worker (GLA) and a target of 6 per cent vacancy the LGA would require a further 170,000m² of additional office space to keep up with demand (say 190,000m² GFA).

7.1.4 Projected commercial floorspace - current trend

Using the above information and assuming an efficiency rate of 85per cent for retail and 88 per cent for office space the following areas were forecast:

Table 31 Required Floor space to 2036 by Centre

Centre	Retail Space		Commercial (Office)	
	2026	2036	2026	2036
Bankstown*	15,765	31,412	22,500	56,250
Roselands	0	1,176	1,136	2,841
Campsie	18,941	23,412	16,364	41,023
Earlwood	3,294	4,353	2,727	6,932
Canterbury	5,412	6,235	3,409	8,636
Clemton Park	4,824	5,882	4,091	10,227
Belmore	1,647	3,294	3,409	8,523
Lakemba	0	1,294	2,500	6,364
Punchbowl	0	0	1,477	3,636
Greenacre	0	0	114	341
Chullora	6,118	8,706	3,977	9,886
Chester Hill	588	1,882	1,591	3,977
Bass Hill	706	2,353	1,818	4,659
Georges Hall	1,176	1,529	1,364	3,409
Revesby	10,000	12,706	5,795	14,432
Padstow	0	0	1,250	3,068
Panania	706	1,412	1,477	3,864
Neighbourhood Centres	1,294	6,353	2,159	5,455
TOTAL	70,471	112,000	77,159	193,523

*projections based on current trends only. Does not include an allowance for planned hospital and university developments.

7.2 Demand for employment land and floorspace

The following Chapter projects the demand for employment lands within Canterbury Bankstown LGA to 2036. The basis of this analysis has been the TPA's 2016 employment projections.

7.2.1 Employment demand methodology

The methodology for projecting the demand for employment lands is as follows:

- Analysis of State Government employment projections at the LGA level
- Deduce the net growth/decline in employment at the ANSZIC 1-Digit industry level between 2019 and 2036
- Estimate the amount of employment directed towards employment precincts for each industry, based on the industry type, employment zonings, land use audit and market trends. Achieved by applying a proportion to the net growth/decline in employment at the ANZSIC 1-digit industry level, that is, what proportion of a particular industries net growth/decline in employment would be directed/accommodated in the study areas employment precincts. For example, 90-100 per cent of manufacturing would be expected to be directed towards employment precincts while 10-15 per cent of retail would be directed to the precincts
- Convert employment directed towards employment precincts to floorspace by applying industry standard employment densities to the net growth/decline by industry type
- Allocate the growth/decline in employment space to each employment precinct based on its current floorspace composition – for example, employment precinct with a higher proportion of floorspace would be allocated a greater proportion of the net growth/decline in floorspace.

7.2.2 Employment demand scenarios

The basis for projecting the demand for employment lands in the LGA has been the TPA's 2016 employment projections. At the time of this study, these were the most recent State Government projections.

Scenarios were developed based on these 2016 projections, these being:

- **Scenario 1** | applies the projected growth/decline in employment for the former LGAs of Canterbury and Bankstown as forecasted by the TPA
- **Scenario 2** | uses the TPA projections as a base, however, given that overall employment in the industry of transport, postal and warehousing has steadily increased in past 17 years and the TPA project a decrease – this scenario assumes relative static employment growth in this category over the forecast period. To account for increased automation in the manufacturing and transport, postal and warehousing industries its average amount of floorspace per employee has been increased by around 30 per cent.
- **Scenario 3** | applies the same methodology as Scenario 1 however, to account for increased automation in the manufacturing and transport, postal and warehousing industries its average amount of floorspace per employee has been increased by around 30 per cent.
- **Intervention Scenario 4** | through an increased intervention policy, Council has indicated that they could achieve an additional 7,500 jobs across their employment precincts. This scenario tests whether its employment precincts can accommodate this aspirational target by forecasting the additional space this target would require. To account for the mixture of employment within this employment target, this aspirational scenario applies an average employment density of 65m² to project the additional demand.

7.2.3 Employment projections by scenario

The TPA project that employment will increase by around 20,375 jobs or 18% over the next 17 years, reaching a total of around 135,250 jobs by 2036.

The TPA project a decline of around 1,660 jobs over the next 17 years in the industry of transport, postal and warehousing will. However, this industry has increased by around this amount (+1,670 jobs) over a five-year period to 2016.

Although this high employment growth is unlikely to continue into the future, Scenario 3 assumes this industry to have relative static growth over the forecast period. This increases overall employment over the period to 22,035 jobs or 19 per cent to around 137,035 jobs in 2036.

The following table provides a summary of the total and net growth in employment by scenario.

Please note that in Scenario 4, employment across the study areas employment precincts increases by 7,500.

Table 32 Employment projections by scenario

Industry	Scenario 1 and 3				Scenario 2			
	2019	2026	2036	Change 19-36	2019	2026	2036	Change 19-36
Agriculture, Forestry and Fishing	91	88	85	-6	91	87	85	-6
Mining	46	50	56	10	46	53	56	10
Manufacturing	17,890	17,990	17,925	34	17,890	17,932	17,925	34
Electricity, Gas, Water & Waste Ser.	1,219	1,455	1,698	479	1219	1,597	1,698	479
Construction	11,882	13,040	14,845	2,963	11,882	13,900	14,845	2,963
Wholesale Trade	6,279	6,153	6,211	-68	6279	6,207	6,211	-68
Retail Trade	13,059	13,994	15,649	2,590	13,059	14,819	15,649	2,590
Accommodation and Food Services	7,006	7,758	8,944	1,938	7,006	8,343	8,944	1,938
Transport, Postal and Warehousing	8,211	7,651	6,553	-1,658	8,337	8,340	8,341	4
Information Media and Telecom.	1,570	1,595	1,551	-18	1,570	1,583	1,551	-18
Financial and Insurance Services	1,990	2,149	2,383	394	1,990	2,255	2,383	394
Rental, Hiring and Real Estate Ser.	1,749	1,951	2,237	488	1,749	2,091	2,237	488
Professional, Scientific & Techn Ser.	4,927	5,561	6,577	1,650	4,927	6,039	6,577	1,650
Administrative and Support Services	3,060	3,242	3,431	371	3,060	3,325	3,431	371
Public Administration and Safety	4,989	5,527	6,233	1,244	4,989	5,844	6,233	1,244
Education and Training	10,191	11,726	14,042	3,851	10,191	12,878	14,042	3,851
Health Care and Social Assistance	13,960	15,991	19,251	5,291	13,960	17,556	19,251	5,291
Arts and Recreation Services	1,180	1,287	1,454	273	1,180	1,368	1,454	273
Other Services	5,576	5,774	6,122	546	5,576	5,922	6,122	546
Total	114,875	122,985	135,247	20,373	115,000	130,139	137,035	22,035

Source: TPA

7.2.4 Employment projections to floorspace

Industry standard benchmarks have been adopted to the proportion of employment directed towards the study areas employment precincts. The table below provides a summary of the net growth/decline in floorspace demand by industry for each scenario.

Table 33 Net floorspace change 2019-2036

Industry	Scenario 1	Scenario 2	Scenario 3
Agriculture, Forestry and Fishing	-279	-279	-279
Mining	752	752	752
Manufacturing	2,411	2,411	2,411
Electricity, Gas, Water and Waste Services	64,690	64,690	64,690
Construction	35,555	35,555	35,555
Wholesale Trade	-3,343	-3,343	-3,343
Retail Trade	11,657	11,657	11,657
Accommodation and Food Services	3,876	3,876	3,876
Transport, Postal and Warehousing	-	600	78,977
Information Media and Telecommunications	-28	-28	-28
Financial and Insurance Services	590	590	590
Rental, Hiring and Real Estate Services	8,788	8,788	8,788
Professional, Scientific and Technical Services	4,951	4,951	4,951
Administrative and Support Services	557	557	557
Public Administration and Safety	1,865	1,865	1,865
Education and Training	7,701	7,701	7,701
Health Care and Social Assistance	13,229	13,229	13,229
Arts and Recreation Services	1,639	1,639	1,639
Other Services	15,291	15,291	15,291
Total	-78,790	170,502	248,879

For Scenario 4 a net total floorspace of 487,500m² has been calculated based on the floor area required to support an additional 7,500 jobs.

7.2.5 Floorspace allocation by precinct

The total net growth in floorspace demand to each individual employment precinct within the study area has been proportioned. Please note that this has been done by the total amount of floorspace present in each precinct.

Table 34 Net change in floorspace by precinct and scenario

	Current floorspace	Floorspace projection 2036				Net change			
Precinct name	2019	Scenario 1	Scenario 2	Scenario 3	Scenario 4	Scenario 1	Scenario 2	Scenario 3	Scenario 4
Ashbury	17,528	17,242	18,147	18,431	19,296	-286	619	903	1,768
Belmore	24,371	23,974	25,231	25,626	26,830	-397	860	1,255	2,459
Canterbury Road, Campsie	14,109	13,879	14,607	14,836	15,532	-230	498	727	1,423
Chapel Street	32,422	31,893	33,566	34,092	35,693	-529	1,144	1,670	3,271
Chullora	755,862	743,537	782,534	794,794	832,122	-12,325	26,672	38,932	76,260
Clemton Park	87,437	86,011	90,522	91,941	96,259	-1,426	3,085	4,504	8,822
Condell Park	164,962	162,272	170,783	173,459	181,605	-2,690	5,821	8,497	16,643
Croydon Park	8,326	8,190	8,620	8,755	9,166	-136	294	429	840
Edward Dunlop Paper	16,462	16,194	17,043	17,310	18,123	-268	581	848	1,661
Greenacre Bowls	13,737	13,513	14,222	14,445	15,123	-224	485	708	1,386
Kingsgrove North	229,887	226,138	237,999	241,728	253,081	-3,749	8,112	11,841	23,194
Lakemba	82,019	80,682	84,913	86,244	90,294	-1,337	2,894	4,225	8,275
Leightonfield Station	677,159	666,117	701,054	712,037	745,478	-11,042	23,895	34,878	68,319
Milperra	542,467	533,621	561,609	570,408	597,197	-8,846	19,142	27,941	54,730
Padstow North	601,838	592,024	623,075	632,837	662,558	-9,814	21,237	30,999	60,720
Padstow South	233,816	230,003	242,067	245,859	257,406	-3,813	8,251	12,043	23,590
Punchbowl	2,721	2,677	2,817	2,861	2,996	-44	96	140	275
Punchbowl, Wattle Street	61,469	60,467	63,638	64,635	67,671	-1,002	2,169	3,166	6,202
Revesby	758,279	745,914	785,036	797,336	834,783	-12,365	26,757	39,057	76,504
Riverwood	289,366	284,648	299,577	304,270	318,560	-4,718	10,211	14,904	29,194
Sefton	184,498	181,490	191,008	194,001	203,112	-3,008	6,510	9,503	18,614
West Riverwood, Wiggs Road	33,207	32,666	34,379	34,917	36,557	-541	1,172	1,710	3,350
Total	4,831,942	4,753,152	5,002,444	5,080,821	5,319,442	-78,790	170,502	248,879	487,500

Source: GSC

7.2.6 Capacity assessment

The study area currently contains 22 employment precincts of varying size and scale. Combined these precincts cover around 965.9 hectares of land, if developed to their allowable FSR, a total theoretical maximum development capacity of around 9.7 million square metres of floorspace could be achieved.

However, this is unlikely as, due to various operational necessities, industrial type development are typically developed at between 0.5 to 0.75:1. This allows these uses to have space for turning vehicles, on site car parking and storage of materials or loading and unloading areas.

As such, a projected capacity within each precinct at 75 per cent of its allowable FSR has been applied. This results in a total capacity of around 7,244,355m².

Currently, it is estimated that the 22 precincts contain around 4.8 million square metres of employment floorspace resulting in a built FSR of 0.5:1. This results in a residual capacity of around 4.8 million square metres across the precincts.

- Scenario 1 results in over loss in employment floorspace. As such, residual capacity increases slightly across the precincts at around 2.49 million square metres.
- Under Scenario 2, there is an overall increase of around 170,500 square metres. This reduces capacity across the 22 precincts to around 2.24 million square metres.
- Under Scenario 3, there is an overall increase of around 248,880 square metres. This reduces capacity across the 22 precincts to around 2.16 million square metres.
- Under Scenario 4, there is an overall increase of around 487,500 square metres. This reduces capacity across the 22 precincts to around 1.92 million square metres.

Without undertaking a detailed assessment of constrained land, floorspace audit and an understanding of vacancy levels within the precincts, this high-level analysis that there is significant capacity within the study areas employment precincts.

It is noted that some precincts outlined below are made up of isolated industrial land parcels surrounded by residential development. Given the significant capacity for growth within other employment lands, these isolated industrial precincts may be considered in the future for development that is more sympathetic to the adjacent residential land uses. These sites include:

- 4-10 Gunya Street and 20-24 Auburn Road, Regents Park (recent rezoning from industrial to residential land south of the site, leaving this pocket of industrial land isolated)
- 149-165 Milton Street, Ashbury (currently subject of a Planning Proposal to rezone from Industrial to residential land uses)
- 15-29 Brighton Street, Croydon Park.

Table 35 Employment precinct capacity assessment

Precinct	Land area	Built FSR	Permissible FSR	Development capacity at 75% of maximum FSR	Residual capacity				
					Current	Scenario 1	Scenario 2	Scenario 3	Scenario 4
Ashbury	3.1	0.57	1	23,016	5,488	5,774	4,869	4,585	3,720
Belmore	3.7	0.65	1	27,930	3,559	3,956	2,699	2,304	1,100
Canterbury Road, Campsie	3.2	0.44	1*	23,810	9,701	9,931	9,203	8,975	8,278
Chapel Street	7.3	0.44	1	54,754	22,332	22,860	21,188	20,662	19,061
Chullora	210.0	0.36	1	1,574,682	818,820	831,145	792,148	779,888	742,560
Clemton Park	16.6	0.53	1	124,786	37,349	38,775	34,263	32,845	28,527
Condell Park	29.1	0.57	1	218,452	53,490	56,180	47,669	44,993	36,847
Croydon Park	1.5	0.56	1	11,059	2,733	2,869	2,439	2,304	1,893
Edward Dunlop Paper	2.9	0.58	1	21,446	4,984	5,253	4,403	4,136	3,323
Greenacre Bowls	4.2	0.33	1	31,247	17,510	17,734	17,026	16,803	16,124
Kingsgrove North	37.9	0.61	1	284,214	54,327	58,076	46,215	42,486	31,133
Lakemba	11.8	0.69	1	88,867	6,848	8,185	3,954	2,623	-1,427
Leightonfield Station	162.4	0.42	1	1,218,023	540,864	551,906	516,970	505,986	472,545
Milperra	102.4	0.53	1	767,756	225,289	234,134	206,147	197,348	170,558
Padstow North	94.7	0.64	1	710,050	108,212	118,025	86,975	77,213	47,492
Padstow South	45.3	0.52	1	339,502	105,686	109,498	97,435	93,643	82,096
Punchbowl	0.3	0.79	1	2,600	-122	-77	-218	-262	-396
Punchbowl, Wattle St	11.7	0.52	1	87,970	26,501	27,503	24,332	23,335	20,299
Revesby	132.7	0.57	1	995,379	237,100	249,465	210,343	198,043	160,596
Riverwood	49.3	0.59	1	369,749	80,383	85,101	70,172	65,478	51,188
Sefton	29.9	0.62	1	224,512	40,014	43,022	33,503	30,511	21,400
West Riverwood, Wiggs Road	5.9	0.56	1	44,554	11,347	11,888	10,175	9,636	7,996
Total	965.9	0.50		7,244,355	2,412,413	2,491,203	2,241,911	2,163,534	1,924,913

Source: GSC *no FSR identified assumed at 1:1

7.1 LGA employment projections

Table 36 combines the job projections for commercial centres, employment precincts and major developments (WSU and potential new hospital) and employment precincts to give job projections for the LGA under various scenarios. Up to 44,200 jobs could be created in the LGA to 2036. This is highly dependent upon the delivery of employment growth from planned projects in Bankstown CBD and Bankstown Airport. Without these major projects to stimulate employment generation, around 24,000 additional jobs would be expected.

Table 36: Forecast future employment, Canterbury Bankstown LGA

Employment scenario	2016	2026	2036	Net change	% Increase
Business as usual growth (employment precincts + business centres)	111,034	122,985	135,247	24,214	22%
Business as usual growth (employment precincts + business centres), plus Bankstown Airport Master Plan forecast growth	111,034	127,940	140,508	29,474	27%
Growth with intervention (employment precincts + business centres + Bankstown Airport Master Plan), using low growth scenarios for Bankstown and Campsie as per the South District Plan	111,034	137,773	146,748	35,715	32%
Growth with intervention (employment precincts + business centres + Bankstown Airport Master Plan), using high growth scenarios for Bankstown and Campsie as per the South District Plan	111,034	142,023	155,248	44,215	40%

PLANNING CONTROL REVIEW

8.0 PLANNING CONTROL REVIEW

This section reviews the Business and industrial zones in the Bankstown Local Environmental Plan and Canterbury Local Environmental Plan. The review is intended to assist the alignment of the instruments into a consolidated LEP.

8.1 Proposed zoning framework

The table below provides a suggested framework for applying employment zones throughout the LGA. It considers potential objectives and the existing functions of each zone, recommends changes to strengthen the zone and provides a rationale for those recommendations.

Key recommendations include:

Broadening mixed-use development types in B1 Neighbourhood Centre and B2 Local Centre zones

Residential flat buildings are currently permitted in BLEP 2015's and prohibited in CLEP 2012's B1 Neighbourhood Centre and B2 Local Centre zones. CLEP 2012 permits shop top housing in these zones. Due to the technicalities of the shop top housing use, it is only permitted where a retail premises or business premises is at the ground floor. This limits options for mixed use development above alternative uses, such as a medical centre, government customer service centre or other non-retail/business premises uses.

Residential flat buildings, without a ground floor non-residential use are not supported in B1 Neighbourhood Centre or B2 Local Centre zones. However, the use is recommended to be permissible, when combined with a ground floor non-residential use. This would promote delivery of vital services in mixed use development that may otherwise be pushed out by retail uses attached to shop top housing.

Residential uses in B6 Enterprise Corridor zones

Residential flat buildings are currently permitted in BLEP 2015's and prohibited in CLEP 2012's B6 Enterprise Corridor zone. The uses are permitted in BLEP 2015, only as part of a mixed-use development. The main purpose of the B6 zone is to promote a range of employment uses along major corridors. Allowing residential uses in the zone, even as mixed-use development, may limit potential above ground employment uses over time due to land use competition. In order to strengthen the employment qualities of the zone, it is recommended that all residential uses be prohibited.

It is also recommended that any B6 zoned land with existing residential uses be rezoned to a residential supporting zone that exists nearby, such as B2 Local Centre. This is recommended to reflect that existing mixed-use development is more reflective of an established centre-focused mixed-use enabling zone.

Consolidated tourist and visitor accommodation use

Serviced apartments are permitted in BLEP 2015's B1 Neighbourhood Centre, B2 Local Centre, B4 Mixed Use and B5 Business Development and B6 Enterprise Corridor zones. They are also permitted in CLEP 2012's B2 Local Centre zone. Tourist and visitor accommodation takes several important forms, supporting a range of employment uses. This may include backpacker's accommodation or hotels that cater to tourists, or serviced apartments that enable extended stays for workers.

It is recommended that tourist and visitor accommodation uses be consolidated into the B2 Local Centre, B4 Mixed Use and B6 Enterprise Corridor zones. This would focus tourist and visitor accommodation development in well serviced areas that are best suited for higher intensity accommodation uses and put visitors near services, or their ultimate employment destination. Lower intensity tourist and visitor accommodation uses,

specifically backpacker's accommodation, should be excluded from the B6 Enterprise Corridor zone, instead focusing on accommodation for visiting employees or clients of surrounding businesses.

Table 37: Recommended planning framework changes

Zone	Recommended objectives	Current functions	Change	Rationale
B1 Neighbourhood Centre	<ul style="list-style-type: none"> 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. To enable mixed use residential dwellings that are compatible with neighbourhood centre character. 	<ul style="list-style-type: none"> Small scale retail and business services Generally 1-10 shops Limited ground level and shop-top housing Serves the local walking catchment 	<ul style="list-style-type: none"> Permit residential only as shop-top housing or residential flat dwelling associated with non-residential ground floor use. Prohibit tourist and visitor accommodation. Permit only low intensity retail and services (e.g. neighbourhood shops, food and drink premises, business premises or medical centre) Permit small-scale early education facilities Consider rezoning intensive B1 zones to B2 Local Centre zones 	<ul style="list-style-type: none"> Prohibiting other forms of residential maintains the primary role of the centre for local convenience purposes and protects retail uses from potential displacement. Reducing intensity of visitor and commercial land uses promotes neighbourhood centres as walkable destinations for the local catchment
B2 Local Centre	<ul style="list-style-type: none"> 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. To encourage employment opportunities in accessible locations. To maximise public transport patronage and encourage walking and cycling. To provide for residential uses as part of commercial development. 	<ul style="list-style-type: none"> Access to goods and services for the local community. Generally transit-oriented or easily accessible by private vehicle. Supported by office premises, health, civic and occasional light industry. Residential accommodation primarily as part of shop-top/mixed use development. 	<ul style="list-style-type: none"> Permit shop-top housing, seniors housing and residential flat buildings where commercial premises are provided on the ground floor (requires additional local provision mechanism similar to BLEP 2015 Clause 6.9 and non-residential FSR). Consider permitting selected light industrial uses on the periphery of B2 zones interfacing with higher order business (B5/B6/B7) and light industrial zones. 	<ul style="list-style-type: none"> Enabling mixed use residential accommodation as part of all commercial development types would allow increased residential density while maintaining ground floor uses for non-residential purposes. Selected Light industrial land uses allow for low intensity manufacturing and processing activities, including high technology and artisan food and drink industries. These uses are not permitted to interfere with local amenity. Permitting light industrial land uses would increase the diversity of employment opportunities well suited for local centres.
B3 Commercial Core	<ul style="list-style-type: none"> To provide a wide range of retail, business, office, entertainment, community and other suitable land uses that serve the needs of the local and wider community. To encourage appropriate employment opportunities in accessible locations. To maximise public transport patronage 	<ul style="list-style-type: none"> Does not currently exist in the LGA. 	<ul style="list-style-type: none"> Establish a commercial core zone to protect an area for the long-term supply of commercial floorspace 	<ul style="list-style-type: none"> Failure to protect land for commercial uses could result in the CBD being dominated by strata titled residential development that locks out the potential for significant commercial floorspace

Zone	Recommended objectives	Current functions	Change	Rationale
	and encourage walking and cycling.			
B4 Mixed Use	<ul style="list-style-type: none"> To provide a mixture of compatible land uses. To integrate suitable business, office, residential, retail and other development in accessible locations so as to maximise public transport patronage and encourage walking and cycling. 	<ul style="list-style-type: none"> Primary zoning of Bankstown precinct. Provides a mix of commercial uses and residential accommodation. Relatively high level of commercial-only buildings around the civic centre 	<ul style="list-style-type: none"> Promote the B4 Mixed Use zoning in areas well suited for a mix of high intensity residential and commercial uses. Consider inclusion of additional local provisions relating to non-residential FSR minimums or podium-level uses. Consider inclusion of DCP provisions relating to ground level floor to ceiling heights minimums 	<ul style="list-style-type: none"> The B4 Mixed Use zone is generally used to encourage high intensity residential uses, promoting redevelopment due to the relative value of residential and commercial uses. Establishing additional local provisions that encourage the development of high-quality commercial uses at the ground and podium level of developments maximises the likelihood of successful tenancies in those spaces.
B5 Business Development	<ul style="list-style-type: none"> To enable a mix of business and warehouse uses, and specialised retail premises that require a large floor area, in locations that are close to, and that support the viability of, centres. To support urban renewal that encourages an increased use of public transport, walking and cycling. 	<ul style="list-style-type: none"> Multiple uses in former Canterbury and Bankstown Council areas Bankstown area generally supports urban services and outlets or 'Homemaker centres' Canterbury area serves a mix of main road uses, including urban services, hotels and mixed use. 	<ul style="list-style-type: none"> Prohibit all residential accommodation uses Prohibit all tourist and visitor accommodation uses Permit certain commercial uses to support the 'homemaker centre' use Rezone B5 elements of Hume Highway and Canterbury Road, east of Punchbowl Road to B2 or B6, depending on proximity to existing centres Maintain B5 elements of Canterbury Road, West of Punchbowl Road 	<ul style="list-style-type: none"> The B5 Business Development zone lands on Hume Highway and Canterbury Road, east of Punchbowl Road is highly fragmented and would be better suited to: <ul style="list-style-type: none"> expand B2 Local Centres which are either spatially constrained or fragmented; or expand B6 Enterprise Corridor centres that are suited to main road development The B5 Business Development zone lands on Canterbury Road, west of Punchbowl Road serve generally as 'homemaker centres' that are primarily outlets and supporting retail/services.
B6 Enterprise Corridor	<ul style="list-style-type: none"> To promote businesses along main roads and to encourage a mix of compatible uses. To provide a range of employment uses (including business, office, retail and light industrial uses). To maintain the economic strength of centres by limiting retailing activity. To facilitate the revitalisation of main roads and create an 	<ul style="list-style-type: none"> Facilitates employment uses along major road corridors, including business and office premises. Vehicle-oriented services such as service stations, repair stations and vehicle sales/hire. Occasional mixed-use development 	<ul style="list-style-type: none"> Prohibit all residential accommodation uses. Permit serviced apartments (and mandated Hotel or motel accommodation). Permit certain commercial uses to promote large lot businesses and supporting neighbourhood shops/food and drink premises suitable for main roads. Identify sites with residential uses in the zone and rezone to alternate residential appropriate zone (e.g. B2 Local Centre or similar). 	<ul style="list-style-type: none"> The B6 Enterprise corridor is designed to promote commercial and light industrial uses along main roads, such as Canterbury Road and Hume Highway. Prohibiting residential and low-density tourist and visitor accommodation (e.g. backpackers' accommodation) will enable the zone to focus on the provision of employment and services while also minimising reverse-amenity issues (except as recommended by the Canterbury Road review).

Zone	Recommended objectives	Current functions	Change	Rationale
	<ul style="list-style-type: none"> attractive streetscape supported by buildings of a high standard of design. To support urban renewal and a pattern of land use and density that reflects the existing and future capacity of the transport network. 			<ul style="list-style-type: none"> Land that has transitioned to mixed use should be considered for rezoning to B2 or B4, with the goal of supporting local centres in the long term.
B7 Business Park	<ul style="list-style-type: none"> To provide a range of office and light industrial uses. To encourage employment opportunities. To enable other land uses that provide facilities or services to meet the day to day needs of workers in the area. 	<ul style="list-style-type: none"> The B7 Business Park zone is applied to lands surrounding the Potts Hill Reservoirs Site, effectively used by Sydney Water and Ausgrid to support critical infrastructure. 	<ul style="list-style-type: none"> No change. 	<ul style="list-style-type: none"> While there is potential to extend the Special Purposes zone to include the B7 Business Park zone, existing uses appear to conform with the objectives of the zone.
IN1 General Industrial	<ul style="list-style-type: none"> To provide a wide range of industrial and warehouse land uses. To encourage employment opportunities. To minimise any adverse effect of industry on other land uses. To support and protect industrial land for industrial uses. 	<ul style="list-style-type: none"> Provides local, district and regional manufacturing, processing and storage Support services for the airport Major economic and employment generation for the Greater Sydney area 	<ul style="list-style-type: none"> Protect remaining industrial zones Prohibit pubs, small bars and registered clubs Consider prohibiting or establishing floor space limits on restaurant and café land uses via additional local provisions Consider prohibiting large lot commercial uses (e.g. timber yards and landscaping material supplies) and registered clubs 	<ul style="list-style-type: none"> The IN2 Light Industrial zone generally applies to lands on the periphery of IN1 General Industrial zones, providing a buffer with neighbouring residential lands Industrial land should not be rezoned to residential or businesses, ensuring future provision of manufacturing and employment capacity Takeaway food and drink and restaurant and café land uses should be permitted as necessary to support local workers, with the understanding that they are a potential source of land use conflict with industrial land uses. Limiting their size will help mitigate these effects. Pubs, small bars and registered clubs are more likely to compete with traditional industrial land uses, potentially changing the character of the area and displacing those uses. Commercial uses that require large lots but do not otherwise have potential amenity issues (e.g. timber yards and landscaping material supplies) reduce the overall industrial

Zone	Recommended objectives	Current functions	Change	Rationale
				capacity of IN1 General Industrial zones and may be better suited to neighbouring IN2 Light Industrial zones, designed for low-impact uses.
IN2 Light Industrial	<ul style="list-style-type: none"> To provide a wide range of light industrial, warehouse and related land uses. To encourage employment opportunities and to support the viability of centres. To minimise any adverse effect of industry on other land uses. To enable other land uses that provides facilities or services to meet the day to day needs of workers in the area. To support and protect industrial land for industrial uses. 	<ul style="list-style-type: none"> Provides low-impact industrial and support services for the local and district area. Supports land uses that require large lots with lower relative land costs Provides an employment and service-centred buffer between general industrial uses and residential lands. 	<ul style="list-style-type: none"> Protect remaining industrial zones Prohibit pubs, small bars and registered clubs Consider prohibiting or establishing floor space limits on restaurant and café land uses via additional local provisions 	<ul style="list-style-type: none"> The IN2 Light Industrial zone generally applies to lands on the periphery of IN1 General Industrial zones, providing a buffer with neighbouring residential lands

8.2 Review of planning controls

8.2.1 Protect employment lands and strengthen centres

There is increasing competition within the centres and along the main road corridors for the provision of medium and high-density dwellings as part of shop top housing and as part of mixed-use developments. This housing demand has, over time, the capacity to reduce the supply of employment land and/or to reduce the availability of well serviced and accessible sites for employment activities. The role of the centres in addition to providing jobs and housing, is to provide locally serving retail, services and entertainment to support the growing population around these centres. Providing housing in the centres contributes to the trade catchment of these activities which supports the vibrancy and viability of these centre. To ensure commercial activity is maintained as the primary function of the centres, objectives and controls should be included within the LEP which will protect commercial activities.

Along the major road corridors of Canterbury Rd, Georges River Rd, King Georges Rd, Punchbowl Rd and Hume Highway with sites zoned B1 and B2 and under Canterbury LEP B5 shop top housing is permitted. These roads are also major arterial roads with good access to motorways, airports and ports. The effective movement of freight along these roads is important. This significant traffic movement makes the amenity of these locations undesirable for housing. It is recommended that density controls be set to deter shop top housing in B1 zoned centres along these major roads and that B5 going forward either not allow shop top housing (currently permissible under Canterbury LEP) or be rezoned to B6 to focus development on commercial uses rather than the provision of residential accommodation.

8.2.2 Support urban services land particularly around strategic assets

Urban services land is located across Canterbury Bankstown LGA, industrial zoned land is located adjacent to strategic assets including Bankstown Airport and Milperra collaboration area and the emerging health and education precinct. Industrial uses alongside these assets supports these assets by allowing supporting urban services activities in close proximity. For example, Chullora business park can build on the close proximity of Bankstown Airport and the Western Sydney University by specialising into Chullora Technology Park. As manufacturing declines, it will be important for established industrial precincts to retain this land, support the restructuring of the manufacturing sector and identify future employment land needs.

When reviewing the LEPs, flexible and innovative application of zoning, permissible uses and development controls should be considered to allow for flexibility for businesses to evolve over time. For instance, in Chullora Technology Park amending the planning controls to permit conference facilities and business services will be important and will facilitate transitioning this precinct into a flexible contemporary technology precinct. Such a transition however should maintain Chullora's important freight, transport and logistics hub and not compromise its ongoing industrial land use.

Employment precincts are generally poorly serviced with childcare centres, convenience retail and services, public transport and have a low level of amenity. Providing small areas of retail, childcare and personal services in employment precincts would assist workers to undertake day to day tasks. To support the amenity of these employment/urban services precincts Council should consider opportunities for public domain improvements. When reviewing the LEP a review of the permitted uses within the IN zones should ensure that these convenience retail and services uses are permitted however it will be critical to cap the area and number of these uses so as to not support out of centre development.

To complement LEP changes, ongoing monitoring and management of employment lands is appropriate. In particular, important urban services land at Chullora (south of Chullora Business Park), Milperra and Padstow should be protected for urban services uses. This could be done by providing a clear statement as to the identity and future role of these precincts within Council's DCP.

In reviewing how best to support urban services land, the Bankstown Strategic Centre and Bankstown Airport and Milperra collaboration area and supporting health and education precinct should be prioritised. Working with the NSW Government and land owners, Council should seek out opportunities to grow these employment precincts as a priority.

8.2.3 Density controls across the LEPs

Canterbury LEP does not apply FSR within its local and neighbourhood centres. The centres of the Former Canterbury Council rely on height. The centres of former Bankstown Council include both height and FSR to guide future development. Under a harmonised LEP for Canterbury Bankstown a consistent approach to controlling the size of development is recommended. Given that a comprehensive master planning process is proposed for the centres along the metro line the setting of building envelopes translated into FSR for these centres is recommended. Additionally, it is noted that there is a mismatch between the height and FSR set for some of the centres within Bankstown LEP. The centres of Yagoona, Sefton and Chester Hill have an FSR that cannot not be achieved under the maximum height after setbacks and separation between dwellings (shop top housing) is factored in. Given the distance of these centres from Sydney CBD it is recommended that the FSR be reduced to align to the current maximum height.

8.2.4 Minimum lot width controls within the DCP (overcoming land fragmentation)

Both DCPs applying across the LGA include minimum lot width controls when seeking to redevelop within centres. These controls are different with Bankstown DCP requiring a lower minimum lot width for commercial development however where the development includes more than three dwellings its minimum lot width is higher (6m and 26m respectively). Canterbury DCP requires 18m (B1 or B2) and 30m for B5. It is suggested that this requirement be reviewed when a single DCP is being prepared. A more tailored approach to minimum lot width that reflects the dominant lot width of each centre would better address the issue of land fragmentation reducing redevelopment. For centres along the metro line redevelopment is encouraged and so it is suggested that a smaller minimum lot width of potentially 10m be tested. Given these centres will have excellent access to mass transit opportunities to reduce or not require parking within 400m of the stations would provide more sustainable outcomes, result in more affordable development and would facilitate renewal as lot consolidation is generally difficult to achieve. It is recommended that a review of residential accommodation outside of the centres along major roads be reconsidered. As part of this, the need to set a minimum lot width could be reviewed as large mixed use/shop top housing is generally not desirable along these major arterial roads where employment uses should be encouraged.

8.2.5 Centres hierarchy

This report supports the centres hierarchy outlined below.

Hierarchy	Centres	Future role
City Centre	Bankstown	The city centre is the highest order centre in the Canterbury Bankstown LGA, comprising a mix of retail, commercial, administrative and community facilities. The centre will emerge into an employment and economic generator specialising in health and education, servicing a metropolitan wide catchment.
Town Centre	Campsie	Campsie currently operates as a town centre but has been identified as a strategic centre for significant growth in the future. This report proposes the establishment of Campsie as a specialised lifestyle precinct.

Hierarchy	Centres	Future role
Local centre	Canterbury Belmore Lakemba Padstow Revesby Chester Hill Greenacre Yagoona Earlwood	These town centres provide essential access to day to day goods and services close to where people live. They are serviced by good public transport which increases their accessibility from the surrounding community. The town centres provide a mix of retail, commercial and community space with retail space anchored by a supermarket.
Village centre	Punchbowl Wiley Park Canterbury Road-Hurlstone Park Canterbury Road-Campsie Canterbury Road-Belmore Canterbury Road-Lakemba Canterbury Road-Punchbowl Narwee Clemton Park Yagoona-Hume Highway/Rookwood Road	Neighbourhood centres provide a range of small-scale retail and other services that serve the convenience needs of people that live and work in the surrounding neighbourhood. Higher order retail and commercial uses that serve the wider community are not located in neighbourhood centres. Neighbourhood centres generally comprise less than 2,000 m2
Small Village Centre	Bass Hill Regents Park Georges Hall Condell Park Hurlstone Park Birrong East Hills Belfield Croydon Park Sefton Panania	A small cluster of convenience shops, typically with a focus on convenience food items and/or services
Stand Alone Shopping Centres	Chullora Marketplace Roselands	Stand-alone centres provide for the weekly or monthly shopping needs of the local community. They generally serve a broader catchment and provide a diversity of retail uses including department and grocery stores.

There are inconsistencies between LEP's as to how centres are zoned. Some centres are zoned B2 local centre zoning, but they have attributes of a neighbourhood centre. Centres with zonings that are inconsistent with the centres hierarchy above are outlined below

Centres that could be investigated for neighbourhood centre zoning and densities B1 Neighbourhood Centre:

- Sefton
- Georges Hall
- East Hills
- Belfield (lower density already)
- Croydon Park
- Hurlstone Park
- Condell Park

Centres that could be investigated for B2 local centre zoning

- Clemton Park
- Bass Hill

Stand-alone centres that could be investigated for an alternative zoning that provides greater flexibility and aligns to the centres hierarchy (potentially B4 Mixed Use)

- Roselands
- Chullora Market Place

A number of centres have density provisions that do not reflect the hierarchy of that centre or align to the objectives of the zone.

- Condell Park – a density of 2:1 and a maximum height of 11m is not feasible. Additionally, the density of 11m reflects a neighbourhood centre (B1) and not a local centre. It is recommended that the density controls be lowered and rezoning the centre to B1 investigated.
- Croydon Park is identified as a neighbourhood centre within the centres hierarchy. This centre is locally serving. It is recommended that the future zoning of the centre be reviewed to align it to its tier within the hierarchy (B1). Additionally, the height of the centre is set at 18m which given the low level of public transport accessibility of this centre (1.7km to Campsie station) it is recommended that the maximum height be reduced to 11m.
- Hurlstone Park is currently zoned B2, within the centres hierarchy it has been identified as a neighbourhood centre. To provide consistent messaging about the future direction and role of the centre it is suggested that the zoning of the centre be reviewed. A B1 zoning with a maximum height of 11m may be more appropriate for this centre with strong architectural character.

8.2.6 Development Control Plans

As with the Local Environmental Plans Canterbury-Bankstown LGA is still working to harmonise the two development control plans of the amalgamated councils.

8.2.6.1 Bankstown DCP 2015

Bankstown DCP was adopted in 2014, and then updated in 2015 to align with the gazettal of the LEP. The DCP was written to provide additional objectives and development controls to enhance the function, appearance and amenity of development within the then LGA.

For commercial centres the DCP is structured around the types of centres (reflective of business land use zones). The DCP sets desired character objectives to complement the LEP objectives. The overarching objective for centres is to encourage employment opportunities in accessible locations, maximise public transport patronage and encourage walking and cycling. Traditionally in local centres there have been two storeys of commercial with residential above. Along the enterprise corridors commercial development is encouraged however residential is also allowed. Generally, the function and future uses of the centres needs to respond to the centres hierarchy set by the land use zoning. The minimum primary frontage for commercial development, shop top housing (containing a single dwelling), and mixed-use development (that do not contain dwellings) with 2 or more storeys is 6 metres. The minimum primary frontage for shop top housing and mixed-use development including residences with 3 or more storeys is 26 metres.

Industrial precincts are covered in a separate section. The section provides building envelopes, design requirements and specifically identified Chullora Technology Park and a key site in Greenacre. The DCP supplements the LEP by providing additional objectives and development controls for development within the IN and In2 zones to enhance the function and appearance of industrial precincts in the Former Bankstown LGA. The development controls include setbacks and building design.

8.2.6.2 Canterbury DCP 2012

Canterbury DCP was adopted in 2012 to align with the gazettal of the LEP. The DCP's purpose is to provide detailed objectives and controls to guide the form of development across the former Canterbury LGA. The overall objectives of the DCP are focused on enhancing amenity, ensuring development is well-designed, compatible with its context and protection of natural features and the environment. Most of the centres retain the fine grain character that comes from consistent building scale, proportions and materials in the narrow frontages and strong parapet shopfronts. The DCP states that the community generally values these attributes that contribute to the character of Canterbury's centres.

The DCP provides a section that provides objectives and controls for business centres. The DCP, as written in 2012 specifies that most neighbourhood centres will not experience significant growth or change, and the DCP controls are aimed at minimising any impacts of development on adjacent low-density residential areas. The DCP provides specific controls for key centres that can accommodate residential accommodation.

The DCP includes a requirement for minimum frontage. This control specifies that where redevelopment is proposed in a B1 or B2 zone a minimum frontage of 18m and in B5 zone 30m shall be provided. The value of the traditional shop fronts is recognised within the controls and demolition of shops dated prior to the 1950s is discouraged. Shop top housing is to be set behind the traditional shop front.

The Industrial development section of the DCP provides setback, height plane and site coverage controls.

8.2.7 Implications

The review of Canterbury Bankstown City's planning controls has the following implications for an Employment Lands Strategy:

- There is an inconsistent application of FSR and height controls across the two LEPs.
- There is an inconsistent approach for minimum lot widths across the two LGAs where redevelopment is proposed.
- The value of the traditional fine grain shops along the commercial strips of the centres is recognised and should form part of the future character of these centres.
- Objectives within the DCPs do not reflect contemporary approaches to increasing development within the centres.
- The use of the zones differs between the two LEPs. Following a hierarchy of centres may require a review of zones.
- Density controls across the two LEPs differ between consistent centre types. A review of densities is required.
- The DCP controls are not focused on encouraging employment uses in each zone. There is a tendency to encourage residential uses over employment lands.
- The wording of LEP Local Provisions within the LEP for ground floor uses is not consistent.
- There is inconsistency between the permitted uses within the B and IN zones across the two LEPs.

STRATEGIC CENTRES

9.0 STRATEGIC CENTRES – BANKSTOWN & CAMPSIE

Bankstown and Campsie have been nominated by the Greater Sydney Commission to be strategic centres. The Commission indicates that strategic centres have one or more of the following:

- A high proportion of knowledge-intensive jobs, principally relating to the presence of major hospitals, tertiary education institutions, stand-alone office developments or a combination of these
- Existing or proposed major transport gateways
- A major role in supporting the increased economic activity of the Eastern, Central or Western Cities
- Generally, generate over 20,000 jobs³⁰.

Planning for the transition of Bankstown and Campsie to strategic centres requires an analysis of existing activities and floorspace in the centres. Opportunities to build on each centre's strengths to generate investment and job creation have been researched and the findings are presented in this section. This work has underpinned the development of planning strategies for each centre.

The section includes findings from a floorspace audit conducted in March and April 2019. The audit provides an estimate of floorspace and land use in Bankstown and Campsie centres.

The floorspace audit was undertaken as an on-ground field survey using the pacing method verified using aerial imagery building outline measurements. The floorspace figures are based upon gross floor plate data obtained via satellite and generally do not consider any voids and circulation space. The floorspace estimates are likely to be subject to a human error factor of around plus or minus 10 per cent. The floorspace audit provides an indication of the types of businesses and uses currently operating in the centre and the mix of floorspace devoted to different uses.

9.1 Bankstown CBD

Bankstown CBD is approximately 741,600m² in size. It is well connected to Sydney CBD by buses and trains. Bankstown Station is on the Bankstown line and is served by T3 Bankstown line services. The area has a good road connection to the M5 Motorway via the A6.

Bankstown is a Strategic Centre featuring extensive retail, community and civic services within a CBD precinct focused on the northern and southern sides of Bankstown Station.

Bankstown CBD includes high street shop fronts with office space or residential development above as well as larger commercial office buildings. There are several large land uses including Bankstown Central Shopping Centre, Bankstown Sports Club, Bankstown RSL and Little Saigon Plaza. These include a mix of premium commercial, retail, entertainment and hotels. An "Eat Street" is located south of the rail station along Chapel Road, containing Asian restaurants and market stalls within a predominant built form of two storey shop top buildings.

Bankstown CBD is experiencing significant investment in transport and development, supporting its growth as a significant health and education precinct.

³⁰ <https://www.greater.sydney/content/economic-growth-focusses-centres>; cited 29 August 2019

Table 38: Centre size

	Centre (m2)	Centres in LGA (m2)	Precinct contribution to centres (%)
Precinct size	741,580	1,955,360	38

Figure 22: Bankstown Centre CBD



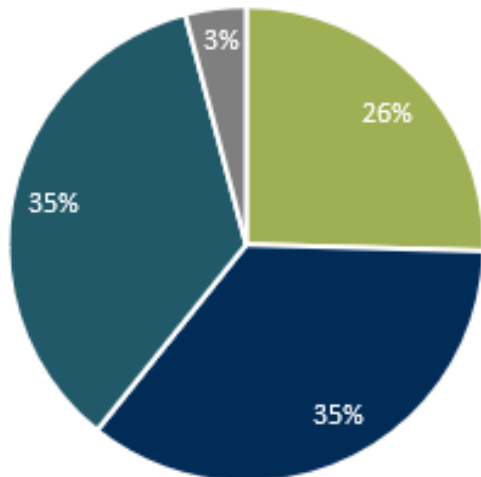
Source: HillPDA 2018

9.1.1 Floorspace snapshot

The Bankstown CBD currently has around 815,000sq m for floorspace (gross floor area). As identified in Figure 23, around 35 per cent of floorspace in the centre was used for retail purposes, 26 per cent was used for commercial purposes, only four per cent were vacant and a substantial 35 per cent was used for 'other purposes' including but not limited to residential and, community and residential/fitness.

Figure 23: Bankstown CBD – Floorspace by land use categories

■ Commercial ■ Retail ■ Other ■ Vacant space



The overall breakdown of floorspace across land use types can be found in

Table 39. The centre has a diverse mix of land uses. An analysis of the floorspace in Bankstown CBD indicates that the five highest land uses as of April/March 2019 were:

- Residential – approx. 246,585m² or 30.3 per cent
- General commercial use – approx. 54,125m² or 6.6 per cent
- Community use – approx. 52,615m² or 6.4 per cent
- Commercial medical and health care use – approx. 40,830m² or 5.0 per cent
- Speciality non-food retail – approx. 39,720m² or 4.8 per cent.

Table 39: Breakdown of industry floorspace

	Land use type	GFA (m ²)	Proportion
Retail	Bulky goods ¹	762	0%
	Café/restaurant	29,470	4%
	Clothing	31,927	4%
	Convenience store	1,442	0%
	Department store	4,710	1%
	Discount department stores	16,863	2%
	Fruit and vegetables	834	0%
	Homewares	2,767	0%
	Other retail	869	0%
	Personal service	18,275	2%
	Professional service	89	0%
	Pub/hotel ²	22,762	3%
	Speciality food	9,497	1%
	Speciality non-food	39,719	5%
	Supermarket/grocery	15,454	2%
	Take away	14,921	2%
Commercial	Financial	24,445	3%
	General	54,125	7%
	Government	11,365	1%
	Legal	40,832	5%
	Medical	450	0%
	Real estate	7,963	1%
	Travel agent	1,496	0%
Other	Automotive	766	0%
	Community	52,615	7%
	Education	33,479	4%
	Government	32,722	4%
	Industrial	2,417	0%
	Recreation/Fitness	37,290	5%
	Residential	246,583	31%
	Storage	2,157	0%
	Other uses ³	13,293	2%
	Vacant space	23,088	3%
Total		814,616	100%
Total (commercial/retail)		336,115	41%

Source: Land use audit 2019

1 includes bulky goods, homewares, hardware and large electronics

2 includes pubs and clubs eating and drinking areas

3 includes unknown, car park and utilities

9.1.2 Land use mix

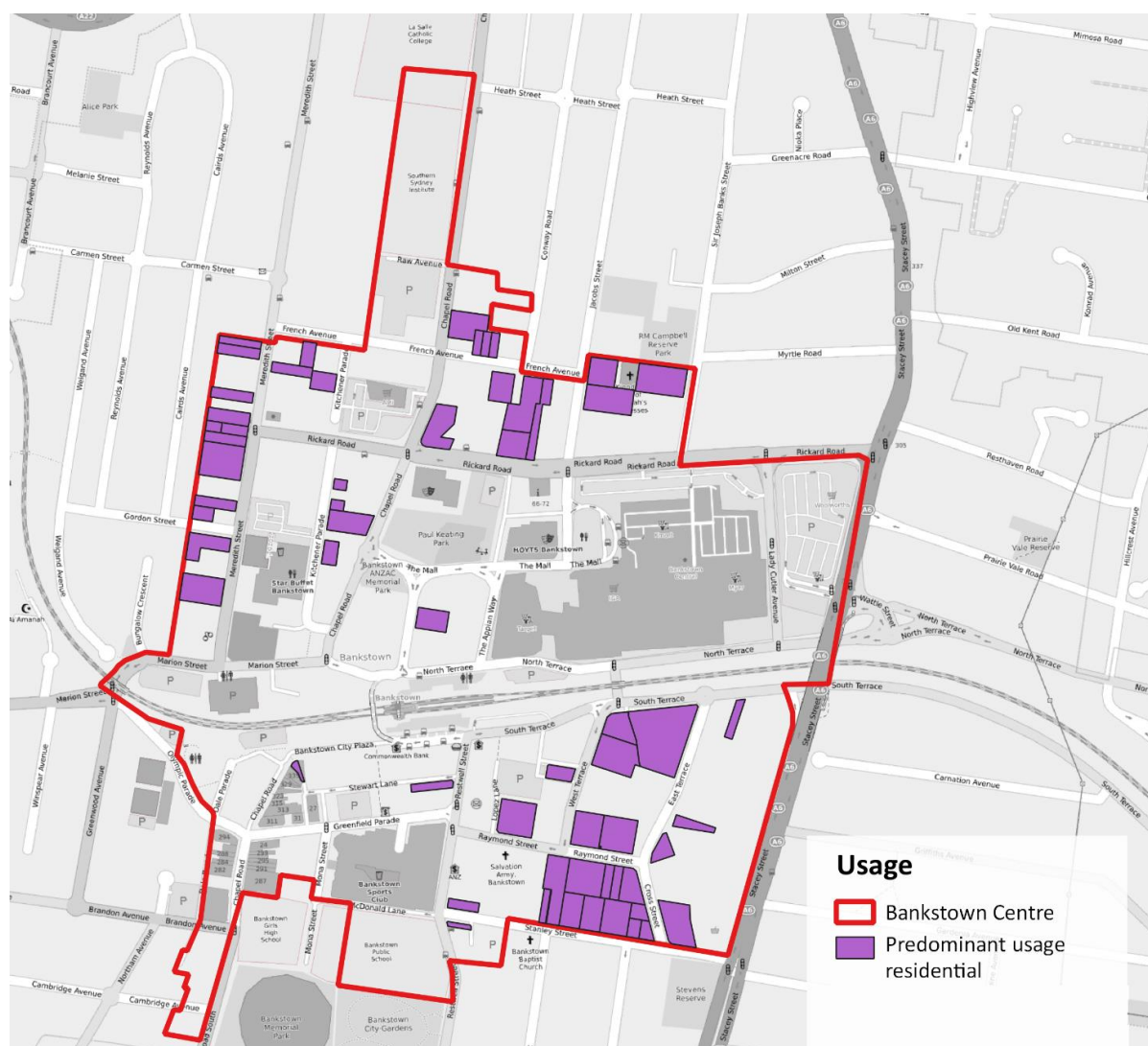
Bankstown CBD has a relatively well-defined retail commercial core, with a mix of uses throughout the centre, accompanied by some pockets of purely commercial uses, in which government, administrative and supporting services are strongly represented, in line with the centre's role as an administrative and commercial centre.

This section and the supporting maps provide an overview of the various land uses in the Bankstown CBD.

9.1.3 Residential floorspace

The distribution of residential premises is shown in Figure 24. This map illustrates that residential lots were generally concentrated away from the core of the CBD. The study area contains a diverse residential built form including clusters of modern high-density residential apartments fronting the train line along South Terrace, Rickard Road and Meredith Street.

Figure 24: Residential lot distribution



Source: HillPD land use audit (2019), basemap OpenStreetMap.

9.1.4 Retail floorspace

The study area contains approximately 210,361m² of retail floor area. This contributed to around 39 per cent of the total floor area in the study area, as shown in Table 40. The distribution of lots with predominantly office and business floorspace types is mapped in Figure 25. Bankstown CBD has a wide mix of retail businesses; the top three retail land uses were:

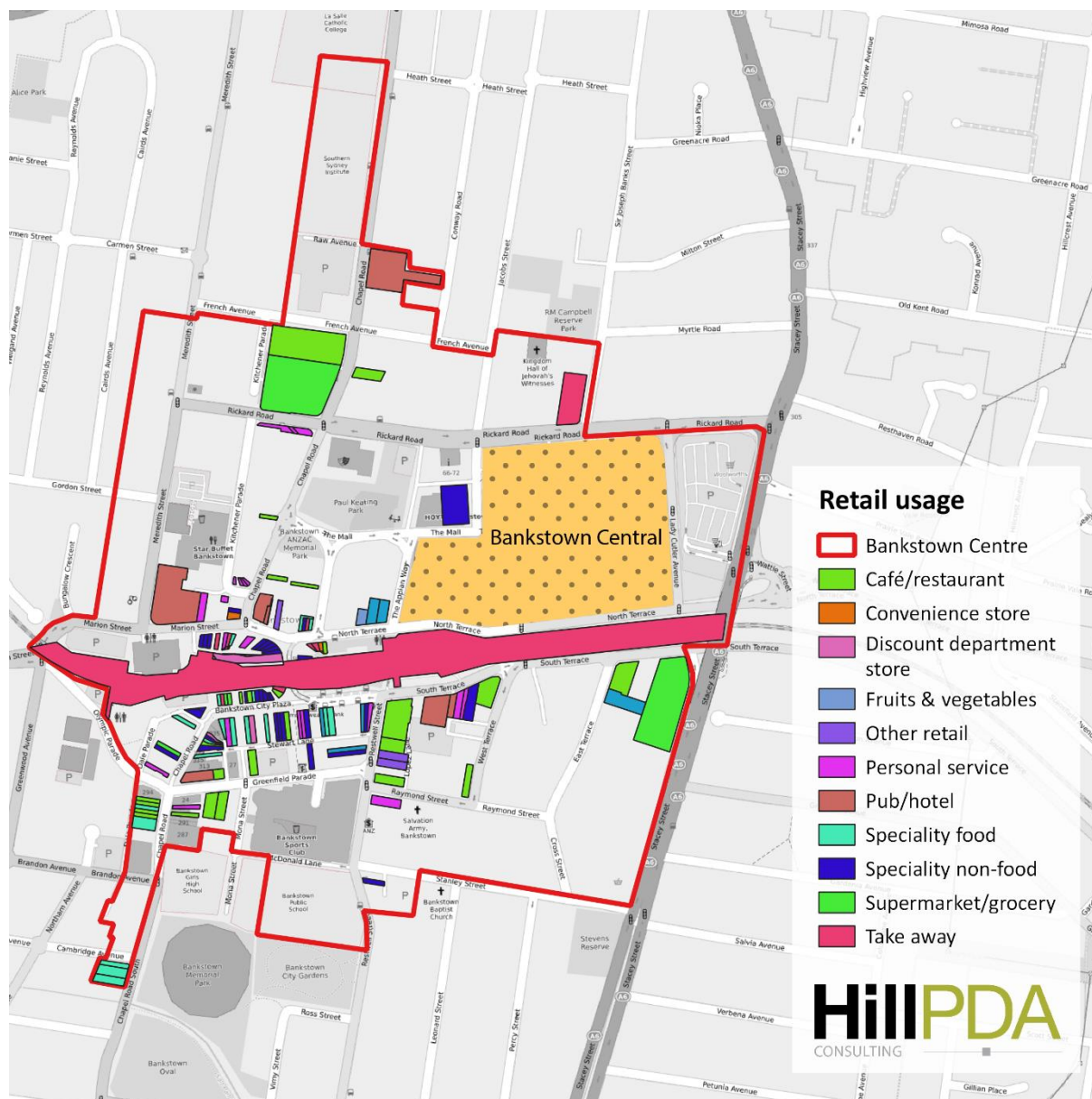
- Speciality non-retail – approx. 39,720 or 19 per cent
- Clothing retail – approx. 31,930m² or 15 per cent
- Café/restaurant – approx. 29,470m² or 14 per cent

The table below illustrates the distribution of retail lots throughout the study area. In general, the retail land uses were concentrated along the rail corridor. Retail lots in the commercial core were generally smaller and there were two large lots containing supermarkets (Aldi and Woolworths) located outside of the commercial core. Bankstown Central is a major retail attractor both locally and regionally. Bankstown Central provides extensive retail offerings across three floors with a total retail area of 85,628m². It includes major tenants Big W, K Mart, Myer, Target and two supermarkets.

Table 40 Retail floorspace by type, Bankstown CBD

Land use type	Study area (m ²)	Proportion
Bulky goods	762	0%
Café/restaurant	29,470	14%
Clothing	31,927	15%
Convenience store	1,442	1%
Department store	4,710	2%
Discount department stores	16,863	8%
Fruits and vegetables	834	0%
Homewares	2,767	1%
Other retail	869	0%
Personal service	18,275	9%
Professional service	89	0%
Pub/hotel	22,762	11%
Speciality food	9,497	5%
Speciality non-food	39,719	19%
Supermarket/grocery	15,454	7%
Take away	14,921	7%

Figure 25: Retail floorspace by lot, Bankstown CBD



Source: HillPDA land use audit (2019), base map OpenStreetMap.

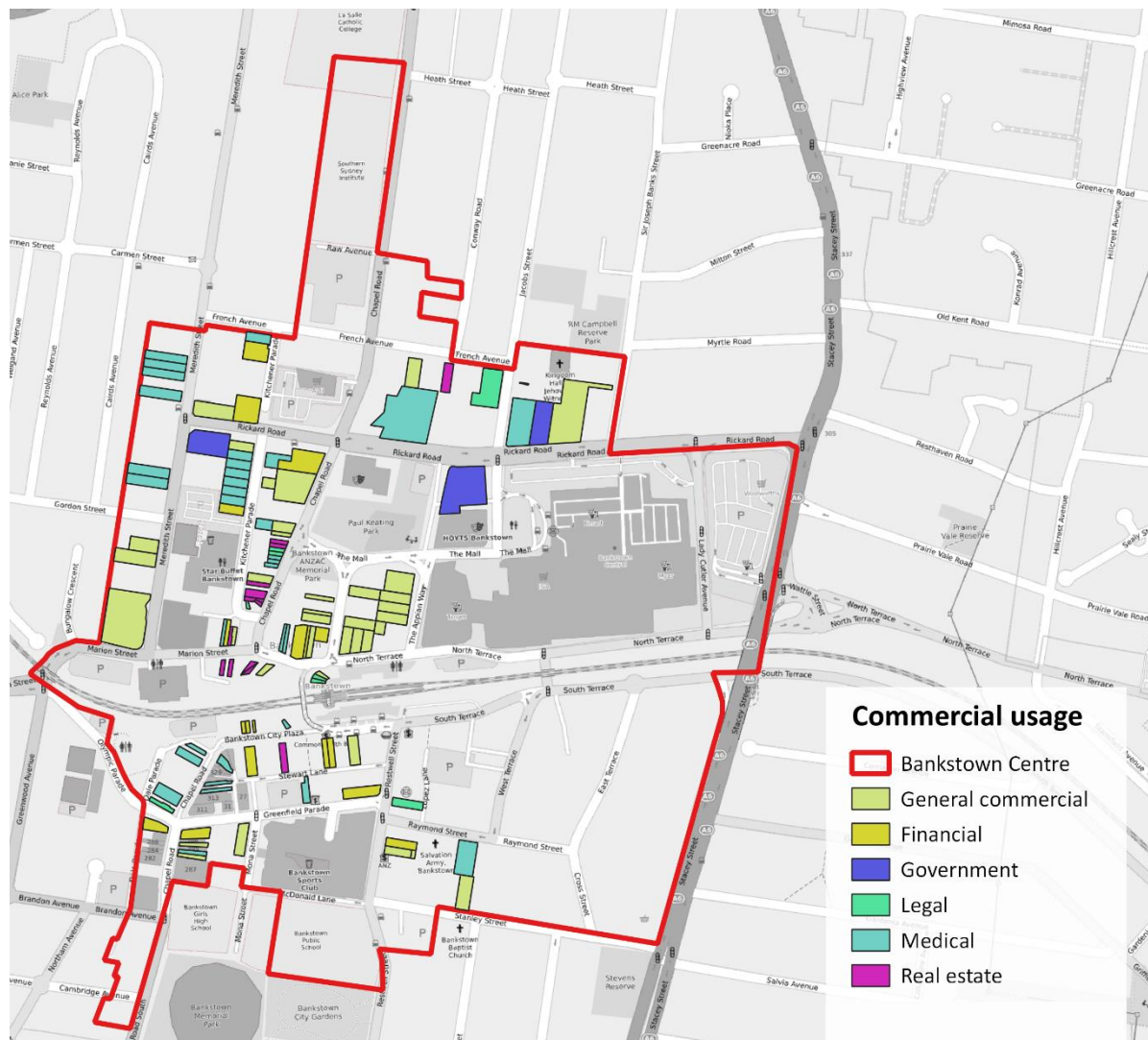
9.1.5 Office and business floorspace

The study area contained around 152,041m² of office and business floor area. This contributed to around 26 per cent of the total floor area in the study area. Bankstown CBD has a wide mix of commercial uses throughout the centre, the top three commercial land uses were:

- General commercial – approx. 54,125m² or 36 per cent
- Medical – approx. 40,832m² or 27 per cent
- Financial – approx. 24,445m² or 16 per cent.

Figure 26 illustrates the distribution of commercial lots throughout the study area. In general, commercial land use were dispersed throughout the Bankstown CBD with some clusters of general commercial businesses located along North Terrace and Marion Street and a small cluster of medical uses along Kitchener Parade and Meredith Street.

Figure 26 Location and distribution of office and businesses floorspace, Bankstown CBD



Source: HillPDA land use audit (2019). Basemap: OpenStreetMap.

Commercial office spaces within the area were surveyed on their grade, the breakdown of office space by usage is shown in Table 42. Officer grades were defined in accordance with the Property Council of Australia's definitions are as follows:

Table 41 Description of office grades

Criteria	Premium Office	A Grade Office	B Grade Office	C Grade Office	D Grade Office
Description	Landmark building located in the CBD which includes expansive views, great amenities and prestige finishes.	High quality building with good outlook, good quality finishes and presentation.	Quality space with a good standard of finish and maintenance.	Average quality space.	Poor quality space.
Size	Total building >20,000sqm	Total building >10,000sqm			
Floorplate	>1,000sqm	>700sqm			
Environmental	Accredited rating e.g. Greenstar or similar	Accredited rating e.g. Greenstar or similar	ABGR accredited rating.		
Other	Multiple lifts with minimum waiting periods (= < 28 secs). 100% mobile coverage. 24/hr building management On site security Change rooms/ lockers / showers Loading dock and on site carparking	Multiple lifts (= < 30 secs wait) Building management On site / off site security Change rooms/ showers Loading dock and on site carparking	At least one lift with minimal wait (= < 35 secs) Building management Communications Electronic/key card access Off-site 24-hour security	At least one lift (= < 40 secs wait) Keypad access system Periodic security patrol	Minimal technical services that generally do not meet the requirements of C Grade buildings

Source: Property Council of Australia

The business type with the largest proportion of office space by grade were:

- Commercial - General which comprised of 41.3 per cent of A grade office space and at 19 per cent also had the highest proportion of C grade office space
- Government office space comprised of 35.4 per cent of B grade office space
- Community comprised of 25.3 per cent of D grade office space

Table 42 Proportionate use of office space by grade (retail uses include back office and admin space within retail premises)

Grade	Business type	Proportion of floorspace	Business type	Proportion of floorspace
Grade A	Commercial - Financial	7.00%	Other - Education	4.74%
	Commercial - General	41.31%	Other - Government	18.32%
	Commercial - Legal	6.23%	Other - Vacant space	12.23%
	Commercial - Medical	8.77%	Retail - Café/restaurant	0.68%
	Commercial - Real estate	0.73%		
			TOTAL	3.96%
Grade B	Commercial - Financial	1.35%	Other - Education	1.45%
	Commercial - General	3.62%	Other - Government	35.37%
	Commercial - Legal	4.76%	Other - Recreation/Fitness	3.89%
	Commercial - Medical	21.77%	Other - Utility	9.11%
	Commercial - Real estate	1.05%	Other - Vacant space	0.34%
	Other - Community	17.06%	Retail - Café/restaurant	0.23%
			TOTAL	6.32%
Grade C	Commercial - Financial	6.05%	Other - Unknown	2.74%
	Commercial - General	18.98%	Other - Vacant space	7.04%
	Commercial - Legal	2.98%	Retail - Café/restaurant	3.64%
	Commercial - Medical	11.18%	Retail - Personal service	0.79%
	Commercial - Real estate	4.49%	Retail - Pub/hotel	5.58%
	Other - Community	2.32%	Retail - Speciality food	0.65%
	Other - Education	12.72%	Retail - Speciality non-food	8.27%
	Other - Government	8.56%	Retail - Supermarket/grocery	2.25%
	Other - Recreation/Fitness	0.16%	Retail - Take away	1.60%
			TOTAL	9.05%
Grade D	Commercial - Financial	8.13%	Other - Unknown	0.33%
	Commercial - General	7.68%	Other - Vacant space	3.32%
	Commercial - Legal	3.62%	Retail - Café/restaurant	1.44%
	Commercial - Medical	11.11%	Retail - Clothing	1.96%
	Commercial - Real estate	1.26%	Retail - Convenience store	0.39%
	Commercial - Travel agent	0.04%	Retail - Discount department stores	1.43%
	Other - Community	25.27%	Retail – Fruits and vegetables	0.45%
	Other - Education	11.77%	Retail - Homewares	0.27%
	Other - Government	0.04%	Retail - Personal service	1.74%
	Other - Recreation/Fitness	0.21%	Retail - Speciality non-food	2.86%
	Other - Residential	12.52%	Retail - Take away	4.15%
			TOTAL	9.88%

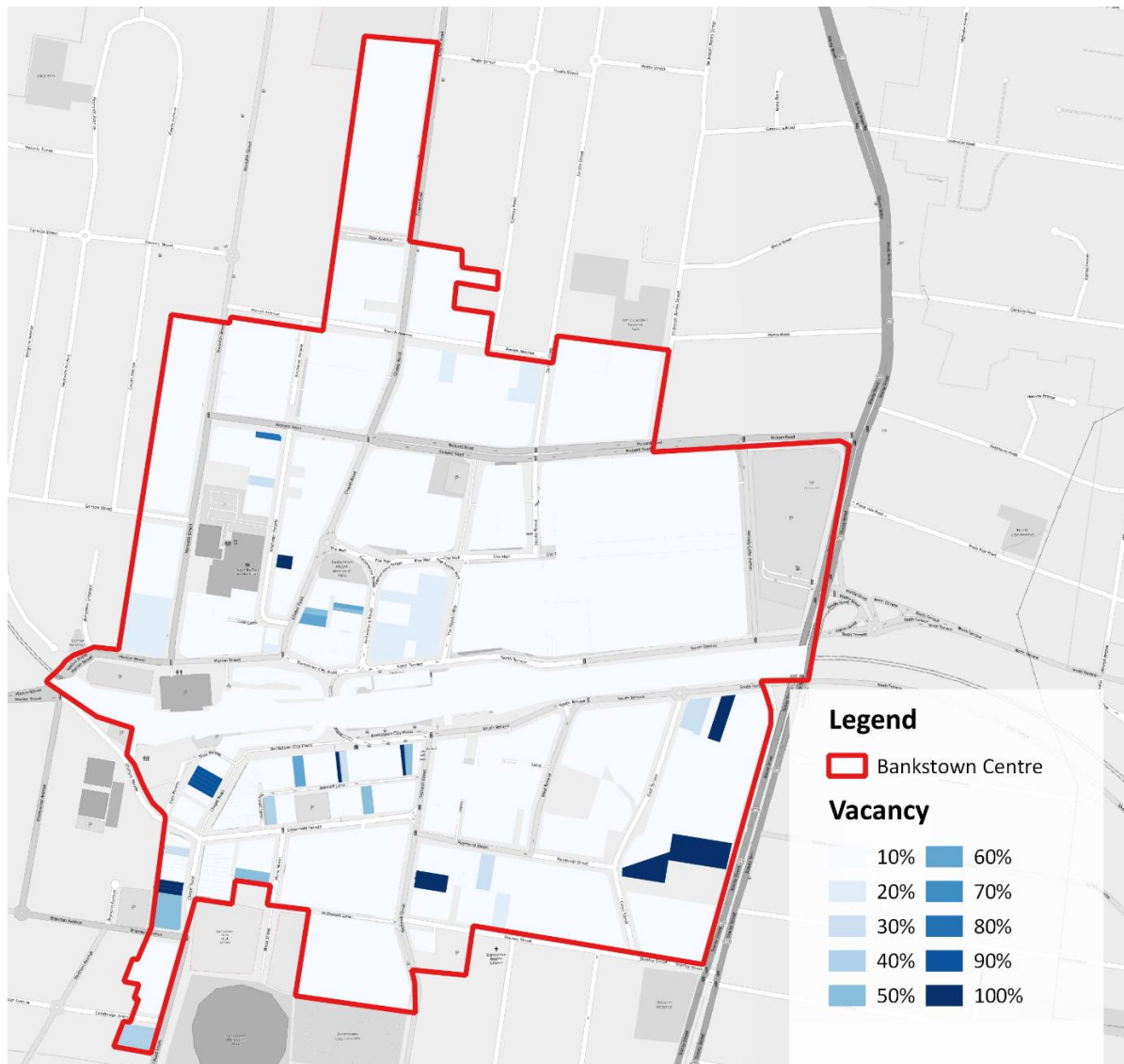
9.1.6 Vacancy

The study area contained approximately 22,794 square metres of vacant floor area, which equated to 3 per cent of the overall floorspace in the study area. This vacancy rate is less than the rate for the Sydney CBD reported by BIS Shrapnel in May 2019 (4.1 per cent).

The proportion of lots identified with vacancy are shown in Figure 27. The vacant floor area is scattered throughout the study area; however a large proportion of vacant floor area lays between Meredith street and Kitchener Parade. Interestingly there is a relatively low proportion of vacant floor space to the north of the precinct which is likely due to the close proximity of TAFE NSW.

As identified in section 6.1.6, a high proportion (12.2 per cent) of A grade office space within the precinct were vacant at the time of the audit. It is noted that the supply of A grade office space was significantly boosted by the recent opening of the Flinders Centre which provided 11 storeys of A grade office space and has most likely influenced the increased vacancy rate in this grade. Seven per cent of C grade office space and three per cent of D grade office space were vacant. However, less than one per cent of all B grade office space was vacant, indicating a potential demand for B grade office space within the study area, noting that several government departments occupy B Grade office space. These indicates that demand is weakest for higher priced, A grade office space.

Figure 27 Proportion of floorspace vacant per lot



Source: HillPDA floorspace audit (2019), base map OpenStreetMap

9.1.7 Planning parameters

Current planning controls in Bankstown CBD are identified in

Table 43. In general, the CBD is all zoned B4 Mixed Use with a variety of height and density controls to a maximum of 53 metres building height and 4.5:1 floor space ratio

Table 43 Bankstown planning parameters

Planning control	Standard
Land zoning	B4
Building height	17m to 53m
Floor space ratio	2:1 to 4.5:1
Minimum lot size	Nil
Commercial floorspace requirement (Bankstown LEP Clause 6.9(3))	Ground floor and first floor of buildings are to be used for commercial premises or other non-residential purposes
Heritage	<ul style="list-style-type: none"> Rosen Chambers, at 346 Chapel Street is a shop 'Rosen Chambers' – Local significance Council Chambers, at 375 Chapel Street – Local significance Heritage house, 525 Chapel Street – Local significance former Bankstown Parcels Office and Bankstown Railway Station Building and Platform, 143 Bankstown City Plaza – Local significance 290 South Terrace is a shop – Local significance At 109 Bankstown City Plaza is a shop (former accommodation house) – Local significance Bankstown Hotel, at 102 Bankstown City Plaza – Local significance

9.1.8 Development pipeline

Recent development applications in the Bankstown CBD have been extracted from Cordells and are listed below.

Table 44 Development proposals

Project address	Type	Floor area	Floors	Status
226 Chapel Road South	Apartments (37)/commercial (1) - 6 storey	2,788	6	Deferred
83-99 North Terrace	Apartments (471)/retail/commercial/administration - 22 storey	50,610	22	Possible
32 Kitchener Pde	Apartments (516)/commercial/child care centre - 14 storey	46,464	14	Possible
280 Chapel Rd	Commercial (7)/units (3) - 3 storey	1,159	3	Abandoned
60 Kitchener Pde	Commercial/cafe - 4 storey	637	4	Commenced
2-6 Greenfield Pde, 4-14 Sweethaven St & 23, 45, 51 & 57 Restwell St	Office/club - 10 storey	41,065	10	Commenced
15-17 Restwell St	Units (12)/commercial (4)/restaurant - 5 storey	1,603	5	Deferred
190-196 Stacey St	Units (131)/commercial (2) - 11 storey	9,258	11	Commenced
8a-14 West Tce	Units (143)/retail (5)/commercial (7) - 10 storey	13,175	10	Commenced
196-200 Stacey St	Units (146)/commercial/retail - 14 storey	14,671	14	Firm
53-55 Stanley St	Units (20)/commercial/retail - 8 storey	2,527	8	Deferred

Project address	Type	Floor area	Floors	Status
35-37 Kitchener Pde & 434 Chapel Rd	Units (31)/commercial (3) - 8 storey - stage 2	2,480	8	Abandoned
61-63 Rickard Rd	Units (62)/retail (3)/office (2) - 10 storey	4,539	7	Firm
10-12 French Ave	Units (69)/commercial - 11 storey	5,037	11	Firm
290) South Terrace	Units (7)/boarding house units/retail (2) - 5 storey	1,296	5	Abandoned
5-9 French Av & 2 Conway Rd	Units (81)/retail - 11 storey	7,063	11	Firm
4-6 French Av	Units (97) - 9 storey	8,468	9	Commenced

Source: Cordells

9.1.9 SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Established strategic centre Strong economic base Excellent road and rail access Strong development pipeline Diverse role including administrative function Majors anchors present and planned Planning framework permits growth Low vacancy rate 	<ul style="list-style-type: none"> Some fragmented parcels Variable amenity throughout the centre Substantial older and poorly maintained stock Poor connections to strategic centres and employment precincts Poor pedestrian connections Lack of character
Opportunities	Threats
<ul style="list-style-type: none"> Planned investment in metro rail Planning for health education precinct Part of collaboration area Potential to attract knowledge jobs Potential to grow research and innovation roles Increased job diversity NSW Government 	<ul style="list-style-type: none"> Competing strategic centres Delays in Government investment in infrastructure Market trends

9.1.10 Capacity

The Greater Sydney Commission has set job targets for Bankstown CBD as indicated above and repeated below.

Table 45 Targets set by the Greater Sydney Commission

Target	Bankstown
2016 estimate	12,100
2036 baseline target	17,000
2036 higher target	25,000

Source: South District Plan, Greater Sydney Commission

The ability of Bankstown CBD to accommodate the additional floorspace required in order for it to attain its baseline and high employment targets has been assessed.

Using ABS place of work data, it is estimated that in 2016, Bankstown generated around 9,120 jobs. This has been derived from the following ABS Destination Zones which best conform to the boundary of Bankstown CBD 115710002; 115710003; 115710004; 115720004; and 115720007.

This implies that an additional 7,880 to 15,880 jobs will be delivered over the next 17 years to reach its baseline and high targets. It is estimated that these additional employees would require between an additional 273,220m² and 550,630m² of space. The projected breakdown by industry sector is provided below.

Table 46 Bankstown Strategic Centre forecast additional floorspace requirement by 2036 (GFA)

Industry sector	2036 employment composition*	Net employment growth		Employment density	Floorspace demand	
		Baseline target	High target		Baseline target	High target
Population serving	34%	2,671	5,383	30	80,122	161,475
Knowledge intensive	32%	2,485	5,009	20	49,707	100,177
Health/education	28%	2,240	4,515	50	112,003	225,727
Industrial	6%	483	973	65	31,386	63,254
Total	100%	7,879	15,879		273,218	550,632

Source: TPA, *TPA forecast composition for TZ that correspond to Strategic Centre boundary

This significant increase in projected floorspace is largely related to the establishment of Bankstown CBD being identified as a Health and Education Precinct (with Bankstown Airport). This creates an opportunity for the centre to leverage off the co-location of health and education facilities in the centre. Notably,

- Within the CBD there are approximately 1,400 jobs in the health and social services sector, excluding Bankstown-Lidcombe Hospital is located two kilometres south west of the CBD. A cluster of allied health services is centred around Kitchener Parade to the west of Chapel Road.
- NSW Government has made a commitment of \$1.3 billion for a redeveloped Bankstown-Lidcombe Hospital. There is an opportunity to bring hospital functions into the City centre. A site adjacent to the existing TAFE and in proximity to the existing cluster of allied health professionals should be considered given the locational factors supporting this location.
- Western Sydney University is expected to relocate part of its Milperra Campus to Bankstown CBD, which could accommodate from 7,000 to 10,000 students. There are currently no other universities located in the City Centre.
- Bankstown Hospital is a teaching hospital for Western Sydney University and University of NSW. Relocation of the hospital to Bankstown CBD would most likely see a transfer of these teaching functions to the CBD.
- Bankstown TAFE is an 8,000 student campus. There is opportunity to strengthen the incorporation TAFE functions into local specialisations and enhance connections between TAFE and the CBD, particularly in light of the proposals above.

9.1.11 Strategic direction

The above analysis suggests that mechanisms need to be put in place to ensure a long-term supply of employment floorspace in the CBD. The current planning controls, including the B4 Mixed Use zoning, generally encourage mixed use developments with a requirement for the ground floor and first floor to be for commercial premises and other non-residential uses. This approach could limit commercial development to two floors

only, with upper levels developed for residential apartments. This does not support the establishment of Bankstown and a diverse CBD and would not yield an adequate floorspace to support up to 25,000 jobs by 2036. Consequently, it is suggested that the planning controls for the CBD be reviewed to ensure a long-term supply of land for commercial floorspace, encouraging a commercial core for high quality commercial office and administration centres as well as providing a range of employment generating non-residential land uses on the lower levels. The approach should aim to protect employment space for future generations, noting that strata subdivided residential developments rarely return to commercial floorspace.

Commercial core zoning

It is suggested that a B3 Commercial Core zone be applied to part of the Bankstown CBD to protect an area for employment uses. Residential apartments would not be permitted in the B3 Commercial Core zone.

Options analysis has been undertaken to assist in determining the extent to the B3 Commercial Core zone. The options are presented below. The analysis include only sites that are considered to have development potential. As such, sites with the following attributes have been excluded from the analysis:

- Heritage items
- Special purposes zones – TAFE, school sites
- Recently developed sites -sites where existing development is unlikely to reach the end of its life, warranting redevelopment feasible, before 2036. This includes sites where development is under construction or recently completed (egg
- Land zoned public recreation

A theoretical maximum floorspace has been calculated for the remaining sites to demonstrate the implication of different land areas of B3 Commercial Core zone. The analysis is on the basis of current building height and floorspace ratio controls, assuming two different areas of B3 Commercial Core zone. The results are demonstrated below (over page). These options should be considered as part of the detailed Place Planning for Bankstown City Centre.

Protection of existing commercial floorspace

Further protection of land for commercial floor space can be achieved by maintaining existing controls to encourage commercial floorspace. New measures could also be considered:

- Increasing the permissible FSR in the B4 Mixed Use zone to 4.5:1 and maximum height of 60 metres (subject to detailed Place Plan)
- Including a clause in the new Local Environmental Plan to prevent new development from resulting in a net loss of commercial floor area
- In the B4 Mixed Use zone, continue to require commercial development on two lower levels with housing above (or a minimum requirement for commercial floorspace of 1.4:1)

Encourage population growth in CBD catchment

Population growth in Bankstown CBD and immediate surround would support local businesses and contribute to an active, vibrant and interesting CBD. Measures to support this outcome could include:

- In the R4 High Density Residential zone, increasing the maximum FSR to 3:1 and building height to 12-14 metres
- Identifying through the master planning process, locations for activation strips in the R4 zone.

Option A:



Option B:



Area	Theoretical max. sq m	Assumed take up rates		
		90%	85%	80%
Inner CBD (all floors commercial)	190,678	171,611	162,077	152,543
Outer CBD (2 floors commercial)	438,089	394,280	372,376	350,471
Total	628,767	565,891	534,452	503,014

Area	Theoretical max. sq m	Assumed take up rates		
		90%	85%	80%
Inner CBD (all floors commercial)	314,537	283,083	267,357	251,630
Outer CBD (2 floors commercial)	397,021	357,319	337,468	317,617
Total	711,558	640,402	604,825	569,247

9.2 Campsie

The Campsie precinct is zoned B2-Local Centre and is approximately 108,370m² in size. It is well connected to Sydney and Bankstown CBDs by buses and trains. Campsie Station is on the Bankstown line and is served by T3 Bankstown line services while Canterbury Road provides a road connection.

The Greater Sydney Region Plan identifies Campsie as a Strategic Centre, recognising the existing scale of employment and retail activity. Health and educational services are largely driven by the Canterbury Hospital, which is approximately one kilometre south of the centre.

The Campsie town centre comprises of a commercial strip along Beamish Street. The precinct contains a large variety of shops, civic and community services supporting the needs of the surrounding suburbs. Campsie is the second largest commercial centre in the Canterbury Bankstown LGA after Bankstown CBD.

Larger buildings include the council chambers within the northern section of the town centre and the Campsie Centre shopping centre in the southern section. There are also a number of more recent four to six storey shop top housing developments. These are generally located on the eastern and western perimeter of the Beamish Street commercial strip.

The eastern portion of the precinct is made up of retail land uses with some residential buildings. Retail uses provide an active street frontage on the intersection of Canterbury Road with Beamish St and Bexley Road.

Within the precinct there is also a cluster of bulky goods, light industrial and local service industrial buildings, bounded by Stanley, Perry and Una Streets. These buildings are occupied by a mixture of automobile focussed businesses fronting onto Canterbury Road, and businesses involved in the importation and distribution of goods in buildings fronting onto Perry Street. These developments are interspersed with residential buildings, which are overwhelmingly detached dwellings. There are several large lots throughout this area.

Figure 28: Campsie Centre



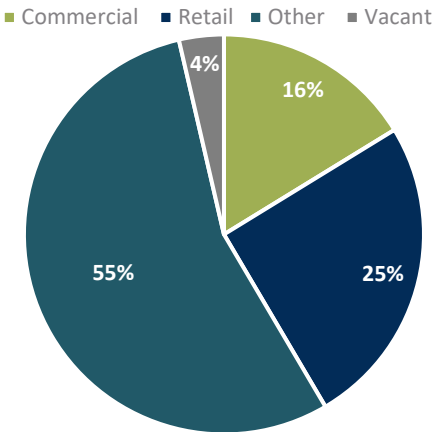
Table 47 Centre size

	Centre (m2)	Centres in LGA (m2)	Precinct contribution to centres (%)
Precinct size	185,440	1,955,360	9

9.2.1 Floorspace snapshot

The overall breakdown of floorspace across specific land use types can be found in Table 48. Around 25 per cent of floorspace in the centre was used for retail purpose, 16 per cent was used for commercial purpose, four per cent was vacant and a substantial 55 per cent was used for ‘other’ purposes including but not limited to; residential, community and Recreation/Fitness.

Figure 29: Breakdown of broad land use categories



As identified in Table 48 the centre has a diverse mix of land use. An analysis of the floorspace in indicates that the five highest land uses as of April/March 2019 were:

- Commercial Medical – approx. 12,010m² or 6.1 per cent
- Pub/hotel – approx. 9,665 or 4.9 per cent
- Retail, Café. /restaurant – approx. 9,010m² or 4.6 per cent
- Speciality non-food retail – approx. 7,290m² or 3.7 per cent
- Vacant – approx. 7,080m² or 3. per cent

Table 48 Industry floorspace breakdown

Sector	Land use	GFA (m2)	Proportion
Retail	Auto repairs and servicing	469	0.2%
	Bulky goods ¹	1,356	0.7%
	Café/restaurant	9,008	4.6%
	Clothing	1,729	0.9%
	Discount department stores	923	0.5%
	Fruit an veg shop	1,565	0.8%
	Other retail	114	0.1%
	Personal service	5,714	2.9%
	Pub/hotel	9,664	5.0%
	Speciality food	4,996	2.6%
	Speciality non-food	7,287	3.7%
	Supermarket/grocery	5,981	3.1%
	Take away	550	0.3%
	Commercial - General	3,727	1.9%
Commercial	Commercial - Other	2,046	1.0%
	Financial	4,818	2.5%
	Government	6,171	3.2%
	Legal	486	0.2%
	Medical	12,009	6.2%
	Real estate	1,988	1.0%
	Travel agent	465	0.2%
	Other	987	0.5%
Other	Community	3,967	2.0%
	Education	2,625	1.3%
	Recreation/Fitness	2,134	1.1%
	Residential	97,352	49.9%
	Vacant space	7,079	3.6%
	Grand Total	195,210	100.0%
	Total (commercial/retail)	82,053	42.0%

Source: Land use audit 2019

¹ includes bulky goods, homewares, hardware and large electronics

² includes pubs and clubs eating and drinking areas

³ includes schools

⁴ includes unknown, car park and utilities

9.2.2 Land use mix

The study area has a strong commercial focus centred on Beamish Street, with a variety of uses emanating to the north and south of the railway station.

The land use mix reflects an older urban retail and services centre, with an identifiable commercial core along Beamish street, with residential uses on the fringes and some mixed-use lots (including older shop-top housing) throughout.

9.2.3 Office and business

The study area contained around 31,710 square metres of office and business floor area. This contributed to around 32 per cent of the total non-residential floor area in the study area. Campsie has a wide mix of commercial uses throughout the centre, the top three commercial land uses were:

- Medical – approx. 12,010m² or 38 per cent
- Government – approx. 6,170m² or 20 per cent
- Financial – approx. 4,820m² or 15 per cent

Table 49 Office and business floorspace breakdown Campsie centre

Land use type	Area (m ²)	Proportion of study area
Medical	12,009	37.87%
Government	6,171	19.46%
Financial	4,818	15.20%
Commercial - General	3,727	11.75%
Commercial - Other	2,046	6.45%
Real estate	1,988	6.27%
Legal	486	1.53%
Travel agent	465	1.47%
Total	31,709	

9.2.4 Retail

The study area contains around 49,355 square metres of retail space, which includes general retailing, cafés, restaurants and bars. **Error! Reference source not found.** shows Campsie has a wide mix of retail businesses; the top three retail land uses were:

- Pub and Hotel – approx. 9,665 or 20 per cent
- Café/restaurant – approx. 29,470m² or 14 per cent
- Speciality non-food retail – approx. 7,290m² or 15 per cent

Table 50 Retail floorspace in the study area

Land use type	Study area (m ²)	Proportion
Pub/hotel	9,664	20%
Café/restaurant	9,008	18%
Speciality non-food	7,287	15%
Supermarket/grocery	5,981	12%
Personal service	5,714	12%
Speciality food	4,996	10%
Clothing	1,729	4%
Fruits & vegetables	1,565	3%
Bulky goods	1,356	3%
Discount department stores	923	2%
Take away	550	1%
Auto repairs and servicing	469	1%
Other retail	114	0%
Total	49,355	

* includes bulky goods, homewares, hardware and large electronics

9.2.5 Residential

The study area contained approximately 97,352 square metres of residential floor area, contributing to around 50 per cent of the overall floorspace in the study area. A large proportion of this floor space is concentrated to the north east of the precinct, to the left of Beamish street.

Figure 30: Residential floorspace distribution

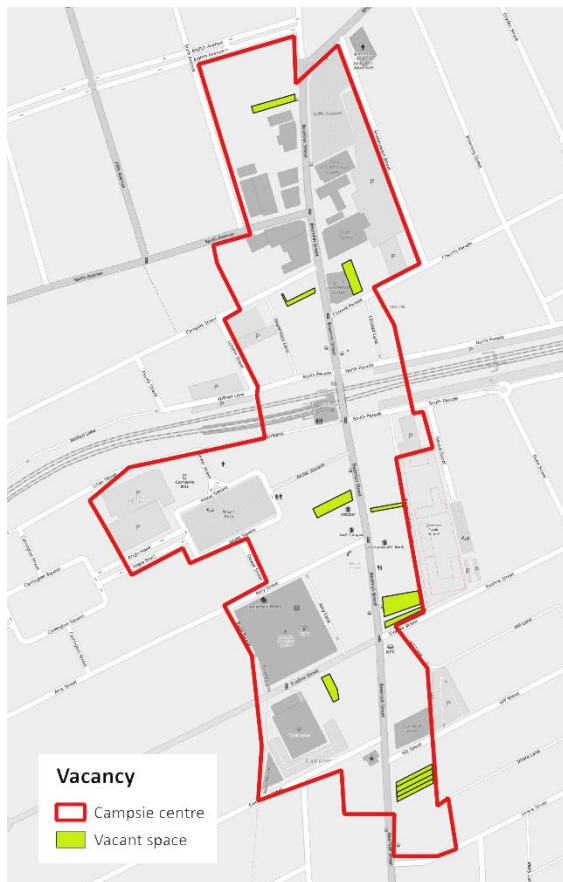


Source: Land use audit (2019), base map OpenStreetMap.

9.2.6 Vacancy

The study area contained approximately 7,079m² of vacant floor area. This equated to 4 per cent of the overall floorspace in the study area. The vacant floor space is evenly scattered throughout the precinct.

Figure 31: Distribution of vacant floorspace



Source: LHillPDA land use audit (2019). basemap: OpenStreetMap.

9.2.7 Planning parameters

Planning parameters relevant to the centre are identified in Table 51 Campsie planning parameters.

Table 51 Campsie planning parameters

Planning control	
Land zoning	B2
Building height	14m to 27m
Floor space ratio	Nil
Minimum lot size	Nil
Heritage	Nil
Key sites	Nil

9.2.8 Development pipeline

Recent development applications in the suburb of Campsie have been extracted from Cordells and are listed below.

Table 52 Campsie planning parameters

Project Address	Type	Floor Area	Floors	Status
44-50 Sixth Av & 67-73 Fifth Av	SENIORS HOSTEL/HALL/CHILD CARE CENTRE/ADMIN - 3 storey	6194	3	Firm

Project Address	Type	Floor Area	Floors	Status
321 (Lot 2) Beamish St (DP3970)	UNITS (16)/COMMERCIAL - 5 storey	1052	5	Commenced
45 (Lot 32) South Pde (DP3846)	APARTMENTS (27)/COMMERCIAL (2) - 6 storey	2684	5	Firm
82 Beamish St	UNITS (33)/COMMERCIAL (4)/RETAIL - 6 storey	3246	6	Commenced
548-568 (Lot 106) Canterbury Rd (DP624546)	UNITS (340)/COMMERCIAL/RETAIL - 8 storey	24680	8	Commenced
337-339 (Lots A & B) Beamish St (DP962954)	UNITS (24)/COMMERCIAL - 5 storey	0	5	Commenced
60 (Lot 22) Charlotte St (DP1185027)	UNITS (290)/RETAIL - 7 storey - stage 3	29863	7	Firm
538-546 (Lot B) Canterbury Rd (DP389844)	APARTMENTS (66)/COMMERCIAL (4) - 8 storey	4226	8	Commenced
2-4 Messiter St	UNITS (51)/COMMERCIAL (7) - 6 storey	3938	6	Firm
418-422 (Lots 44-46) Canterbury Rd (DP7053)	UNITS (62)/COMMERCIAL (4) - 9 storey	0	9	Commenced
424-426 Canterbury Rd	UNITS (50)/COMMERCIAL (4) - 9 storey	4290	9	Commenced
445-453 Canterbury Rd	APARTMENTS (200+)/COMMERCIAL	0	0	Early
570-580 Canterbury Rd	APARTMENTS (86)/RETAIL (5) - 6 storey	0	6	Commenced
502-518 (Lots 2-5 & 8) Canterbury Rd (DP878714)	APARTMENTS (87)/COMMERCIAL (6) - 7 storey	8212	7	Firm
349 (Lot 21) Beamish St (DP3970)	UNITS (26)/COMMERCIAL (2) - 6 storey	0	6	Possible
359-365 Beamish St & 33-35 Unara St	UNITS (102)/COMMERCIAL - 6 storey	8281	6	Firm
13-15 (Lots 1 & 2) Anglo Rd (DP304948)	UNITS (28)/RETAIL (3) - 6 storey	3607	6	Firm
25 Anglo Rd	APARTMENTS/CLUB/FITNESS CENTRE/RETAIL	0	0	Deferred
43 North Pde & 10 London St	UNITS (139)/COMMERCIAL - 16 storey	0	16	Abandoned
46-47 & 48 (Lot 1) South Pde (DP124328)	APARTMENTS (68)/COMMERCIAL (2) - 14 storey	4723	14	Possible
349 & 355-357 Beamish St (Lots 21 & 22 DP3970)	UNITS (47)/COMMERCIAL - 6 storey	12217	6	Deferred
13 & 17 Sixth Av	APARTMENTS (61)/COMMERCIAL (6) - 8 storey	0	8	Possible
520-522 Canterbury Rd (cnr Lot 1 DP878714)	UNITS (26)/COMMERCIAL (2)	1691	0	Possible
124-142 Beamish St & 16-18 Ninth Av	DWELLINGS/RETAIL/COMMERCIAL - 25 storey	0	25	Deferred
386, 396 & 398 Beamish St	UNITS (67)/RETAIL (3) - 7 storey	5738	7	Possible
433-435 & 473 Canterbury Rd (Lot 100 DP1041138 & Lot 1 DP1097521)	HOTEL/COMMERCIAL (2) - part 3 & 4 storey	0	4	Possible
430 Canterbury Rd (Lot 1 DP120416)	BOARDING HOUSE/COMMERCIAL - 6 storey	413	6	Abandoned
46 Third Avenue (Lot 394 DP 2521)	CHILD CARE CENTRE	309	1	Possible
46 Third Ave (Lot 394 DP2521)	RESPIRE DAY CARE CENTRE/OFFICE	0	1	Firm

Source: Cordells

9.2.9 SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Established strategic centre Strong character and cultural identity Excellent road and rail access Strong development pipeline Established food destination Valued fine grain urban fabric Proximity to Central Sydney 	<ul style="list-style-type: none"> Fragmented parcels Variable amenity throughout the centre Some old and poorly maintained stock No anchors in centre Poor links to nearby anchors/uses
Opportunities	Threats
<ul style="list-style-type: none"> Planned investment in metro rail Recognition as strategic centre Potential to attract lifestyle activities Proximity to Canterbury Hospital Proximity to recreation destinations Cultural identity Proximity to the Eastern Harbour City Proximity to Sydney's Inner West 	<ul style="list-style-type: none"> Competing strategic centres Delays in Government investment in infrastructure Market trends

9.2.10 Capacity

The South District Plan sets a baseline employment target for Campsie Strategic Centre of 4,800 jobs and a high target of 7,500 jobs by 2036.

Table 53 Targets set by the Greater Sydney Commission

Target	Campsie
2016 estimate	4,800
2036 baseline target	7,000
2036 higher target	7,500

Using ABS place of work data, it is estimated that in 2016, Campsie generated around 4,164 jobs. This implies that between an additional 2,836 to 3,336 jobs over the next 17 years would be required to reach its baseline and high targets. It is estimated that these additional employees would require between an additional 108,258m² and 127,344m² of space. The breakdown by industry sector is provided below.

Table 54 Campsie Strategic Centre forecast additional floorspace requirement by 2036 (GFA)

Industry sector	2036 employment composition*	Net employment growth		Employment density	Floorspace demand	
		Baseline target	High target		Baseline target	High target
Population serving	31%	877	1,032	30	26,310	30,949

Industry sector	2036 employment composition*	Net employment growth		Employment density	Floorspace demand	
		Baseline target	High target		Baseline target	High target
Knowledge intensive	20%	572	672	20	11,434	13,450
Health/education	46%	1,311	1,542	50	65,536	77,090
Industrial	3%	77	90	65	4,978	5,856
Total	100%	2,836	3,336	165	108,258	127,344

9.2.11 Strategic direction

Plan for an incremental expansion to commercial activity within the centre

Between 108,200 sqm and 127,300 sqm of additional commercial floorspace will be required. It will be necessary to investigate opportunities to expand the centre, through incremental amendments to the planning controls, in order to maintain the traditional high street character of Campsie and accommodate future demand. Suggested actions are outlined below:

- Maximise the potential from underutilised sites, such as carparks, in the context of creating a vibrant and interesting centre that champions character and heritage.
- Investigate increasing building heights on sites with development potential to improve redevelopment feasibility and consistency.
- Undertake a masterplan for the Campsie Town Centre to:
 - Implement the lifestyle precinct concept
 - Improve pedestrian connectivity
 - Enhance the public realm and more effectively integrate with community facilities
 - Investigate opportunities to enhance a night-time economy
- Undertake design and feasibility testing to consider the appropriateness of:
 - Increasing the FSR controls across the whole centre zone (including car park sites) but protecting the fine grain and high street building facades
 - Increasing the building height of the car park sites to enable redevelopment, potentially
 - Establishing a minimum non-residential FSR control of 1.2:1 – 1.6:1, subject to testing.
- Target health and medical suites to build on the existing strengths of the centre and proximity to Canterbury hospital
- Target leisure and entertainment facilities, such as a cinema, evening colleges and gyms, to build on the lifestyle theme of the centre
- Continue to support the strong multi-cultural character and food retailing
- Establish appropriate development contributions to support civic improvements and social infrastructure delivery matched with population and employment growth
- Consider facilitating a Business Improvement District scheme that offers grants for improvements in building facades and shop frontages.

Support the establishment of a lifestyle precinct

Encourage entertainment, leisure and retail activities in Campsie to support a growing LGA population. This lifestyle precinct will retain the existing character of Campsie while offering a broader range of facilities

- Establish pedestrian, cycle and shuttle bus connections from:

- Campsie to Canterbury Hospital
- Campsie to Mildura Reserve and Cooks River open space
- Implement built form controls that:
 - Protect the character and high fine grain
 - Ensure a transition of building heights
 - Encourage shop-top housing
 - Maintain retail and commercial at street level.
 - Implement the Campsie smart hub project

Long term supply

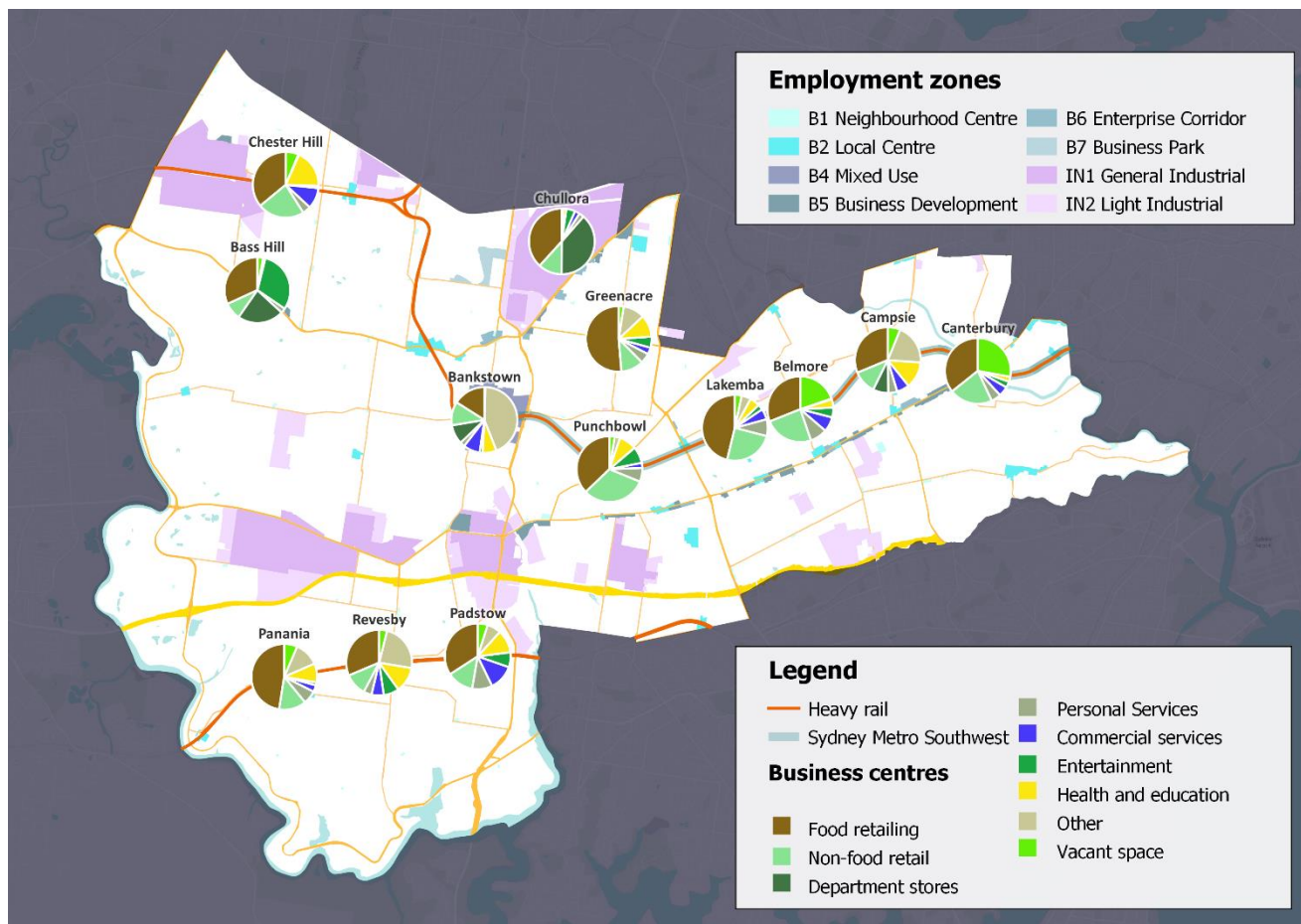
Consider the medium to longer term need for expansions to the centre, including along Beamish street to the south of the existing centre, to connect with the commercial hub at the intersection of Beamish Street and Canterbury Road and strengthen the centres connection through to Kingsgrove, as outlined in the Local Strategic Planning Statement.

REVIEW OF BUSINESS CENTRES

10.0 REVIEW OF BUSINESS CENTRES

There are over 40 business centres in the LGA providing a range of retail and personal services. Each centre provides important local economic and employment opportunities and are hallmarks of the distinctive character of the community they service. This includes land zoned as B1 Neighbourhood Centre, B2 Local Centre and B4 Mixed Use.

Figure 32: Study area land use mix



The following table presents the floorspace findings and demand projections for the centres. The pie charts within the figure illustrate the diversity of floorspace in each notable centre under broad use categories. It does not represent the size of the centre. The data relied on for these floorspace findings was provided by Canterbury Bankstown Council.

Table 33: Overview of business centre floorspace supply 2019

Business centre	Super- markets	Specialty Foods	Take- away Foods	Cafes, restaurants, clubs, etc	Depart- ment Stores	Apparel Stores	Bulky Goods	Other Non- Food Goods	Selected Personal Services	TOTAL
Bankstown	12,185	7,579	11,450	19,290	34,482	18,975	2,400	20,700	8,600	135,661
Roselands	7,208	1,000	1,660	1,600	32,187	5,900	600	3,600	2,600	56,355
Neighbourhood centres	9,908	3,500	6,600	7,100	500	1,500	7,462	7,800	4,800	49,170
Campsie	6,465	6,400	1,400	8,600	7,662	2,250	1,200	8,100	4,400	46,477
Punchbowl	6,807	3,045	2,158	4,853	0	300	5,800	8,681	3,169	34,813
Revesby	8,541	3,840	2,796	1,645	0	2,076	998	3,791	2,503	26,190
Lakemba	4,500	3,000	2,500	3,000	0	2,500	1,500	3,500	2,500	23,000
Bass Hill	5,610	954	2,145	1,100	8,157	1,240	200	1,581	845	21,832
Chullora	5,685	840	500	800	7,916	1,080	0	1,300	500	18,621
Greenacre	6,717	1,322	2,078	3,414	0	1,332	629	1,050	1,336	17,878
Chester Hill	5,334	1,100	1,000	1,300	0	2,534	300	3,389	1,100	16,057
Padstow	2,125	862	1,221	3,663	0	1,042	1,760	1,439	3,201	15,313
Belmore	1,700	900	1,000	2,800	0	600	2,500	2,900	2,100	14,500
Earlwood	2,300	1,200	1,500	1,800	300	1,200	400	2,100	2,300	13,100
Canterbury	2,588	800	800	1,200	0	400	2,000	1,100	800	9,688
Panania	1,499	1,090	846	1,291	0	411	332	1,275	996	7,740
Clemton Park	3,800	150	450	600	0	0	0	1,600	300	6,900
Georges Hall	3,150	200	400	700	0	0	200	100	100	4,850
TOTAL	96,122	37,782	40,504	64,756	91,204	43,340	28,281	74,006	42,150	518,145

10.1 Bass Hill

10.1.1 Location characteristics

The Bass Hill precinct is zoned B2-Local Centre and is approximately 55,990m² in size. The A22 Hume Highway provides a road connection to Bankstown CBD. A bus service connects the centre to Bankstown CBD.

Bass Hill Plaza is an indoor shopping mall in the suburb of Bass Hill. The centre is anchored by strong performing Woolworths, Aldi, Kmart and approximately 50 specialty stores. Originally opened in 1984, the exterior of the centre is somewhat run-down (although Council is in receipt of a development application to renew the centre) while the interior has undergone modernising renovations. The centre itself is performing strongly.

The centre is located on the Hume Highway, providing shoppers with good road access to the from the Bass Hill Area and neighbouring suburbs Yagoona and Villawood.

Figure 34: Bass Hill



Legend

B2 - Local Centre

Secondary School



Legend

B2 - Local Centre

Secondary School

HillPDA
CONSULTING

Source: HillPDA 2018

Table 55 Bass Hill centre statistics

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	55,990	1,955,360	3
Floorspace by Category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Occupied Retail Floorspace			
Supermarkets & Grocery Stores	5,610	25.7%	15.7%
Specialty Food Stores	954	4.4%	2.7%
Fast-Food Stores	2,145	9.8%	6.0%
Restaurants, Hotels and Clubs	1,100	5.0%	3.1%
Department Stores	8157	37.4%	22.8%
Clothing Stores	1,240	5.7%	3.5%
Hardware and Bulky Goods Stores	200	0.9%	0.6%
Other Personal & Household Goods	1,581	7.2%	4.4%
Selected Personal Services	845	3.9%	2.4%
Total Retail	21,832	100.0%	61.0%
Occupied Non-Retail Floorspace			
Accommodation	10,356	79.9%	28.9%
Pubs, Taverns & Clubs	1,600	12.3%	4.5%
Rental, Hiring & Real Estate Services	0	0.0%	0.0%
Health Care & Social Assistance	100	0.8%	0.3%
Financial & Insurance Services	0	0.0%	0.0%
Administrative & Support Services	0	0.0%	0.0%
Arts & Recreation Services	600	4.6%	1.7%
Transport, Postal & Warehousing	0	0.0%	0.0%
Education and Training	0	0.0%	0.0%
Other	300	2.3%	0.8%
Total Non-Retail Commercial Space	12,956	100.0%	36.2%
Vacant Space	1,000		2.8%
Total Floorspace	35,788		100.0%
Planning framework	Control		
Land zoning	B2		
Building height	13m and 14m		
Floor space ratio	1:1 to 2:1		
Minimum lot size	Nil		
Heritage	Nil		

10.1.2 S.W.O.T. Analysis

An assessment of the precinct's strengths, weaknesses, opportunities and threats is provided below.

Strengths	Weaknesses
-----------	------------

<ul style="list-style-type: none"> Strongly performing shopping centre Excellent road access Major anchors present 	<ul style="list-style-type: none"> Lack of character Lack of civic space Internal facing centre Limited public transport Low density of development limits population growth in catchment
Opportunities	Threats
<ul style="list-style-type: none"> Vacant land adjacent to centre provides opportunity to revitalise this centre 	<ul style="list-style-type: none"> Competing centres Market trends

10.1.3 Strategic direction

- Achieve activation opportunities and public benefits through development of the vacant sites.
- Prepare a revitalisation strategy to deliver amenity improvements to the centre

10.2 Belmore

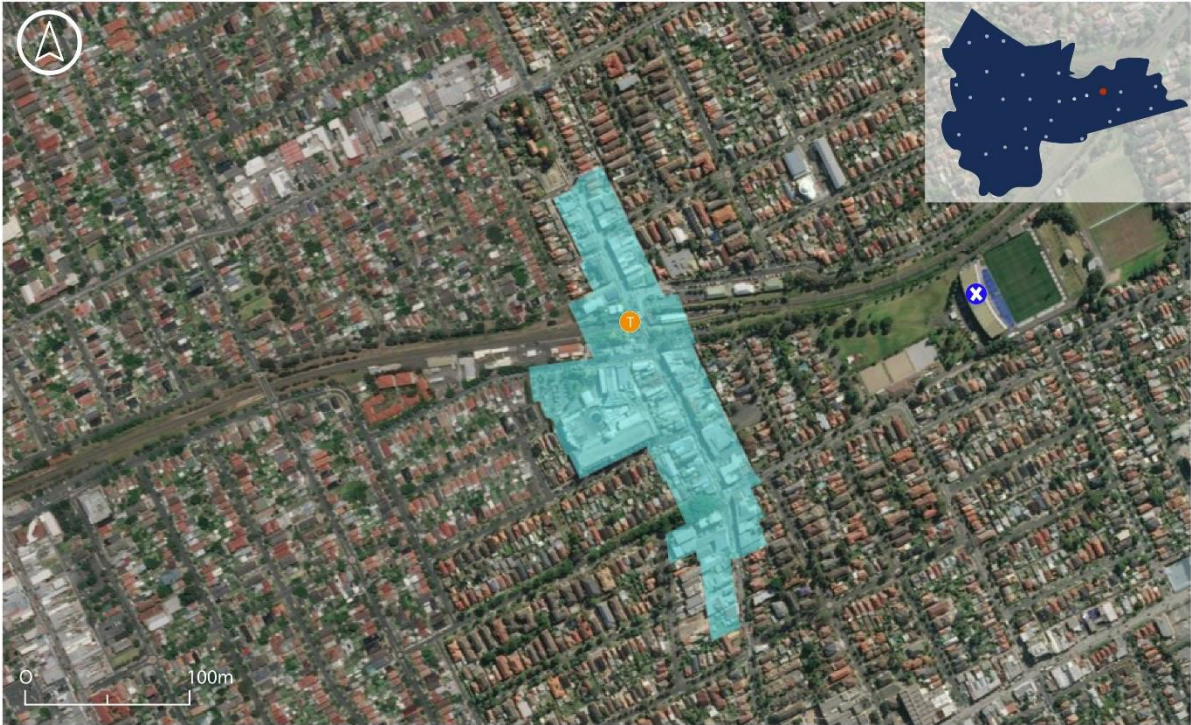
10.2.1 Location characteristics

The Belmore precinct is zoned B2-Local Centre and is approximately 107,920m² in size. It is well connected to Sydney and Bankstown CBD by buses and trains. Belmore Station is on the Bankstown line and is served by T3 Bankstown line services while Canterbury Road provides a road connection.

Belmore is home to the Canterbury Bulldogs NRL team. The team's home ground is the Belmore Sportsground and the team have a Club on a large site behind the Burwood Road shops between Bridge Road and Collins Street.

Automobile related land uses feature prominently alongside traditional high street retail land uses. Burwood Road contains a selection of local shops including a number of restaurants and cafes. Many of the shop fronts have been modernised to maximise ground floor retail opportunities.

Figure 35: Belmore Centre



- Legend
- B2 - Local Centre
 - Train Station
 - Multi-purpose stadium



- Legend
- B2 - Local Centre
 - Train Station
 - Multi-purpose stadium

Source: HillPDA 2018

HillPDA
CONSULTING

Table 56 Belmore centre statistics

	Centre	Centres in LGA	Precinct contribution to centres
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Precinct size	107,920	1,955,360	6
Floorspace by Category	Floorspace*	Proportion of category	Proportion of total
	m ²	%	%
Occupied Retail Floorspace			
Supermarkets & Grocery Stores	1,700	11.7%	6.8%
Specialty Food Stores	900	6.2%	3.6%
Fast-Food Stores	1,000	6.9%	4.0%
Restaurants, Hotels and Clubs	2,800	19.3%	11.2%
Department Stores	0	0.0%	0.0%
Clothing Stores	600	4.1%	2.4%
Hardware and Bulky Goods Stores	2,500	17.2%	10.0%
Other Personal & Household Goods	2,900	20.0%	11.6%
Selected Personal Services	2,100	14.5%	8.4%
Total Retail	14,500	100.0%	57.8%
Occupied Non-Retail Floorspace			
Accommodation	0	0.0%	0.0%
Pubs, Taverns & Clubs	1,300	22.8%	5.2%
Rental, Hiring & Real Estate Services	1,000	17.5%	4.0%
Health Care & Social Assistance	1,000	17.5%	4.0%
Financial & Insurance Services	600	10.5%	2.4%
Administrative & Support Services	200	3.5%	0.8%
Arts & Recreation Services	1,200	21.1%	4.8%
Transport, Postal & Warehousing	300	5.3%	1.2%
Education and Training	0	0.0%	0.0%
Other	100	1.8%	0.4%
Total Non-Retail Commercial Space	5,700	100.0%	22.7%
Vacant Space	4,900	-	19.5%
Total Floorspace	25,100		100.0%
Planning control			
Land zoning	B2		
Building height	18m to 30m		
Floor space ratio	Nil		
Minimum lot size	Nil		
Heritage	<ul style="list-style-type: none"> Federation railway station buildings, 348 Burwood Road and 32-36 Redman Parade (Belmore Railway Station) – State significance Inter war building (former post office), 370–372 Burwood Road – Local significance 		

*Provided by Canterbury Bankstown Council

10.2.2 S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Strong character and community feel High level of amenity and heritage Good range of convenience retail services Good public transport 	<ul style="list-style-type: none"> Some fragmented parcels Some older and poorly maintained stock Poor pedestrian connections High vacancy rate
Opportunities	Threats
<ul style="list-style-type: none"> Planned investment in metro rail Improved public transport connections Planned increased population in catchment 	<ul style="list-style-type: none"> Competing centres Delays in Government investment in infrastructure Market trends

10.2.3 Strategic direction

The opening of the Sydenham to Bankstown Metro is likely to stimulate development in Belmore. Projections suggest that an additional 11,800 sqm (GFA) will be required in Belmore to 2036. Notably the centre has a relatively high vacancy rate, providing some capacity for initial take-up. Balancing future development with the need to maintain the character of Belmore. It is suggested that place-based planning be undertaken to:

- Identify opportunities to deliver amenity improvements to the centre
- Plan for additional housing and commercial development in the centre to increase the population living in the retail catchment and encourage reduced vacancy rates
- Establish appropriate height and FSR controls to balance the need for additional floorspace and housing growth.

10.3 Canterbury

10.3.1 Location characteristics

The Canterbury centre is zoned B2-Local Centre and is approximately 16,588m² in size. It is well connected to Sydney and Bankstown CBDs by buses and trains. Canterbury Station is on the Bankstown line and is served by T3 Bankstown line services while Canterbury Road provides a road connection.

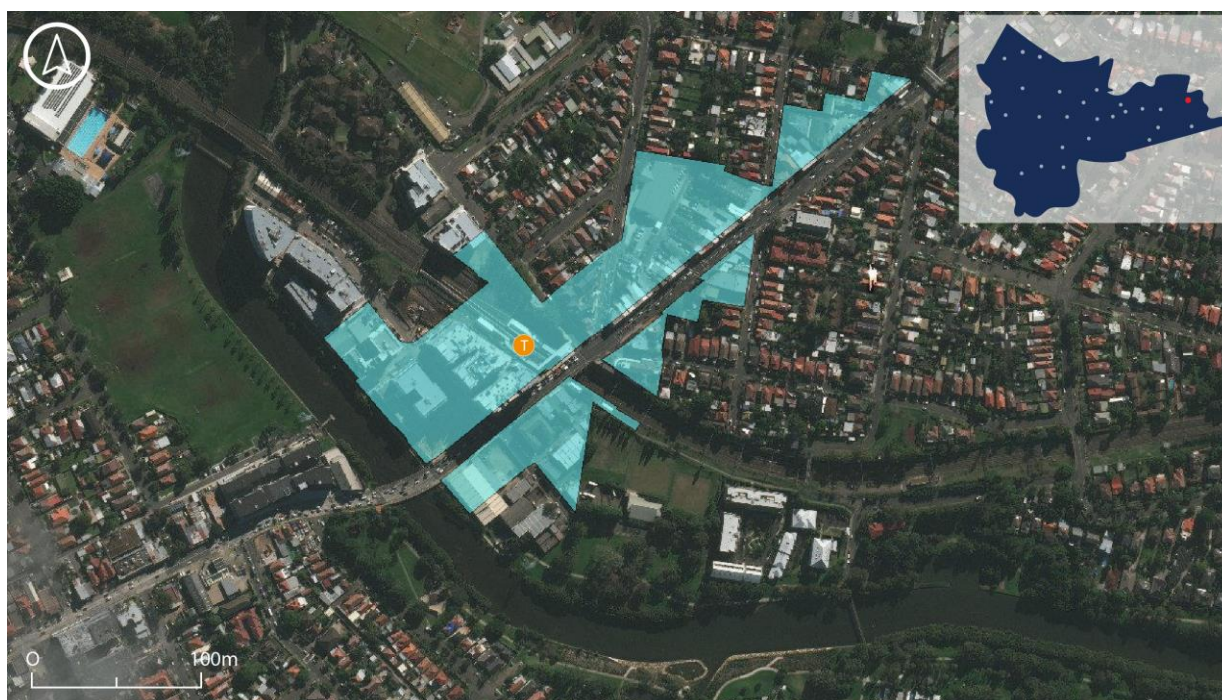
The Canterbury town centre comprises of a commercial strip along Canterbury Road as it intersects with the train station. The precinct contains a variety of older terraced single-story shops along the western end including restaurants and an Aldi. There are high density residential buildings in the eastern B2 area between the railway line and the riverfront; this recently developed area includes ground-floor retail with a Woolworths.

There is a high level of vacancy in this area, particularly along Canterbury Road, but also in the newly developed river-front area which is awaiting tenants. Within the precinct there are poorly maintained warehouses and shops. Lot sizes within this precinct are small.

There is limited on-street parking (not on Canterbury Road), and limited parking for supermarket customers.

The surrounding area is zoned R3 and R4, although dwellings are predominantly single-detached houses.

Figure 36: Canterbury Centre



Legend

B2 - Local Centre

T Train Station

Source: HillPDA, 2019

Table 57 Canterbury centre statistics

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	16,588	974,978	2
Estimated floorspace	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Occupied Retail Floorspace			
Supermarkets & Grocery Stores	2,588	26.7%	15.6%
Specialty Food Stores	800	8.3%	4.8%
Fast-Food Stores	800	8.3%	4.8%
Restaurants, Hotels and Clubs	1,200	12.4%	7.2%
Department Stores	0	0.0%	0.0%
Clothing Stores	400	4.1%	2.4%
Hardware and Bulky Goods Stores	2,000	20.6%	12.1%
Other Personal & Household Goods	1,100	11.4%	6.6%
Selected Personal Services	800	8.3%	4.8%
Total Retail	9,688	100.0%	58.4%
Occupied Non-Retail Floorspace			
Accommodation	0	0.0%	0.0%
Pubs, Taverns & Clubs	500	21.7%	3.0%
Rental, Hiring & Real Estate Services	800	34.8%	4.8%
Health Care & Social Assistance	200	8.7%	1.2%
Financial & Insurance Services	0	0.0%	0.0%

	Floorspace	Proportion of category	Proportion of total
Estimated floorspace	m ²	%	%
Administrative & Support Services	0	0.0%	0.0%
Arts & Recreation Services	500	21.7%	3.0%
Transport, Postal & Warehousing	100	4.3%	0.6%
Education and Training	200	8.7%	1.2%
Other	0	0.0%	0.0%
Total Non-Retail Commercial Space	2,300	100.0%	13.9%
Vacant Space	4,600	-	27.7%
Total Floorspace	16,588	-	100.0%
Planning framework	Control		
Land zoning	B2		
Building height	11m to 26m		
Floor space ratio	2:1 to 3:1		
Minimum lot size	Nil		
Heritage	<ul style="list-style-type: none"> Canterbury Train Station Canterbury-Hurlstone Park Road Youth Club – 193 Canterbury Road Canterbury Club Hotel – 208 Canterbury Road Holfy's Garage – 184 Canterbury Road 		

10.3.2 SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none">Established convenience retailMajors anchors presentGood road and rail accessRow shops have characterProximity to planned Metro line	<ul style="list-style-type: none">Variable amenity throughout the centreLoud/busy Canterbury RoadLack of civic space/ public domainHigh level of vacancies
Opportunities	Threats
<ul style="list-style-type: none">Potential to develop shop top housingPotential to develop above railwayRevitalise Canterbury Road shopsPlanned growth in areaProximity to planned Metro lineClose to the Eastern Harbour CityClose to the Inner WestCanterbury racecourse	<ul style="list-style-type: none">Competing centresPreference for residential in B2 zoned areasCanterbury Racecourse

10.3.3 Strategic direction

The opening of the Sydenham to Bankstown Metro is likely to stimulate development in Canterbury. Projections suggest that an additional 14,900 sqm (GFA) will be required in Canterbury to 2036 including 6,200 sqm of retail floorspace and 8,600 sqm of office floorspace. Balancing future development with the need to maintain the character of Canterbury will require place-based planning for the centre to:

- Identify opportunities to deliver amenity improvements to the centre
- Plan for additional housing and commercial development in the centre to increase the population living in the retail catchment and encourage reduced vacancy rates
- Establish appropriate height and FSR controls to balance the need for additional floorspace and housing growth.
- The future of the Canterbury Centre will be heavily influenced by the future of Canterbury Racecourse, including opportunities for employment, education and commercial uses. This site also opens up an opportunity to reform the centre and deliver public domain benefits and improved links to the Cooks River and Tasker Park. Future Master Planning for this centre should factor in any decision for Canterbury Racecourse.

10.4 Chester Hill

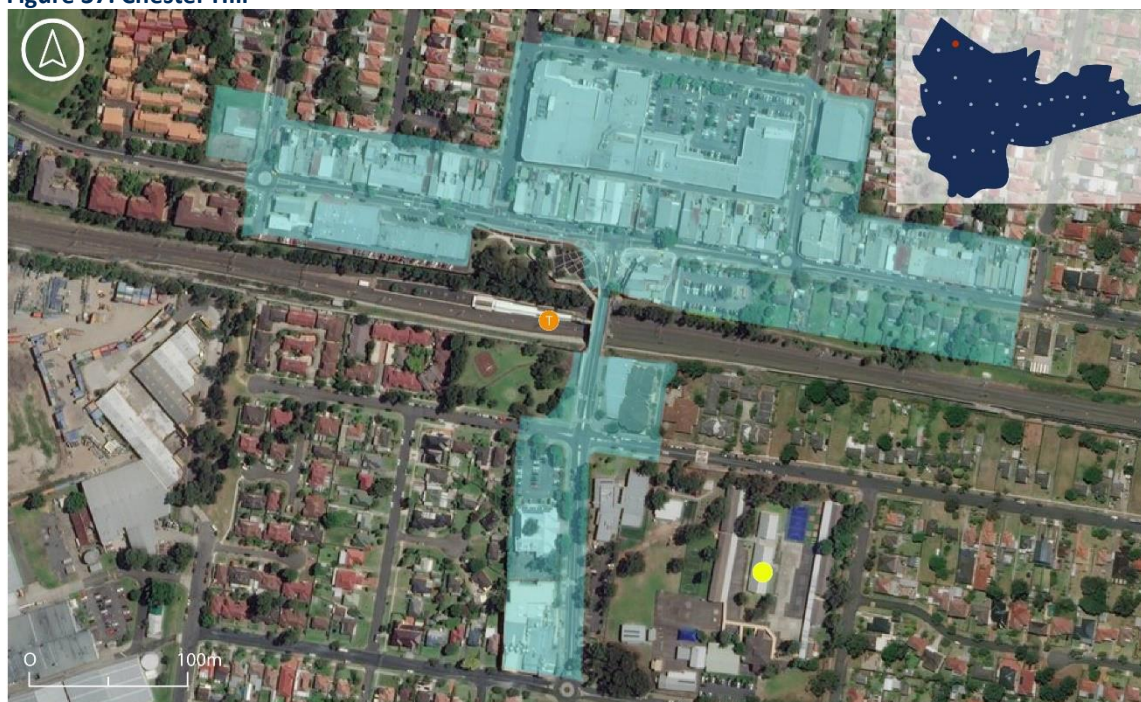
10.4.1 Location characteristics

The Chester Hill precinct is zoned B2-Local Centre and is approximately 108,370m² in size. It is well connected to Sydney and Bankstown CBDs by buses and trains. Chester Hill Station is located at the southern end of the precinct. On the Main South line, it is served by Sydney Trains T3 Bankstown line services while the A22 Hume Highway provides a road connection.

The Chester Hill precinct is comprised of land uses typical of a local centre. These include a medical centre, cafes, restaurants and bars as well as high street retailers. Also present are a small number of specialty stores such as an aquarium and smallgoods retailer. These businesses are located on either side of the Waldron Road, though are predominantly on the Northern side of the road.

At the Northern end of the precinct, bounded by Frost Lane and Bent, Leicester and Priam Streets is Chester Square Shopping Centre. This contains a large supermarket, food court and over 30 retail outlets.

Figure 37: Chester Hill



- Legend
- B2 - Local Centre
 - Train Station
 - Primary School

Source: HillPDA 2018

Table 58 Chester Hill centre statistics

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	108,370	1,955,360	6
Category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Occupied Retail Floorspace			
Supermarkets & Grocery Stores	5,334	33.2%	19.4%
Specialty Food Stores	1,100	6.9%	4.0%
Fast-Food Stores	1,000	6.2%	3.6%
Restaurants, Hotels and Clubs	1,300	8.1%	4.7%
Department Stores	0	0.0%	0.0%
Clothing Stores	2,534	15.8%	9.2%
Hardware and Bulky Goods Stores	300	1.9%	1.1%
Other Personal & Household Goods	3,389	21.1%	12.3%
Selected Personal Services	1,100	6.9%	4.0%
Total Retail	16,057	100.0%	58.5%
Occupied Non-Retail Floorspace			
Accommodation	300	3.1%	1.1%
Pubs, Taverns & Clubs	1,000	10.3%	3.6%

Category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Rental, Hiring & Real Estate Services	800	8.2%	2.9%
Health Care & Social Assistance	4,700	48.5%	17.1%
Financial & Insurance Services	1,500	15.5%	5.5%
Administrative & Support Services	500	5.2%	1.8%
Arts & Recreation Services	0	0.0%	0.0%
Transport, Postal & Warehousing	400	4.1%	1.5%
Education and Training	400	4.1%	1.5%
Other	100	1.0%	0.4%
Total Non-Retail Commercial Space	9,700	100.0%	35.3%
Vacant Space	1,700		6.2%
Total Floorspace	27,457		100.0%
Planning framework	Control		
Land zoning	B2		
Building height	20m to 26m		
Floor space ratio	2.5:1 to 3:1		
Minimum lot size	Nil		
Heritage	Nil		

10.4.2 S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none">Established convenience retailMajors anchors presentGood road and rail accessCharacter and community scale and feel	<ul style="list-style-type: none">Variable amenity throughout the centrePoor pedestrian connectionsLack of civic space/ public domainLimited short term planned growth in catchment
Opportunities	Threats
<ul style="list-style-type: none">Delivery of a new civic plaza to establish a focus for the centreLarge government land holdings adjacent to the main street and a large shopping centre - significant opportunity for growth	<ul style="list-style-type: none">Competing centresClosure of anchorMarket trends

10.4.3 Strategic direction

Chester Hill is expected to continue to grow as a convenience retail centre, largely based in food retailing, to support the surrounding population. Projections suggest that an additional 5,900 sqm (GFA) will be required in Chester Hill to 2036, including 1,900 sqm of retail space and 4,000 sqm of commercial floorspace.

It is suggested that planning for Chester Hill consider:

- The potential to deliver amenity improvements to the centre, including the potential for the establishment of a town square
- Plan for commercial development matched with continued housing growth in the area to increase the population living in the retail catchment
- Maintain and manage existing floorspace.
- At the time of writing this report, Council is in receipt of a Planning Proposal for the Charter Square site. This proposal offers a significant opportunity to inject investment into commercial/residential and public domain improvements to the centre.

10.5 Chullora Marketplace

10.5.1 Location characteristics

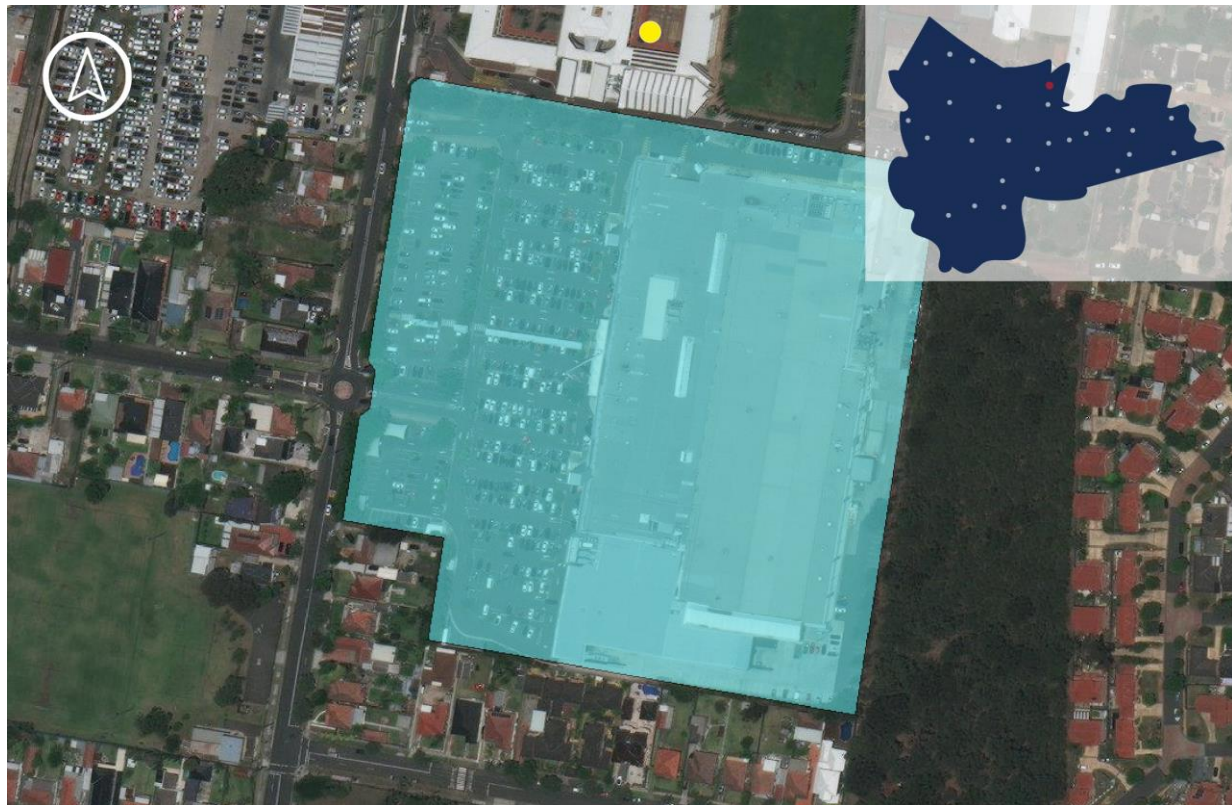
Chullora Marketplace is a large shopping mall zoned as B2 Local Centre, located to the north in the suburb of Greenacre. With a total GFA of 20,659m² of retail floorspace, the centre hosts the anchor tenants Woolworths, Big W and Aldi. Other businesses include meat and fish specialty stores, a pharmacy, florist, cake shop, post office and numerous food outlets.

The Hume Highway is 100m north-west of the centre. There is no train station nearby, however, the centre is serviced by the M90, 913 and 941 buses. There is a ground-level open air car park afront the centre, which is historically congested.

The site is bordered by a high school to the north and a public park to the east. Residential areas to the south and west areas are characterised by single detached dwellings and are zoned R2 Low Density Residential.

At its meeting of the 23 July 2019 Canterbury Bankstown resolved to prepare and submit a planning proposal to the NSW Department of Planning, Industry and Environment relating to the redevelopment of Chullora Marketplace (and an adjacent lot) into a mixed-use development incorporating a mixed-use development (3–6 storeys) with shop top housing and associated parking within podium levels. The key feature is a central roadway and plaza area with active frontages and community space.

Figure 38: Chullora Marketplace



Legend

- B2 - Local Centre
- Primary school

Table 59 Chullora Marketplace centre statistic

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	20,659	974,978	2
Category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Occupied Retail Floorspace			
Supermarkets & Grocery Stores	5,685	30.5%	27.5%
Specialty Food Stores	840	4.5%	4.1%
Fast-Food Stores	500	2.7%	2.4%
Restaurants, Hotels and Clubs	800	4.3%	3.9%
Department Stores	7916	42.5%	38.3%
Clothing Stores	1,080	5.8%	5.2%
Hardware and Bulky Goods Stores	0	0.0%	0.0%
Other Personal & Household Goods	1,300	7.0%	6.3%
Selected Personal Services	500	2.7%	2.4%
Total Retail	18,621	100.0%	90.1%
Occupied Non-Retail Floorspace			
Accommodation	738	36.2%	3.6%

Category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Pubs, Taverns & Clubs	0	0.0%	0.0%
Rental, Hiring & Real Estate Services	0	0.0%	0.0%
Health Care & Social Assistance	300	14.7%	1.5%
Financial & Insurance Services	100	4.9%	0.5%
Administrative & Support Services	400---	19.6%	1.9%
Arts & Recreation Services	150	7.4%	0.7%
Transport, Postal & Warehousing	200---	9.8%	1.0%
Education and Training	0	0.0%	0.0%
Other	150	7.4%	0.7%
Total Non-Retail Commercial Space	2,038	100.0%	9.9%
Vacant Space			0.0%
Total Floorspace	20,659		100.0%
Planning framework	Controls		
Land zoning	B2 – Local Centre		
Building height	11m		
Floor space ratio	1:1		
Minimum lot size	Nil		
Heritage	Item – Archaeological (Site of “Liebentritt Pottery”, 355 Waterloo Road, Lot 41, DP 1037863, Local significance, Item No. A4)		

10.5.2 S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Strong anchor tenants Large lot size Close to industrial area 	<ul style="list-style-type: none"> Poor access to public transport Site constrained by sensitive uses (school, low density residential, public open space)
Opportunities	Threats
<ul style="list-style-type: none"> Consolidate parking Diversify retail offering 	<ul style="list-style-type: none"> Competing centres Market trends

10.5.3 Strategic direction

Projections suggest that an additional 18,600 sqm (GFA) will be required in Chullora to 2036, including 8,700sq m of additional retail floorspace and 9,900 sqm of commercial floorspace. It is likely that this standalone centre will continue to expand as the catchment population increases. Particular opportunities may arise from the planned repositioning of Chullora Business Park.

It is suggested that:

- Opportunities to improve connections to Chullora Business Park be explored, to facilitate improved access to services by workers to retail and commercial
- Monitor interest in expansion opportunities surrounding Chullora Marketplace to transition from a standalone shopping centre to a more diverse village centre in the medium to long term.

10.6 Clemton Park

10.6.1 Location characteristics

Clemton Park is centred upon a recently developed mixed use centre, predominantly medium to high density residential. It is called the Clemton Park Shopping Village. The precinct is zoned B1-Neighbourhood Centre and is approximately 7,400m² in size. It is located 100m south of Canterbury Road and Canterbury Hospital, situated on the southern side of Canterbury Road. The Clemton Park industrial areas is to the west of the centre.

The nearest train station is Campsie station located 2km north of the precinct. There is limited on-street parking, with some underground parking provided. The 490 bus connects the precinct from Hurstville to Drummoyne and Campsie station, operating at 30-minute frequency.

The Clemton Park Shopping Village is anchored by a Coles and hosts health facilities and several cafes and restaurants.

The residential area surrounding the centre is predominantly single detached houses, however it is mostly zoned R3 Medium Density Residential or R4 High Density Residential.

Figure 39: Clemton Park



HillPDA
CONSULTING

Source: HillPDA, 2019

Table 60 Clemton Park centre statistics

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	7,400	974,978	1

Category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Occupied Retail Floorspace			
Supermarkets & Grocery Stores	3,800	55.1%	51.4%
Specialty Food Stores	150	2.2%	2.0%
Fast-Food Stores	450	6.5%	6.1%
Restaurants, Hotels and Clubs	600	8.7%	8.1%
Department Stores	0	0.0%	0.0%
Clothing Stores	0	0.0%	0.0%
Hardware and Bulky Goods Stores	0	0.0%	0.0%
Other Personal & Household Goods	1,600	23.2%	21.6%
Selected Personal Services	300	4.3%	4.1%
Total Retail	6,900	100.0%	93.2%
Occupied Non-Retail Floorspace			
Accommodation	0	0.0%	0.0%
Pubs, Taverns & Clubs	0	0.0%	0.0%
Rental, Hiring & Real Estate Services	0	0.0%	0.0%
Health Care & Social Assistance	400	80.0%	5.4%
Financial & Insurance Services	0	0.0%	0.0%
Administrative & Support Services	0	0.0%	0.0%
Arts & Recreation Services	0	0.0%	0.0%
Transport, Postal & Warehousing	0	0.0%	0.0%
Education and Training	0	0.0%	0.0%
Other	100	20.0%	1.4%
Total Non-Retail Commercial Space	500	100.0%	6.8%
Vacant Space	0		0.0%
Total Floorspace	7,400		100.0%
Planning framework	Control		
Land zoning	B1 – Neighbourhood Centre		
Building height	10m		
Floor space ratio	Nil		
Minimum lot size	Nil		
Heritage	Nil		

10.6.2 S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Close to Canterbury Road and Canterbury Hospital Good pedestrian/shopper amenity 	<ul style="list-style-type: none"> Poor public transport connections Fully developed Industrial land nearby should be favoured
Opportunities	Threats

- Densifying surrounding residential population can support retail
- Health-related uses in support of Canterbury Hospital
- Nearby under-utilised land parcels

- Market preference for residential land use
- Competing centres

10.6.3 Strategic direction

Projections suggest that an additional 16,100 sqm (GFA) will be required in Clemton Park to 2036, including 8,800sq m of additional retail floorspace and 10,200 sqm of commercial floorspace. These projections take into account population projections which assume continued growth in Clemton Park. This may be subject to further rezoning decisions by Council.

It will be appropriate to monitor development activity in Clemton Park. Any proposals to increase population in this catchment should consider the need for additional commercial floorspace noting current vacancy levels are at 0%.

Council intends to undertake a broader master planning exercise for the *Eastern Lifestyle and Medical Precinct – Campsie to Kingsgrove*. Any need to accommodate additional retail and commercial floorspace in the centre could be addressed as part of this work.

10.7 Earlwood

10.7.1 Location characteristics

The Earlwood precinct is zoned B2-Local Centre and is approximately 75,620m² in size. The M5 motorway provides good road access to the West. Canterbury Road provides good access to Sydney and Bankstown CBDs. Earlwood is served by public buses and Bardwell Park Station is located on the other side of Girrawheen Park, approximately 500 metres south along Hartill-Law Avenue. The station is located on the East Hills line, It is served by Sydney Trains T8 Airport & South line services.

The Earlwood precinct is comprised of land uses typical of land zoned B2 Local Centre. These include a supermarket, cafes, restaurants and bars as well as high street retailers. These businesses are clustered at the junction of Homer Street, Clarke Street and Earlwood Avenue and extend East along Homer Street.

Also present in the centre, on Homer Street, is Our Lady of Lourdes Catholic Church and Primary school. To the south of the cluster of businesses is Girraween Park, maintained by NSW National Parks. The park is large and features native vegetation and hiking trails. A picnic area is located approximately a 750 metre walk from the town centre.

Figure 40: Earlwood



- Legend
- B2 - Local Centre
 - Primary School

Table 61 Earlwood centre statistics

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	75,620	1,955,360	4
Category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Occupied Retail Floorspace			
Supermarkets & Grocery Stores	2,300	17.6%	12.4%
Specialty Food Stores	1,200	9.2%	6.5%
Fast-Food Stores	1,500	11.5%	8.1%
Restaurants, Hotels and Clubs	1,800	13.7%	9.7%
Department Stores	300	2.3%	1.6%
Clothing Stores	1,200	9.2%	6.5%
Hardware and Bulky Goods Stores	400	3.1%	2.2%
Other Personal & Household Goods	2,100	16.0%	11.4%
Selected Personal Services	2,300	17.6%	12.4%
Total Retail	13,100	100.0%	70.8%
Occupied Non-Retail Floorspace			
Accommodation	0	0.0%	0.0%
Pubs, Taverns & Clubs	500	14.7%	2.7%
Rental, Hiring & Real Estate Services	500	14.7%	2.7%
Health Care & Social Assistance	800	23.5%	4.3%
Financial & Insurance Services	400	11.8%	2.2%
Administrative & Support Services	100	2.9%	0.5%
Arts & Recreation Services	700	20.6%	3.8%
Transport, Postal & Warehousing	200	5.9%	1.1%
Education and Training	0	0.0%	0.0%
Other	200	5.9%	1.1%
Total Non-Retail Commercial Space	3,400	100.0%	18.4%
Vacant Space	2,000		10.8%
Total Floorspace	18,500		100.0%
Planning framework	Control		
Land zoning	B2		
Building height	11.5m to 18m		
Floor space ratio	1:1		
Minimum lot size	Nil		
Heritage	Nil		

10.7.2 S.W.O.T. Analysis

An assessment of the precinct's strengths, weaknesses, opportunities and threats is provided below.

Strengths	Weaknesses
<ul style="list-style-type: none"> Established convenience retail centre Strong food and personal services sectors Relatively low vacancy rates Good road access Ample parking Anchors (Coles) present 	<ul style="list-style-type: none"> Reduced amenity due to main road Some fragmented parcels Variable amenity throughout the centre Some older and poorly maintained stock Poor connections to other centres and employment precincts Significant number of development proposals have been abandoned
Opportunities	Threats
<ul style="list-style-type: none"> Improved civic space through partial street closures 	<ul style="list-style-type: none"> Competing centres Market trends

10.7.3 Strategic direction

Projections suggest that an additional 11,300 sqm (GFA) will be required in Earlwood to 2036, including 4,400sq m of additional retail floorspace and 6,900 sqm of commercial floorspace. Options to strengthen and build on this well-performing centre could include:

- Amenity improvements and eat streets in the quieter parts of the centre, building on the multi-cultural nature of the centre
- Investigate the potential to encourage improvements in amenity through street or lane way closures to create civic space.

10.8 Georges Hall

10.8.1 Location characteristics

The Georges Hall centre contains land zoned B2-Local Centre and is approximately 5,350m² in size. It is located just north of the Bankstown Airport and is 4km west of the Bankstown CBD. Henry Lawson Drive connects Georges Hall to the A22 Hume Highway 3km to the north, and the A34 Milperra Road 3km to the south.

Georges Hall is not on a train line; however, the 905 and 911 bus services connect the centre to Fairfield station and Bankstown CBD at 15-30-minute intervals. There is ample on-street parking and several parking lots.

The centre is surrounded by R2 Low Density Residential land to the north and west, and SP2 Infrastructure to the south and east.

Businesses include fast food restaurants, a post office, café, butchers, dentist and hair studio. There is an IGA just to the east of the centre.

Georges Hall is positioned immediately to the North of Bankstown Airport. This provides a significant opportunity and potential to grow the centre to support the future role of Bankstown Airport and to provide conveniences to the workers of the Airport.

Georges River Grammar is also located within this suburb. The school is a significant generator of activity and employment as it has a regional catchment.

Figure 41: Georges Hall



Legend

- B2 - Local Centre
- Primary / Secondary school

Table 62 Georges Hall centre statistic

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	5,350	974,978	1
Floorspace category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Occupied Retail Floorspace			
Supermarkets & Grocery Stores	3,150	64.9%	58.9%
Specialty Food Stores	200	4.1%	3.7%
Fast-Food Stores	400	8.2%	7.5%
Restaurants, Hotels and Clubs	700	14.4%	13.1%
Department Stores	0	0.0%	0.0%
Clothing Stores	0	0.0%	0.0%
Hardware and Bulky Goods Stores	200	4.1%	3.7%
Other Personal & Household Goods	100	2.1%	1.9%
Selected Personal Services	100	2.1%	1.9%
Total Retail	4,850	100.0%	90.7%
Occupied Non-Retail Floorspace			
Accommodation	0	0.0%	0.0%

Floorspace category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Pubs, Taverns & Clubs	100	33.3%	1.9%
Rental, Hiring & Real Estate Services	0	0.0%	0.0%
Health Care & Social Assistance	100	33.3%	1.9%
Financial & Insurance Services	0	0.0%	0.0%
Administrative & Support Services	0	0.0%	0.0%
Arts & Recreation Services	0	0.0%	0.0%
Transport, Postal & Warehousing	100	33.3%	1.9%
Education and Training	0	0.0%	0.0%
Other	0	0.0%	0.0%
Total Non-Retail Commercial Space	300	100.0%	5.6%
Vacant Space	200		3.7%
Total Floorspace	5,350		100.0%
Planning framework	Controls		
Land zoning	B2		
Building height	11m		
Floor space ratio	1:1 – 2:1		
Minimum lot size	Nil		
Heritage	Nil		

10.8.2 S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Established local retail offering Planning controls allow for development 	<ul style="list-style-type: none"> Lack of public transport Disconnected from main transport nodes or other activity areas Insufficient population to support business development
Opportunities	Threats
<ul style="list-style-type: none"> Focus on retail and dining Consolidate parking Close proximity to Bankstown Airport 	<ul style="list-style-type: none"> Competition from other centres

10.8.3 Strategic direction

Georges Hall is expected to continue to grow as a convenience retail centre, largely based in food retailing, to support the surrounding population. Projections suggest that an additional 4,900 sqm (GFA) will be required in Georges Hall to 2036, including 1,500 sqm of retail space and 3,400 sqm of commercial floorspace.

It is suggested that planning for Georges Hall consider:

- Support continued housing growth in the area to increase the population living in the retail catchment
- Maintain and manage existing floorspace.

10.9 Greenacre Centre

10.9.1 Location characteristics

The Greenacre precinct contains land zoned B2-Local Centre and is approximately 54,460m² in size. Bankstown CBD is approximately 3 kilometres South-West via local Roads and the Hume Highway provides access to Sydney CBD. Greenacre doesn't have a train station, however bus services are frequent to Bankstown and Sydney CBDs.

The Greenacre centre is zoned B2 and is comprised of land uses typical of a local centre. These include two supermarkets, cafes, restaurants and bars as well as high street retailers. These businesses are largely located on either side of Waterloo Road between Macquarie Street and Chiswick Road. The co-location of Middle Eastern food retailers and grocery stores is a key factor for the 'pull' of the precinct as a destination.

Greenacre library is located on Community Place, a block to the West of Waterloo Road. Also present in the centre, at the southern end of the centre is Al Sadiq College, an independent school offering education based in the Muslim Alawite tradition. The College serves over 600 students across two campuses drawn from the LGA and further afield across two campuses (the other being in Yagoona).

Approximately a kilometre East of Greenacre local centre is the Primo Foods Distribution Centre, located on the A3 Roberts Road. This is a large cold storage and distribution facility on a lot zoned IN2 Light Industrial. The facility is at the southern end of a large extent of industrial land containing manufacturing, warehousing and wholesale businesses. While the Primo Foods Distribution Centre is located in Canterbury Bankstown LGA, the remainder of the industrial lands is located in Inner West LGA. Also located on Roberts Road is Greenacre Bowling Club (Bankstown Sports Club) and is a significant employment and activity generator.

Figure 42: Greenacre Centre



Table 63 Greenacre centre statistics

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	54,650	1,955,360	3
Floorspace Category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Occupied Retail Floorspace			
Supermarkets & Grocery Stores	6,717	37.6%	24.3%
Specialty Food Stores	1,322	7.4%	4.8%
Fast-Food Stores	2,078	11.6%	7.5%
Restaurants, Hotels and Clubs	3,414	19.1%	12.4%
Department Stores	0	0.0%	0.0%
Clothing Stores	1,332	7.5%	4.8%
Hardware and Bulky Goods Stores	629	3.5%	2.3%
Other Personal & Household Goods	1,050	5.9%	3.8%
Selected Personal Services	1,336	7.5%	4.8%
Total Retail	17,878	100.0%	64.8%
Occupied Non-Retail Floorspace			
Accommodation	0	0.0%	0.0%
Pubs, Taverns & Clubs	336	3.7%	1.2%

Rental, Hiring & Real Estate Services	384	4.2%	1.4%
Health Care & Social Assistance	2,769	30.5%	10.0%
Financial & Insurance Services	504	5.6%	1.8%
Administrative & Support Services	0	0.0%	0.0%
Arts & Recreation Services	1,471	16.2%	5.3%
Transport, Postal & Warehousing	569	6.3%	2.1%
Education and Training	176	1.9%	0.6%
Other	2,867	31.6%	10.4%
Total Non-Retail Commercial Space	9,076	100.0%	32.9%
Vacant Space	646		2.3%
Total Floorspace	27,600		100.0%
Planning framework	Control		
Land zoning	B2		
Building height	13m to 14m		
Floor space ratio	.6:1 to 1:1		
Minimum lot size	Nil		
Heritage	Nil		

10.9.2 S.W.O.T. Analysis

An assessment of the precinct's strengths, weaknesses, opportunities and threats is provided below.

Strengths	Weaknesses
<ul style="list-style-type: none">Strongly performing convenience retail centreTraditional high street characterStrong development pipelineMajors anchor present (Coles and IGA)Planning framework permits growthGood amenityGood parking provisionGood mix of convenience retail	<ul style="list-style-type: none">Some fragmented parcelsSubstantial older and poorly maintained stockPoor public transport connectionsCivic space does not well used (at time of inspection) and connections need to be improved – community place
Opportunities	Threats
<ul style="list-style-type: none">Development sites available	<ul style="list-style-type: none">Competing centresMarket trends

10.9.3 Strategic direction

Greenacre commercial centre is not expected to grow significantly, largely due to the centre's proximity to Bankstown CBD.

It is suggested that planning consider:

- The potential to deliver amenity improvements to the centre, in order to maintain competitiveness
- Support continued housing growth in the area to increase the population living in the neighbourhood retail catchment
- Maintain and manage existing floorspace.

10.10 Lakemba Centre

10.10.1 Location characteristics

The Lakemba precinct is zoned B2-Local Centre and is approximately 137,700m² in size. It is well connected to Sydney and Bankstown CBDs by buses and trains. Lakemba Station is on the Bankstown line and is served by T3 Bankstown line services while Canterbury Road provides a road connection.

Lakemba town centre comprises of a retail/commercial strip running north-south along Haldon Street. The co-location of Middle Eastern and South-Asian food retailers and grocery stores is a key factor for the 'pull' of the precinct as a destination.

Haldon Street / Wangee Road is the primary north-south route through the precinct connecting to Punchbowl Road in the north and Canterbury Road in the south. Automobile related land uses feature prominently alongside traditional high street retail land uses.

Schools in the precinct include Holy Spirit College, Hampden Park Public School and St Therese's Catholic Primary School. There are a number of churches and mosques in the surrounding area including Lakemba Mosque on Wangee Road near Punchbowl Road.

Figure 43: Lakemba Centre



- Legend
- B2 - Local Centre
 - Train Station
 - Primary School
 - Secondary School



- Legend
- B2 - Local Centre
 - Train Station
 - Primary School
 - Secondary School

Source: HillPDA 2018

HillPDA
CONSULTING

Table 64 Lakemba centre statistics

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	137,700	1,955,360	7
Category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Occupied Retail Floorspace			
Supermarkets & Grocery Stores	4,500	19.6%	14.8%
Specialty Food Stores	3,000	13.0%	9.8%
Fast-Food Stores	2,500	10.9%	8.2%
Restaurants, Hotels and Clubs	3,000	13.0%	9.8%
Department Stores	0	0.0%	0.0%
Clothing Stores	2,500	10.9%	8.2%
Hardware and Bulky Goods Stores	1,500	6.5%	4.9%
Other Personal & Household Goods	3,500	15.2%	11.5%
Selected Personal Services	2,500	10.9%	8.2%
Total Retail	23,000	100.0%	75.4%
Occupied Non-Retail Floorspace			
Accommodation	0	0.0%	0.0%
Pubs, Taverns & Clubs	1,000	15.4%	3.3%
Rental, Hiring & Real Estate Services	700	10.8%	2.3%
Health Care & Social Assistance	1,300	20.0%	4.3%
Financial & Insurance Services	700	10.8%	2.3%
Administrative & Support Services	200	3.1%	0.7%
Arts & Recreation Services	800	12.3%	2.6%
Transport, Postal & Warehousing	200	3.1%	0.7%
Education and Training	200	3.1%	0.7%
Other	1,400	21.5%	4.6%
Total Non-Retail Commercial Space	6,500	100.0%	21.3%
Vacant Space	1,000		3.3%
Total Floorspace	30,500		100.0%
Planning framework	Control		
Land zoning	B2		
Building height	11.5m to 21m		
Floor space ratio	Nil		
Minimum lot size	Nil		
Heritage	Nil		

10.10.2S.W.O.T. Analysis

An assessment of the precinct's strengths, weaknesses, opportunities and threats is provided below.

Strengths	Weaknesses
<ul style="list-style-type: none">Strongly performing convenience retail centreStrong food retail presenceTraditional high street characterReasonable development interest, including rezoning at Croydon StreetMajors anchor present (Woolworths and IGA)Good amenityGood public transport	<ul style="list-style-type: none">Some fragmented parcelsSome older and poorly maintained stock
Opportunities	Threats
<ul style="list-style-type: none">Investment in metro rail	<ul style="list-style-type: none">Competing centresMarket trends

10.10.3 Strategic direction

The opening of the Sydenham to Bankstown Metro is likely to stimulate development in Lakemba. Projections suggest that an additional 7,700 sqm (GFA) will be required in Lakemba to 2036. Balancing future development with the need to maintain the character of Lakemba. It is suggested that place-based planning be undertaken for the centre to:

- Identify opportunities to deliver amenity improvements to the centre
- Support additional housing in the centre to increase the population living in the retail catchment and encourage reduced vacancy rates
- Establish appropriate height and FSR controls to balance the need for additional floorspace and housing growth.

10.11 Padstow Centre

10.11.1 Location characteristics

The Padstow Centre precinct is zoned B2-Local Centre and is approximately 93,840m² in size. The new M5 motorway provides a road connection to Sydney CBD and the A6 to Bankstown. Padstow Train Station is on the East Hills Line, it is served by Sydney Trains T8 Airport and South Line services.

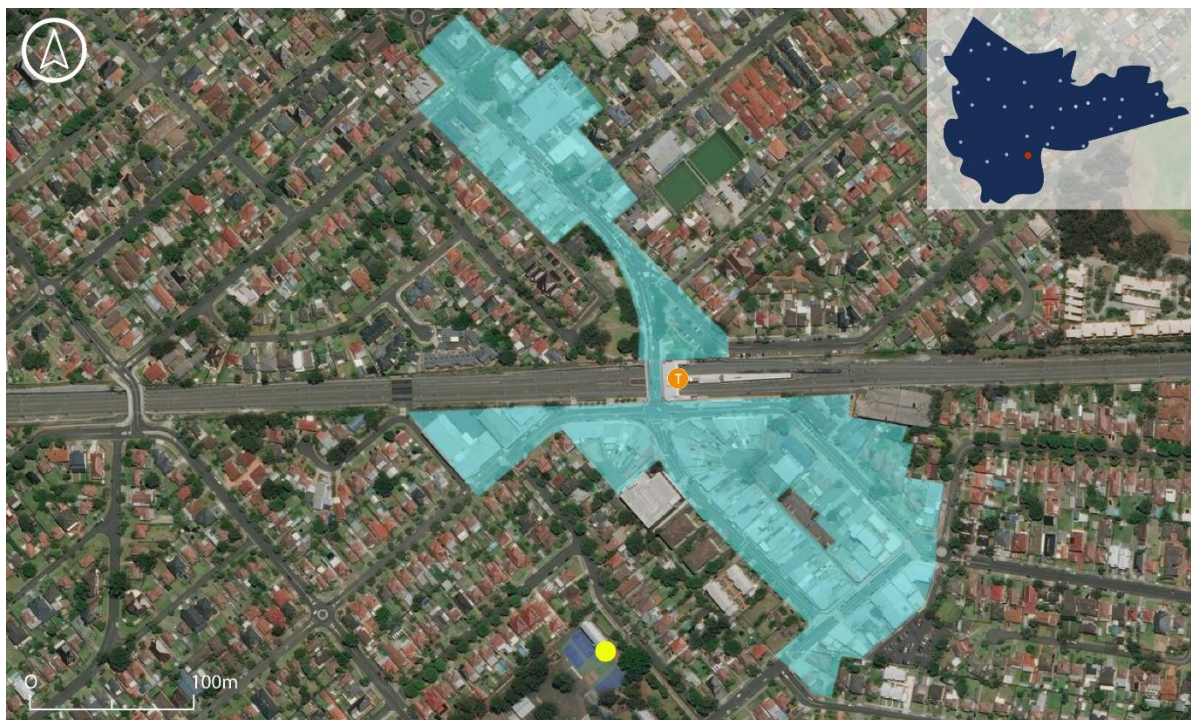
The Padstow precinct is comprised of land uses typical of a local centre. These include a supermarket, cafes, restaurants and bars as well as high street retailers. These businesses are located on either side of Padstow Station, located at the centre of the precinct.

The area south of the railway line, along Howard Road and Padstow Parade also contains two gyms and Padstow RSL Club. The area north of the railway line, along Cahors Road is home to Padstow Library, a bowling club and aquatic centre. Padstow centre also includes a major TAFE NSW campus north of the railway station and town centre.

Figure 44: Padstow Centre



- Legend
- B2 - Local Centre
 - Train Station
 - Primary School



- Legend
- B2 - Local Centre
 - Train Station
 - Primary School

Source: HillPDA 2018

HillPDA
CONSULTING

Table 65 Padstow centre statistics

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	93,840	1,955,360	5
Category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Occupied Retail Floorspace			
Supermarkets & Grocery Stores	2,125	13.9%	6.5%
Specialty Food Stores	862	5.6%	2.6%
Fast-Food Stores	1,221	8.0%	3.7%
Restaurants, Hotels and Clubs	3,663	23.9%	11.1%
Department Stores	0	0.0%	0.0%
Clothing Stores	1,042	6.8%	3.2%
Hardware and Bulky Goods Stores	1,760	11.5%	5.3%
Other Personal & Household Goods	1,439	9.4%	4.4%
Selected Personal Services	3,201	20.9%	9.7%
Total Retail	15,313	100.0%	46.5%
Occupied Non-Retail Floorspace			
Accommodation	1,035	6.5%	3.1%
Pubs, Taverns & Clubs	3,182	19.9%	9.7%
Rental, Hiring & Real Estate Services	2,765	17.3%	8.4%
Health Care & Social Assistance	3,468	21.6%	10.5%
Financial & Insurance Services	1,032	6.4%	3.1%
Administrative & Support Services	241	1.5%	0.7%
Arts & Recreation Services	1,322	8.3%	4.0%
Transport, Postal & Warehousing	567	3.5%	1.7%
Education and Training	203	1.3%	0.6%
Other	2,208	13.8%	6.7%
Total Non-Retail Commercial Space	16,023	100.0%	48.7%
Vacant Space	1,571		4.8%
Total Floorspace	32,907		100.0%
Planning framework	Control		
Land zoning	B2		
Building height	13m to 14m		
Floor space ratio	0.6:1 to 1:1		
Minimum lot size	Nil		
Heritage	Nil		

10.11.2S.W.O.T. Analysis

Strengths	Weaknesses
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<ul style="list-style-type: none"> • Diverse retail offering • Good amenity • Ample parking • Good public transport and motorway access 	<ul style="list-style-type: none"> • Low density of development limits population growth in catchment • Small lot sizes • Some old and poorly maintained stock
Opportunities	Threats
<ul style="list-style-type: none"> • Improved long term transport connections to Bankstown and Parramatta proposed by Council • Any change to planning controls to provide sensitive transition to surrounding low density residential areas 	<ul style="list-style-type: none"> • Competing centres • Market trends

10.11.3 Strategic direction

There is an opportunity for Padstow to strengthen its role as a local centre. Projections suggest that an additional 3,100 sqm (GFA) will be required in Padstow to 2036. It is suggested that place-based planning be undertaken for the centre to:

- Leverage good public transport access to strengthen the Centre and range of uses located in the centre as incremental growth occurs
- Identify opportunities to deliver amenity improvements to the centre
- Support additional housing in the centre to increase the population living in the retail catchment and encourage reduced vacancy rates
- Establish appropriate height and FSR controls to balance the need for additional floorspace and housing growth.
- Council is in receipt of a Planning Proposal that is in proximity to the centre. This in principle would restore the mixed-use nature of the precinct and strengthen the economic resilience of the centre.

10.12 Panania

10.12.1 Location characteristics

The Panania precinct is zoned B2-Local Centre and is approximately 61,180m² in size. It is connected to Sydney and Bankstown CBDs by train and buses respectively. Panania Station is on the East Hills line, is served by Sydney Trains T8 Airport & South line services. The M5 motorway provides a road connection to Sydney CBD.

Panania Centre is effectively two local centres, separated by a small stretch of residential houses along Tower Street. The larger centre stretched North from Tower Street, along Anderson Avenue to Panania Station. This strip of businesses is typical of a local centre, comprising of high street retail land uses as well as a supermarket, public library and senior citizens centre. Panania Centre also includes St Christopher's Church and Primary School, both of which are a significant generator of employment and economic activity within this centre. Further, there is a clear concentration of economic and centre activity south of the railway line. The focus for growth and change should be retained south of the railway line with small scale retail north of the rail line to main local servicing and produce a sensitive transition in scale to the surrounding residential areas.

Approximately 500 metres East along Tower Street is a second cluster of businesses. These comprise of further high street retailers, with a high concentration of restaurants and cafes, as well as an automotive repair business.

Figure 45: Panania



Table 66 Panania centre statistics

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	61,180	1,955,360	3
Category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Occupied Retail Floorspace			
Supermarkets & Grocery Stores	1,499	19.4%	9.6%
Specialty Food Stores	1,090	14.1%	7.0%
Fast-Food Stores	846	10.9%	5.4%
Restaurants, Hotels and Clubs	1,291	16.7%	8.3%
Department Stores	0	0.0%	0.0%
Clothing Stores	411	5.3%	2.6%
Hardware and Bulky Goods Stores	332	4.3%	2.1%
Other Personal & Household Goods	1,275	16.5%	8.2%
Selected Personal Services	996	12.9%	6.4%
Total Retail	7,740	100.0%	49.8%
Occupied Non-Retail Floorspace			
Accommodation	0	0.0%	0.0%
Pubs, Taverns & Clubs	2,422	35.4%	15.6%
Rental, Hiring & Real Estate Services	0	0.0%	0.0%
Health Care & Social Assistance	1,394	20.4%	9.0%
Financial & Insurance Services	369	5.4%	2.4%

Category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Administrative & Support Services	125	1.8%	0.8%
Arts & Recreation Services	221	3.2%	1.4%
Transport, Postal & Warehousing	507	7.4%	3.3%
Education and Training	0	0.0%	0.0%
Other	1,811	26.4%	11.6%
Total Non-Retail Commercial Space	6,849	100.0%	44.0%
Vacant Space	965		6.2%
Total Floorspace	15,554		100.0%

10.12.2 Planning parameters

Planning control	
Land zoning	B2
Building height	14m
Floor space ratio	1:1 to 2:1
Minimum lot size	Nil
Heritage	Nurse Schwarzel Fountain 77 Anderson Avenue - Local significance

10.12.3S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none">• Good pedestrian environment and public spaces• Anchor land uses (IGA)• Proximity to train station	<ul style="list-style-type: none">• Some fragmented parcels• Vacant retail floorspace• Low density of development limits population growth in catchment• Limited north-south connection• Tower Street area has low public transport accessibility
Opportunities	Threats
<ul style="list-style-type: none">• More diverse retail and food	<ul style="list-style-type: none">• Limited area for growth within B2 zoned land• Resistance to densification in the centre

10.12.4 Strategic direction

Panania is expected to continue to grow as a convenience retail centre to the local neighbourhood. The centre's strengths are largely based in food retailing, to support the surrounding population. The Panania Hotel also make a significant contribution to the total floorspace of the centre. Building on these strengths, will allow the centre to continue to grow.

Projections suggest that an additional 5,300 sqm (GFA) will be required in Panania to 2036, including 1,400 sqm of retail space and 3,900 sqm of commercial floorspace.

It is suggested that planning for Panania consider:

- The potential to deliver amenity improvements to the centre
- Support continued housing growth in the area to increase the population living in the retail catchment with a focus on retention south of the railway line.
- Maintain and manage existing floorspace.
- Reconsider the potential for longer term expansion post 2026, when existing floor space vacancy may be lower.
- Opportunity to retain Council owned land for a variety of uses including public domain and local services.

10.13 Revesby Centre

10.13.1 Location characteristics

The Revesby precinct is zoned B2-Local Centre and is approximately 123,400m² in size. The M5 motorway provides a road connection to Sydney CBD and Bankstown. Revesby is located on the East Hills and Sydney Airport train lines affording it excellent mass transit connectivity.

The Revesby precinct is comprised of land uses typical of a local centre. These include two supermarkets, cafes, restaurants and bars as well as high street retailers. These businesses are located on either side of the East Hills Line. Revesby Station is located at the centre of the precinct.

At the southern end of the precinct, is Revesby Village Centre, a large shopping and entertainment complex. Within the centre there is a food court, various retail outlets, a bowling and arcade centre and medical centre. Attached to the centre is Revesby Workers Club, a large complex which features cafes, bars, restaurants, a fitness centre, function rooms, childcare facilities and a car wash. The Revesby Workers Club is a large employer and generator of activity in the centre.

Also located at the southern end of the precinct are Revesby Community Centre and YMCA Bankstown.

Figure 46: Revesby Centre



Source: HillPDA 2018



Table 67 Revesby centre statistics

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	123,440	1,955,360	6

Category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Occupied Retail Floorspace			
Supermarkets & Grocery Stores	8,541	32.6%	13.5%
Specialty Food Stores	3,840	14.7%	6.1%
Fast-Food Stores	2,796	10.7%	4.4%
Restaurants, Hotels and Clubs	1,645	6.3%	2.6%
Department Stores	0	0.0%	0.0%
Clothing Stores	2,076	7.9%	3.3%
Hardware and Bulky Goods Stores	998	3.8%	1.6%
Other Personal & Household Goods	3,791	14.5%	6.0%
Selected Personal Services	2,503	9.6%	4.0%
Total Retail	26,190	100.0%	41.5%
Occupied Non-Retail Floorspace			
Accommodation	0	0.0%	0.0%
Pubs, Taverns & Clubs	2,886	8.4%	4.6%
Rental, Hiring & Real Estate Services	907	2.6%	1.4%
Health Care & Social Assistance	6,659	19.4%	10.6%
Financial & Insurance Services	2,220	6.5%	3.5%
Administrative & Support Services	661	1.9%	1.0%
Arts & Recreation Services	4,757	13.8%	7.5%
Transport, Postal & Warehousing	210	0.6%	0.3%
Education and Training	1,205	3.5%	1.9%
Other	14,904	43.3%	23.6%
Total Non-Retail Commercial Space	34,409	100.0%	54.6%
Vacant Space	2,442		3.9%
Total Floorspace	63,041		100.0%
Planning control			
Land zoning	B2		
Building height	14m to 26m		
Floor space ratio	1:1 to 2:1		
Minimum lot size	Nil		
Heritage	Nil		

10.13.2S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Major anchor tenants (Coles, Woolworths) Diverse retail offering Ample parking Excellent mass transit connections Community facilities in centre 	<ul style="list-style-type: none"> No centralised retail strip Poor pedestrian connections Poor north-south connection across railway Some old and poorly maintained stock
Opportunities	Threats

- Redevelopment potential for underutilised lots
- Parking can be consolidated
- High activity levels can support office space
- Public realm improvements

- Competing centres
- Market trends
- Competition with residential development

10.13.3 Strategic direction

Revesby is a significant local centre with excellent access to mass transit. It has significant potential for growth in terms of land area and potential for expansion. The centre is expected to continue to grow as a higher order retail centre, largely based in food retailing, to support the surrounding population. In the longer term, there is potential for growth to occur in this centre, if coupled with housing growth.

Projections suggest that an additional 27,100 sqm (GFA) will be required in Revesby to 2036, including 12,700 sqm of retail space and 14,400 sqm of commercial floorspace.

By 2026 it is suggested that planning for Revesby involve place-based planning to:

- Identify opportunities to deliver amenity improvements to the centre
- Support additional housing in the centre to increase the population living in the retail catchment and encourage reduced vacancy rates
- Establish appropriate height and FSR controls to balance the need for additional floorspace and housing growth
- Capitalise on opportunities of frequent and fast connections between Revesby and Sydney's domestic and international airports.

10.14 Roselands

10.14.1 Location characteristics

Roselands is a major shopping mall located 300m south of Canterbury Road and 200m west of King Georges Road. The centre is zoned B2 Local Centre, and the land immediately surrounding the centre is zone SP2. The SP2 land is predominantly ground-level open air car parking.

The M5 motorway is 600m south of the centre. There is ample parking in the centre. The Roselands Leisure and Aquatic Centre is located on the north-east border of the centre. The residential area surrounding the centre is predominantly single detached houses, although the area is zoned R3 Medium Density Residential.

There is no train station nearby, however the 941, 942, 944 and S14 bus services connect the centre to Mortdale, Hurstville, Campsie and Lakemba.

The centre is home to banks, cafés, restaurants, fashion, cosmetics, florists, hair and beauty, homewares jewellery, liquor, newsagency, health services, pharmacies, hobby shops, travel stores and major department stores and supermarkets.

Roselands Shopping Centre is one of the oldest shopping malls in Australia and is currently being expanded to include a Woolworths, Aldi and approximately 50 specialty stores.

Figure 47: Roselands
Source: HillPDA, 2019



Legend

- B2 - Local Centre
- Leisure and Aquatic Centre

Table 68 Roselands centre statistics

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	60,780	974,978	6
Floorspace category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Occupied Retail Floorspace			
Supermarkets & Grocery Stores	7,208	12.8%	11.9%
Specialty Food Stores	1,000	1.8%	1.6%
Fast-Food Stores	1,660	2.9%	2.7%
Restaurants, Hotels and Clubs	1,600	2.8%	2.6%
Department Stores	32,187	57.1%	53.0%
Clothing Stores	5,900	10.5%	9.7%
Hardware and Bulky Goods Stores	600	1.1%	1.0%
Other Personal & Household Goods	3,600	6.4%	5.9%
Selected Personal Services	2,600	4.6%	4.3%
Total Retail	56,355	100.0%	92.7%
Occupied Non-Retail Floorspace			
Accommodation	0	0.0%	0.0%
Pubs, Taverns & Clubs	0	0.0%	0.0%
Rental, Hiring & Real Estate Services	0	0.0%	0.0%

Floorspace category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Health Care & Social Assistance	835	28.5%	1.4%
Financial & Insurance Services	600	20.5%	1.0%
Administrative & Support Services	0	0.0%	0.0%
Arts & Recreation Services	0	0.0%	0.0%
Transport, Postal & Warehousing	0	0.0%	0.0%
Education and Training	0	0.0%	0.0%
Other	1,490	50.9%	2.5%
Total Non-Retail Commercial Space	2,925	100.0%	4.8%
Vacant Space	1,500		2.5%
Total Floorspace	60,780		100.0%
Planning Framework	Control		
Land zoning	B2 – Local Centre		
Building height	Nil		
Floor space ratio	Nil		
Minimum lot size	Nil		
Heritage	Nil		

10.14.2S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Strong anchor tenants Established retail centre Flexible planning controls 	<ul style="list-style-type: none"> Poor connections to strategic centres and employment precincts Poor public transport access No office-commercial focus
Opportunities	Threats
<ul style="list-style-type: none"> Surrounded by under-utilised SP2 land Potential to consolidate parking Opportunity for improved utilisation of at grade parking area, which may include a mixed-use development subject to adequate supporting infrastructure being more available 	<ul style="list-style-type: none"> Competing retail centres Market trends

10.14.3Strategic direction

Roselands is a stand-alone centre that is currently undergoing some modifications and minor expansion.

Projections suggest that an additional 4,000 sqm (GFA) will be required in Roselands to 2036. Future development proposals are likely to occur as population increases the centre's catchment. This should be monitored to ensure that expansions do not impact negatively on established local and village centres.

10.15 Punchbowl Centre

10.15.1 Location characteristics

The Punchbowl precinct is zoned B2-Local Centre and is approximately 88,100m² in size. It is well connected to Sydney and Bankstown CBDs by buses and trains. Punchbowl Station is on the Bankstown line and is served by T3 Bankstown line services while Canterbury Road provides a road connection.

The Punchbowl town centre is located on Punchbowl Road and The Boulevarde and includes a range of retail and restaurant uses. It extends approximately 200m to the east, south-west and north-east from the station entrance. The rail corridor combined with Punchbowl Road creates a clear divide in the town centre.

The commercial precinct extends further to the east encompassing a major multi-building mixed-use development which includes a supermarket and several minor retail tenancies.

The area is well represented for bulky goods uses. Between King Georges Road and Punchbowl Public School there is a number of buildings within the Bulky Goods Retail precinct, which host a range of uses such as trades suppliers and furniture retailers.

At the western extent of the precinct, there are several large lots containing light industrial buildings, which play host to a range of bulky goods retailers. This area contained the following businesses: submarine cables supplier, Marble/granite/hardware supplier and other warehousing type uses. Along the northern part of the precinct, there is a greater amount of local goods and service providers. The area contains some factory units.

Punchbowl centre includes two schools, Punchbowl Boys on the north side of the station and St Jerome's Primary School on the south side. There are also a number of religious institutions in and around the centre. These education and religious facilities are significant generators of activity and employment.

Figure 48: Punchbowl Centre



Table 69 Punchbowl centre size

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	88,100	1,955,360	5
Category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Occupied Retail Floorspace			
Supermarkets & Grocery Stores	6,807	19.6%	14.5%
Specialty Food Stores	3,045	8.7%	6.5%
Fast-Food Stores	2,158	6.2%	4.6%
Restaurants, Hotels and Clubs	4,853	13.9%	10.3%
Department Stores	0	0.0%	0.0%
Clothing Stores	300	0.9%	0.6%
Hardware and Bulky Goods Stores	5,800	16.7%	12.4%
Other Personal & Household Goods	8,681	24.9%	18.5%
Selected Personal Services	3,169	9.1%	6.8%
Total Retail	34,813	100.0%	74.2%
Occupied Non-Retail Floorspace			
Accommodation	74	0.7%	0.2%
Pubs, Taverns & Clubs	500	4.6%	1.1%
Rental, Hiring & Real Estate Services	400	3.7%	0.9%
Health Care & Social Assistance	3,105	28.5%	6.6%
Financial & Insurance Services	500	4.6%	1.1%

Category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Administrative & Support Services	262	2.4%	0.6%
Arts & Recreation Services	3,727	34.2%	7.9%
Transport, Postal & Warehousing	200	1.8%	0.4%
Education and Training	900	8.3%	1.9%
Other	1,227	11.3%	2.6%
Total Non-Retail Commercial Space	10,895	100.0%	23.2%
Vacant Space	1,197		2.6%
Total Floorspace	46,905		100.0%
Parameter	Planning control		
Land zoning	B2		
Building height	14m to 18m		
Floor space ratio	1:1 to 2:1		
Minimum lot size	Nil		
Heritage	<ul style="list-style-type: none"> 269A The Boulevard (Punchbowl Railway Station)- Local significance Post-war civic building (former Punchbowl Baby Health Centre), 748 Punchbowl Road, Local significance 		

10.15.2S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Great access to public transport Good streetscape character Anchor (Woolworths) present 	<ul style="list-style-type: none"> Limited parking Some old and poorly maintained stock Lack of civic space/ public domain Unsafe at night
Opportunities	Threats
<ul style="list-style-type: none"> Population growth can support additional uses Planned investment in metro rail 	<ul style="list-style-type: none"> Competition with demand for residential floor space Competing centres Market trends

10.15.3Strategic direction

Punchbowl is a significant local centre with direct access to mass transit. It has potential for growth following delivery of the Sydenham to Bankstown metro line. Transit oriented development will encourage employment growth matched with population growth.

Projections suggest that an additional 3,600 sqm (GFA) will be required in Punchbowl to 2036, of which all is expected to be commercial floorspace.

By 2026 it is suggested that planning involve place-based planning to:

- Identify opportunities to deliver amenity improvements to the centre
- Support additional housing in the centre to increase the population living in the retail catchment and encourage reduced vacancy rates

- Establish appropriate height and FSR controls to balance the need for additional floorspace and housing growth.

10.16 Wiley Park

10.16.1 Location characteristics

The Wiley Park precinct is zoned B2-Local Centre and is approximately 17,540m² in size. It is well connected to Sydney and Bankstown CBDs by buses and trains. Wiley Park Station is on the Bankstown line and is served by T3 Bankstown line services while Canterbury Road provides a road connection.

Wiley Park town centre is dominated by the six lane arterial King Georges Road which has limited the development of a cohesive shopping strip due to poor pedestrian amenity. In addition, Punchbowl and Lakemba are in close proximity and have the ability to draw shoppers from Wiley Park.

Wiley Park retail and commercial market is small, however, there is a large floorplate Bulky Goods retailer (Harvey Norman) located towards its western extent, opposite Wiley Park. This is an important bulky goods anchor.

Figure 49: Wiley park



Table 70 Wiley Park centre statistics

	Centre	Centres in LGA	Precinct contribution to centres
Precinct size	17,540	1,955,360	1
Floorspace category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Occupied Retail Floorspace			
Supermarkets & Grocery Stores	100	14.3%	3.5%
Specialty Food Stores	100	14.3%	3.5%

Floorspace category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Fast-Food Stores	0	0.0%	0.0%
Restaurants, Hotels and Clubs	100	14.3%	3.5%
Department Stores	0	0.0%	0.0%
Clothing Stores	0	0.0%	0.0%
Hardware and Bulky Goods Stores	0	0.0%	0.0%
Other Personal & Household Goods	400	57.1%	14.0%
Selected Personal Services	0	0.0%	0.0%
Total Retail	700	100.0%	24.6%
Occupied Non-Retail Floorspace			
Accommodation	0	0.0%	0.0%
Pubs, Taverns & Clubs	1,000	55.6%	35.1%
Rental, Hiring & Real Estate Services	0	0.0%	0.0%
Health Care & Social Assistance	0	0.0%	0.0%
Financial & Insurance Services	0	0.0%	0.0%
Administrative & Support Services	0	0.0%	0.0%
Arts & Recreation Services	0	0.0%	0.0%
Transport, Postal & Warehousing	0	0.0%	0.0%
Education and Training	400	22.2%	14.0%
Other	400	22.2%	14.0%
Total Non-Retail Commercial Space	1,800	100.0%	63.2%
Vacant Space	350		12.3%
Total Floorspace	2,850		100.0%
Planning framework	Control		
Land zoning	B2		
Building height	26m		
Floor space ratio	Nil		
Minimum lot size	Nil		
Heritage	Nil		

10.16.2S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Large resident population to support growth Access to road and rail 	<ul style="list-style-type: none"> Limited B2 zoned land near train station Major road causes poor pedestrian environment Some old and poorly maintained stock
Opportunities	Threats
<ul style="list-style-type: none"> Vacant land within and adjacent to centre Urban-servicing retail Planned investment in metro rail 	<ul style="list-style-type: none"> Competing centres Constraint from residential and schools

10.16.3 Strategic direction

Wiley Park is a small centre with direct access to mass transit. It has significant potential for growth following delivery of the Sydenham to Bankstown metro line, noting Council is currently considering a substantial redevelopment at the corner of King Georges Road and Lakemba Street. Transit oriented development will encourage employment growth matched with population growth.

By 2026 it is suggested that place-based planning be undertaken to:

- Identify opportunities to deliver amenity improvements to the centre
- Support additional housing in the centre to increase the population living in the retail catchment and encourage reduced vacancy rates
- Establish appropriate height and FSR controls to balance the need for additional floorspace and housing growth.

10.17 Yagoona Centre

10.17.1 Location characteristics

The Yagoona precinct is zoned B2-Local Centre and is approximately 104,000m² in size. The Hume Highway provides a road connection east to Sydney CBD and west to Parramatta and Liverpool. Bankstown CBD is approximately 2 kilometres to the South East, via local roads. Yagoona Station is located at the centre of the precinct. On the Bankstown line, it is served by Sydney Trains T3 Bankstown line services.

The Yagoona precinct is comprised of land uses typical of a local centre. These include a medical centre, supermarket, cafes, restaurants and bars as well as high street retailers. These businesses are located on either side of the Hume Highway.

Also present in the centre, set back a block from the Hume Highway are a senior citizens centre and Al Sadiq College, an independent school offering education based in the Muslim Alawite tradition. The College serves over 600 students drawn from the LGA and further afield across two campuses (the other being in Greenacre).

Yagona centre also includes Yagoona Public School which is also an employment and activity generator. A number of residential/mixed use developments have been erected within Yagoona and interest continues. However, high levels of fragmentation severely reduces the ability for sites to renew viably under current planning controls

Figure 50: Yagoona Centre



Table 71 Yagoona centre statistics

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	103,990	1,955,360	5
Category	Floorspace	Proportion of category	Proportion of total
	m ²	%	%
Occupied Retail Floorspace			
Supermarkets & Grocery Stores	2,000	17.2%	12.3%
Specialty Food Stores	1,500	12.9%	9.3%
Fast-Food Stores	1,200	10.3%	7.4%
Restaurants, Hotels and Clubs	1,000	8.6%	6.2%
Department Stores	500	4.3%	3.1%
Clothing Stores	800	6.9%	4.9%
Hardware and Bulky Goods Stores	1,700	14.7%	10.5%
Other Personal & Household Goods	1,700	14.7%	10.5%
Selected Personal Services	1,200	10.3%	7.4%
Total Retail	11,600	100.0%	71.6%
Occupied Non-Retail Floorspace			
Accommodation	0	0.0%	0.0%
Pubs, Taverns & Clubs	400	23.5%	2.5%
Rental, Hiring & Real Estate Services	100	5.9%	0.6%
Health Care & Social Assistance	700	41.2%	4.3%
Financial & Insurance Services	200	11.8%	1.2%

Administrative & Support Services	0	0.0%	0.0%
Arts & Recreation Services	100	5.9%	0.6%
Transport, Postal & Warehousing	200	11.8%	1.2%
Education and Training	0	0.0%	0.0%
Other	0	0.0%	0.0%
Total Non-Retail Commercial Space	1,700	100.0%	10.5%
Vacant Space	2,900		17.9%
Total Floorspace	16,200		100.0%
Planning control			
Land zoning	B2		
Building height	19m to 26m		
Floor space ratio	1:1 to 1.5:1		
Minimum lot size	Nil		
Heritage	Nil		
Key sites	Nil		

10.17.2S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Variety of retail outlets Proximity to road and rail 	<ul style="list-style-type: none"> High level of vacancy Main road creates poor pedestrian environment Some fragmented parcels Some old and poorly maintained stock
Opportunities	Threats
<ul style="list-style-type: none"> Vacant land within centre Proximity to Bankstown City Centre New residential stock recently added 	<ul style="list-style-type: none"> Constrained by neighbouring schools or residential use Competition from Bankstown

10.17.3Strategic direction

Yagoona is a small centre with direct access to mass transit. Its proximity to Bankstown CBD limits potential for growth. Planning for any increase in centre size must occur in tandem with planning for additional housing in the local retail catchment.

10.18 Neighbourhood centres

There are several smaller local and neighbourhood centres in the LGA. These have been audited and identified in Table 72 Other neighbourhood centres. Most areas are zoned B1 Neighbourhood Centre, with the inclusion of some B2 Local Centre zones.

Figure 51 Neighbourhood centres in the LGA

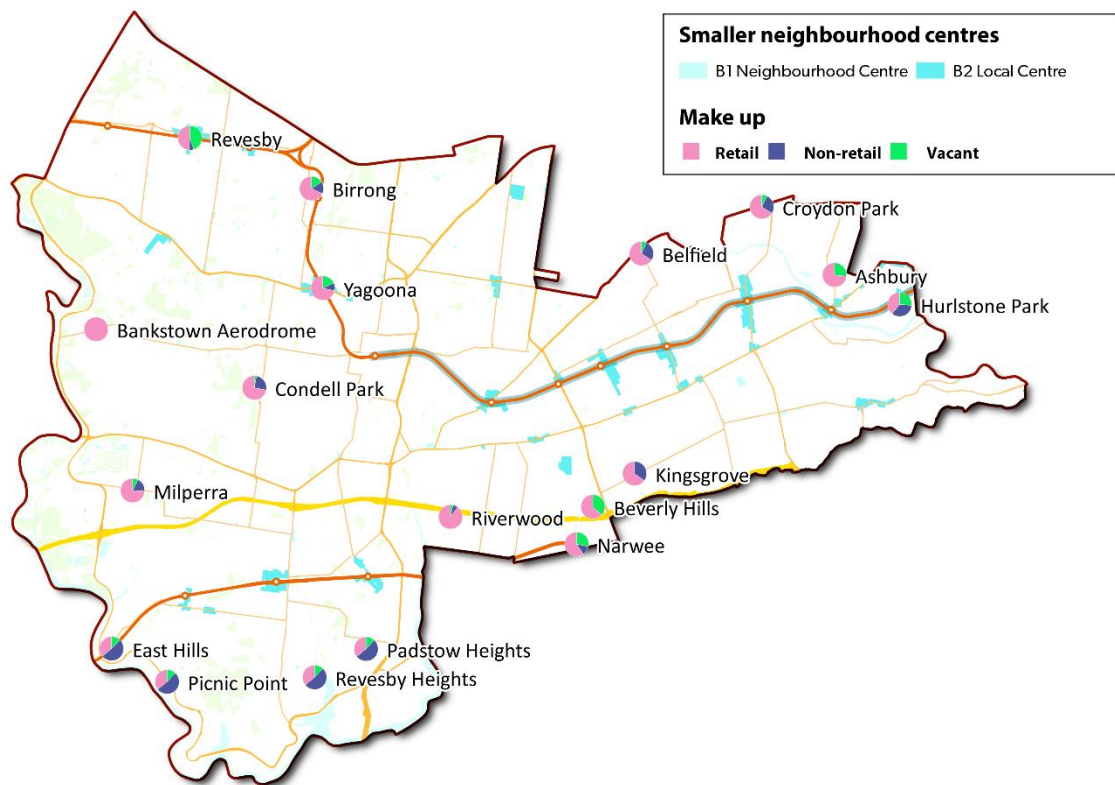


Table 72 Other neighbourhood centres

Neighbourhood centre	Retail	Non-retail	Vacant	Total
Bankstown Aerodrome	3,500	-	-	3,500
Sefton	3,070	400	2,800	6,270
Milperra	2,000	500	200	2,700
East Hills, Picnic Point, Revesby Heights, Padstow Heights	1,800	2,600	600	5,000
Birrong	1,700	400	400	2,500
Riverwood (C-B LGA)	2,700	200	100	3,000
Narwee	1,900	400	900	3,200
Beverly Hills (C-B LGA)	1,700	-	1,000	2,700
Kingsgrove (C-B LGA)	1,300	700	-	2,000
Hurlstone Park (C-B LGA)	4,200	3,700	2,800	10,700
Ashbury	1,100	-	400	1,500
Croydon Park (C-B LGA)	4,500	1,800	500	6,800
Belfield (C-B LGA)	2,900	1,200	300	4,400
Condell Park	5,200	1,800	200	7,200
Total	37,570	4,800	4,200	61,470

The neighbourhood centres host predominantly retail floor space (63 per cent), with around 5 per cent vacancy. Most are 2,000-7,000m² in size and are characterized by attached row shops in small lots. These suburban centres are characterised by local urban-servicing businesses such as cafes, restaurants, pharmacies, doctors and hairdressers. They are predominantly surrounded by R2 Low Density Residential areas. These neighbourhood centres are retail-focussed and only serve a small local catchment.

Each neighbourhood centre provides opportunities for convenience retail and community interaction. Collectively, the centres are an important source of land and floorspace. Planning needs to acknowledge the importance of these centres and ensure ongoing review of planning controls retain their viability. These centres also respond positively to ongoing investment in public domain maintenance of local services.

REVIEW OF EMPLOYMENT PRECINCTS

11.0 REVIEW OF EMPLOYMENT PRECINCTS

The LGA has over 969.5 hectares of land in employment precincts. This includes land zoned B5 Business Development, B6 Enterprise Corridor, B7 Business Park, IN1 General Industrial and, IN2 Light Industrial. The following table present the floorspace findings and demand projections for the employment precincts.

The floorspace data presented in this section is known to be somewhat dated and there may be some discrepancies in the data and current floorspaces occupancies. This data was used in preference to the data provided by the Department of Planning, Industry and Environment as significant discrepancies were found in that data. Ground truthing confirmed that the Council data was the more accurate source. It is recommended that the employment precincts be audited in the future to obtain definitive information.

Table 73: Estimated floorspace in employment precincts

	Estimated floorspace 2016	% of total floorspace
Chullora	786,612	15.1%
Clemton Park	190,000	3.6%
Condell park	167,515	3.2%
Kingsgrove	319,879	6.1%
Milperra	1,283,025	24.6%
Padstow	840,712	16.1%
Riverwood	476,848	9.1%
Sefton	184,976	3.5%
Villawood	666,997	12.8%
Canterbury Road	59,447	1.1%
Lakemba	89,225	1.7%
Chapel street	68,088	1.3%
Hume Highway Corridor	38,656	0.7%
Ashbury	17,528	0.3%
Belmore	24,371	0.5%
Punchbowl	2,721	0.1%
Croydon Park	8,326	0.2%
Total	5,224,926	100%

11.1 Chullora

11.1.1 Location characteristics

Chullora features a large industrial area with a mix of IN1-General Industrial and IN2-Light Industrial land zoning and is approximately 2,455,000m² in size. The A22 Hume Highway, which bounds the area to the East, and A6, which bound the area to the west, are the two main roads that service the suburb. The centre is also close to the M4 Western Motorway, which is to the north. Road access is good to Bankstown CBD but there is limited access to Port Botany by road. The area is bound to the north by railway tracks and a number of commercial railway operations. Chullora does not have its own public railway station but has freight rail intermodal facility.

The area is largely comprised of factories and warehouses, including Tip Top Bakeries at the Chullora Business Park. Chullora also houses the printing plants for Sydney newspapers and magazines including The Sydney Morning Herald, The Sun-Herald, The Australian, The Daily Telegraph and The Sunday Telegraph. Volkswagen Group Australia's national head office is located on Muir Road, and includes a parts distribution centre. Chullora is also home to the largest postal distribution centre in the Southern Hemisphere, the Australia Post bulk parcel lodgement centre off the Hume Highway.

Chullora Market Place is a shopping centre on Waterloo Road, approximately 600 metres East of the Hume Highway. It features a variety of stores, ranging from large retail outlets to independent small businesses; the centre features 50 shops, and major stores include Big W, Woolworths, Aldi and The Reject Shop.

Chullora, off the Hume Highway features a cluster of land zoned B5 Business Development and B6 Enterprise Corridor. Land uses in these zones is comprised of filling stations, automotive sales, hotels, motels.

Figure 52: Chullora



Table 74 Chullora precinct statistics

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	2,455,460	11,049,243	22
Description	Chullora (m ²)	Chullora (%)	
Business / Office Parks	19,791	1.5%	
Carpark - external	166,118	12.8%	
Dispersed Activities	41,655	3.2%	
Freight and Logistics	179,701	13.8%	
Local light industrial and urban support	90,091	6.9%	
Manufacturing - Heavy	253,748	19.5%	
Manufacturing - Light	42,423	3.3%	
Office	20,905	1.6%	
Retail - Big Box	0	0.0%	
Bulky Goods Retail	5,571	0.4%	
Residential	0	0.0%	
Retail - Main Street	3,096	0.2%	
Special Activities	26,207	2.0%	
Urban Services	49,612	3.8%	
Vacant Building	53,812	4.1%	
Vacant Site	348,306	26.8%	
Total	1,301,036	100%	
Planning framework	Control		
Land zoning	IN1, IN2		
Building height	Nil		
Floor space ratio	1:1		
Minimum lot size	1000 to 10000m ²		
Heritage	Nil		

11.1.2 Development pipeline

Project Address	Type	Floor Area	Floors	Status
24 (Lot 1) Muir Rd (DP1155176)	CARPARK - 3 storey	0	3	Abandoned
14-18 (Lot 2) Worth St (DP1102984)	TRANSPORT DEPOT/OFFICE	1083	0	Firm
14-18 (Lot 1) Worth St	WAREHOUSE/DISTRIBUTION CENTRE/OFFICE - 2 storey	12110	0	Firm
2 & 12 (Lot 12) Hume Hwy (DP834734)	WAREHOUSE/DISTRIBUTION FACILITY - 5 level	39225	5	Abandoned
2C Hume Hwy	WAREHOUSE (4) - 4 storey	9032	4	Firm
77 Hume Hwy (Lot 500 DP1161478)	VEHICLE STORAGE FACILITY/WORKSHOPS - 3 storey	3240	3	Possible
2 Hume Hwy (Lot 2171 DP1153854)	WAREHOUSE/OFFICE - 2 storey	21710	2	Commenced

11.1.3 S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Great access to road and freight Variety of lot sizes including very large lots Anchor tenants (Australia Post, Tip Top, Volkswagen) Demand remains strong (recent introduction of Lyons, PFD and Supercheap Auto) 	<ul style="list-style-type: none"> Poor public transport accessibility High level of vacancies No amenity or local retail sourcing for workforce
Opportunities	Threats
<ul style="list-style-type: none"> Large vacant lots within precinct Capitalise on freight access Attract specialised industry 	<ul style="list-style-type: none"> Market trends Competing centres

11.1.4 Strategic direction

While retaining and managing Chullora as an important employment precinct, the LSPS proposes that Chullora Business Park transitions to a higher order centre to attract additional major corporations and corporate headquarters to the LGA, contributing to a growing knowledge economy in the LGA. Similar to Macquarie Park, Chullora offers large lots and floorplates with good road access.

Anecdotal evidence indicates that existing businesses are finding it difficult to attract talent and visitors due to the poor transport connections, amenity and services within the business park. VW Headquarters are located in the business park and advise that the area does not offer the range of services needed for their operations. A review of planning controls is appropriate to allow the development of services and complementary uses, such as conference facilities and convenience retail services, to ensure major corporations and their workforce will have access to the services they need. Council's planned improvements to the waterfront park will provide a pleasant location for workers and visitors to spend time during the working day. Facilities for meetings to support collaboration of businesses could be encouraged. Improved connections to Bankstown CBD with rapid and frequent mass transit would assist in connecting the precinct to Bankstown CBD.

The review of planning controls could provide for:

- Open space, for informal meetings and relaxation during the working day
- Small scale retail services and facilities such as gyms, cafes, banks, convenience retail, bars and the like to improve the services available to workers in the business park without detracting from the current industrial land uses and zoning
- Conference/event facilities and business services - to encourage "stickability" of businesses in the right locations so as to not detract from the industrial and important freight role of Chullora
- An appealing public domain that's capitalises on future investment in the Heritage Transport Centre.

Suggested LEP amendments

Objective	Potential LEP amendments
<ul style="list-style-type: none">• To retain and manage the employment land• To allow land uses that support high profile corporate headquarters• To provide a high level of amenity for the precinct workforce.	<ul style="list-style-type: none">• Maintain the current zoning however review the range of permissible land uses and ensure permitted uses include short stay accommodation for visiting executives and services e.g. conference facilities, convenience retail, restaurants/cafes, gyms, child care and the like – the service the needs of businesses and employees within the business park.

Non-statutory responses to support the long-term vitality of the high-tech business park include:

- Promotion of the business park to major corporations and supporting businesses
- Improving pedestrian network and safety within the business park
- Managing truck movements to minimise amenity impacts
- Establishing high amenity open space area for informal gatherings and relaxation during the working day
- Improving transport connections to Chullora Market Place through shuttle bus services
- Improving transport connections to Bankstown CBD and other key Strategic Centres through high frequency mass transit.

11.2 Clemton Park

11.2.1 Location characteristics

The Clemton Park Centre precinct is zoned IN2-Light Industrial and is approximately 176,980m² in size. The area is located on the southern side of Canterbury Road, which provides access East to Sydney CBD and West to Bankstown CBD. The M5 motorway is approximately 2 kilometres south of the precinct and provides access to Port Botany.

A key land use within this employment land precinct is Pickles Auctions. In the vicinity of Pickles, a cluster of automotive servicing has developed. Other businesses in the vicinity include a knit wear manufacturer, cleaning supplies and food wholesalers, an office with some warehousing, Gordon Bros industry – a refrigeration company, furniture wholesalers, Mitre 10, Loumbus – paper recycling and factory units containing manufacturing, joiners, shop fit-out companies and engineers.

The precinct has some frontage to Canterbury Road (across land zoned B5 Business Development) and has access to the M5 via Kingsgrove Road.

At the time of writing this report, Council is in receipt of a Planning Proposal to rezone industrial lands in Clemton Park Centre Precinct for hospital and seniors housing uses.

Figure 53: Clemton Park



Table 75 Clemton Park precinct statistics

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	176,980	11,049,243	2
Description	Clemton Park (m ²)	Clemton Park (%)	
Business / Office Parks	0	0.0%	
Carpark - external	1,999	0.8%	
Dispersed Activities	15,565	6.3%	
Freight and Logistics	73,478	29.8%	
Local light industrial and urban support	63,129	25.6%	
Manufacturing - Heavy	0	0.0%	
Manufacturing - Light	26,976	11.0%	
Office	0	0.0%	
Retail - Big Box	0	0.0%	
Bulky Goods Retail	9,477	3.8%	
Residential	11,539	4.7%	
Retail - Main Street	1,375	0.6%	
Special Activities	0	0.0%	
Urban Services	0	0.0%	
Vacant Building	0	0.0%	
Vacant Site	42,707	17.3%	
Total	246,245	100%	
Planning framework	control		

Land zoning	IN2
Building height	NA
Floor space ratio	1:1
Minimum lot size	Nil
Heritage	I46

11.2.2 S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Good access to Canterbury Road Strong automobile industry Proximity to Clemton Park centre 	<ul style="list-style-type: none"> Interface with residential properties in all directions
Opportunities	Threats
<ul style="list-style-type: none"> Maintain and develop automobile industry Consolidate underutilised land Embrace new technology (driverless or car share hubs) Future master planning by Council for the Eastern Lifestyle and Medical Precinct should strengthen the role of the precinct 	<ul style="list-style-type: none"> Surrounding residential limits growth of industrial uses High market demand for residential Competition from other centres

11.2.3 Strategic direction

The strategic direction for Clemton Park is to retain and manage the precinct. Industrial activity and urban services are important to Canterbury Bankstown's economy. The precinct is expected to continue to change, as emerging technologies and new industries with different requirements impact on the precinct. The evolution of industrial and manufacturing lands, and freight and logistics hubs, into complex employment lands is expected to impact on this precinct. This trend is consistent with other parts of Greater Sydney.

Council intends to undertake a broader master planning exercise for the *Eastern Lifestyle and Medical Precinct – Campsie to Kingsgrove*, which will more definitely guide the role of the Clemton Park employment precinct in supporting the evolution of the broader area.

11.3 Condell Park

11.3.1 Location characteristics

The Condell Park precinct is zoned IN2-Light Industrial and is approximately 325,040m² in size. It is next to Bankstown Airport and approximately 3 kilometres from Bankstown CBD, although connection is via small local roads. Condell Park is part of the Bankstown and Bankstown Airport Collaboration Area (currently underway).

There are some local bus services. The M5 motorway provides a road connection to Port Botany.

Condell Park is bordered by Marion Street to the north, residential housing to the east and Bankstown Airport to the South and West. This industrial precinct contains a small number of aviation related businesses, including an airport hotel, but the vast majority are typical of a more usual industrial estate. Aviation related businesses are mostly located within the neighbouring airport complex itself.

The Condell Park industrial area includes fitness facilities and warehousing, wholesale, automotive and manufacturing land uses. Also present are some more specialist businesses such as a swim school, auction house and an indoor firing range.

Figure 54: Condell Park



- Legend
- IN2 - Light Industrial
 - Airport
 - Secondary School

Table 76 Condell Park precinct statistics

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	325,040	11,049,243	3
Floorspace category	Floorspace (m ²)*	Condell Park (%)	
Business / Office Parks	17,731	7.3%	
Carpark - external	75,924	31.1%	
Dispersed Activities	0	0.0%	
Freight and Logistics	58,850	24.1%	
Local light industrial and urban support	8,668	3.5%	
Manufacturing - Heavy	9,361	3.8%	
Manufacturing - Light	50,656	20.7%	
Office	6,625	2.7%	
Retail - Big Box	0	0.0%	
Bulky Goods Retail	0	0.0%	
Residential	0	0.0%	
Retail - Main Street	1,251	0.5%	
Special Activities	0	0.0%	
Urban Services	598	0.2%	
Vacant Building	13,775	5.6%	
Vacant Site	979	0.4%	
Total	244,419	100%	
Planning framework	Control		
Land zoning	IN2		
Building height	Nil		
Floor space ratio	1:01		
Minimum lot size	1000m ²		
Heritage	Nil		

*provided by Canterbury Bankstown Council

11.3.2 Development pipeline

Project Address	Type	Floor Area	Floors	Status
12-14 Harris St (DP14055)	FACTORY/WAREHOUSE/OFFICE	304	1	Construction

11.3.3 S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none">• Close proximity to Bankstown airport• Access route south to Milperra Road• Low level of vacancy• Large lot sizes	<ul style="list-style-type: none">• Sensitive interfaces include low density residential and high school
Opportunities	Threats
<ul style="list-style-type: none">• Capitalise on proximity to airport• Potential to redevelop underutilised lots	<ul style="list-style-type: none">• Surrounding residential limits growth of industrial uses

11.3.4 Strategic direction

The strategic direction for Condell Park is to retain and manage the precinct. Industrial activity and urban services are important to Canterbury Bankstown's economy. The precinct is expected to continue to change, as emerging technologies and new industries with different requirements impact on the precinct. The evolution of industrial and manufacturing lands, and freight and logistics hubs, into complex employment lands is expected to impact on this precinct. This trend is consistent with other parts of Greater Sydney. Improved connections to the airport and Bankstown could support local businesses and strengthen the role and function of the precinct.

11.4 Kingsgrove

11.4.1 Location characteristics

The Kingsgrove precinct is zoned IN2-Light Industrial and is approximately 418,590m² in size. It is well connected to Sydney CBD but not connected Bankstown CBD by train. Kingsgrove Station is on the East Hills line, is served by Sydney Trains T8 Airport & South line services. The M5 motorway provides road connection to Port Botany and Sydney CBD.

The Kingsgrove precinct is characterised by Freight and Logistics, Local Industry, Urban Services and Light Manufacturing.

These employment lands are located along the southern boundary of the LGA, in proximity to the M5. The area contains a variety of companies accommodated in small factory/office units through to medium sized industrial parcels. Businesses include tile and kitchen companies, smash repairs/automotive parts suppliers and an Australia Post distribution centre.

The western component of Kingsgrove is largely occupied by warehousing and manufacturing. Businesses include furniture wholesalers, graphics/printers, food manufacturing/wholesale, glass blocks/masonry supplies and shipping. Businesses within this area appear to supply a relatively broad area, in comparison to much of the other employment lands within the LGA which provide local services.

Garema Circuit contains a take-away shop, selling lunch to local employees. Retailing and services are available at Kingsgrove south of the railway line, outside of Canterbury LGA.

Figure 55: Kingsgrove



Table 77 Kingsgrove centre size

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	418,590	11,049,243	16
Floorspace category	Floorspace (m ²)*	Kingsgrove (%)	
Business / Office Parks	24,557	7.8%	
Carpark - external	9,797	3.1%	
Dispersed Activities	9,073	2.9%	
Freight and Logistics	122,172	39.1%	
Local light industrial and urban support	10,988	3.5%	
Manufacturing - Heavy	10,079	3.2%	
Manufacturing - Light	73,401	23.5%	
Office	7,664	2.4%	
Retail - Big Box	0	0.0%	
Bulky Goods Retail	0	0.0%	
Residential	7,736	2.5%	
Retail - Main Street	0	0.0%	
Special Activities	0	0.0%	
Urban Services	1,320	0.4%	
Vacant Building	60,625	19.4%	
Vacant Site	0	0.0%	
Total	312,855	100%	
Planning control			

Land zoning	IN2
Building height	Nil
Floor space ratio	1:1
Minimum lot size	Nil
Heritage	Nil

* provided by Canterbury Bankstown Council

11.4.2 Development pipeline

Project Address	Type	Floor Area	Floors	Status
155-165 Kingsgrove Rd & 30-38 Richland St	BULKY GOODS WAREHOUSE - 2 level	13250	2	Contract Let

11.4.3 S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Proximity to the M5 Motorway and train station Variety of lot sizes Nil Vacancy – high demand 	<ul style="list-style-type: none"> Sensitive interfaces include low density residential and high school Poor connection to Kingsgrove station Awkward access routes to the M5 Heavy vehicle traffic
Opportunities	Threats
<ul style="list-style-type: none"> Some underutilised lots 	<ul style="list-style-type: none"> Market trends Competing centres

11.4.4 Strategic direction

Kingsgrove will form a southern component of the Eastern Lifestyle and medical Precinct proposed by Council. Improved connections to Campsie and Canterbury Hospital will be key to delivering this outcome.

Longer term plans for a Metro Connection from Hurstville in the south, through Kingsgrove, to Campsie and Macquarie Park in the north, will greatly enhance the potential for employment growth in Kingsgrove.

In the immediate future the strategic direction for Kingsgrove is to retain and manage the precinct. However, the planned Metro connection will necessitate a planning review of the precinct, to future growth is appropriately managed.

- A number of options to improve the quality of development could be considered by Council including:
- Improved permeability, pedestrian and vehicular movement throughout
- Increased FSRs on Kingsgrove Rd to encourage better quality development.
- Improved connections to the Station and to Campsie as part of the eastern Lifestyle and Medical Precinct urban spine proposed by Council
- Improved streetscapes - trees and footpaths
- Review (long term) opportunities for renewal of low-density residential uses surrounded by the Kingsgrove employment area.

11.5 Milperra

11.5.1 Location characteristics

The Milperra precinct contains IN1- General Industrial and IN2-Light Industrial zoning and is approximately 2,902,140m² in size. The precinct is bounded to the south by the M5 motorway which provides connection to Port Botany. Milperra is part of the Bankstown and Bankstown Airport Collaboration Area (currently underway).

The Milperra precinct is largely an industrial area with a major general aviation airport, identified as a trade gateway.

Milperra provides significant industrial and urban services lands for the District and South West Sydney. The South District Plan identifies the Milperra industrial area as one of the most important centres of economic activity in the South District, with up to 15,700 jobs in manufacturing, aviation and electronics.

This precinct has the presence of two university campuses, being the Western Sydney University's current Bankstown Campus at Milperra (proposed to be relocated to the City Centre), and the University of NSW's Aviation School.

The airport fulfils an important role for fixed-wing and helicopter flight training and as a base for emergency services. Bankstown Airport sits between Sydney Airport and the planned Western Sydney Airport.

Flooding presents a major constraint to development at the airport, particularly along its western edge, which has interface to Henry Lawson Drive and parklands along the Georges River.

Figure 56: Milperra

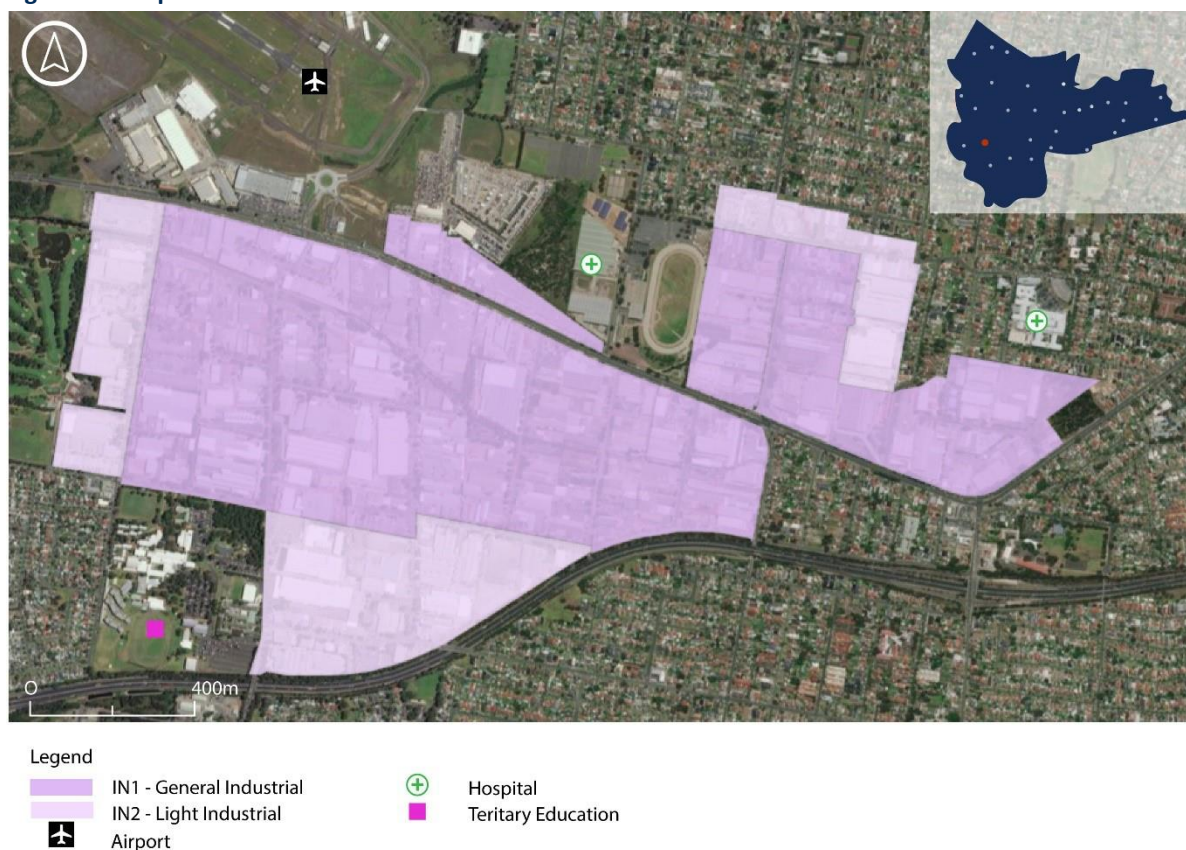


Table 78 Milperra precinct statistics

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	2,902,140	11,049,243	26
Description	Milperra (m ²)	Milperra (%)	
Business / Office Parks	506	0.0%	
Carpark - external	129,726	8.8%	
Dispersed Activities	5,020	0.3%	
Freight and Logistics	497,162	33.8%	
Local light industrial and urban support	212,218	14.4%	
Manufacturing - Heavy	126,992	8.6%	
Manufacturing - Light	252,294	17.1%	
Office	19,810	1.3%	
Retail - Big Box	3,727	0.3%	
Bulky Goods Retail	13,914	0.9%	
Residential	0	0.0%	
Retail - Main Street	10,756	0.7%	
Special Activities	0	0.0%	
Urban Services	21,856	1.5%	
Vacant Building	118,770	8.1%	
Vacant Site	59,819	4.1%	
Total	1,472,064	100%	
Planning framework	Control		

Land zoning	IN2, IN1
Building height	Nil
Floor space ratio	Nil
Minimum lot size	1000 to 1500m ²
Heritage	<ul style="list-style-type: none"> Milperra Soldier Settlement (former). Ashford Avenue, Bullecourt Avenue, Fleurbaix Avenue – Local significance The precinct borders on Bankstown Aerodrome – Local significance

11.5.2 Development pipeline

Project Address	Type	Floor Area	Floors	Status
75 (Lot 1) Ashford Av (DP703922)	WAREHOUSE - altns & addns	391	1	Construction
Bankstown Airport, Milperra Rd	BULKY GOODS/ WAREHOUSING/ RESTAURANTS/ ENTERTAINMENT	150260	3	Early Planning

Source: Cordells

11.5.3 S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Proximity to Bankstown Airport Good access to SW Motorway Variety of lot sizes Large variety of tenants 	<ul style="list-style-type: none"> Fairly high level of building vacancy Some interface with residential – land use and traffic conflicts Minor interest from developers Far from activity centres Flooding is a major constraint to development, particularly on the airport land
Opportunities	Threats
<ul style="list-style-type: none"> Redevelopment of Western Sydney University Campus 	<ul style="list-style-type: none"> Competing centres Market trends

11.5.4 Strategic direction

Milperra will be 'retained and managed' as industrial land and strengthened by continuing to leverage new planning controls to enhance amenity, whilst the precinct will grow in supporting the aviation role of Bankstown Airport, and as a logistics, advanced manufacturing and industrial precinct. Comprehensive planning for this area will advance as part of the Bankstown CBD and Bankstown Airport collaboration precinct, as noted in section 2.2.3. Planning seeks to leverage:

- The existing manufacturing base with up to 15,700 jobs in manufacturing, aviation and electronics.
- Specialised aviation function noting the airport provides an important role for fixed-wing and helicopter flight training and as a base for emergency services such as Polair and NETS, a newborn and paediatric emergency transport services, and the only one of its kind in Australia.

11.6 Padstow

11.6.1 Location characteristics

The Padstow Industrial precinct encompasses B5-Business Development, IN-1 General Industrial and IN2-Light Industrial zoned land and is approximately 1,924,660m² in size. The M5 motorway provides a road connection to Port Botany and Bankstown CBD is approximately 4 kilometres North via the A6. There is no train station but the area does have bus connections.

The precinct covers a large area and is effectively divided by the M5 motorway. The land to the south of the motorway is zoned IN-2 and is comprised of uses typical of this zoning. These include warehousing, wholesale, automotive and manufacturing land uses as well as a forklift training operation.

To the North of the motorway is a large area zoned IN1 extending North to Hoskins Avenue and extending out from both sides of the A6. Land uses here reflect the General Industrial zoning and include a recycling centre, various manufacturing, wholesale and construction businesses. Many of these businesses are situated on large lots, reflective of the warehouse and factory facilities required.

Smaller areas zoned IN2 are present on the North. East and Western edges of this area north of the M5. Within these zonings are more warehousing, wholesale, automotive and manufacturing land uses similar to those found south of the motorway.

On the Western edge of the precinct, at the junction of Canterbury Road and Chapel Road is a small area zoned B1 which contains a small number of cafes, restaurants and neighbourhood shops, such as a Bottlemart and newsagents. Also at this junction is a larger area zoned B5 which is a commercial complex containing a gym, furniture and automotive outlets, a Harvey Norman store and large electrical retailer.

On the Eastern edge of the precinct, on the southern edge of Canterbury Road and bordering the suburb of Punchbowl, is another commercial area zoned B5. This contains a similar range of businesses, including a gym, furniture outlet, electric and automotive businesses as well as a large Officeworks store. Also present in this area are some manufacturing businesses and Trades College Australia, a training centre.

On the Northern side of Canterbury Road is a small area zoned B1. This is The Croatian Club (Club Punchbowl), a large club offering restaurants, bars and function rooms for events. The site is the subject of a planning proposal for mixed use development, including a component of retail/commercial.

Figure 57: Padstow

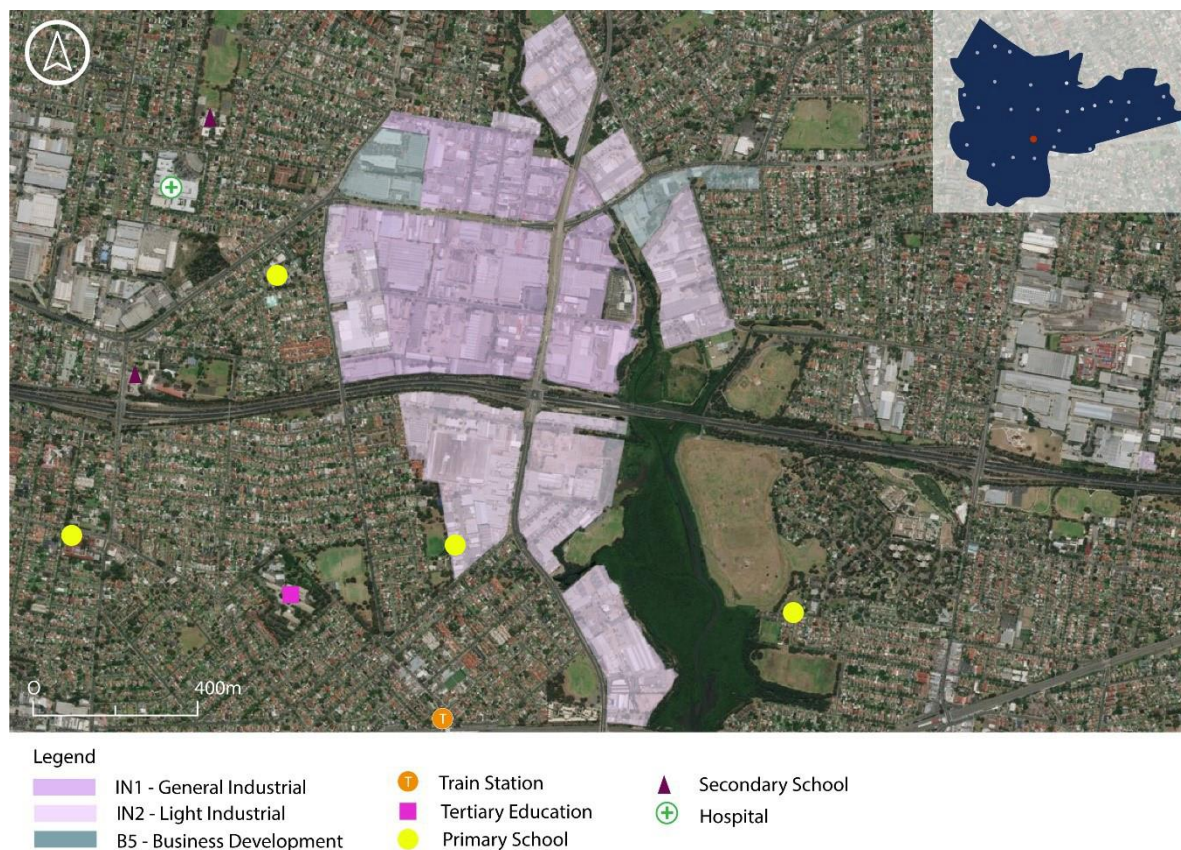


Table 79 Padstow precinct statistics

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	1,924,660	11,049,243	17
Floorspace Category	M ²	%	
Business / Office Parks	13,333	1%	
Carpark - external	119,269	10%	
Dispersed Activities	3,411	0%	
Freight and Logistics	266,975	22%	
Local light industrial and urban support	114,749	10%	
Manufacturing - Heavy	204,999	17%	
Manufacturing - Light	208,014	17%	
Office	19,249	2%	
Retail - Big Box	-	0%	
Bulky Goods Retail	48,932	4%	
Residential	-	0%	
Retail - Main Street	7,503	1%	
Special Activities	2,074	0%	
Urban Services	19,670	2%	
Vacant Building	83,979	7%	
Vacant Site	84,168	7%	
Total	1,196,325	100%	

Planning framework	Control
Land zoning	IN1, IN2, B5
Building height	13m to 16m
Floor space ratio	1:1
Minimum lot size	1000 to 1500m ²
Heritage	Nil

11.6.2 Development pipeline

Project Address	Type	Floor Area	Floors	Status
74-78, 83 & 92 Gow St (Lots 2 & 3)	WAREHOUSE	11000	1	Abandoned
3 (Lot 12) Gatwood Cl (DP1122166)	FACTORY - 2 storey	N/A	2	Firm
5 (Lot 11) Gatwood Cl (DP1122166)	WAREHOUSE/OFFICE	1625	1	Commenced
88-98 (Lots 203) Fairford Rd (DP814242)	HOME IMPROVEMENT CENTRE/BULKY GOODS (2)	25147	1	Possible
33 (Lot 6) Gow St (DP14062)	WAREHOUSE	454	1	Possible
95 (Lot 21) Gow St (DP771395)	INDUSTRIAL UNITS (5) - 2 storey	7620	2	Firm

Source: Cordells

11.6.3 S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none">• Excellent road access via A6, A34 and M5 Motorway• Variety of lot sizes• Close to Padstow, Punchbowl and Bankstown centres• Strong logistics and transport sector	<ul style="list-style-type: none">• Interface with low density residential• Minor flood events
Opportunities	Threats
<ul style="list-style-type: none">• Long term, transport improvements may benefit the precinct providing improved connections to Bankstown and Parramatta	<ul style="list-style-type: none">• High market demand for residential floor space

11.6.4 Strategic direction

The strategic direction for Padstow employment precinct is to retain and manage allowing existing industrial and urban services land to be safeguarded from competing pressures, especially residential and mixed-use zones. The approach seeks to protect this land for economic activities required for The LGA's local economic and population serving needs, such as urban services.

The objective is to continue to provide a mix of activities that support the LGA's economy and population. The management of these lands should accommodate evolving business practices and changes in needs for urban services from the surrounding community and businesses.

No changes are proposed to the range of permissible land uses.

11.7 Riverwood

11.7.1 Location characteristics

Riverwood features a large industrial area with a mix of IN1 and IN2 land zoning which is approximately 548,800m² in size. The M5 Motorway which bounds the area to the South provides access to Port Botany. Belmore Road, which bound the area to the West, provides access North towards Bankstown CBD.

The area is characterised by land uses which include Utilities/Urban Services, Local Industry, Freight and Logistics and Manufacturing-Light.

The largest scale employment lands within the LGA are located here. There were also some smaller premises i.e. factory units. Businesses included a funeral home, warehousing, seafood wholesalers, badge manufacturers, a small amount of local industry – smash repairs etc, print head technology, plastic bags – manufacture/wholesale, book printers, Arrowmaster Gifts – direct to public, Multiplex, hire places – event equipment, pump repairs, metalwork, wholesale foods, Electrolux – head office, service, Santos – coffee, Eureka tiles, Packaging services, Glampak and removal and storage. Retail type uses are concentrated at the northern end of Belmore Road.

This area has excellent access to the M5, which bounds the employment lands. The precinct is also partially buffered by a park. Most of the area is accessible off main roads, with only some properties accessible through residential areas.

Figure 58: Riverwood



Table 80 Riverwood precinct size

	Centre (m ²)	Centres in LGA (m ²)	Precinct contribution to centres (%)
Precinct size	548,760	11,049,243	5
Floorspace Category	Riverwood (m ²)	Riverwood (%)	
Business / Office Parks	75,883	16%	
Carpark - external	10,268	2%	
Dispersed Activities	6,882	1%	
Freight and Logistics	169,691	36%	
Local light industrial and urban support	37,106	8%	
Manufacturing - Heavy	-	0%	
Manufacturing - Light	196,571	41%	
Office	-	0%	
Retail - Big Box	-	0%	
Bulky Goods Retail	1,331	0%	
Residential	5,621	1%	
Retail - Main Street	-	0%	
Special Activities	-	0%	
Urban Services	6,004	1%	
Vacant Building	40,895	9%	
Vacant Site	3,250	1%	
Total	477,619	100%	
Planning control			

Land zoning	IN1, IN2
Building height	12m to 18m
Floor space ratio	1:1
Minimum lot size	Nil
Heritage	Nil

11.7.2 Development pipeline

Project Address	Type	Floor Area	Floors	Status
5 (Lot 7) Vermont Cr (DP1191223)	UNITS (218)/SHOPS (3) - 8 storey	15103	8	Contract Let

11.7.3 S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Proximity to M5 motorway Good connections to Canterbury Road Mixture of lot sizes High performing precinct Low vacancy rate 	<ul style="list-style-type: none"> Some sites accessed via residential area
Opportunities	Threats
<ul style="list-style-type: none"> Large scale employment land sites Long term plans for transport improvements could benefit the precinct 	<ul style="list-style-type: none"> Increasing land values for nearby residential Land use conflicts arising from neighbouring residential

11.7.4 Strategic direction

The strategic direction for Riverwood employment precinct is to retain and manage allowing existing industrial and urban services land to be safeguarded from competing pressures, especially residential and mixed-use zones. The approach seeks to protect this land for economic activities required for The LGA's local economic and population serving needs, such as urban services.

The objective is to continue to provide a mix of activities that support the LGA's economy and population. The management of these lands should accommodate evolving business practices and changes in needs for urban services from the surrounding community and businesses.

No changes are proposed to the range of permissible land uses.

11.8 Sefton

11.8.1 Location characteristics

The Sefton precinct contains land zoned B2-Local Centre, IN1-General Industrial and IN2-Light Industrial and is approximately 376,860m² in size. It is well connected to Sydney and Bankstown CBDs by buses and trains. Sefton Station is on the Main South line, it is served by Sydney Trains T3 Bankstown line services while the A22 Hume Highway provides a road connection.

Sefton Industrial Precinct is characterised by electric and engineering companies, warehouses and smash repair workshops. The Precinct is adjacent to the Sefton Railway Station and bordered by the still developing Regents Park Industrial Area to the north (although the Sydney Water Supply Pipeline separates the two areas). There is a

branch 'drain' from the pipeline that also divides the Sefton precinct and lines up with the boundary to the LGA. To the north of this drain the lots are larger.

There are a small number of food retailers and neighbourhood shops in B2 zoned land in close proximity to the Station. Jensen Oval located north of the train line has recently undergone a major upgrade. This oval is a significant generator of activity.

Figure 59: Sefton

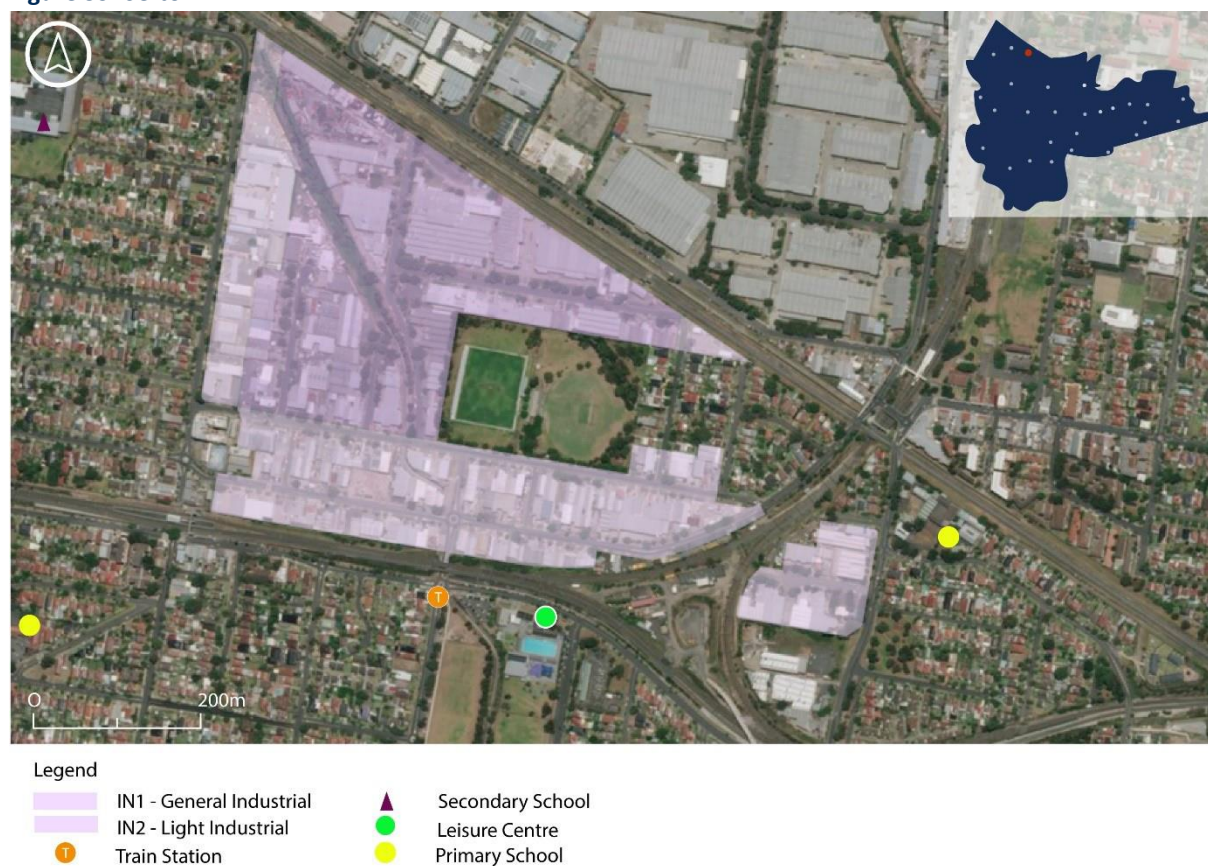


Table 81 Sefton precinct statistics

	Centre (m²)	Centres in LGA (m²)	Precinct contribution to centres (%)
Precinct size	376,860	11,049,243	3
Floorspace category	Floorspace	%	
Business / Office Parks	10,337	4.7%	
Carpark - external	22,133	10.0%	
Dispersed Activities	0	0.0%	
Freight and Logistics	43,282	19.5%	
Local light industrial and urban support	23,647	10.7%	
Manufacturing - Heavy	15,654	7.1%	
Manufacturing - Light	65,811	29.7%	
Office	2,896	1.3%	
Retail - Big Box	0	0.0%	
Bulky Goods Retail	179	0.1%	

Floorspace category	Floorspace	%
Residential	0	0.0%
Retail - Main Street	4,657	2.1%
Special Activities	0	0.0%
Urban Services	3,499	1.6%
Vacant Building	15,014	6.8%
Vacant Site	14,333	6.5%
Total	221,460	100%
Planning framework	Control	
Land zoning	IN1, IN2	
Building height	NA	
Floor space ratio	1:1	
Minimum lot size	1000 to 1500m ²	
Heritage	Pressure Tunnel and associated infrastructure – State significance	

11.8.2 Development pipeline

Project Address	Type	Floor Area	Floors	Status
66-72 (Lot 49-52) Carlingford St (DP715)	WAREHOUSES (4)/OFFICE - 3 storey	1200	3	Contract Let

11.8.3 S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Proximity to Sefton Station Older and cheaper premises 	<ul style="list-style-type: none"> Far from business centres Poor connection Large number of vacancies Rundown centres Poor connectivity to Auburn Road, Regents Park industrial land from the precinct due to railway Poorly maintained sites
Opportunities	Threats
<ul style="list-style-type: none"> Creative and emerging industries looking for cheaper warehouse space Isolated area east of the railway line to be explored for alternative use 	<ul style="list-style-type: none"> Market demand for residential close to train station High vacancy rates may cause some to question the need for the area

11.8.4 Strategic direction

The strategic direction for Sefton employment precinct is to primarily to retain and manage the area to allow existing industrial and urban services land to be safeguarded from competing pressures, especially residential and mixed-use zones. The approach seeks to protect this land for economic activities required for the LGA's local economic and population serving needs, such as urban services. The objective is to continue to provide a mix of activities that support the LGA's economy and population. The management of these lands should accommodate evolving business practices and changes in needs for urban services from the surrounding community and businesses.

The isolated and disjointed area to the east of the rail line is in close proximity to Regents Park Railway Station and centre. This area has had a number of recent approvals that, although permissible, are not traditional industrial uses (education and tutoring), which results in land use conflict with adjoining and surrounding residential uses and Regents Park Public School. The NSW Department of Planning, Industry and Environment is in the process of a major rezoning for residential purposes that will include residential flat development up to 8 storeys adjoining this precinct. This area is no longer ideal for industrial style uses and may be considered for rezoning, reflecting a more appropriate future uses for this isolated part of this precinct.

No changes are proposed to the range of permissible land uses at this point.

Opportunities to improve the amenity and public safety in the precinct, particularly near the station, could be explored.

11.9 Villawood

11.9.1 Location characteristics

The Villawood precinct contains IN1-General Industrial and IN2-Light Industrial zonings. It is approximately 1,787,000m² in size. It is well connected to Sydney and Bankstown CBDs by buses and trains. Leightonfield and Villawood Stations are located on the Main South Line and served by Sydney Trains T3 Bankstown line services while the A22 Hume Highway provides a road connection.

Villawood contains a large industrial area comprised of a number of large floorplate light industrial businesses. This is located to the East of the local centre and also straddles the railway line. Leightonfield Station is in the centre of this industrial area. Businesses in the precinct include, warehouse facilities, wholesalers, automotive businesses.

At the northern end of this light industrial area is Villawood Immigration Detention Centre, bounded by Miowera Road to the North, industrial businesses to the West and South and residential houses to the East. Also located at the Northern end of the precinct is a branch of the National Archives of Australia.

Figure 60: Villawood



Table 82 Villawood precinct statistics

	Centre (m²)	Centres in LGA (m²)	Precinct contribution to centres (%)
Precinct size	1,786,970	11,049,243	16
Floorspace category	Floorspace(m²)	(%)	
Business / Office Parks	8,641	1.2%	
Carpark - external	0	0.0%	
Dispersed Activities	7,420	1.0%	
Freight and Logistics	355,101	49.6%	
Local light industrial and urban support	25,666	3.6%	
Manufacturing - Heavy	28,228	3.9%	
Manufacturing - Light	144,328	20.2%	
Office	2,786	0.4%	
Retail - Big Box	0	0.0%	
Bulky Goods Retail	14,336	2.0%	
Residential	0	0.0%	
Retail - Main Street	12,134	1.7%	
Special Activities	0	0.0%	
Urban Services	7,197	1.0%	
Vacant Building	61,160	8.5%	
Vacant Site	48,597	6.8%	
Total	715,594	100%	

Planning control	
Land zoning	IN1, IN2
Building height	NA
Floor space ratio	1:1
Minimum lot size	1000 to 1500m ²
Heritage	Nil

11.9.2 Development pipeline

Project Address	Type	Floor Area	Floors	Status
13 Birmingham Av (Lot 1002 DP1151793)	WAREHOUSE (17)/BULKY GOODS	9624	1	Development Approval

11.9.3 S.W.O.T. Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Proximity to train stations Large lot sizes Large floorplates Reasonable access to Hume Highway Long term high performance Proximity to Parramatta via Woodville Rd 	<ul style="list-style-type: none"> Some substantial sites are vacant due to environmental factors Limited access and movement throughout Large scale of the precinct increases car reliance
Opportunities	Threats
<ul style="list-style-type: none"> Underutilised land may be redeveloped Freight network improvements 	<ul style="list-style-type: none"> Decline in manufacturing and transport and warehousing may reduce demand for large sites / floorplates

11.9.4 Strategic direction

The strategic direction for Villawood employment precinct is to retain and manage, consistent with the Greater Sydney Commissions policy position. A particular objective is to protect this area for large lot manufacturing as there are few similar locations throughout Greater Sydney. The precinct makes a substantial contribution to the manufacturing sector and employment in the LGA. The approach seeks to protect this land for economic activities required for The LGA's local economic and population serving needs, such as urban services.

No changes are proposed to the range of permissible land uses.

SUMMARY OF FINDINGS

12.0 SUMMARY OF FINDINGS

Canterbury Bankstown has a strong local economy. In 2017/18 the LGA generated \$14.48 billion in GRP and supported 118,450 jobs. This represents almost 3 per cent of the State of NSW's economy. Analysis of business counts in Canterbury Bankstown revealed that between 2014 and 2018 identified an additional 11,812 businesses were recorded. Over this period almost all industry categories experienced an increase in the number of businesses present.

In 2018, Canterbury Bankstown's Local Residents GRP was \$16.3 billion, this was higher than local industry GRP. This indicates that residents are contributing their economic productivity to other areas.

In 2018 there were a total of 38,337 active and registered for GST businesses.

12.1 Existing employment structure

Canterbury Bankstown LGA has a long-standing specialisation in manufacturing. While manufacturing is declining in line with the national trend, 16 per cent of Canterbury Bankstown's LGA's industry value added (IVA) with a specialisation in food production manufacturing and machinery and equipment manufacturing. Manufacturing has experienced a 10.5 per cent decrease in IVA between 2014 and 2018. Over the same period employment in manufacturing also decreased by 1.5 per cent and the proportion of local residents working in manufacturing experienced a decline of 3.7 per cent between 2011 and 2016. Despite this declining trend, it will be important to continue to provide land and spaces suitable for manufacturing. Improving the LGAs competitive advantage may attract manufacturers from other parts of Great Sydney. The LGA's excellent access to freight and a skilled labour force are likely to be significant attractors.

Transport, postal and warehousing is the second largest generator of value added with specialisations in road transport (taxis and buses), warehousing and storage services and postal and courier pick-up and delivery services. Maintaining an efficient road network including access to major roads and freight routes will be key for this sector. The LGA has a large supply of sites suited to this sector.

Canterbury Bankstown LGA has strong employment in activities that service the population, largely related the LGA's large population. Compared to Greater Sydney, the LGA has an over-representation of employment in population servicing sectors such as retail, health care and social assistance.

The LGA has an under-representation of jobs in knowledge based sectors such as Professional and Technical Services and Information, Media and Telecommunications. This is likely due the low qualification levels of its resident base and the strong transport connections to Sydney CBD. In this context, the proposed health-education precinct and high tech park at Chullora are particularly important, as they will diversity the employment base, increase jobs in the knowledges sector and upskill to local labour force.

Health and Social Assistance is the largest source of employment and third largest of IVA. With an ageing population and expansion of Bankstown-Lidcombe Health precinct the Health industry is an opportunity area. The local economy has developed specialisations in key industries based on competitive advantages and local physical and human capital characteristics. The largest sub-sector IVA contributions are by Preschool and School Education, Public Administration and Safety, Financial and Insurance Services, Construction Services and Professional, Scientific and Technical Services.

The South District Plan identifies a new Bankstown Health and Education Precinct and that the Greater Sydney Commission will collaboratively plan the Bankstown Airport and Milperra industrial area with the NSW Department of Planning, Industry and Environment, Canterbury Bankstown Council, Bankstown Airport Limited and State agencies. Bankstown CBD has also been identified as a Collaboration Area where a place based approach is to be

used to plan for the strategic transformation of the centre. These projects will be fundamental to the delivery of the job target for Bankstown.

This is to include resolving impediments to the delivery of coordinated investment and ensuring infrastructure alignment through a whole-of-government consideration.

12.2 Leveraging infrastructure

The LGA has excellent access to some of Sydney's major road routes and freight network. Existing infrastructure has positioned the LGA to capture transport and logistics through the M5 motorway, Chullora Intermodal and Bankstown Airport. This combined with the availability of large sites has allowed the LGA to develop its status as one of Greater Sydney's key locations for distribution of goods.

New investment in infrastructure will create new opportunities for the LGA to diversify industries and jobs – Sydenham to Bankstown Metro, UWS Campus in Bankstown, a potential new hospital in Bankstown and longer term planning for mass transit connections. There is opportunity to leverage this substantial infrastructure investment by prioritising employment growth in areas with strong connections and targeting industries that can benefit from improved network efficiencies. Future infrastructure investment should be sustainable and encourage active transport alternatives.

Jobs and industries will diversify as a result of new infrastructure investment with growth expected in knowledge sector and professional jobs. This will increase choice of jobs available to residents, bring jobs closer to home and reducing commute times consistent with a 30 minute city principle.

12.3 Employment land

The review of the LGAs employment land indicates that the LGA is well serviced with a good supply of employment land. Its 22 employment precincts of varying size and scale combined, provide around 965.9 hectares of land. If developed to their allowable FSR, a total theoretical maximum development capacity of around 9.7 million square metres of floorspace could be achieved. Allowing for typical development constraints a total capacity of around 7,244,355m² is likely.

Currently, it is estimated that the 22 precincts contain around 4.8 million square metres of employment floorspace resulting in a built FSR of 0.5:1. This results in a residual capacity of around 4.8 million square metres across the precincts.

Overall, employment precincts offer a diversity of lot sizes and floorplate sizes that are suited to a wide variety of employment activities. However, employment land focussed on knowledge jobs is limited. The proposal to upgrade Chullora business park to a high tech, state of the art business location, and the promotion of this precinct, will increase the diversity of employment precincts in the LGA.

Ongoing monitoring and management of the employment lands is appropriate. In particular, important urban services land at Chullora (south of Chullora Business Park), Milperra and Padstow, must be protected for this purpose.

Servicing employment precincts

Employment precincts are generally poorly serviced with convenience retail, services public transport and have a low level of amenity. Providing small areas of retail and personal services in employment precincts would assist workers to undertake day to day tasks. It would also support businesses by providing increased access to services. Providing opportunities for informal meeting spaces and breakout places throughout the day could interaction and collaboration.

The high tech precinct at Chullora will require a significant increase in the range of service on offer to support to high profile business locating in the precincts. Immediate access to retail and personal services along with civic space of a high standard is a priority. Amending the planning controls to permit serviced apartment of hotel accommodation along with conference facilities is also considered to be important.

Improving public transport connections between employment precincts would provide businesses and workers with increased access to services and increase the efficiencies. High frequency bus connections to Bankstown CBD (wheel and spoke model) from Chullora, Milperra and Padstow and improve access would be along with major employment precincts – addressing these though would support businesses and employees

12.4 Hierarchy of centres

A recommended retail hierarchy is provided in section 7.2.5. Development proposals that are aligned with this hierarchy will support positive outcomes in a network of efficient business centres.

12.5 Delivering jobs growth

Delivering jobs in Canterbury Bankstown LGA means building on the LGA's existing strengths – a strong local economy, a skilled workforce and a strategic location.

Canterbury-Bankstown is the 8th largest economy out of all NSW LGAs. In 2018, our Gross Regional Product (GRP) was \$14.48 billion, representing an 18 per cent increase from that generated in 2002 (\$11.87 billion).

Despite this growth, Canterbury-Bankstown LGA shrank as a percentage of GRP for NSW from 3.68 per cent to 3.06 per cent.

12.5.1 Attract more knowledge intensive jobs to the LGA

Canterbury Bankstown has historically specialised in manufacturing and logistics based industries. While these industries make a substantial contribution to the local economy, they are declining while other sectors such as health and education are growing.

The LGA has a relatively low proportion of knowledge intensive industries compared to Greater Sydney with total industry value added for knowledge intensive industries (25 per cent) being the only industry category that was less than Greater Sydney at (44 per cent). Only 13 per cent of were in jobs in knowledge intensive industries in the LGA compared to 29 per cent in Greater Sydney. Increasing the number of knowledge intensive jobs in the LGA would:

- Provide greater choice of jobs types in the LGA
- Protect the LGA against a downturn in one sector
- Attract increased investment in the LGA, in sectors such as health, education, research and technology
- Generate employment growth – “one knowledge job creates 5 local jobs.”

12.5.2 Elevate Bankstown CBD in the centres hierarchy

Establishing Bankstown as the major CBD in south west Sydney will attract investment to the LGA and deliver a larger range of jobs, services and facilities to the local population. The NSW Government has committed to establishing the Bankstown Collaboration Precinct including the establishment of University of Western Sydney Bankstown Campus by 2022 and a potential new hospital in Bankstown CBD by 2036. Measures to leveraging this investment to support local jobs growth include:

- Establish a commercial core in Bankstown CBD as a prestige office and administration precinct comprising Council's offices, WSU site and Library
- Require a minimum of two floors or 1.4:1 FSR of commercial floor space in all development within the B4 zone – to provide adequate office space to meet the LGA's growing business needs
- Establish a cultural and employment spine on Chapel Road between TAFE and Bankstown Station – to provide a gateway to the LGA
- Establish a Health Education Precinct comprising WSU in Bankstown and a potential new Hospital co-located with TAFE.

12.5.3 Retain, manage and enrich industrial and urban services land at Chullora

The Greater Sydney Commission has indicated that the Chullora employment lands are to be retained and managed. The current industrial and urban services land at Chullora contains large vacant lots with good access to an established rail freight network, providing opportunities to enhance the employment function of the precinct.

Increasing the range of complementary services in the precinct may assist in attracting new businesses and improving the functionality of the precinct. The delivery of convenience retail and personal services along with high standard civic spaces and parklands would support businesses and improve amenity for workers. Protecting the existing high productivity employment lands around the intermodal will deliver long term benefits.

The delivery of mass transit in this area would support and enhance the performance, quality and quantum of investment to this precinct, including increasing the potential to accommodate higher employment generating land uses such as technology businesses and lessen workers' reliance on private vehicles.

The key directions for this precinct are:

- Retain and manage industrial and urban services land
- Protect the high productivity employment lands around the intermodal
- Advocate for a high frequency mass transit connection from the precinct to Bankstown CBD and beyond
- Improve amenity and support businesses through delivery of convenience retail and personal services to the precinct along with high standard civic spaces and parklands .

12.6 Deliver better places of employment

Companies are keen to provide a good working environment for their employees as it helps them to attract and retain talent. Employees like to eat out during meal breaks and have access to basic services such as a bank or gym, and convenience retail services. Businesses benefit from having services nearby. For example major corporations need to have a hotel or function centre nearby while medium sized business benefit from service such as printers.

Work places that have access to services and facilities will meet the day to day needs of employees as well as being pleasant working environments. Having planning controls that encourage services and facilities to establish in employment precincts can support businesses and employees.

12.6.1 Urbanise employment precincts

The LGA offers a diversity of employment locations. Improving the amenity of employment locations will attract businesses and employers to the LGA, including major headquarters. It will also support businesses to attract and retain talent. Council can support businesses and workers by providing a planning framework that encourages:

- Convenience retail and services (e.g. child care, gyms, banks and the like) in employment areas, potentially in a small centre
- A pleasant location, such as employment areas for people to rest or interact with others during the working day.

12.6.2 Encourage transit oriented development in centres

Focussed employment growth matched with population growth, can be encouraged in a small number of centres through carefully managing development to retain local character and support local communities. Transit oriented development can focus population growth in selected centres where there is a good range of retail services. This supports local retail businesses by increasing the population in the local catchment and increasing demand for their services. This will encourage employment growth matched with population growth through an expanded retail sector in local centres and strategic centres. Transit oriented development will deliver jobs closer to homes to reduce the journey to work and services, allowing workers to spend more time with their family and leisure activities. Place based planning is needed in to manage growth arising from improvements to infrastructure and ensure that the character of each local centre is retained for the benefit of local communities. Initial centres for investigation are Bankstown, Campsie, Canterbury, Belmore and Lakemba.

12.6.3 Connect places of work

Building good public transport connections between places of work will benefit businesses and employees by improving the efficiency of moving people and goods throughout the LGA and to other places of employment (e.g. Parramatta and Sydney CBD). Improving the connections between Chullora and Bankstown will benefit businesses and workers – making the journey to work easier and providing businesses in Chullora with easy access to the range of services on offer in the growing Bankstown CBD. Proposals to connect workplaces are:

- Within the LGA, new express frequent transit connecting:
 - Bankstown to Chullora (medium term) and Lidcombe (long term)
 - Bankstown to Milperra – Bankstown Airport (Medium term)
 - Bankstown to Padstow (long term)
- Connecting workplaces external to the LGA
 - North – South Metro connecting to Parramatta and Macquarie Park
 - Sydenham to Bankstown Metro improving connections to Sydney CBD.

Benefits of connecting the workforce to workplaces via telecommunications should also not be underestimated and planned for as part of any future precinct masterplan to define density requirements and upfront investment needed in information technology infrastructure.

12.7 Meet the needs of the local population

The LGA's centres and employment precincts must service to local population. In some locations it will be important to protect businesses from being pushed out of the area if rents increase or there is competition from larger businesses. It is also important for the LGA to offer a range of opportunities for shopping, leisure and entertainment.

12.7.1 Establish a lifestyle precinct in Campsie

This lifestyle precinct will retain the existing character of Campsie while offering a broader range of facilities. Suggested actions include:

- Establish pedestrian, cycle and shuttle bus connections from:
 - Campsie to Canterbury Hospital
 - Campsie to Mildura Reserve and Cooks River open space
- Implement built form controls that:
 - Protect the character and fine grain
 - ensure a transition of building heights
 - Encourage shop-top housing
 - Maintain retail and commercial at street level.
- Implement the Campsie smart hub project

12.7.2 Protect employment land from rezoning

Some of the LGA's employment precincts service the needs of the local population. These precincts offer a range of services that are important for our day to day activities such as car repairs and hardware. It is important to ensure that these areas are protected from rezoning, so that the local population can continue to enjoy these services close to home, and not have to travel outside the LGA. Retaining these areas for population serving activities means protecting areas such as:

- Milperra-Bankstown Airport Industrial Precinct
- Bankstown-Padstow Industrial Precinct

- Chapel Street Industrial Precinct
- Chullora (motor vehicle precinct).

STRATEGY

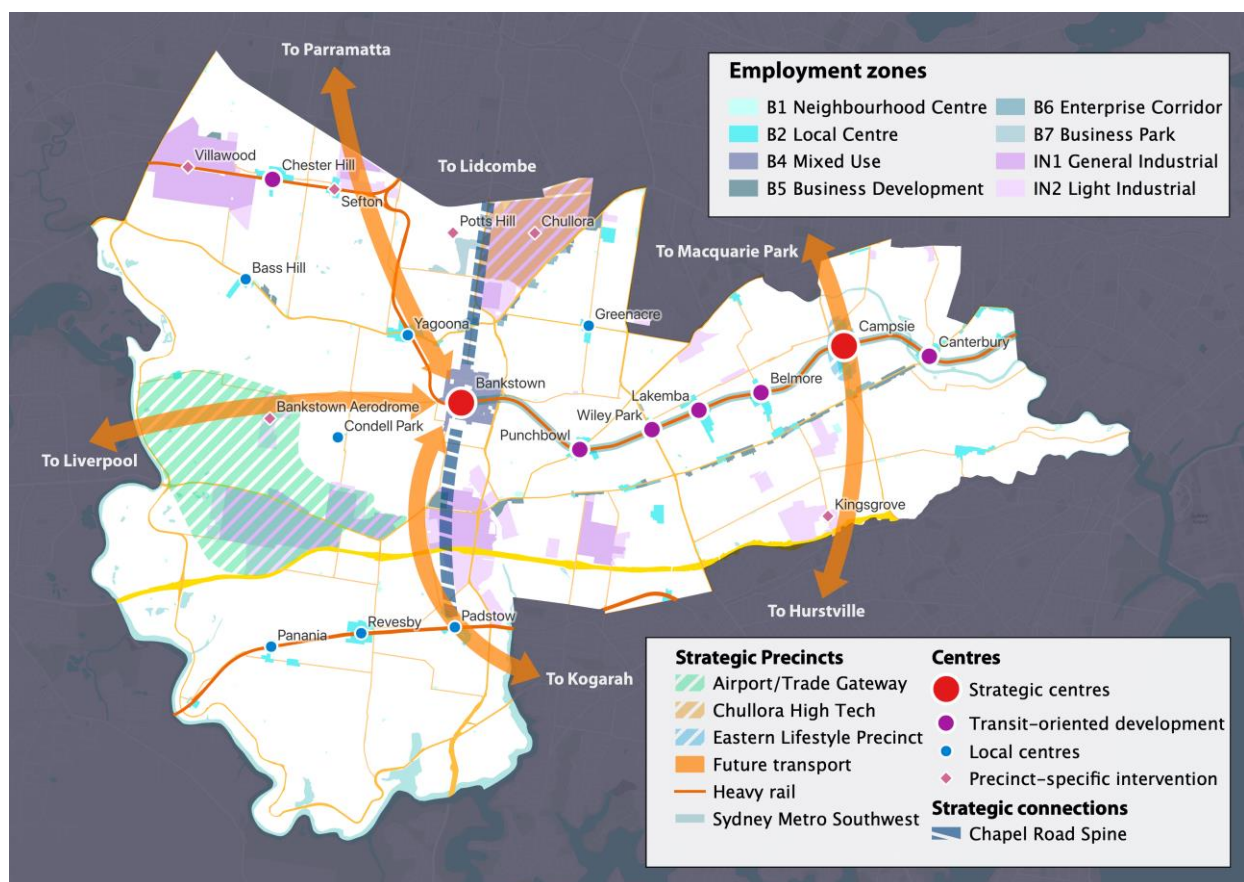
13.0 STRATEGY

13.1 Vision

By 2036 Canterbury Bankstown's employment lands will be a network of places engaged in business, production and knowledge advancement, connected to a thriving Bankstown City Centre. Collectively this network will deliver a diversity of jobs in a prosperous local economy that services domestic and global markets.

Ongoing revitalisation of employment lands will prioritise uses which generate new jobs. Vibrant local centres will provide a diverse range of goods and services to meet the needs of their community and provide a high level of amenity to encourage social interaction.

Key strategies for employment lands



13.2 Key directions for building a successful resilient economic foundation

Key Directions	Principles of Success
Businesses can respond to market drivers	<ul style="list-style-type: none"> There is land and floorspace space available for rent / purchase on the market at any given time Employment land and space provides for a range of floorplates sites and locational preferences A skilled labour force is located nearby Businesses have access to the infrastructure and services they need Mutually beneficial partnerships develop Businesses can connect, collaborate and innovate.
Employment places are connected	<ul style="list-style-type: none"> Mass transit connects employment places to maximise business interactions Mass transport connects businesses to a skilled workforce Freight transport efficiently connects businesses to regional and global markets Digital infrastructure supports global connections.
Employees needs are met	<ul style="list-style-type: none"> Workers have access to a diverse choice of jobs located close to home Commute times are within 30 minutes Employment places offer convenience retail and personal services Places to take a break in the working day are available, pleasant and interesting
The LGA builds a strong competitive advantage	<ul style="list-style-type: none"> Employment precincts are strategically placed within a typology Business centres are strategically placed within a hierarchy Opportunities to cluster and agglomerate are maximised. A network of complementary centres and employment precincts is formed Future development is aligned with and supports the strategic typology of employment places and Centres hierarchy
Business needs are serviced	<ul style="list-style-type: none"> Businesses have immediate access to the services they need High tech precincts, education and health precincts can accommodate business needs, visitors and learning experiences Urban services precincts have an adequate supply of land and spaces to meet demand and surrounding land uses are managed to minimise risk of conflict Precincts that provide large floorplates are protected for a sustainable industry base.
Community needs are met	<ul style="list-style-type: none"> Households have easy access to goods and urban services that meet their everyday needs Local centres provide a convenient location for shopping and a focal point for community events, social interaction and outings Campsie lifestyle precinct offers an exciting place for eating out, entertainment and leisure activities Bankstown CBD provides for all higher order shopping and administration services.

13.3 Proposed actions

Aim 1: Elevate Bankstown City Centre's position in the centres hierarchy for South West Sydney to encourage development of a high profile mixed use CBD

Objective	Actions	Potential LEP amendments
<p>Establish a commercial core as an office and administration precinct comprising Council's offices, WSU site and Library.</p> <p>Establish a Health Education Precinct comprising:</p> <ul style="list-style-type: none"> WSU in Bankstown A potential new Hospital co-located with TAFE Encourage further investment in private and allied health, research and institutional development. <p>Encourage an arts precinct south of the rail line.</p>	<ul style="list-style-type: none"> Review planning controls to: <ul style="list-style-type: none"> Establish a commercial core zone to protect potential for long term commercial development Require no loss of commercial floorspace through redevelopment Establish a cultural and employment spine on Chapel Road between TAFE and Bankstown Station and onto Chullora. Identify and preserve sites for university and hospital campuses and other supporting health and education uses. Implement Complete Streets Strategy and at grade connection along Appian Way across the rail line as part of the station redevelopment for the new metro. Deliver a master planned outcome for the CBD. 	<ul style="list-style-type: none"> Introduction of a commercial and administrative core precinct with height and floor space controls subject to development of a place plan Test opportunities to increasing the permissible FSR and height in the B4 Mixed Use zone (excluding the commercial administrative core precinct) to increase density of both employment and residential uses through a Place Planning process Introduction of an LEP clause to ensure new development does not result in a net loss of commercial floor area In the B4 Mixed Use zone explore opportunities to support the growing commercial function of Bankstown CBD. This may require establishing minimum requirements for commercial floor space In the R4 High Density Residential zone, test an increase in height and floor space for additional residential capacity (refer to Housing Strategy) Identify through the master planning process, locations for activation strips in the R4 zone. Introduce a design and sustainability excellence clause which requires a high standard of design quality and sustainability benchmarks.

Aim 2: Establish a lifestyle and medical precinct in Campsie

Objective	Actions	Potential LEP amendments
<p>Encourage entertainment, leisure and retail activities in Campsie to support a growing LGA population.</p>	<ul style="list-style-type: none"> Establish pedestrian, cycle and shuttle bus connections from: <ul style="list-style-type: none"> Campsie to Canterbury Hospital Campsie to Cooks River open space Implement built form controls that: <ul style="list-style-type: none"> Protect the character and fine grain along Beamish Street 	<ul style="list-style-type: none"> Review the range of permissible land uses e.g. conference facilities, convenience retail, restaurants/cafes, gyms, child care and the like – to service the needs of businesses and employees within the business park. Introduce a design and sustainability excellence clause which requires a high standard of design quality and sustainability benchmarks.

Objective	Actions	Potential LEP amendments
	<ul style="list-style-type: none"> – ensure a transition of building heights to lower density areas – Encourage shop-top housing – Maintain retail and commercial at street level. – Ensure no net reduction in commercial/retail floor space on sites – Support a health and medical precinct around Canterbury Hospital – Support a ‘lifestyle precinct’ underpinned by good access to the river, the green grid network and health and wellness facilities. 	

Aim 3: Connect workplaces within the LGA

Objective	Actions	Potential LEP amendments
<p>To improve productivity and efficiencies</p> <p>To create a better working environment</p>	<ul style="list-style-type: none"> • New mass transit connections: <ul style="list-style-type: none"> • Bankstown to Parramatta and Kogarah Working with NSW Government authorities may assist in early identification of suitable corridors for mass transit, which can be protected for future use through zoning controls. <ul style="list-style-type: none"> – via Padstow and Chullora (medium term) and Lidcombe (long term) – Bankstown to Milperra – Bankstown Airport (Medium term) • Connect workplaces external to the LGA with mass transit: <ul style="list-style-type: none"> – North – South Metro connecting to Parramatta and Kogarah – Sydenham to Bankstown Metro improving connections to Sydney CBD with extensions to Liverpool via Bankstown Airport. 	<ul style="list-style-type: none"> • Working with NSW Government authorities may assist in early identification of suitable corridors for mass transit, which can be protected for future use through zoning controls.

Aim 4: Urbanise employment precincts

Objective	Actions	Potential LEP amendments
<p>Offer a high level of amenity and services in employment locations to:</p> <ul style="list-style-type: none"> Attract businesses and employers to the LGA, including major headquarters Assist corporations to attract and retain talent Provide convenience retail and services (e.g. child care, gyms, banks and the like) in employment areas, potentially in a small centre <p>Provide a pleasant location in employment areas for people to rest or interact with others during the working day.</p>	<ul style="list-style-type: none"> Review planning controls to permit a broader range of compatible land uses in employment precincts, subject to limitations to maintain the employment priorities of the precinct and the 'retain and manage' approach required under the South District Plan. 	<ul style="list-style-type: none"> Review the range of permissible land uses e.g. conference facilities, convenience retail, restaurants/cafes, gyms, child care and the like – to service the needs of businesses and employees within the business park.

Aim 5: Encourage transit oriented development in centres

Objective	Actions	Potential LEP amendments
<p>Encourage employment growth matched with population growth – to reduce the journey to work and service residents- in the following centre</p>	<ul style="list-style-type: none"> Undertake place based master planning in centres to attract housing growth and to deliver: <ul style="list-style-type: none"> High quality commercial spaces Protect an adequate commercial floorspace for the needs of a growing population High quality civic space and amenity 	<ul style="list-style-type: none"> Test opportunities to increasing the permissible FSR and height in the B4 Mixed Use zone (excluding the commercial administrative core precinct) to increase density of both employment and residential uses through a Place Planning process around existing transport nodes

Aim 6: Protect employment precincts for employment uses

Objective	Actions	Potential LEP amendments
<p>Recognise the importance of conveniently located industrial and urban services land which services the needs of the local population</p>	<ul style="list-style-type: none"> Establish a policy position to 'retain and manage' industrial and urban services land as per the District Plan and protect precincts from inappropriate uses. Ensure permissibility of zones reflect current and future uses intended for the zone. This may be through the use of additional permissible uses within a zone. 	<ul style="list-style-type: none"> Introduction of an LEP clause to ensure new development does not result in a net loss of commercial floor area

Aim 7: Promote innovation and high tech jobs in Chullora

Objective	Actions	Potential LEP amendments
Promote innovation and high tech jobs, including HQ's of major corporations, where they do not negatively impact the viability of freight and urban support services	<ul style="list-style-type: none"> Implement a retain and manage policy as outlined in the District Plan Deliver open space, for informal meetings and recreation during the working day Review planning controls to permit: <ul style="list-style-type: none"> Small scale retail services and facilities such as gyms, cafes, banks, convenience retail, bars and the like conference facilities and co-working spaces - to encourage "stickability" of businesses An appealing public domain that's capitalises on future investment in the Heritage Transport Centre 	<ul style="list-style-type: none"> Introduction of an LEP clause to ensure new development does not result in a net loss of commercial floor area Working with NSW Government authorities may assist in early identification of suitable corridors for mass transit, which can be protected for future use through zoning controls.

Aim 8: Leverage Bankstown airport

Objective	Actions	Potential LEP amendments
Support the transition the Milperra – Bankstown employment land to a collaboration precinct	<ul style="list-style-type: none"> Leverage the strategic location for specialised aviation and logistics precinct Establish infrastructure finding mechanisms to support the long term transition of the precinct Providing supporting infrastructure and services such as student housing facilities for aviation training in the Bankstown City Centre 	<ul style="list-style-type: none"> Introduction of a commercial and administrative core precinct with height and floor space controls subject to development of a place plan Introduction of an LEP clause to ensure new development does not result in a net loss of commercial floor area

Aim 9: Support population serving centres as community hubs for small business

Objective	Actions	Potential LEP amendments
Support the growth of village and neighbourhood retail centres	<ul style="list-style-type: none"> The location of new housing growth to foster growing retail catchments Providing sufficient zoned land to allow business to expand as needed Encouraging a variety of floorplate sizes for a diversity of employment Encouraging innovation such a flexible and We Work places. Improving the amenity of centres – so that they are vibrant attractive places where people enjoy spending time 	<ul style="list-style-type: none"> Test opportunities to increasing the permissible FSR and height in the B4 Mixed Use zone (excluding the commercial administrative core precinct) to increase density of both employment and residential uses through a Place Planning process In the R4 High Density Residential zone, test an increase in height and floor space for additional residential capacity (refer to Housing Strategy) Identify through the master planning process, locations for activation strips in the R4 zone.

Objective	Actions	Potential LEP amendments
		<ul style="list-style-type: none">● Introduce a design and sustainability excellence clause which requires a high standard of design quality and sustainability benchmarks.

13.4 Strategies to deliver jobs growth

Delivering jobs in Canterbury Bankstown LGA means building on the LGA's existing strengths – a strong local economy, a skilled workforce and a strategic location.

13.4.1 Grow Bankstown CBD

Establishing Bankstown as a major CBD in south west Sydney will attract investment to the LGA and deliver a larger range of jobs, services and facilities to the local population. The NSW Government has committed to establishing the Bankstown Collaboration Precinct including the establishment of University of Western Sydney Bankstown Campus by 2022 and a potential new hospital in Bankstown CBD by 2036. Measures to be considered to leverage investment to support local jobs growth include:

- Establish a commercial core in Bankstown CBD as an office and administration precinct comprising Council's offices, WSU site and library
- Ensure new development does not result in a net loss of commercial floorspace
- Provide adequate commercial office space to meet the LGA's growing business needs
- Establish a cultural and employment spine on Chapel Road between TAFE and Bankstown Station, and northward toward Chullora – to provide a gateway to the LGA
- Establish a Health and Education Precinct comprising WSU, a potential new Bankstown Hospital and TAFE, anchoring the Chapel Road spine
- Encourage an arts precinct south of the rail line.

There is an opportunity to facilitate training to equip the workforce with appropriate skills to effectively contribute to the industry. Training courses operated by the Western Sydney University or TAFE, aimed at local business, can help local business improve and grow.

- Work collaboratively to establish the new university campus in the Bankstown CBD and attract other educational and research investment in the city, which could bring the student population up to 25,000 by 2036
- Provide training spaces for the utilisation by businesses, universities and TAFE to run training courses

Undertaking engagement with local industries to determine the gap in employment skill sets and tailor training courses to suit. Non-statutory responses to support the transition of the CBD could include:

- Establish a brand for Bankstown CBD and promote the CBD across NSW
- Work with businesses to identify needs and support their operations and potential for growth
- Preparing a Master Plan for the CBD that identifies opportunities for key sites including private and public lands where appropriate, activity precincts e.g. eat street, retail core, entertainment precinct and so on that builds on the strategies being implemented by the Complete Streets Strategy.

The benefits of increasing population within a centre's walkable catchment

Centre performance is intrinsically linked to the population within the trade catchment. Increasing the residential and commercial density of the walkable catchment can enhance the vitality of retail and reduces the reliance of private vehicle trips. A balance of both commercial and residential within the catchment can extend centre activation both during the day and in the evening.

Providing increased residential populations in locations with strong access to public transport and employment opportunities is encouraged by all levels of government. Increasingly, people are choosing to live in or in close proximity to centres as a lifestyle choice due to the enhanced access to services.

Increasing the permanent population of residents and workers within the 400-metre catchment of the main activity spine would boost centre vitality. It would also enable more people to live closer to jobs if additional commercial floorspace is also delivered in the catchment. The business survey indicated that an appeal of the centre was the ability to live and work in the centre. The proximity to other employment areas and the trade catchment potential (including the demographics of the surrounding residential population) were considered the greatest strengths. In Bankstown, this needs to be balanced with the protection of sites for future jobs growth.

Further opportunities to expand and grow the centre in line with future population projections and associated residential and commercial demand would benefit the centre, contributing to a lively and active place. Provisioning a variety of housing types including affordable options for key workers would encourage greater diversity. This would need to be balanced with other considerations such as heritage and surrounding local character.

Support jobs closer to homes in line with the 30-minute city concept.

Planning considerations

- Consider allowing a greater density of residential and office space within the walkable catchment to support centre activation.
- Provision for a mix of housing (including affordable housing, student housing, executive housing and short to medium term accommodation) to cater to a diversity of age groups and incomes and support the employment function and anchor institutions of the City Centre

13.4.2 Increase knowledge jobs

Non-statutory responses to support the long term vitality of the high tech business park include:

- Promotion of the business park to major corporations and supporting businesses
- Improving pedestrian network and safety within the business park
- Managing truck movements to minimise amenity impacts
- Establishing high amenity open space area for informal gatherings and relaxation during the working day
- Improving transport connections to Chullora Market Place through shuttle bus services
- Improving transport connections to Bankstown CBD through high frequency mass transit, with high frequency buses considered in the short and medium term which can connect Bankstown Metro Station, potential future hospital and university developments in the City Centre, schools, TAFE and Chullora.

Case Study: Engaging with partners to develop solutions – Macquarie Park

HackMacPark involved over 70 participants from corporate partners, students and entrepreneurs. This unique mix included equal parts students and professionals. Teams addressed one of two challenges: solutions to improve mobility and connectivity in Macquarie Park or solutions to enhance the vibrancy of Macquarie Park.

40 partners attended an ideation workshop to formulate the challenge focus. Consultation occurred with over 400 employees, students and residents in Macquarie Park via an online survey.

A 2-day “Hackathon” involved the formation of 11 teams that designed, built and pitched solutions

11 teams pitched solutions on the final day including peak-shifting apps, ride-share apps, sustainable food-truck platforms, district engagement platforms and active travel platforms.

Engage with businesses in Chullora business park

Planning considerations

- Survey business to identify current barriers, issues and needs.
- Test solutions with local business before implementing for the greatest chance of success

Case Study: Boston Seaport transition to a modern industrial precinct

Fifteen years ago, the precinct was a run-down, ageing docks area, separated from downtown by a major freeway. The Big Dig buried the freeway and connected the docks back to the city. Now it's emerging as a thriving tech hub, that is giving fierce competition to nearby Kendall Square, located next to Cambridge and MIT, which was historically the area where the best of the best in the tech sector would cluster:

The rise of the millennials has seen these companies moving out of the traditional tech hubs, in search of more appealing urban locations that enable them to attract the best talent. The Innovation District is the fastest growing start-up area in the greater Boston metroplex, and maybe the fastest growing anywhere in the nation.

What makes it appealing is a combination of excellent food, great transport access, and urban amenity.

<https://urbis.com.au/insights-news/global-trends-in-mixed-use-development-the-new-paradigm-in-urban-placemaking-2/>

13.4.3 Enhance business centres as places – a community focus

Vibrant town centres can be enhanced by :

- Reducing the car dominance of the main street environments by undertaking public domain works that create opportunities for footpath dining and street trees through car park buildouts
- Encouraging mixed use redevelopment at that incorporates ground floor retail and podium business and office space to increase the worker and resident population in the catchment
- Encouraging more local events such as markets, street festivals etc. that bring people into the area
- Actively marketing and promoting the centres as places to establish businesses
- Facilitating the establishment of co-working spaces in the town centre.
- Facilitate development of a night time economy

Implement built form controls that:

- Protect the character and fine grain of Beamish Street
- Ensure a transition of building heights
- Encourage shop-top housing
- Maintain retail and commercial at street level.
- Ensure no reduction in retail or commercial floor space
- Encourage night time economy

- Establish an 'Eastern Lifestyle and Medical Precinct' from Campsie to Kingsgrove, supported by north south mass transit connectivity.

13.4.4 Protect employment lands for employment uses

Some of the LGA's employment precincts service the needs of the local population. These precincts offer a range of services that are important for day to day activities such as car repairs and hardware. It is important to ensure that these areas are protected from rezoning, so that the local population can continue to enjoy these services close to home, and not have to travel outside the LGA. Retaining these areas for population serving activities means protecting areas such as:

- Milperra-Bankstown Airport Industrial Precinct
- Bankstown-Padstow Industrial Precinct
- Chapel Street Industrial Precinct

13.4.5 Leverage infrastructure that supports jobs growth

The LGAs significant manufacturing, transport and logistics industries rely on access to an efficient road network. Maintaining an efficient road network is appropriate to service industries and to accommodate future growth. Extensive congestion, which effects commute times and the efficiency of freight and commercial vehicle movements. Council could consider:

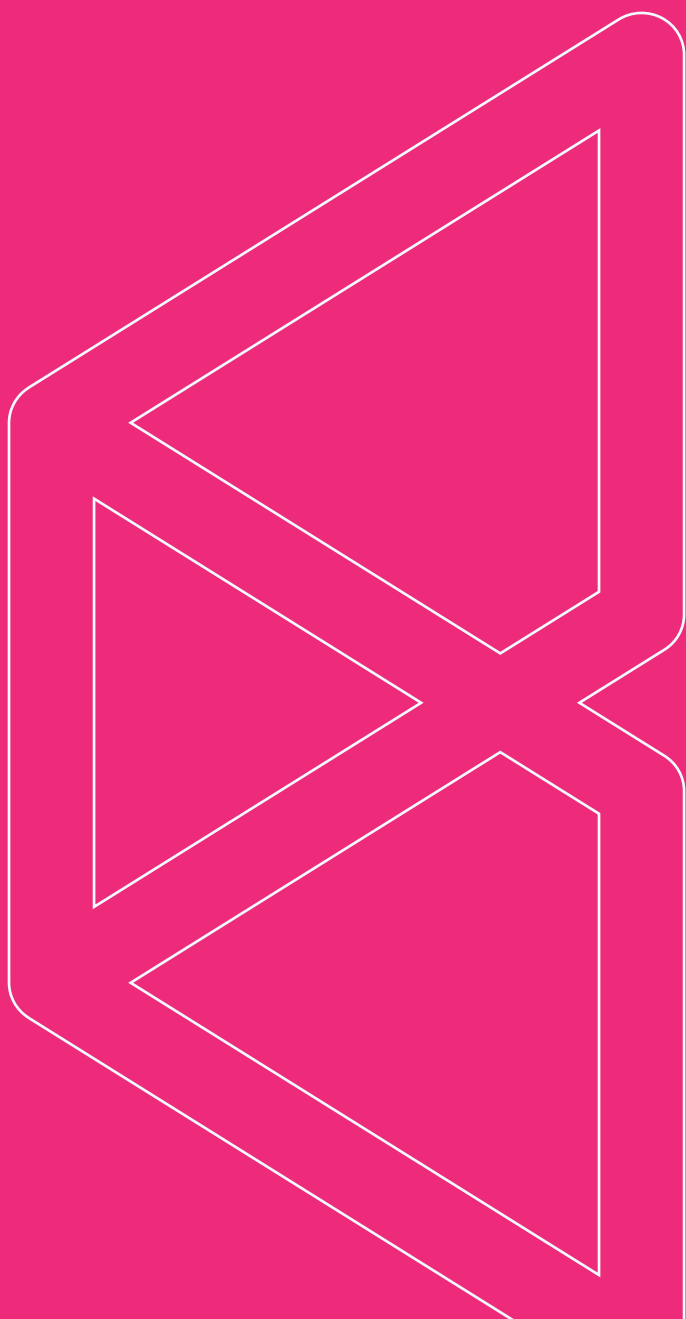
- Preparing a Transport and Traffic Study for the broader LGA to identify the immediate priorities for investment
- Working with Transport for NSW to free up capacity on the priority road networks and enhance their efficiency as major freight and movement corridors for Greater Sydney.

Industrial and urban service areas are major employment locations and need to be connected with efficient public transport. While the areas are known to be car dependent, improving public transport connectivity would encourage higher usership and reduce parking pressures. The current connection from the rail stations to Chullora and Milperra industrial area in particular is poor.

Investigate the implementation of a high frequency bus service or a shuttle bus to circulate from the Bankstown station to the precincts during peak times and test mass transit and Light Rail connectivity from Bankstown to Chullora (via Kogarah to Parramatta metro link) and to Bankstown Airport (via Bankstown to Liverpool metro extension).

The delivery of infrastructure is a substantial cost for Council and needs to be effectively planned for and managed:

- Review contribution plans to capture the costs of infrastructure improvement works and community facilities in employment lands.
- Where feasible, VPA's could be used to encourage greater provision of community facilities in employment lands.
- Advocate for the delivery of new mass transit connections including the Kogarah to Parramatta link and Bankstown to Liverpool extension.



WHERE
INTERESTING
HAPPENS