Gunnedah
Shire Council
Open New Horizons

GUNNEDAH SHIRE
EMPLOYMENT LAND STRATEGY

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APPROVED BY: DEPARTMENT OF PLANNING, HOUSING AND INFRASTRUCTURE
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Acknowledgement of Country

Gunnedah Shire Council acknowledges the Kamilaroi Nation as the traditional Custodians of the Land on which we live and work. In doing so, Council pays its respect to all Elders both past and present as well as to the young Indigenous leaders of tomorrow.

EXECUTIVE SUMMARY

Gunnedah Shire Council (Council) commissioned HillPDA to prepare an Employment Land Strategy (ELS) (covering industrial, retail and commercial) for the Gunnedah Shire Local Government Area (LGA), in line with the Employment Land Strategy Guidelines developed by Department of Planning, Housing and Infrastructure. The purpose of the ELS is to analyse and plan for the Gunnedah Shire's employment land needs over the next 20 years, until 2041. The ELS considers local and regional policies, demographics, economic performance, market trends, outcomes private and public sector consultation, audited land uses, modelled land demand and a capacity assessment of employment land.

Gunnedah Shire's population is forecasted to increase gradually to reach 14,492 residents, an increase of 1,404 people by 2041. Data projects a slight decline in jobs, however input from major businesses indicated that significant declines are not expected in Gunnedah Shire due to expansion of the various industries in the area. The ELS considers how employment land can be used to help maintain growth while facilitating a diversification of local industries, encapsulating growth in manufacturing, tourism, services and other sectors.

The ELS ensures Gunnedah Shire Local Government Area (LGA) is well-placed to meet the future employment land opportunities and challenges of changing industries, and strategies to adapt to market influences. Mining, agribusiness and renewable energy industries will power the local economy in the short-to-medium-term. Simultaneously, Gunnedah Shire will move towards economic diversification, supporting its ability to navigate long-term uncertainties. Industries will be attracted that support key local sectors, while new employment opportunities will be leveraged in growing industries. Growth in both commercial and retail businesses are anticipated within Gunnedah's CBD retaining its role as a strategic centre. New employment land, growth in retail and commercial will raise the profile of Gunnedah Shire as a place to do business.

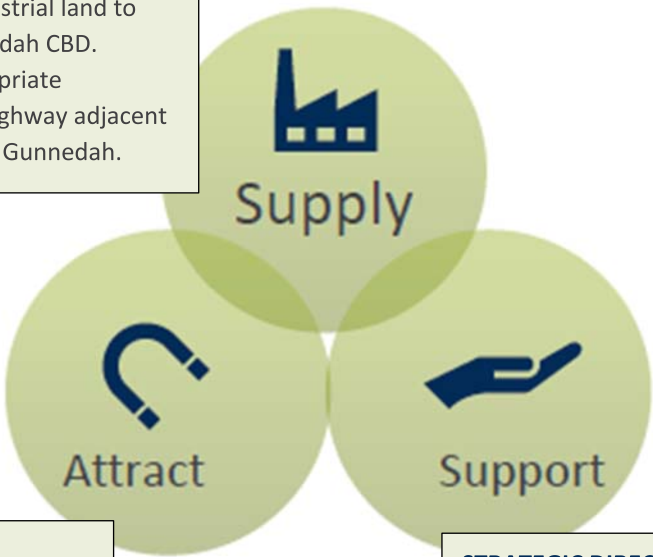
There is 739 hectares of zoned employment land across the LGA; excluding RU5 Village zoned land, there was 440 hectares of zoned employment land. Around 235 hectares, or 32 per cent, was vacant and considered available for development (this is excluding RU5 Village land of which around 72 hectares or 16 per cent, was vacant/available for development). The E1 Local centre zone, E3 Commercial Productivity, E4 General Industry and MU1 Mixed use zones had less than 15% of land available. The E5 Heavy Industry and RU5 Village zones had sufficient land supply. Taking into consideration the current supply and future demand, the ELS proposes a resultant land/area demand that should be accommodated in Gunnedah Shire to cater for the growing community needs:

- Industrial area - a total net demand of around 22 hectares over the 17-year period due to mining expansion and Namoi Jobs Precinct
- Retail floor area - an increase of around 4,145 square metres or 18 per cent to 2041
- Non-retail floor area - estimated that net growth in non-retail commercial-related jobs would drive demand for around an additional 2,000 square metres of space.

To deliver the ELS, three themes namely **supply** of employment lands, **support** for employment opportunities and land and **attract** business and other uses are proposed to boost the LGAs economy and competitiveness.

STRATEGIC DIRECTIONS

1.1 Ensure adequate supply of zoned land and serviced industrial land.
1.2 Ensure adequate supply of well-located commercial land.
1.3 Progress the delivery of key employment precincts.
1.4 Establish new industrial land to the west of Gunnedah CBD.
1.5 Support the appropriate development of highway adjacent land to the east of Gunnedah.



STRATEGIC DIRECTIONS

3.1 Ensure that land is fit for industry needs.
3.2 Encourage new commercial businesses to establish in Gunnedah Shire.
3.3 Raise Gunnedah's Shire's profile as a place to do business.

STRATEGIC DIRECTIONS

2.1 Ensure that local planning control support employment land.
2.2 Use local planning incentives to support commercial land in Gunnedah.
2.3 Protect employment land uses in villages.

In summary, the strategic directions facilitate the development of a new industrial land precinct west of the CBD around Blackjack Road with future associated infrastructure, enhancement and additional retail and business uses within the Gunnedah CBD, supporting highway uses to the east of Gunnedah CBD, and supporting home based business and employment within the villages.

Through the implementation of this Strategy, the LGA's future will be able to support the Shire as a prosperous and stable regional area. Its diverse local community will be benefited by the nurturing and diversification of economic and employment opportunities. The implementation will also facilitate Gunnedah Shire Council achieving the New England North West Regional Plan 2041, other state strategies and Section 9.1 Ministerial Directions.

INTRODUCTION

1.0 INTRODUCTION

Gunnedah Shire Council (Council) has commissioned HillPDA to prepare an Employment Land Strategy (ELS) for the Gunnedah Shire Local Government Area (LGA).

The purpose of the ELS is to analyse and plan for the LGA's employment land needs over the next 20 years. The ELS considers local and regional policies, demographics, economic performance, market trends, outcomes private and public sector consultation, audited land uses, modelled land demand and a capacity assessment of employment land. It presents a strategy with a vision, principles, strategies and actions for the LGA's employment land, in alignment with relevant strategies and the Department of Planning, Housing and Infrastructure's (DPHI) *A guideline for local employment land strategies* (ELS Guideline).

1.1 Background

Employment land refers to land uses that generates employment. While a variety of land uses can provide jobs, employment land typically refers to industrial or commercial land, which provide a particular spatial concentration of jobs. For the purposes of this ELS, employment land is defined as the land use zones under the Gunnedah Local Environmental Plan (LEP) 2012 outlined in Table 1.

Table 1: Employment land use zones in the Gunnedah Local Environmental Plan 2012

Commercial zones	Industrial zones
• RU5 Village • E1 Local Centre • MU1 Mixed Use	• E3 Productivity Support • E4 General Industrial • E5 Heavy Industrial

1.2 The study area

The Gunnedah Shire LGA is located in the New England Northwest region of NSW. It is approximately 430 kilometres north of Greater Sydney and 613 kilometres south-west of Greater Brisbane, and is located adjacent to the LGAs of Tamworth, Liverpool Plains, Warrumbungle and Narrabri.

The Oxley Highway runs east-to-west through the LGA, connecting it to regional towns and cities including Gilgandra, Tamworth and Port Macquarie. The Kamilaroi Highway runs from the south-east to the north-west of the LGA, connecting it to Willow Tree in the south and towards Walgett via Narrabri in the north-west. Gunnedah is located on a regional railway line that connects it to Moree in the north-west and Sydney in the south-east.

The Gunnedah Shire is located on the land of the Kamilaroi nation. The site of the present-day town of Gunnedah, on the banks of the Namoi River, has long been associated with the presence of white stone. The town developed from the arrival of squatters and later development of a wheat industry, commercial trade and coal mining.[1] Today, the Gunnedah LGA contains approximately 13,000 people across the towns, localities and surrounding areas of Gunnedah, Curlewis, Carroll, Mullaley, Breeza and Tambar Springs. Local industries span across mining, agriculture, education, retail and healthcare.[2]

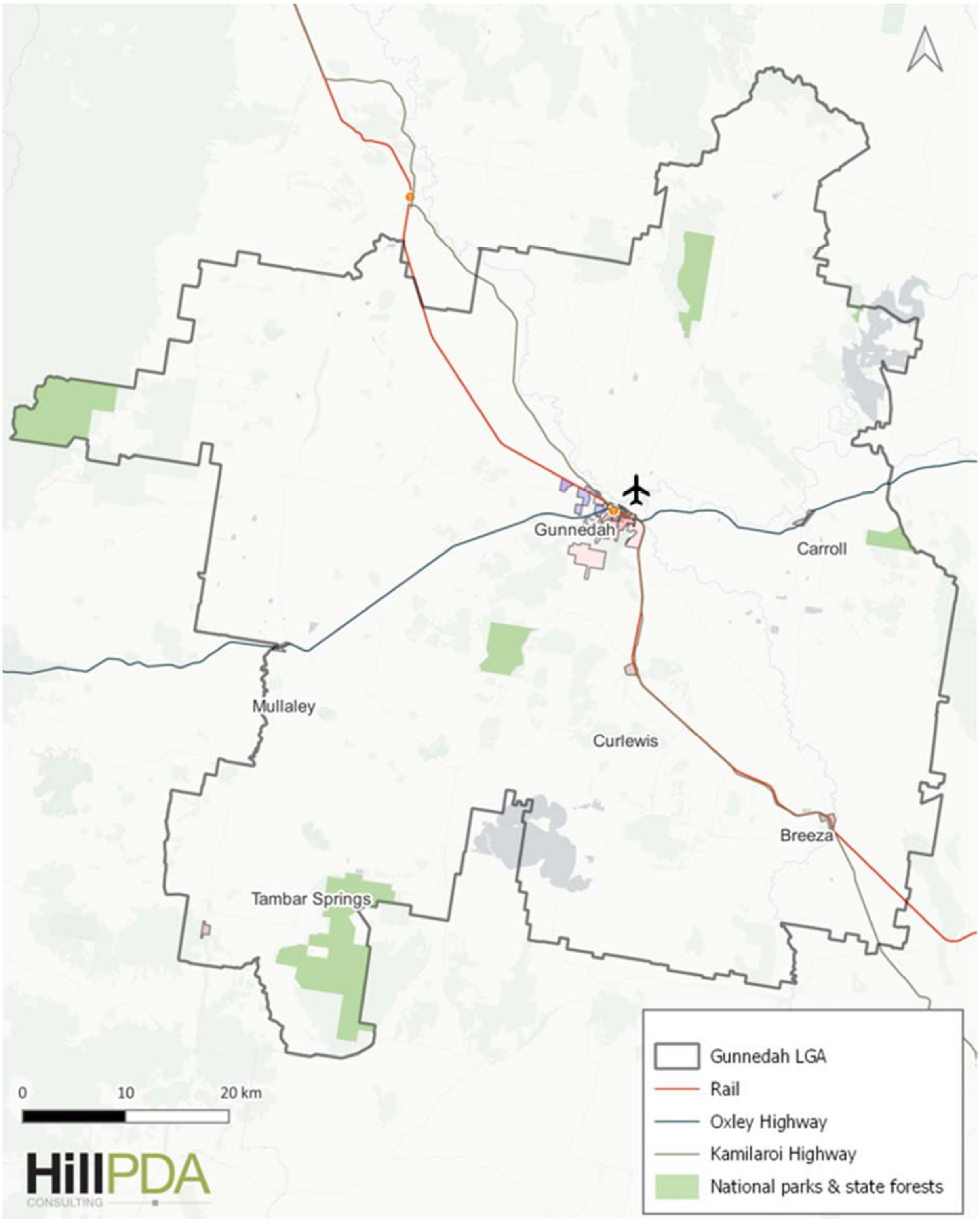
The Gunnedah Shire has a range of unique local assets. It is located in central Namoi Valley, near the edge of the Gunnedah-Bowen sedimentary basin, providing a physical geography supportive of mining and agriculture. The LGA is covered by relatively level plains, with small areas of higher elevation. Protected areas in the LGA include Dowe National Park, Pilliga Nature Reserve, Trinkey and Wondoba State Conservation Areas, Somerton National Park, and Boonalla and Willala Aboriginal areas. The LGA contains dispersed Indigenous and colonial heritage assets.

[1] 'Gunnedah – Culture and History', *The Sydney Morning Herald*, 19 November 2008.
[2] Australian Bureau of Statistics, *2021 Census All persons QuickStats*.

The Gunnedah Shire's population is forecasted to increase gradually over the next 20 years. Although some estimates project a slight decline in jobs, input from major businesses has indicated that significant declines are not expected due to expansion of the industries in the area. The ELS considers how employment land can be used to help maintain growth while facilitating a diversification of local industries, encapsulating growth in manufacturing, tourism, services and other sectors.

Figure 1 illustrates an overview of the Gunnedah LGA.

Figure 1: Gunnedah Local Government Area overview



Source: DPHI; HillPDA. Imagery: CARTO

PLANNING AND POLICY CONTEXT

2.0 PLANNING AND POLICY CONTEXT

To provide policy consistency, the vision and objectives of the Gunnedah Shire Council Employment Land Strategy (ELS) are designed to align with important planning policies that have been developed for NSW, the New England North West and Gunnedah Shire LGA. This chapter overviews the planning and policy context.

SUMMARY OF INSIGHTS

- **The ELS should achieve many of the employment and job strategies identified in the Council's future strategic plan and economic strategy.**
- **Regional developments will have a bearing on the LGA's future employment land needs. These include the Namoi Regional Job Precinct, inland rail and renewable energy production.**
- **The LGA has a range of local opportunities including renewable energy, freight and logistics, tourism, agribusiness, manufacturing, creative industries and population services. These opportunities could be facilitated by employment land.**
- **Specific potential opportunities for employment land include a Processing Precinct/Abattoir, a Food Product Innovation Cluster and saleyard redevelopment.**
- **Existing commercial and industrial centres should be supported and enhanced, including through key anchor tenants.**
- **The ELS should investigate previously identified sites for commercial and/or industrial development, redevelopment and changed planning controls, to unlock new employment-related opportunities in the LGA.**

2.1 New England North West Regional Plan 2041

The New England North West Regional Plan (RP) covers the 12 LGAs of Gunnedah Shire, Liverpool Plains Shire, Tamworth Regional, Narrabri Shire, Moree Plains Shire, Gwydir Shire, Inverell Shire, Uralla Shire, Walcha Shire, Armidale Regional, Glen Innes Severn Shire and Tenterfield Shire. The RP identifies a range of objectives, strategies, actions and collaboration activities. These create the following tasks for employment land planning in Gunnedah Shire:

- Objective 1 – coordinating planning for growth, community need and development by following the Settlement Planning Principles and planning around infrastructure.
- Objective 3 – expanding agribusiness and food processing, including through the Namoi Regional Job Precinct.
- Objective 4 – contributing to the responsible management of mineral resources by supporting economic diversification opportunities.
- Objective 5 – enhancing central business districts by supporting existing centres and industry anchors including health & education infrastructure.
- Objective 6 – responding to workforce and industry needs to calculate employment land needed.
- Objective 7 – supporting tourism including through townships and local arts & culture.
- Objective 9 – promoting renewable energy by considering opportunities related to biomass and bioenergy.
- Objective 10 – supporting the circular economy by considering opportunities relating to renewables, waste, freight, etc.
- Objective 16 – supporting the aspirations of Aboriginal people and communities by considering opportunities for Local Aboriginal Land Councils (LALCs) and partnerships with Aboriginal communities.

In addition, the Regional Plan identifies local government narratives for Gunnedah Shire including the growth of population-serving industries, the development of an ELS, freight and logistics growth, partnership with Aboriginal communities and renewable energy opportunities.

2.2 Lower North West Regional Economic Development Strategy – 2023 Update

The Regional Economic Development Strategy (REDS) includes the following strategies for the Lower North West Functional Economic Region (Gunnedah, Liverpool Plains and Tamworth Regional LGAs). It includes the following goals:

- Leverage existing infrastructure and unique offerings to support growth in key sectors, including agriculture and tourism.
- Build the region's agriculture sector, focusing on support for both traditional strengths in broadacre cropping and livestock as well as growing intensive horticulture and value-add processing activities.

The ELS identifies how employment land can connect to opportunities such as agriculture, tourism and value-add processing, including as part of the Namoi Regional Job Precinct.

2.3 Gunnedah Shire Local Strategic Planning Statement – Future 2040

Adopted in 2020, the Local Strategic Planning Statement identifies themes, planning priorities and actions which are relevant to the LGA's employment land planning, through the following tasks:

- Local Planning Priority 1 – supporting business, service and digital economy growth by identifying/securing employment lands and supporting creative practices through flexible uses of public space.
- Local Planning Priority 2 – through the ELS, facilitating the development of land that supports agriculture and locates industry near freight and away from sensitive land, aided by an investment prospectus and the identification of innovation/hub opportunities.
- Local Planning Priority 4 – enhancing infrastructure by identifying opportunities for more diverse & smaller-scale renewables, and supporting a Processing Precinct for agriculture, processing and manufacturing.
- Local Planning Priority 9 – protecting and supporting transport and freight opportunities (including a potential intermodal freight terminal); strengthening external relationships through export industries and collaboration with partnerships with other Namoi regional councils and state organisations.

2.4 Gunnedah Shire Economic Development Strategy 2022-26

The Economic Development Strategy (EDS) was adopted in February 2022. It outlines themes, strategic objectives and actions (including priority actions) for economic development in the LGA, with the following relevance for the ELS:

- Theme 1 – promoting diversification through investigating opportunities including investment attraction, branding, saleyard redevelopment, a Food Product Innovation Cluster and a Processing Precinct/Abattoir.
- Theme 2 – investing in infrastructure to underpin high-quality serviced employment land and opportunities related to renewables, freight, communications, and the Regional Job Precinct.
- Theme 3 – seeking to support micro-to-medium-sized businesses and considering the role of related Council initiatives.
- Theme 4 – supporting the promotion of Gunnedah through considering opportunities for placemaking, the arts and networking (including in cultivating business communities).

2.5 Gunnedah Shire Urban Landuse Strategy 2016

Dated June 2016, the Urban Landuse Strategy analyses the LGA's context and provides planning recommendations for commercial, industrial and residential land uses, including for the following:

- Town centre key opportunity areas
- Key gateway locations
- Road widening of 'Little Streets' project
- Existing industrial zoned lands
- Future industrial zonings.

The ELS has considered these opportunities in its employment land planning.

2.6 Gunnedah Shire Commercial and Industrial Land Use Strategy 2008

The Commercial and Industrial Land Use Strategy was adopted in August 2008. It identifies priorities for the development of commercial and industrial land in the LGA, with the following principles of relevance for employment land planning:

- Focusing commercial centres around commercial, retail, community facilities and bulky goods
- Ensuring that development strengthens existing centres
- Planning employment lands to facilitate industry's contribution to the local economy
- Ensuring certainty and clarity in planning frameworks
- Strengthening Gunnedah's role within the wider region
- Attracting industrial tenants from the wider region to operate using Gunnedah as a base.

2.7 Gunnedah Shire Destination Management Plan 2015

The Destination Management Plan identifies tasks to develop tourism's contribution to the local economy, including the following principles as incorporated into this ELS:

- Strategy 1 – strengthening Gunnedah and other locations, including by expanding local attractions and supporting facilities/services
- Strategy 3 – expanding the LGA's tourism attraction by supporting development of the Namoi River Precinct and other key sites
- Strategy 4 – building Gunnedah's events sector by reviewing the treatment of events in the Local Environmental Plan and other instruments
- Strategy 5 – supporting tourism by identifying and planning for infrastructure needs, including with regard to communications and access.

SOCIO-ECONOMIC ANALYSIS

3.0 SOCIO-ECONOMIC ANALYSIS

Employment land needs are directly impacted by socio-economic trends. This chapter reviews socio-economic trends in the Gunnedah Shire LGA, incorporating population changes, worker trends and economic data.

SUMMARY OF INSIGHTS

Resident population trends

- Gunnedah Shire's population is relatively young and steadily growing. By 2041, the population is projected to accommodate around 15,000 people, an increase of around 1,900 people.
- Gunnedah Shire has strong labour force participation bolstered by residents aged between 25 and 34. More diverse education and employment opportunities throughout the LGA may help to retain the school leavers demographic which has a lower representation.
- Job containment rates in Gunnedah Shire are strong with around 75% of the workforce living and working locally.
- Compared to regional NSW, mining is currently a specialised industry of employment for residents.

Economic and employment trends

- According to the ABS 2021 Census, the LGA's largest employers are Agriculture, Forestry and Fishing (749 jobs), Healthcare and Social Assistance (540 jobs) and Education and Training (532 jobs). Mining is also significant (322 jobs), with a unique economic contribution. These industries are expected to continue to underpin the LGA's growth.
- Employment opportunities in Gunnedah Shire increased by over 560 jobs between 2011-2021. These jobs were associated with industries in education and training, construction and mining.
- Manufacturing, agriculture, forestry and fishing and transport, postal and warehousing sectors all experienced a decline in job numbers. These trends are reflective of global trends associated with automation and system improvement.
- The town of Gunnedah provided the greatest diversity of jobs across different sectors. Outside of town, jobs were mainly oriented around agriculture, construction and mining industries.
- Over the last two years, the LGA has seen a growth in number of businesses operating. The largest increase in business interest was from the industrial broad industry sector (around 60 businesses), however the population serving sector and health and education sector also increased. There was limited interest from businesses in the knowledge intensive sector.
- Projecting to 2041, the LGA is projected to accommodate more jobs with mining and agriculture, forestry and fishing likely to underpin employment growth.

**Resident population trends refer to LGA residents, regardless of place of work. Economic and employment trends refer to LGA workers, regardless of place of residence. Information has been sourced from the Australian Bureau of Statistics (ABS), the former Department of Planning and Environment (DPE), Transport for NSW (TfNSW) and economy.id. Where relevant, the Gunnedah LGA has been benchmarked against regional NSW.*[3]

[3] Regional NSW is defined as the Rest of NSW Greater Capital City Statistical Area (GCCSA)

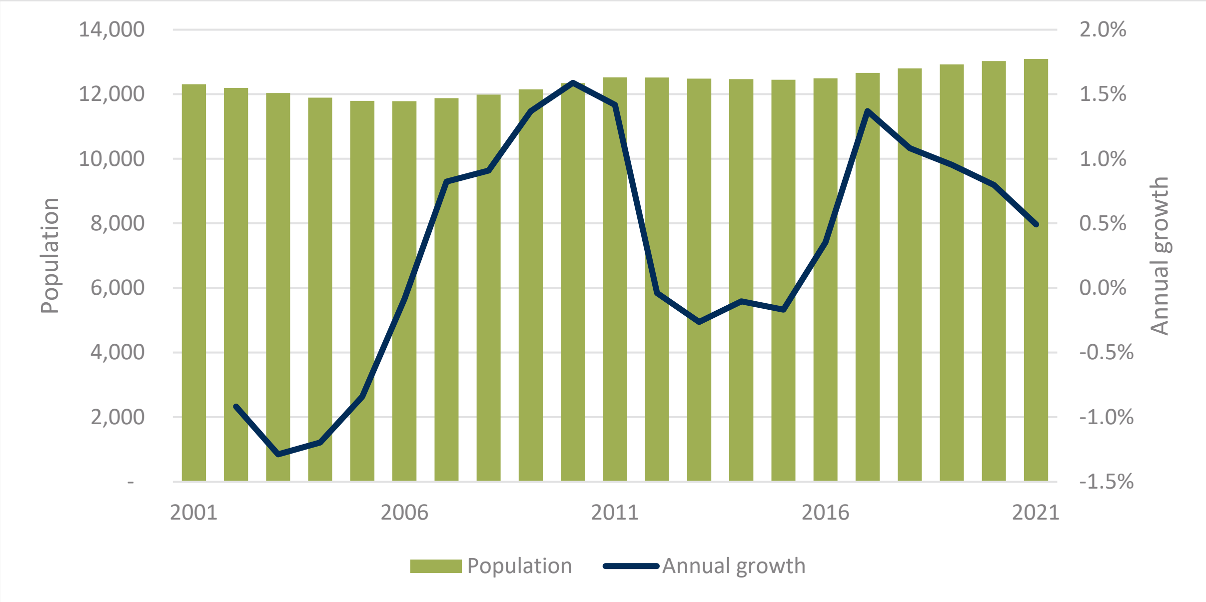
3.1 Population trends

This section discusses trends in Gunnedah Shire's resident population. This refers to persons living in the Gunnedah LGA, regardless of where they travel to work.

3.1.1 Population

Gunnedah Shire had a population of 13,088 people in 2021. This represents growth of 6 per cent from 12,306 people in 2001, or compound annual growth of 0.3 per cent. Figure 2 illustrates Gunnedah Shire's population between 2001 and 2021. Over this time, the LGA grew more slowly than regional NSW, which grew by 17 per cent. Population growth generates demand for employment lands, which support the local economy and employment.

Figure 2: Gunnedah Shire population and annual growth, 2001-21

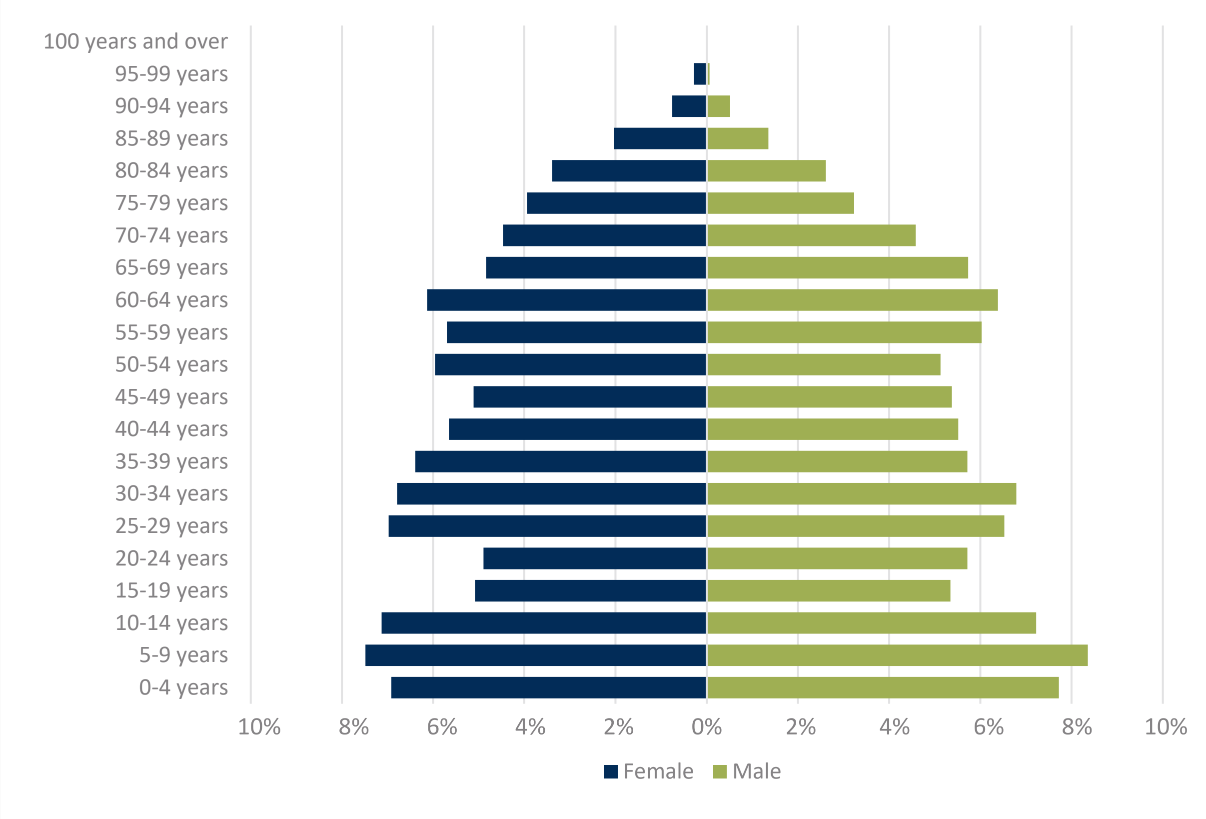


Source: ABS, *Estimated resident population*

3.1.2 Age and gender

Gunnedah Shire's population is relatively young, with a median age at the 2021 Census of 37, compared to the regional NSW median of 43. Figure 3 illustrates a population pyramid for the Gunnedah LGA. As it shows, families with young children are prevalent in Gunnedah Shire, with many residents aged under 15 years, and between 25 and 39 years. There are relatively fewer people aged between 15 and 24, indicating that some residents may be moving away from the area after leaving high school.

Figure 3: Gunnedah Shire population as proportions of males/females by age group, 2021



Source: ABS, *TableBuilder*

Gunnedah Shire's labour force is bolstered by residents aged between 25 and 34. More diverse education and employment opportunities throughout the LGA may help to retain the school leavers demographic.

3.1.3 Projected growth

In 2024, DPHI produced *Common Planning Assumptions* (CPA) for areas across NSW, projecting growth to 2041. The CPA include 'high', 'low' and 'main' series. The 'high' series represents a high growth scenario, which is considered more reflective of the population effects of the Vickery Mine expansion (discussed in section 4.1.2), and is thus used in this report. Table 2 shows the comparative growth scenarios for Gunnedah.

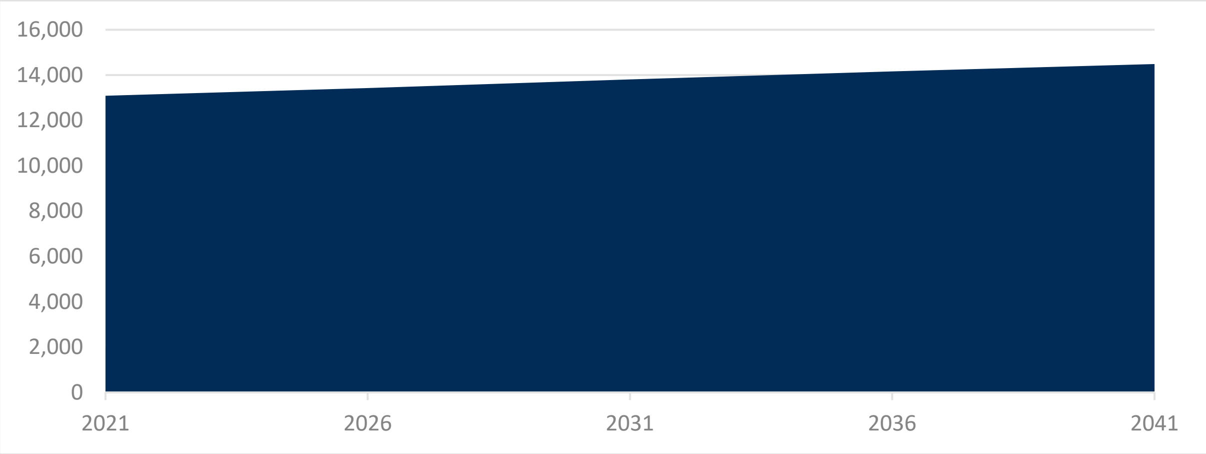
Table 2: Projected population, Gunnedah Shire, 2021-41

Metric	2021	2031	2041
Main series (base scenario)	13,088	13,462	13,764
High series (high growth scenario)	13,088	13,806	14,492

Over the 20 years between 2021 and 2041, Gunnedah Shire's population is forecasted to grow to reach 14,492 residents, an increase of 1,404 people. This represents a projected growth of 11 per cent or a compound annual growth rate (CAGR) of 0.5 per cent, a faster population increase than during the last 20 years.

Figure 4 illustrates Gunnedah Shire's adjusted population projections. An increase in the population is likely to generate more demand for employment lands, to service the population's needs and provide ongoing employment opportunities.

Figure 4: Projected population (high growth scenario), Gunnedah Shire, 2021-41

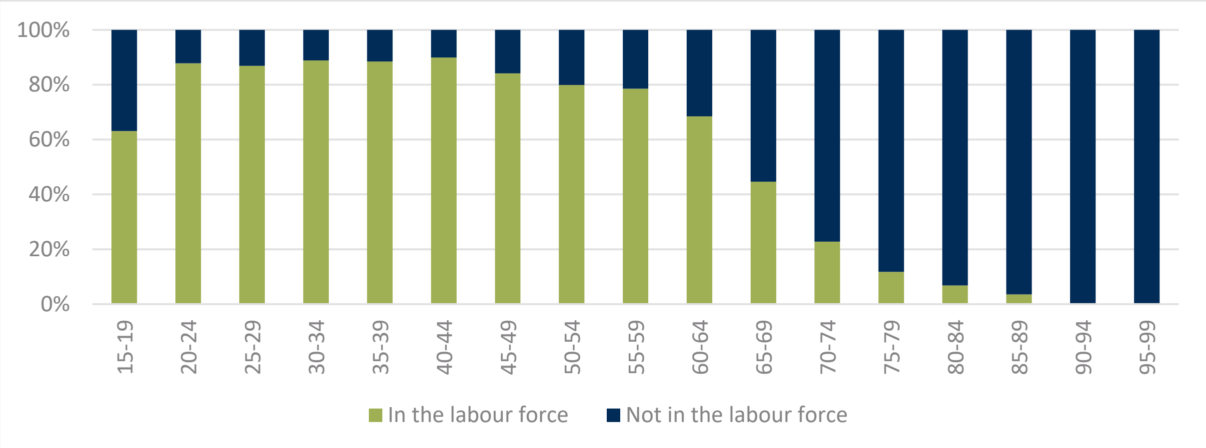


Source: DPHI; HillPDA

3.1.4 Labour force

The Gunnedah LGA has relatively high rates of labour force participation. According to the ABS, 61.1 per cent of residents aged 15+ were in the labour force at the 2021 Census, compared to 56.4 per cent across regional NSW. Figure 5 illustrates labour force participation rates by age groups across the Gunnedah LGA. As it shows, over half of every age group between 15 and 64 participate in the labour force. Participation rates decline significantly from the age of 65 and above.

Figure 5: Gunnedah resident labour force participation rate as proportion of age groups, 2021



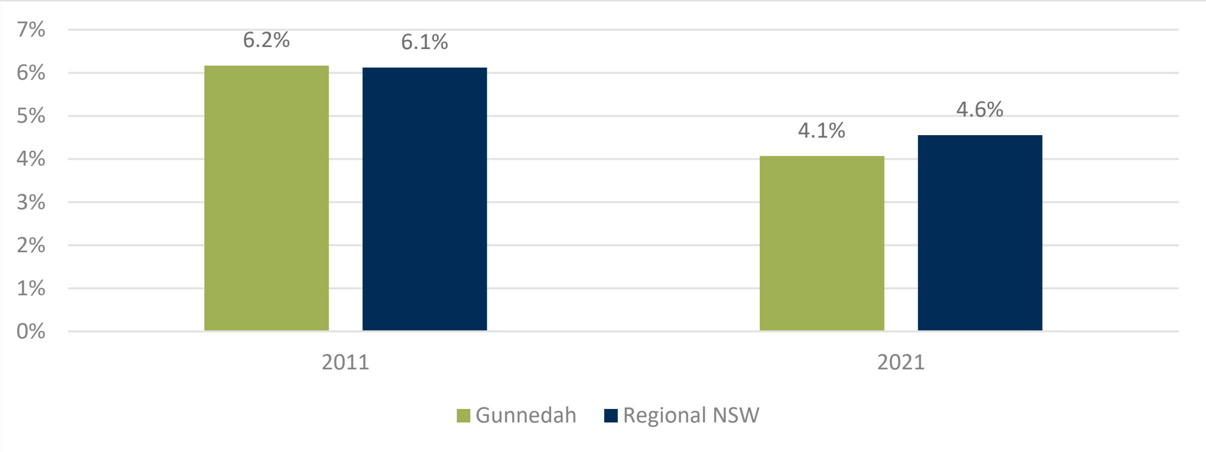
Source: ABS, *TableBuilder*. Proportions exclude not stated/not applicable

Gunnedah Shire's relatively high labour force participation underscores the need to provide ample employment opportunities through suitable, well-located employment lands.

3.1.5 Unemployment

Within Gunnedah Shire's labour force, employment is common, particularly in full-time work. According to the ABS, Gunnedah Shire had an unemployment rate of 4.1 per cent at the 2021 Census, lower than the regional NSW rate of 4.6 per cent. This is a reversal since 2011, at which time Gunnedah Shire's unemployment rate was slightly higher than that of regional NSW (6.2 per cent and 6.1 per cent respectively). Figure 6 illustrates this change.

Figure 6: Proportion of unemployed members of Gunnedah Shire and regional NSW labour force, 2011-21



Source: ABS, *TableBuilder*. Proportions exclude not stated/not applicable

Unemployment rates are at risk of rising in Gunnedah Shire, due to changing industry trends (discussed in Chapter 4.0), as well as national and global economic uncertainty. To mitigate against this risk, new economic opportunities should be pursued in the LGA that would provide its workforce with stable jobs.

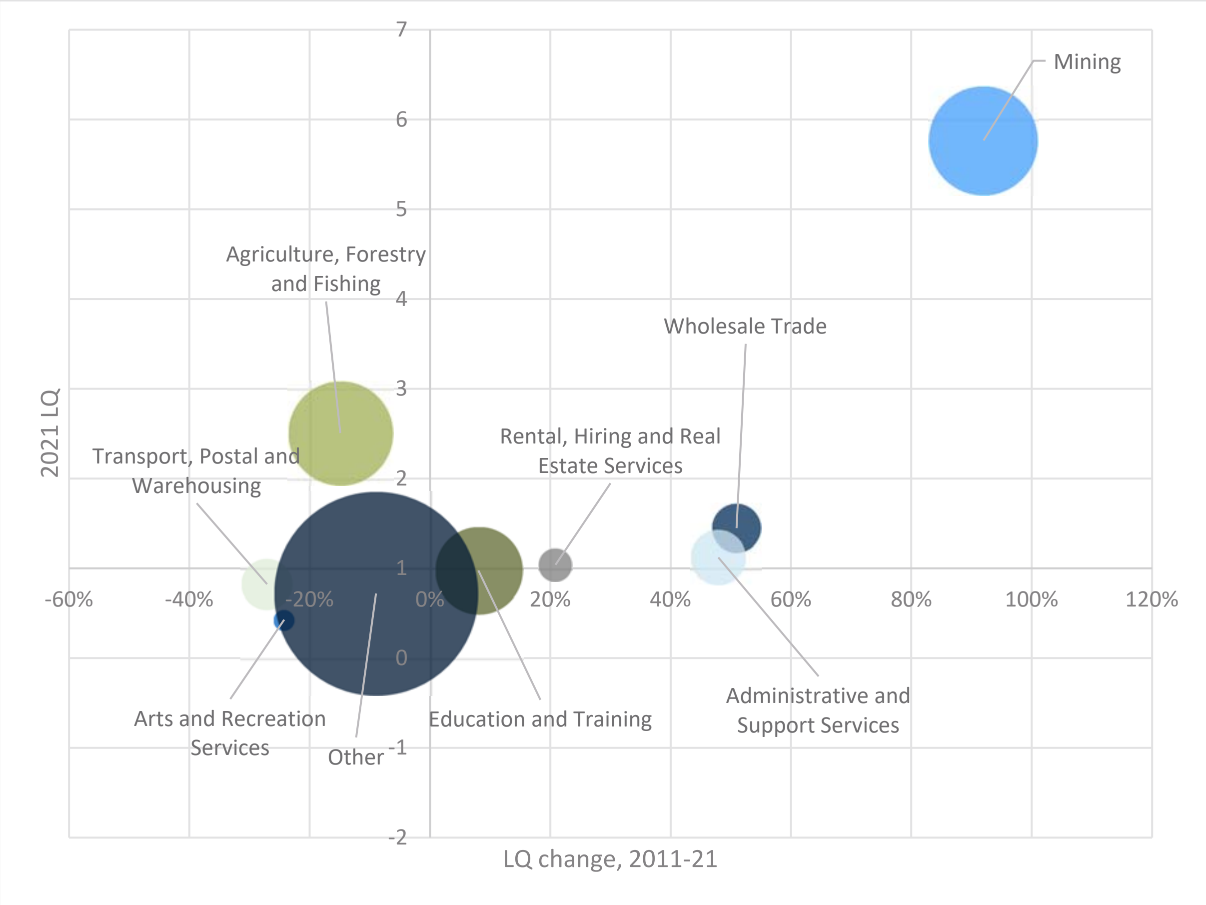
3.1.6 Industry specialisation

There are several key industries of specialisation for the employment of Gunnedah Shire's residents. According to the ABS, Mining was the largest such employer at the 2021 Census (831 residents employed), followed by Agriculture, Forestry and Fishing (758 residents employed). These figures refer to LGA residents, whether they work within or outside the LGA.

Industry specialisation is shown by location quotient (LQ) analysis. LQ refers to an industry's share of employment in one area, compared to another area. Figure 7 illustrates the LQ of industries across Gunnedah Shire compared to regional NSW. The size of circles is directly proportional to the number of residents employed. Key industries have been identified, with the remainder grouped together as 'other'.

As Figure 7 shows, Mining has been generating significant employment in Gunnedah Shire. Its LQ in 2021 was 5.77, representing a share of employment over five times higher than that of regional NSW. This proportion has grown by 92 per cent between 2011 and 2021. Perhaps linked to this, shares of resident employment in Wholesale Trade, Administrative and Support Services, and Rental, Hiring and Real Estate Services have also grown. Although Agriculture, Forestry and Fishing remains a significant local employer, its LQ has also declined slightly between 2011 and 2021.

Figure 7: Location quotient of industries worked by residents, Gunnedah LGA vs regional NSW, 2011-21



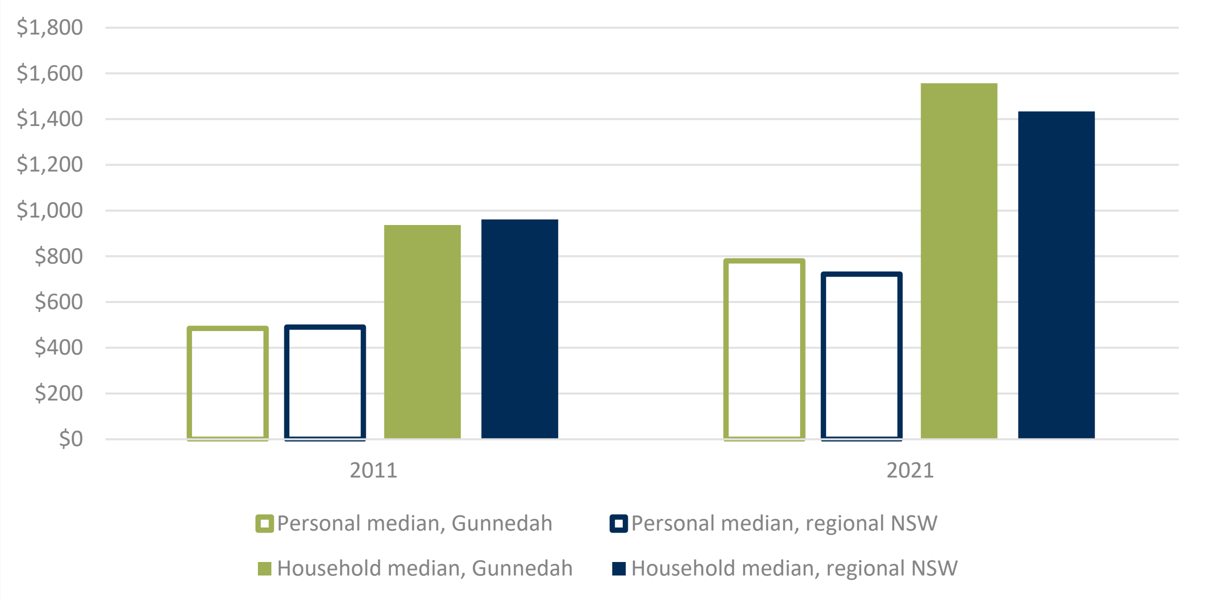
Source: ABS, *TableBuilder*. Note: specialisation refers to LGA residents, regardless of where they work.

Although mining-related industries have grown in the LGA, they are at risk of receding over the longer term, due to energy sector trends (see Chapter 4.0). There will likely be simultaneous opportunities for other industries to emerge as part of an LGA-wide diversification.

3.1.7 Incomes

Residents' incomes are relatively high in Gunnedah Shire. According to the ABS, Gunnedah Shire residents' median weekly individual and household incomes were respectively $780 and $1,557 in 2021, higher than the regional NSW medians of $722 and $1,434. This marks a change since 2011, in which Gunnedah Shire's median weekly personal and household incomes were lower than regional NSW ($485 and $937 respectively, compared to $490 and $961). Figure 8 illustrates this change.

Figure 8: Weekly median personal and household incomes, Gunnedah Shire and regional NSW, 2011-21



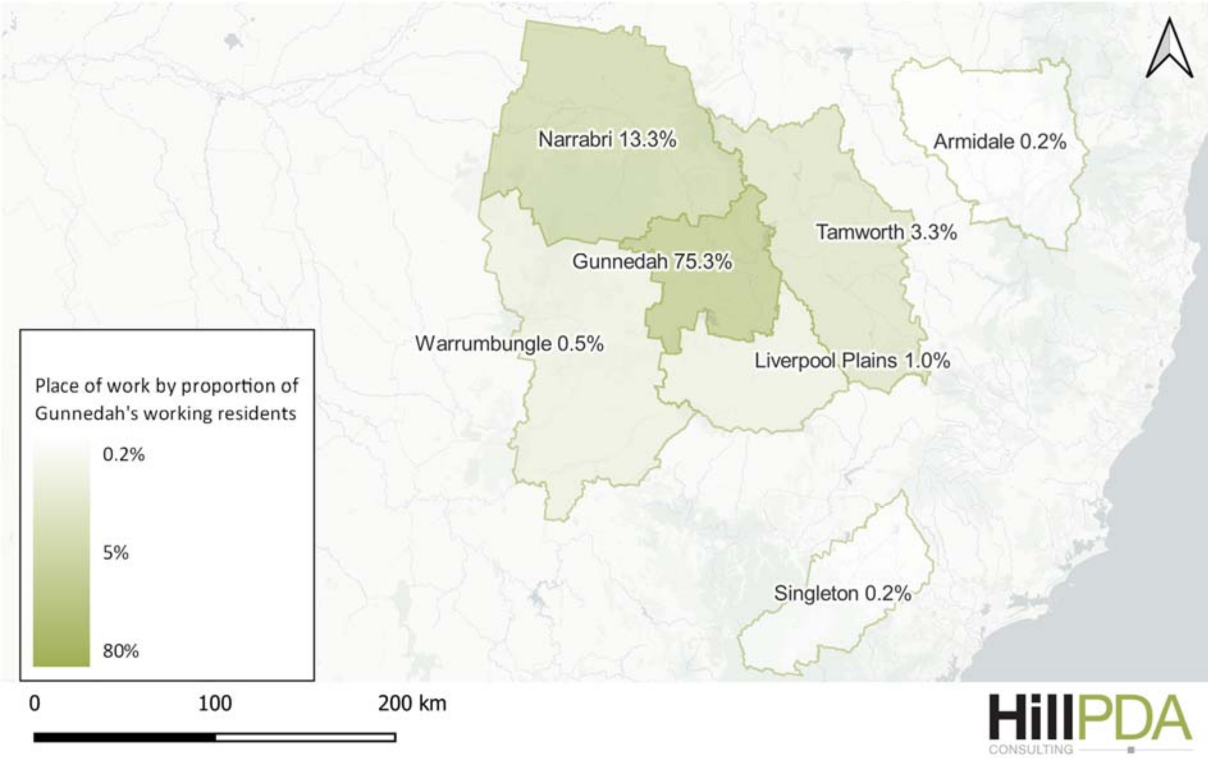
Source: ABS, *QuickStats*

Gunnedah Shire's increase in median incomes relative to regional NSW may reflect the area's proliferation of mining-related jobs, which are typically highly paid.

3.1.8 Places of work

Residents of Gunnedah Shire most commonly work within the Shire and LGAs immediately adjacent to it. According to the ABS, 75 per cent of applicable residents both lived and worked in Gunnedah Shire in 2021. Those who left the LGA for work most commonly commuted to Narrabri, followed by Tamworth. Figure 9 illustrates places of work for Gunnedah Shire's working residents. As it shows, the clear majority of Gunnedah Shire's residents work in either the LGA or its immediate surrounding areas, with a small number of workers travelling to further-away LGAs.

Figure 9: Nearby LGAs in which at least 0.2% of Gunnedah Shire's applicable residents work



Source: ABS, *TableBuilder*. Proportions exclude not applicable. Imagery: CARTO

3.2 Economic and employment trends

This section discusses economic and employment trends in Gunnedah Shire. It refers to jobs and economic output in the Gunnedah LGA, regardless of workers' places of residence. Refer to section 3.1 for analysis of only residents in Gunnedah Shire.

3.2.1 Industries of employment

According to the ABS, there was around 5,200 jobs in Gunnedah Shire at the 2021 Census. These comprised a range of industries, of which the largest were Agriculture, Forestry and Fishing (749 jobs), Healthcare and Social Assistance (540 jobs) and Education and Training (532 jobs). Between 2011 and 2021, Gunnedah Shire's jobs increased by approximately 564, or 12 per cent. Some industries grew rapidly, while others declined. Industries with the largest growth in number of jobs included the following:

- Education and Training (+137 jobs, or 35 per cent)
- Construction (+131 jobs, or 69 per cent)
- Mining (+126 jobs, or 64 per cent).

Simultaneously, the following industries had the largest declines in number of jobs:

- Manufacturing (-77 jobs, or 24 per cent)
- Agriculture, Forestry and Fishing (-75 jobs, or 9 per cent)
- Transport, Postal and Warehousing (-30 jobs, or 13 per cent).

Table 3 shows jobs by industry across Gunnedah Shire, and the change in jobs between 2011 and 2021. These figures refer to employment in the LGA, regardless of workers' places of residence.

Table 3: Jobs by industry, Gunnedah Shire and regional NSW, 2011-21

Industry	2011	2021	2011-21 change	% change	2021 %
Agriculture, Forestry and Fishing	824	749	-75	-9%	14%
Mining	196	322	126	64%	6%
Manufacturing	324	247	-77	-24%	5%
Electricity, Gas, Water and Waste Services	57	70	13	23%	1%
Construction	190	321	131	69%	6%
Wholesale Trade	133	167	34	26%	3%
Retail Trade	498	496	-2	0%	10%
Accommodation and Food Services	349	378	29	8%	7%
Transport, Postal and Warehousing	232	202	-30	-13%	4%
Information Media and Telecommunications	24	15	-9	-38%	0%
Financial and Insurance Services	66	66	0	0%	1%
Rental, Hiring and Real Estate Services	63	71	8	13%	1%
Professional, Scientific and Technical Services	171	167	-4	-2%	3%
Administrative and Support Services	79	164	85	108%	3%
Public Administration and Safety	261	285	24	9%	6%
Education and Training	395	532	137	35%	10%
Health Care and Social Assistance	450	540	90	20%	10%
Arts and Recreation Services	34	25	-9	-26%	0%
Other Services	226	263	37	16%	5%
Inadequately described	52	108	56	108%	2%
Total	**4,624**	**5,188**	**564**	**12%**	**100%**

Source: ABS, *TableBuilder*. Totals and proportions exclude not stated

3.2.2 Industry projections

Employment projections are based on Transport for NSW (TfNSW) *Travel Zone Projections 2024*, released in January 2025. Employment projections are provided for each Australian and New Zealand Standard Industrial Classification (ANZSIC) 1-digit industry sector annually from 2021 to 2031 and 5-yearly from 2031 to 2066.

HillPDA has adjusted TfNSW's base projections to align with DPHI's 2024 high growth population projection scenario. This projection can be considered reflective of the likely population impacts resulting from the approved Vickery Extension Project. The estimated 400 new mining jobs from the expansion have been included in this adjustment. The below figures are nonetheless representative of jobs in Gunnedah, regardless of where workers live.

Between 2024 and 2041, employment in Gunnedah Shire is projected to increase by 773 jobs, most commonly in industries of Mining; Agriculture, Forestry and Fishing; and Health Care and Social Assistance. Industries of Retail Trade, Public Administration and Safety, Construction and Other Services are projected to decline. This indicates that Gunnedah Shire's primary industries will continue to drive its economy and employment. This trend diverges somewhat from national industry trends discussed in Chapter 4.0, in which services- and logistics-based employment are increasing at a broad scale. There may be opportunities to leverage Gunnedah Shire's primary industry strengths to develop complementary industries.

Table 4 outlines projected employment in Gunnedah Shire between 2024 and 2041.

Table 4: Projected jobs by industry, Gunnedah Shire, 2024-41

Industry	2024	2041	Change #	Change %
Agriculture, Forestry and Fishing	901	1,084	183	20%
Mining	291	584	293	101%
Manufacturing	261	271	10	4%
Electricity, Gas, Water and Waste Services	81	85	4	5%
Construction	473	463	-10	-2%
Wholesale Trade	207	221	14	7%
Retail Trade	512	496	-17	-3%
Accommodation and Food Services	440	496	56	13%
Transport, Postal and Warehousing	274	281	6	2%
Information Media and Telecommunications	18	21	3	15%
Financial and Insurance Services	75	90	15	19%
Rental, Hiring and Real Estate Services	90	101	11	12%
Professional, Scientific and Technical Services	232	281	49	21%
Administrative and Support Services	210	221	11	5%
Public Administration and Safety	377	364	-13	-3%
Education and Training	543	601	58	11%
Health Care and Social Assistance	655	751	96	15%
Arts and Recreation Services	47	52	6	12%
Other Services	341	340	-1	0%
Total	**6,028**	**6,802**	**773**	**13%**

Source: TfNSW; ABS; DPHI, HillPDA

3.2.3 Specialisation

As discussed in section 3.1.6, location quotient (LQ) values can indicate the specialisation of areas in certain industries, relative to comparator areas. LQ is the ratio of an industry's proportion of employment in one area, to its proportion in another area.

- Where LQ is equal to 1, the identified industry is as prevalent as in the comparable area
- Where LQ is greater than 1.2, there is a significant specialisation of the industry in the study area, indicating a possible key economic strength. Higher numbers indicate a greater specialisation, with anything exceeding 2 being a major specialisation
- Where LQ is between 0.8 and 1.2, the industry has a similar importance in the study area relative to the comparison region
- An LQ under 0.8 indicates an industry which is relatively less important in the study area and may represent an economic weakness or opportunity for growth.

Table 5 shows the prevalence and LQ value of jobs in each industry in Gunnedah Shire, with regional NSW as a comparator area. Industries with specialisations or under-specialisations are highlighted in green and blue respectively.

Note that Table 5 refers to industry specialisation among people who are employed in Gunnedah Shire, regardless of where they live.

Table 5: Jobs, proportion and location quotient (LQ) per industry, Gunnedah Shire compared to regional NSW, 2021

Industry	Gunnedah	Gunnedah (%)	Regional NSW	Gunnedah LQ
Agriculture, Forestry and Fishing	749	15%	6%	2.62
Mining	322	6%	3%	2.42
Manufacturing	247	5%	6%	0.80
Electricity, Gas, Water and Waste Services	70	1%	1%	1.05
Construction	321	6%	8%	0.76
Wholesale Trade	167	3%	2%	1.63
Retail Trade	496	10%	10%	0.94
Accommodation and Food Services	378	7%	9%	0.87
Transport, Postal and Warehousing	202	4%	4%	1.06
Information Media and Telecommunications	15	0%	1%	0.45
Financial and Insurance Services	66	1%	2%	0.68
Rental, Hiring and Real Estate Services	71	1%	1%	1.07
Professional, Scientific and Technical Services	167	3%	5%	0.70
Administrative and Support Services	164	3%	3%	1.11
Public Administration and Safety	285	6%	7%	0.82
Education and Training	532	10%	10%	1.06
Health Care and Social Assistance	540	11%	18%	0.60
Arts and Recreation Services	25	0%	1%	0.39
Other Services	263	5%	4%	1.29

Source: ABS, *TableBuilder*. Proportions exclude not stated, not applicable and inadequately described.

As Table 5 shows, Gunnedah Shire has specialisations in four industries and under-specialisations in six industries. There are major specialisations in Agriculture, Forestry and Fishing (LQ of 2.62) and Mining (LQ of 2.42), which comprise over twice the proportion of jobs in Gunnedah compared to regional NSW. Together, these industries comprise over 20 per cent of the LGA's jobs, indicating that its economy is currently reliant on them.

Relative to regional NSW, Gunnedah Shire has relatively few knowledge-based jobs, with comparative economic weaknesses or opportunities for growth in Information Media and Telecommunications, Arts and Recreation Services, Health Care and Social Assistance, Financial and Insurance Services, Professional, Scientific and Technical Services and Construction. The LGA also has significant specialisations in Wholesale Trade and Other Services, though these are less major than its specialisations in mining and agricultural industries.

There are opportunities for Gunnedah Shire to become more diversified, in both growing its currently less specialised industries and further leveraging the LGA's secondary strengths.

3.2.4 Places of residence

According to the ABS, in 2021, 84 per cent of workers in Gunnedah Shire also lived in the LGA. Tamworth was the second most common LGA of residence for Gunnedah Shire's workers, followed by Narrabri.

Table 6 shows the proportion of Gunnedah Shire's residents who live within and outside the LGA, by industry. As it shows, Other Services had the highest count of workers who live in Gunnedah Shire (93 per cent), followed by Health Care and Social Assistance (92 per cent). Construction had the lowest (72 per cent), followed by Transport, postal and Warehousing (74 per cent). This shows the importance of commercial precincts in particular, in supporting the local economy and services for residents through healthcare, social assistance and other service-based industries. Continual support for commercial centres would help with the provision of jobs close to where people live.

Table 6: Proportion of Gunnedah Shire workers living in the LGA and externally, 2021

Industry	Within the LGA	External
Agriculture, Forestry and Fishing	87%	13%
Mining	62%	38%
Manufacturing	89%	11%
Electricity, Gas, Water and Waste Services	87%	13%
Construction	72%	28%
Wholesale Trade	79%	21%
Retail Trade	87%	13%
Accommodation and Food Services	86%	14%
Transport, Postal and Warehousing	74%	26%
Information Media and Telecommunications	87%	13%
Financial and Insurance Services	86%	14%
Rental, Hiring and Real Estate Services	87%	13%
Professional, Scientific and Technical Services	84%	16%
Administrative and Support Services	84%	16%
Public Administration and Safety	78%	22%
Education and Training	89%	11%
Health Care and Social Assistance	92%	8%
Arts and Recreation Services	80%	20%
Other Services	93%	7%

Source: ABS, *TableBuilder*. Proportions exclude not stated, not applicable and inadequately described

3.2.5 Clustering

There are different patterns of employment across the Gunnedah LGA.

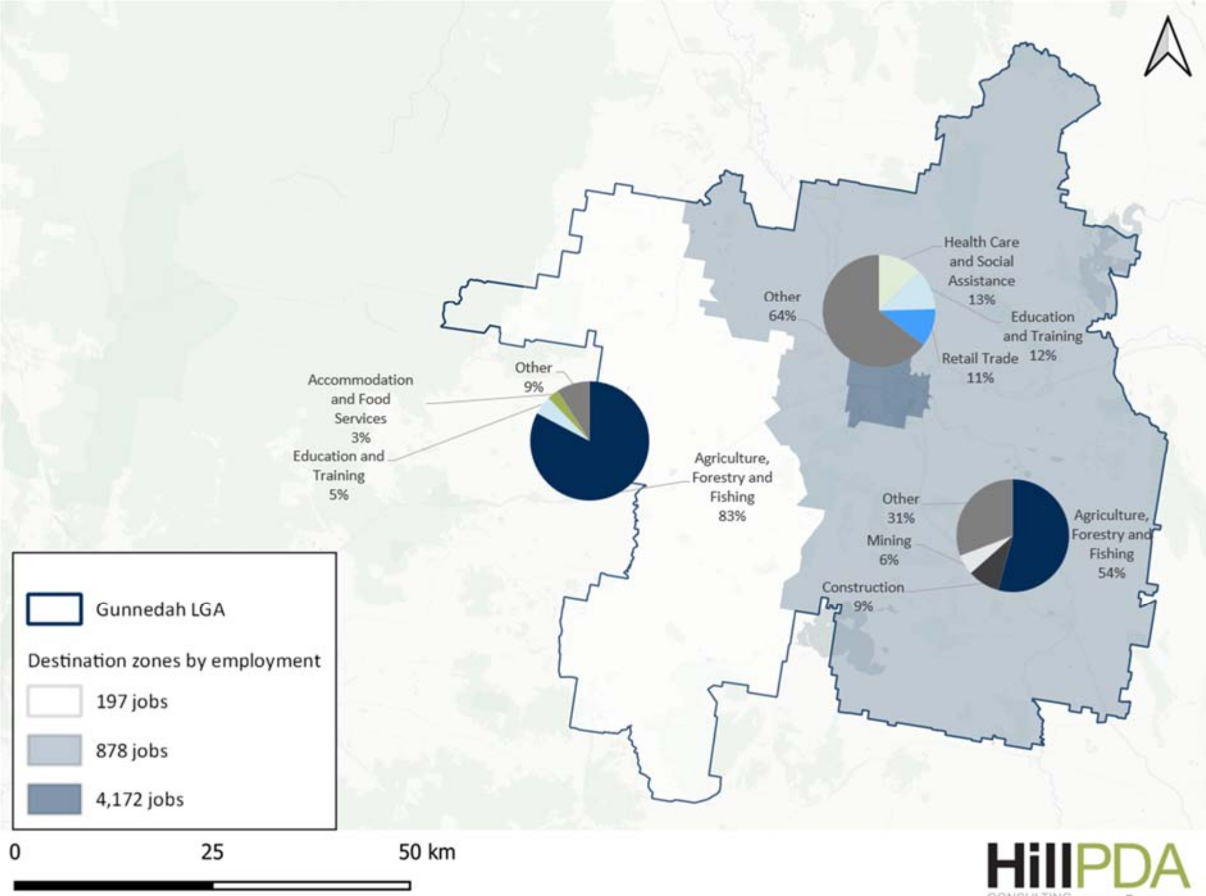
The town of Gunnedah itself is the LGA's major employment hub, providing 4,172 jobs at the 2021 Census, according to the ABS. These jobs are in a diverse range of industries, including Health Care and Social Assistance (13%), Education and training (12 per cent) and Retail Trade (11 per cent).

The eastern two thirds of the LGA, surrounding the town of Gunnedah, provided 878 jobs in 2021, according to the ABS. These jobs were mostly in Agriculture, Forestry and Fishing, accompanied by a small range of jobs in other industries.

In 2021, the western third of the LGA provided the LGA's remaining 197 jobs, almost all of which were in Agriculture, Forestry and Fishing.

As this shows, although Agriculture, Forestry and Fishing is the LGA's largest employer, it is mainly confined to areas of the LGA outside of Gunnedah itself. Gunnedah provides most of the LGA's other jobs, with employment in a range of population-serving, health and education, knowledge-intensive and industrial sectors. Figure 10 illustrates the distribution of jobs across destination zones in the LGA.

Figure 10: Employment by destination zone (including industries as proportion of jobs), Gunnedah Shire, 2021



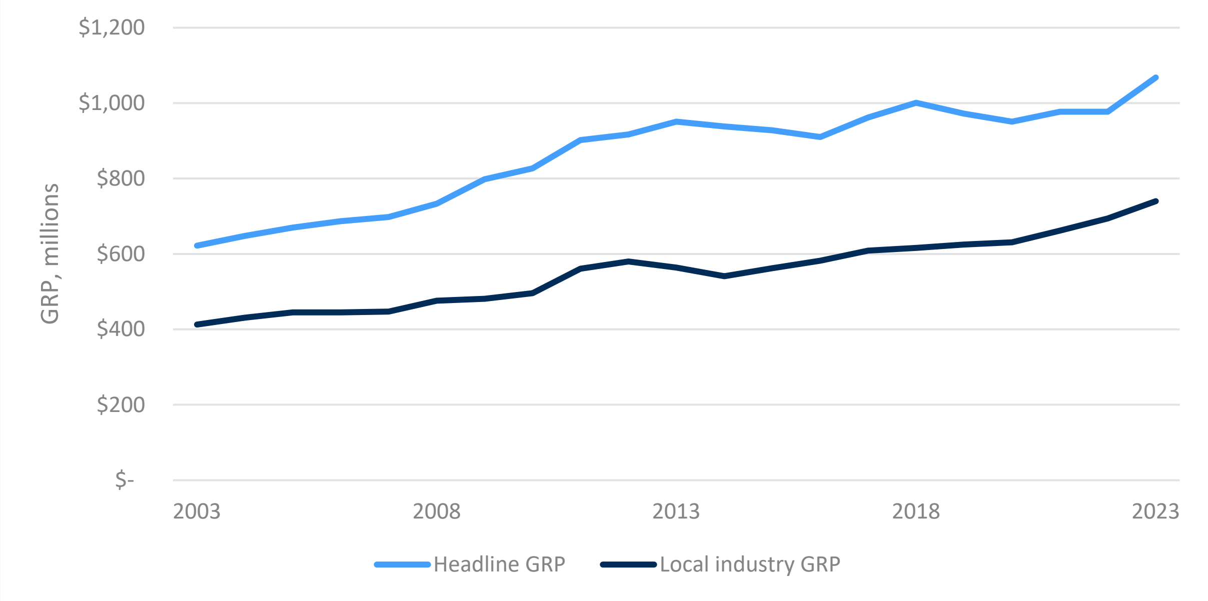
Source: ABS, *TableBuilder*. Imagery: CARTO

3.2.6 Gross product & value added

According to economy.id, Gunnedah Shire had a Gross Regional Product (GRP) of $1.07 billion in the 2023 financial year. This represents a 9.4 per cent increase since the previous financial year. Gunnedah Shire's GRP has generally grown significantly over the last 20 years, although growth has occasionally wavered in the last decade.

GRP can be divided into wealth generated by local industry and local residents. Local industry contributes a significant portion of Gunnedah Shire's GRP, at $0.74 billion in the 2023 financial year. Figure 11 illustrates Gunnedah Shire's headline GRP and local industry GRP between 2003 and 2023.

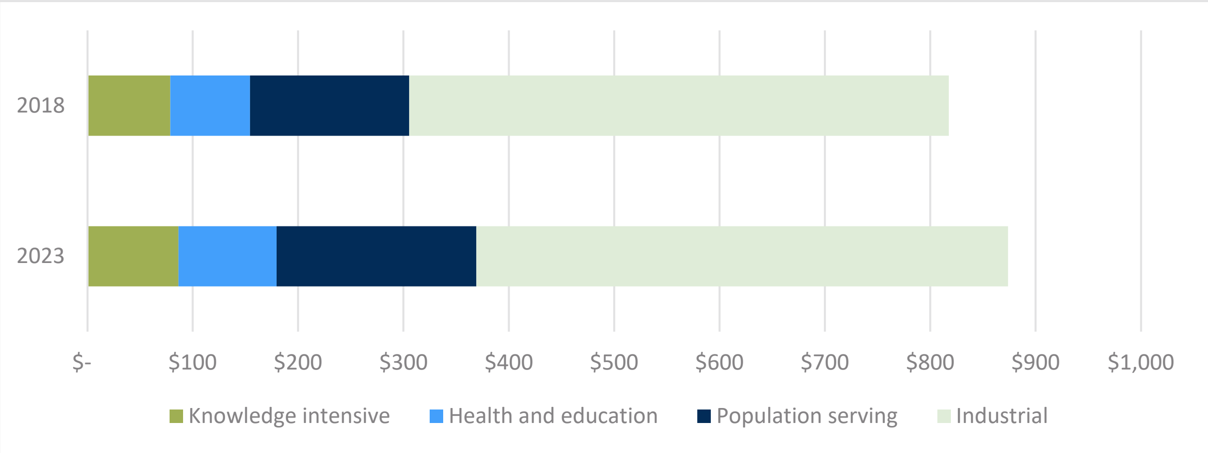
Figure 11: Gross Regional Product (GRP) by financial year, Gunnedah Shire, 2003-23



Source: economy.id

A range of industries contribute to Gunnedah Shire's GRP, as seen when industries are grouped into four broad sectors. Figure 12 illustrates the value added by Gunnedah Shire's different industry sectors in 2018 and 2023. As it shows, the industrial sector added the most value in both years. This was predominantly driven by the two industries of Mining and Agriculture, Forestry and Fishing. However, while all other sectors grew between the two years, the industrial sector declined slightly, mostly due to a decline in the value added by mining. This indicates that slight economic diversification is occurring alongside the LGA's growth. Continuing this diversification will rely on supporting both commercial and industrial centres in the LGA.

Figure 12: Value added by broad industry sector per financial year, Gunnedah Shire, 2018 and 2023



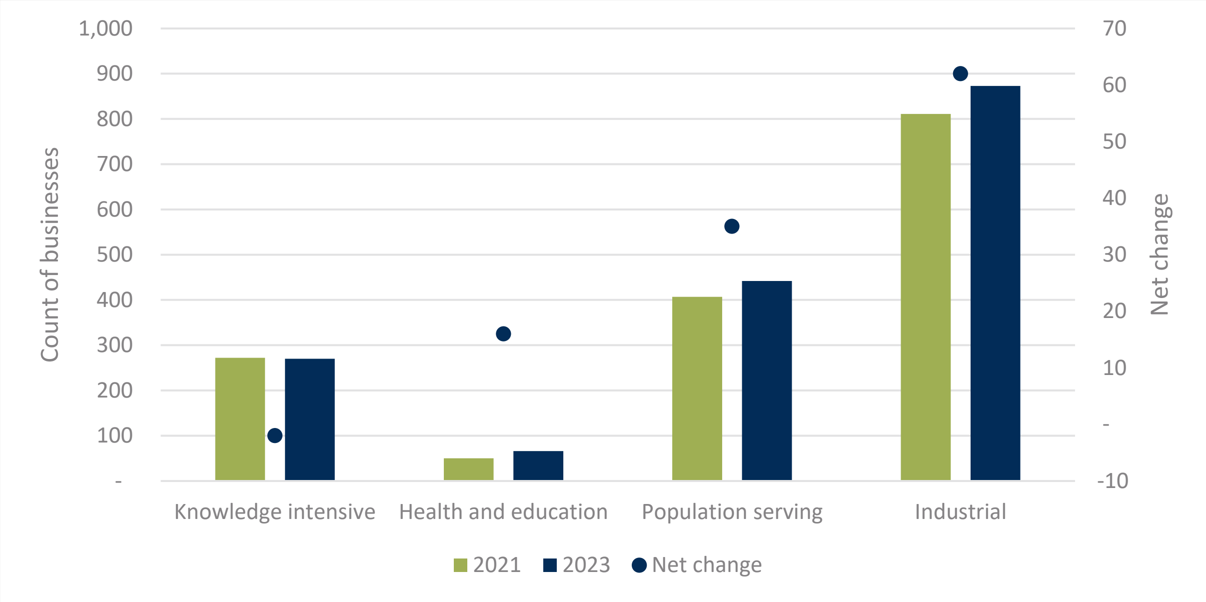
Source: economy.id

3.2.7 Businesses

Much of Gunnedah Shire's GRP and value added is generated through local business. According to the ABS, the LGA contained 1,651 businesses as at June 2023.

Figure 13 illustrates the change in Gunnedah Shire's businesses between June 2021 and June 2023, by broad industry sectors. As it shows, all sectors increased during this time, except for the knowledge intensive sector, which declined by two businesses. The industrial sector had the largest growth in number of businesses (+62), while the health and education had the largest proportional growth (+32 per cent). This indicates generally consistent business growth in Gunnedah Shire in the years following the COVID-19 pandemic. Future business growth will rely on perceptions of the LGA as a desirable place to do business in various fields.

Figure 13: Count of (and net change in) businesses by broad industry sector, Gunnedah Shire, June 2021 – June 2023



Source: ABS, *Counts of Australian Businesses, including Entries and Exits*

MARKET INFLUENCES

4.0 TRENDS AND INFLUENCES

This chapter discusses industrial and retail trends and their potential implications for employment land across Gunnedah Shire. Gunnedah Shire's industrial and retail land is influenced by its key industries, which include agriculture, energy industries and tourism. Broad industry trends feed into employment land demand and needs.

SUMMARY OF INSIGHTS

Sector trends

Agriculture and agribusiness

- Gunnedah Shire's workers are most commonly employed in agricultural industries such as cattle and sheep farming, grain growing and support services.
- Gunnedah Shire has a range of other agribusinesses that involve manufacturing and processing using agricultural products, such as leather, grain product and meat manufacturing.

Energy industry

- Coal mining is currently being expanded in Gunnedah Shire, with renewable energy developments also in the pipeline. All forms of energy production generate jobs in complementary industries, including manufacturing, machinery servicing, labour hire, and freight and transport. This creates an opportunity to leverage energy sector growth within employment lands.
- There may be future opportunities to expand Gunnedah's circular economy. This could leverage from agricultural/energy industry growth, e.g. using potential byproducts (e.g. mine tailings) to support farming, waste-to-energy and other initiatives in the LGA.

Transport and logistics

- The rising demand for freight, transport and logistics services in a context of continually expanding agriculture, technology, energy production and online trade creates opportunities for Gunnedah Shire.

Tourism

- Tourism supports employment lands by generating money for commercial businesses such as motels/hotels, as well as by supporting local commercial centres through visitors spending money at retail, restaurants and other businesses. Continuing to grow the LGA's tourism profile thus would help to contribute to the vibrancy and vitality of its commercial centres.
- The strong agriculture industry and scenic amenity provide opportunity to expand agritourism. Recently legislative changes have further supported this opportunity.

Market influences

- Investment in infrastructure, including telecommunication and transport infrastructure makes places more appealing to business operators and employees. Businesses will pay a premium to be close to major transport infrastructure.
- Increased automation across all sectors has repositioned employment opportunities to higher skill jobs. Despite a reduction in employment opportunities across some industries, the need for floorspace remains.
- Online retailing has dramatically increased transport and logistics demand, however, has also created opportunity for regionally and remote business operations to reach bigger markets.
- Gunnedah Shire's agricultural strength places it in a good position to broaden its range of events, farmers markets, farm-to-table restaurants and outdoor dining options, which may also help to boost its tourism profile.

4.1 Sector trends

4.1.1 Agriculture and agribusiness

Gunnedah Shire's workers are most commonly employed in agricultural industries such as cattle and sheep farming, grain growing and support services. Agriculture also creates opportunities for related industries in the LGA. These include machinery wholesaling, repair and/or maintenance; labour supply services; freight transport; and agricultural product manufacturing and wholesaling. Such opportunities are often based in the LGA's industrial precincts. According to economy.id, between the financial years of 2017-18 and 2022-23, the economic value added by Agriculture, Forestry and Fishing increased by $32 million, bringing its contribution to 19.2 per cent of the LGA's total value added. This growth is likely to continue, with the Namoi Regional Job Precinct seeking to support primary industry investments in Gunnedah Shire and surrounding areas.

Agribusiness involves economic activities linked to agricultural supply chains. It can include processing, wholesaling and other actions that benefit from proximity to farming. The Gunnedah Regional Saleyards, located at the Kamilaroi Highway to the north-west of Gunnedah's town centre, facilitate agribusiness around cattle trading. The saleyards have recently been upgraded to facilitate complementary land uses on-site and maximise economic potential. Gunnedah Shire has a range of other agribusinesses that involve manufacturing and processing using agricultural products, such as leather, grain product and meat manufacturing.

In addition to agribusiness, agriculture generates jobs in wider industries, due to the machinery, labour and systems required by farming. Gunnedah Shire's industrial precincts contain a range of businesses that leverage local agriculture, serving as the base for businesses in manufacturing, hiring, services and other industries related to agriculture. Reflecting Gunnedah Shire's unique agricultural contributions, the AgQuip event is held annually as an industry field day for agribusiness and related enterprises. This supports businesses relating to agriculture while bringing people and activity to Gunnedah Shire, boosting the LGA's profile and generating temporary trade for commercial businesses.

Although agriculture strengthens both agribusiness and farming-related industries, its strong role contributes to some industry specialisation, which may make Gunnedah Shire more vulnerable to industry shocks. Climate change is a key risk for agriculture, with the potential to decrease climate suitability for both cropping and livestock farming. This would be a particular risk in a future high-emissions scenario.[4] Climate-related risks for agriculture include bushfire, flooding, and biosecurity risks such as disease or plague.

Although current forms of agriculture will likely be continually dominant in Gunnedah Shire, innovative farming methods can be more efficient while reducing climate-related risks and impacts. In particular, vertical farming has been developed on employment land in regional NSW. Vertical farming involves indoor farming with hydroponic technology to grow crops in warehouses and other potential buildings in employment precincts. Although this has limited potential for Gunnedah Shire's current agricultural products, it provides a potential opportunity to diversify the LGA's future agricultural/agribusiness activities on employment land.

4.1.2 Energy industries

Energy industries have supported the economy of Gunnedah and its surrounding areas since the late 19th century, when coal mining was first undertaken in the region. Coal mining is currently being expanded in Gunnedah, with renewable energy developments constructed or in the planning phase. These support employment opportunities in a range of industries, although future trends will impact the longer-term role of energy industries in Gunnedah's economy.

[4] Department of Primary Industries 2024, *Primary Industries Climate Change Research Strategy: Climate Vulnerability Assessment Summary Report*, Department of Regional NSW

Gunnedah has black coal deposits that have been mined since 1877, with various coal mines operating in the area over the years. While the number of active mines has declined over time, a significant development occurred in September 2021 when an extension was approved for Whitehaven Coal's Vickery mine. This extension led to the establishment of a new mine within the LGA, which is currently under construction. Mining developments have important implications for the local workforce, employment opportunities, and housing needs, as many residents of Gunnedah Shire work in mines located in neighbouring shires. Additionally, the Gunnedah Coal Handling and Preparation Plant (CHPP) continues to operate, processing coal extracted from both Gunnedah and surrounding local government areas

The Hunter Gas Pipeline has been approved to run from Queensland to Newcastle through the Gunnedah LGA. Construction was expected to commence during October 2024.

Gunnedah Shire is also seeing renewable energy growth, with solar farms having been approved in Gunnedah and Orange Grove during the last decade. There is currently a State Significant Development Application (SSDA) for Gunnedah East BESS, which would provide a battery storage system for energy generated by the solar farms.

Renewable energy developments tend to provide significantly more employment during construction than during operation. However, all forms of energy production generate jobs in complementary industries, including manufacturing, machinery servicing, labour hire, and freight and transport. The development of renewable and non-renewable energy projects is likely to support businesses in Gunnedah Shire’s employment precincts in the medium term. Due to governmental policy commitments and demand projections, opportunities for businesses related to energy sources such as coal and gas are expected to be lower in the long term.

4.1.3 Circular economy

The circular economy refers to the productive reuse of waste. Although the term can refer to conventional forms of recycling, it is increasingly linked to renewable energy opportunities, with technologies evolving to support the conversion of biomass into energy and other products.

Gunnedah Shire has several current and future developments that can be characterised as part of the circular economy. There are waste management facilities and depots in Gunnedah and Curlewis. An SSDA is currently being assessed for a Gunnedah Waste Facility at Torrens Road and Allgayer Drive, which would include processing and resource recovery. Figure 14 illustrates the location of this facility alongside aforementioned energy projects.

As Gunnedah Shire’s agricultural and energy industries continue to develop, there will likely be opportunities to expand the local circular economy, including using potential byproducts (e.g. mine tailings) to support farming, waste-to-energy and other initiatives in the LGA.

Figure 14: Select recent energy-related projects and waste facilities around Gunnedah

Source: HillPDA. Imagery: CARTO

4.1.4 Tourism

The rise in domestic tourism during the COVID-19 pandemic brought newfound awareness to regional travel destinations in NSW. Although domestic tourism has since declined, there are opportunities for Gunnedah Shire to further expand its tourism profile.

Gunnedah Shire's identity is entwined with both its Aboriginal and colonial heritage. Its name is thought to refer to the town's historical white stone deposits. It is also known as the area where Cumbo Gunnerah (also known as Red Kangaroo/Red Chief) lived. Culturally significant sites include the Red Chief Memorial, Boonalla and Willala Aboriginal Areas, Mullibah Lagoon, Cumbo Gunnerah Keeping Place, Porcupine Lookout, Pensioners Hill and the Wallaby Trap.[5] Gunnedah is also associated with Dorothea Mackellar, as represented by a statue at ANZAC Park. Gunnedah Shire contains nature-based tourism destinations, most notably Pilliga Nature Reserve and

[5] Gunnedah Shire Council 2024, *Kamilaroi Country*, https://visitgunnedah.com.au/see-do/kamilaroi-country

recreational areas around Lake Keepit. These areas attract people for activities including fishing, water sports, hiking and birdwatching. Alongside the historical streetscapes of the LGA's towns, these features all attract tourism, supporting the local economy.

Tourism supports employment lands by generating money for commercial businesses such as motels/hotels, as well as by supporting local commercial centres through visitors spending money at retail, restaurants and other businesses. Continuing to grow the LGA's tourism profile thus would help to contribute to the vibrancy and vitality of its commercial centres. Key measures for doing so outlined in the Gunnedah Shire Destination Management Plan 2015 include expanding attractions, facilities and services; developing key sites; boosting events; and supporting infrastructure.

Gunnedah Shire's strategic, infrastructural and statutory planning priorities should seek to support the vibrancy of Gunnedah and surrounding towns, attracting visitors to the area, which would in turn support the performance of commercial-based employment lands. Recognising Gunnedah Shire's agricultural and environmental assets, consideration should also be given to the future role of ecotourism and agritourism in Gunnedah Shire's future tourism economy. Although these forms of tourism generally do not occur on employment lands, a future review of agritourism measures in Gunnedah Shire's statutory framework may help to bolster Gunnedah Shire's future tourism overall, which would support its commercial employment lands.

Table 7 summarises Gunnedah Shire's tourism performance relative to all adjacent LGAs. As it shows, Gunnedah Shire had the smallest overall tourism market for which data were available between 2016 and 2019 (more recent figures are currently unavailable). However, its tourism market is somewhat diversified between holidaymakers, personal visitors and people visiting for business purposes. This diversification may help the LGA's tourism market to remain resilient throughout changes to the industry.

Table 7: Average annual visitors by reason for travel, 2016-19

LGA	Holiday	Visiting friends and relatives	Business	Other
Gunnedah Shire	**66,000**	**62,000**	**65,000**	**No data**
Narrabri	94,000	66,000	89,000	No data
Tamworth Regional	457,000	329,000	204,000	261,000
Warrumbungle	97,000	70,000	No data	46,000

Source: Tourism Research Australia

4.2 Market influences

4.2.1 Infrastructure investment

Employment-generating activities rely on infrastructure to contribute economically to areas. The Gunnedah LGA is located at the nexus of various infrastructure networks, including rail lines, the Oxley and Kamilaroi Highways and the potential aforementioned Hunter Gas Pipeline. The LGA is entirely serviced by 4G cellular coverage, with an area of 5G coverage within and surrounding the town of Gunnedah.

Highway accessibility is a key consideration of businesses choosing where to locate, with proximity to freeways generally leading to increased employment land prices. Businesses being close to road transport networks enables easier access to freight and transport, while increasing business presence (including through visual marketing on highways). Highways also create opportunities for transport, freight, logistics and related businesses. A small portion of Gunnedah Shire's jobs are in road freight and similar industries. The rising demand for freight, transport and logistics services in a context of continually expanding agriculture, technology, energy production and online trade creates opportunities for Gunnedah Shire.

Access to rail infrastructure creates strong opportunities for businesses to trade, including through exporting raw materials. For example, the Gunnedah CHPP is located adjacent to rail infrastructure, enabling coal to be transported to and from the facility. Although not within the LGA, inland rail is currently being developed through Narrabri to link inland communities to wider business markets. This could have indirect benefits for businesses in Gunnedah Shire, which has led the potential for a local intermodal terminal to be assessed.

In late 2023, the Gunnedah Airport was upgraded to meet Australian Civil Aviation Standards. Particularly in rural areas, aviation infrastructure provides opportunities for the commercial movement of goods and people. As noted by Gunnedah Shire Council, this upgrade may link Gunnedah Shire more closely with Sydney and Brisbane, facilitating potential fly-in, fly-out mining workers, while potentially supporting eventual passenger flights. The redeveloped airport may also support a small agglomeration of related employment, including building-servicing jobs and potential car hire services.[6]

In addition to key enabling infrastructure such as freeways, rail, aviation and cellular networks, townships are also benefited by smaller-scale infrastructure that facilitates the movement of people. Public transport networks are often limited in rural areas but can still serve an important function in local economies. For example, train or bus routes may enable non-drivers to access work, study or commercial destinations. Having a functioning rural bus system in particular can enable people such as elderly residents to access shops, or younger residents to access vocational education. Gunnedah Railway Station is relatively well-located, with close access to Gunnedah's town centre. It is serviced by one daily train in each direction (towards Boggabri and Werris Creek respectively). The LGA also contains several bus routes that provide connectivity throughout Gunnedah and to its surrounding towns.

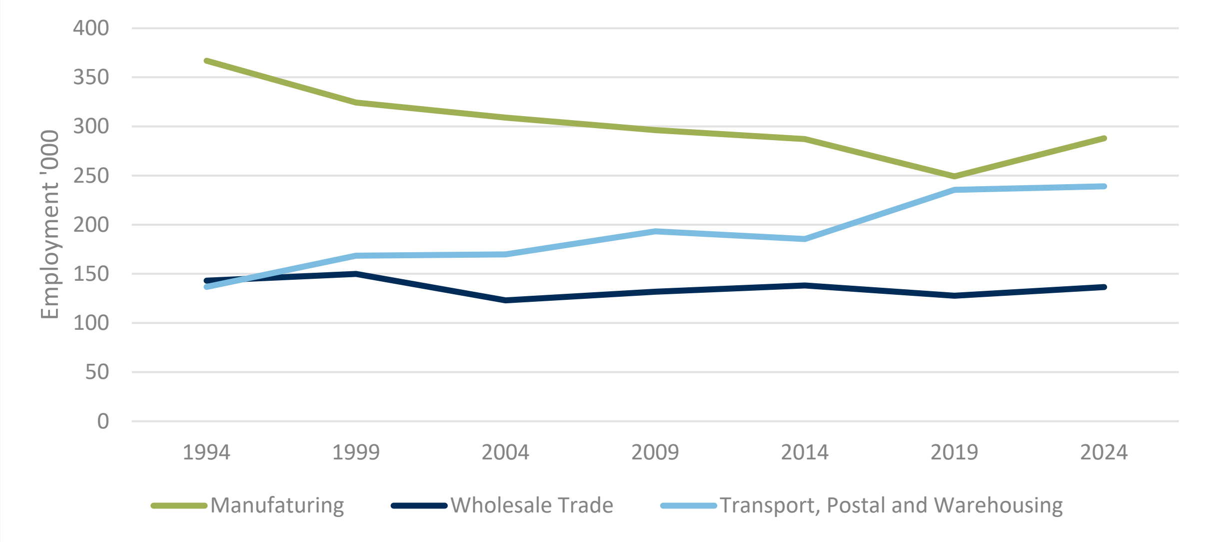
During 2021, funding was allocated for the Gunnedah Public Spaces Activation Program, supporting the development of connected shared pathways/cycleways, pedestrian infrastructure along Wandobah Road and upgrades to ANZAC Park in Gunnedah. These upgrades assist people's movement and physical activity throughout Gunnedah, which has an indirect benefit to local businesses. Encouraging people to stay and walk or cycle around Gunnedah increases pedestrian traffic and customer bases for retail and commercial businesses and contributes to the vitality of the town centre.

4.2.2 Automation

Over recent decades, a combination of globalisation and technological change has shifted the profile of industrial jobs somewhat away from traditional manufacturing towards more service-based employment, including in freight, logistics and warehousing. Figure 15 illustrates industrial employment across NSW over the 30 years to 2024. As it shows, Manufacturing has been declining overall (despite a recent increase), with Wholesale Trade declining before recovering somewhat, and Transport, Postal and Warehousing consistently increasing.

[6] Gunnedah Times 2023, *Gunnedah Airport's tarmac upgrade completed*, https://gunnedahtimes.com.au/2023/12/15/gunnedah-airports-tarmac-upgrade-completed/

Figure 15: Employed persons by type of industry, NSW, 1994-2024



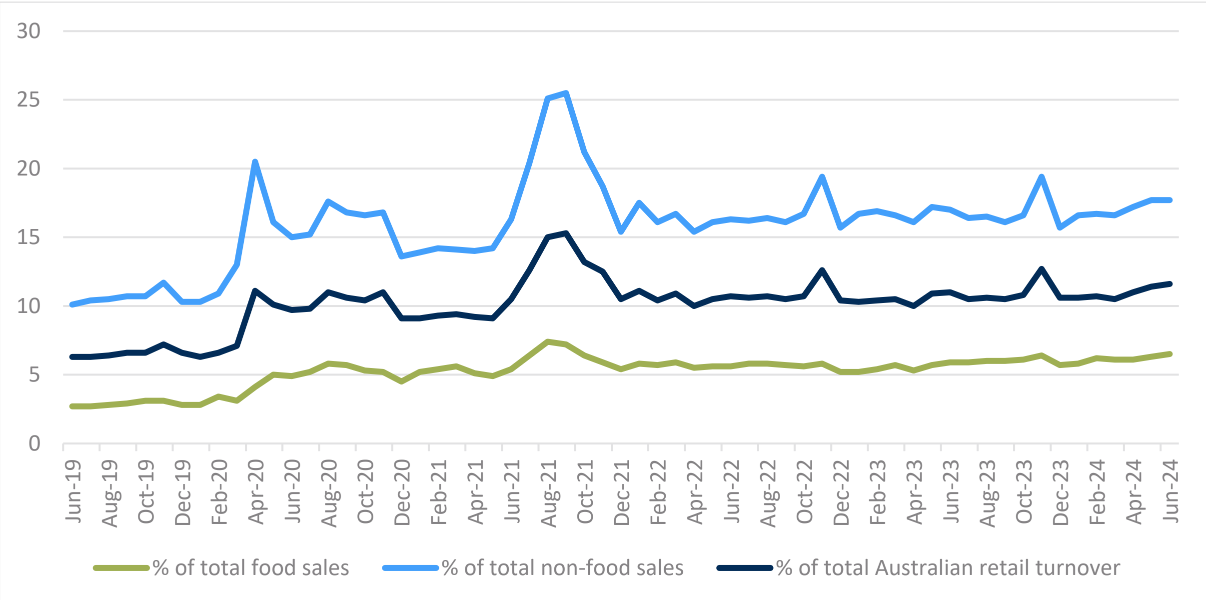
Source: ABS Labour Force, Australia, Detailed – month of February 2024

Industrial trends influence the changing floorspace needs of businesses. For instance, although manufacturing has declined in employment, the increasing number of machines involved has increased floorspace needs. The increase in employment within freight, logistics and warehousing also signifies a growing need for warehouse space in industrial precincts.

4.2.3 Online retailing

Globally there has been a rapid increase in remote shopping, e-commerce and delivery. Although this has particularly affected metropolitan areas, it also has implications for regional communities. During the COVID-19 pandemic in 2020 and 2021, the proportion of Australian retail sales made online significantly increased, peaking at around 15 per cent of all retail sales in September 2021, illustrated in Figure 16. The proportion of non-food online retail sales peaked at around 26 per cent in the same month. Despite a reduction being recorded since September 2021, the proportion of online retail sales still remains well above pre-COVID levels.

Figure 16: Proportion of online retail turnover (Australia)



Source: ABS, *Retail Trade, Australia*

The ability to purchase goods and services online places pressure on brick-and-mortar retailers, which may serve limited markets with high operating costs relative to larger or exclusively online stores. However, it also offers an opportunity for traditional retailers to expand their customer base, with shops in areas like Gunnedah able to utilise freight networks to sell and deliver products across a larger area.

4.2.4 Experiential retailing and hospitality

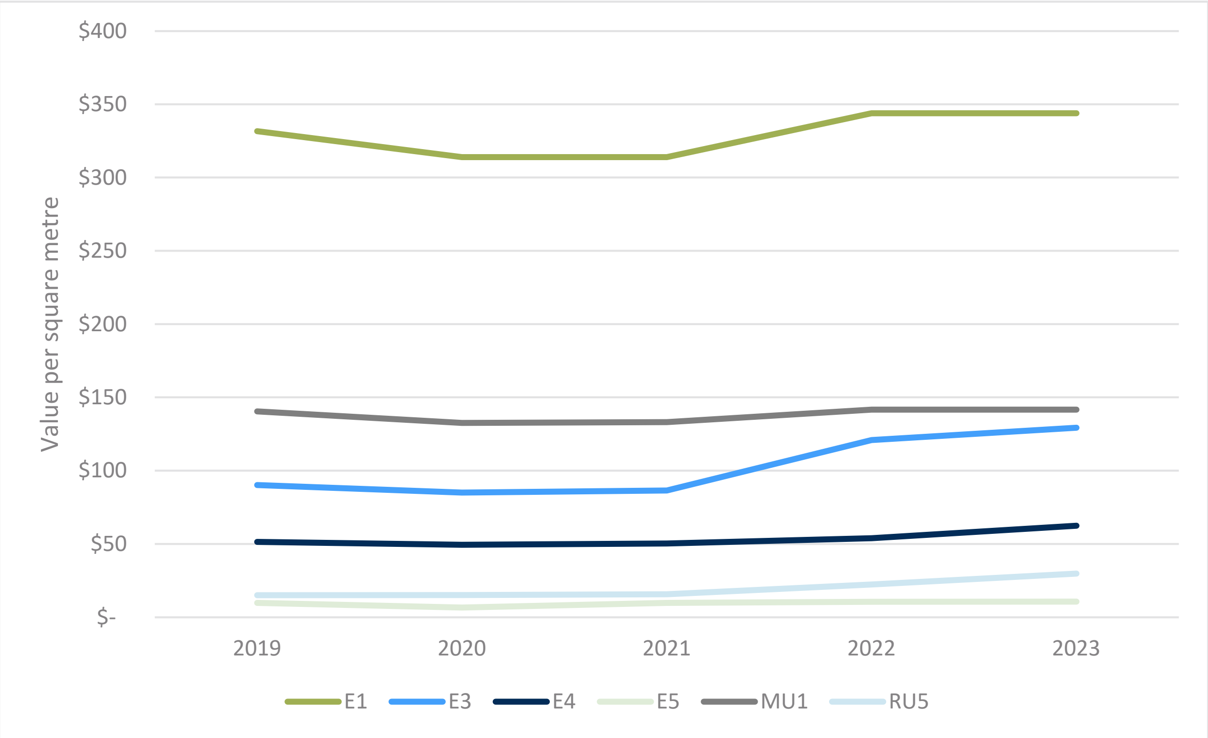
Another response to the pressures of online retailing has been an increased in experiential retail and place-based shopping. There has been a movement from convenience-based shopping precincts to 'destination' retail precincts. Infrastructure improvements and attractors such as community events in Gunnedah's main streets could strengthen the performance of local retail.

Similarly to retail experiences, restaurants have been developing to provide more experiential dining opportunities. With costs of living rising over the several years, restaurants and other food outlets are seeking alternatives to low prices as ways to attract potential customers. One strategy is to provide more outdoor dining, with local councils increasingly supporting the permissibility of outdoor dining and seeking to integrate markets with the operation of restaurants. Gunnedah Shire's agricultural strength places it in a good position to broaden its range of events, farmers markets, farm-to-table restaurants and outdoor dining options, which may also help to boost its tourism profile.

4.2.5 Land values

Employment land values in Gunnedah Shire have generally increased over the last five years. According to data from the NSW Valuer General, unimproved capital land values across the LGA have risen, particularly during the last two years. This is illustrated in Figure 17.

Figure 17: Average unimproved capital land value by zone, Gunnedah Shire, 2019-23



Source: NSW Valuer General; HillPDA

Table 8 explains the zone abbreviations used in Figure 17.

Table 8: Zone abbreviations in Figure 17

Zone abbreviation	Zone name	Meaning
E1	Local Centre	These zones permit uses such as commercial, business, retail, and hotels in central Gunnedah. The MU1 zone also permits housing and the E3 zone permits light industries, local distribution premises and landscaping supplies. Each zone contains housing that pre-dates its implementation.
E3	Productivity Support	
MU1	Mixed Use	
E4	General Industrial	These zones permit industrial land uses around Gunnedah. They permit a range of industries and complementary uses. The E5 zone permits heavy industries where E4 does not.
E5	Heavy Industrial	
RU5	Village	This is a mixed-use zone with variety of uses in LGA's smaller villages. Although industries are prohibited, 'general' and 'home' industries are permitted. Commercial and residential development are permitted.

As Figure 17 shows, Gunnedah Shire's highest land values have consistently been for land use zones in Gunnedah's town centre (E1 and MU1), followed by industrial zones, with the exception of E5 land. Land values have generally been low for RU5-zoned land (despite a recent rise), reflecting the often-isolated position of such land in relation to potential markets.

EMPLOYMENT LAND SUPPLY

5.0 EMPLOYMENT LAND SUPPLY

This chapter details the findings of a high-level audit undertaken of the land development status of Gunnedah Shire's existing employment precincts.

SUMMARY OF INSIGHTS

- There was 739 hectares of zoned employment land across the LGA. Excluding RU5 land, there was 440 hectares of zoned employment land
- Around 503 hectares, or 68 per cent, was considered developed or being used for business operations. Excluding RU5 land, around 368 hectares, or 84 per cent, was considered developed
- 235 hectares, or 32 per cent, was vacant and considered available for development. Excluding RU5 land, around 72 hectares, or 16 per cent, was vacant/available for development
- The E1, E3, E4 and MU1 zones had less than 15% of land available, and more supply may be needed. The E5 and RU5 zones had sufficient land supply
- **The presence of a mining lease over rural lands may result in future mining-associated activities and the need for additional E5 Heavy Industrial land. At this stage this need is not foreseen in the Strategy, and there will be general industrial land to cater for the majority of industrial uses.**

5.1 Land use audit methodology and data sources

The land use audit was informed by the following information sources:

1. NSW Department of Planning, Housing and Infrastructure (DPHI) land use zones
2. Department of Spatial Services SIX Maps Clip and Ship cadastral layer (property lots)
3. Google Earth aerial imagery.

Employment land estimate methodology

To determine the amount of employment land, the following steps were undertaken:

1. Gunnedah Shire's cadastral or property lot layer was clipped against employment land zones
2. Each lot was assigned its corresponding land zone and land area (sqm) calculated
3. All land zones, except for employment land zonings as described in Section 1.1, were excluded
4. Road, laneways and/or footpaths were excluded from land area calculations, where possible
5. Resulting property lot land areas were determined.

Land status definitions and methodology

To determine the status of employment land stocks, the following steps were undertaken:

1. Each individual employment cadastral or property lot was assessed using aerial imagery
2. Each lot was assigned the status of developed or vacant.

Two land use status definitions have been applied in this assessment, these being:

- **Developed**: this refers to employment land stocks which are being used, or which are considered to have limited to no capacity to contribute to future development. Developed land was predominantly identified by having a pre-existing building (commercial or residential) on the lot. In some cases, developed land includes land which is being used for ancillary operational businesses purposes. This category also includes employment-zoned land that is significantly occupied by roads, pedestrian plazas, cemeteries and other infrastructure, but excludes off-road parking

- **Vacant:** this refers to employment land stocks which are vacant; that is, they do not contain a pre-existing building, have no building under construction, or have limited current use. This land is available for development. This category includes land that has no buildings but is being used for storage or parking. It also includes lots subject to approved development applications, but where construction has not commenced.

5.2 Existing employment land characteristics

The following section overviews the land characteristics of the existing employment precincts across the LGA.

5.2.1 Total zoned employment land stocks by zone

As of 2024, there was around 739 hectares of zoned employment land across the LGA. Of this:

- 10 hectares, or 1 per cent, was zoned E1 – Local Centre
- 22 hectares, or 3 per cent, was zoned E3 – Productivity Support
- 307 hectares, or 42 per cent, was zoned E4 – General Industrial
- 79 hectares, or 11 per cent, was zoned E5 – Heavy Industrial
- 20 hectares, or 3 per cent, was zoned MU1 – Mixed Use
- 299 hectares, or 40 per cent, was zoned RU5 – Rural Village.

Note: the above considers all employment opportunities, including RU5 land, as it provides employment opportunities within the LGA's villages. Although predominantly residential, the RU5 zone includes commercial space, business premises and home industries. However, **excluding RU5 land, there is around 440 hectares of zoned employment land across the LGA.**

Table 9 provides a summary of the amount of employment land by zone and precinct (excluding RU5 land). located in Gunnedah urban area and its immediate surrounds.

Table 9: Total non-village employment land stocks by precinct type and zone (hectares)

Precinct type	E1	E3	E4	E5	MU1	Total
Commercial centre	10.4	22.3	0.0	0.0	20.2	52.9
Industrial land	0.0	0.0	307.2	79.4	0.0	386.7
Total	**10.4**	**22.3**	**307.2**	**79.4**	**20.2**	**439.6**

Source: HillPDA

Table 10 provides a summary of the LGA's employment land as distributed in villages outside of Gunnedah CBD.

Table 10: Total village employment land stocks by village (hectares)

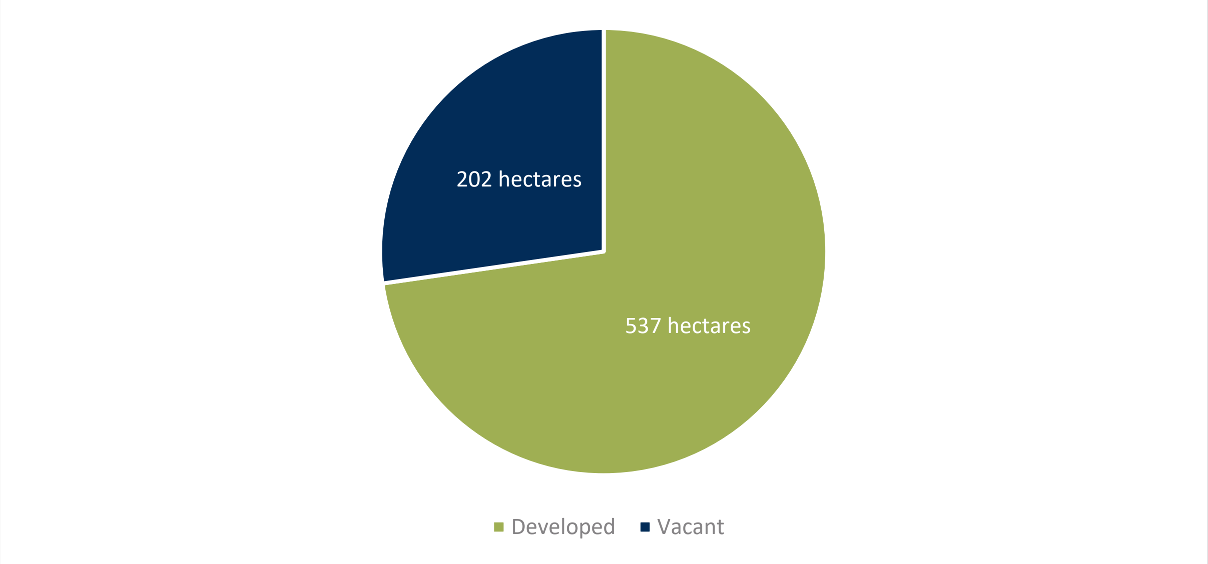
Village	Breeza	Carroll	Curlewis	Mullaley	Tambar Springs	Total
RU5 land	73.4	71.3	56.9	47.6	50.0	**299.1**

Source: HillPDA

5.2.2 Employment land stocks by development status

Of the 739 hectares of zoned employment land across the LGA, around 537 hectares, or 73 per cent, was considered developed or being used for business operations. The remaining 202 hectares, or 27 per cent, was vacant and considered available for development.

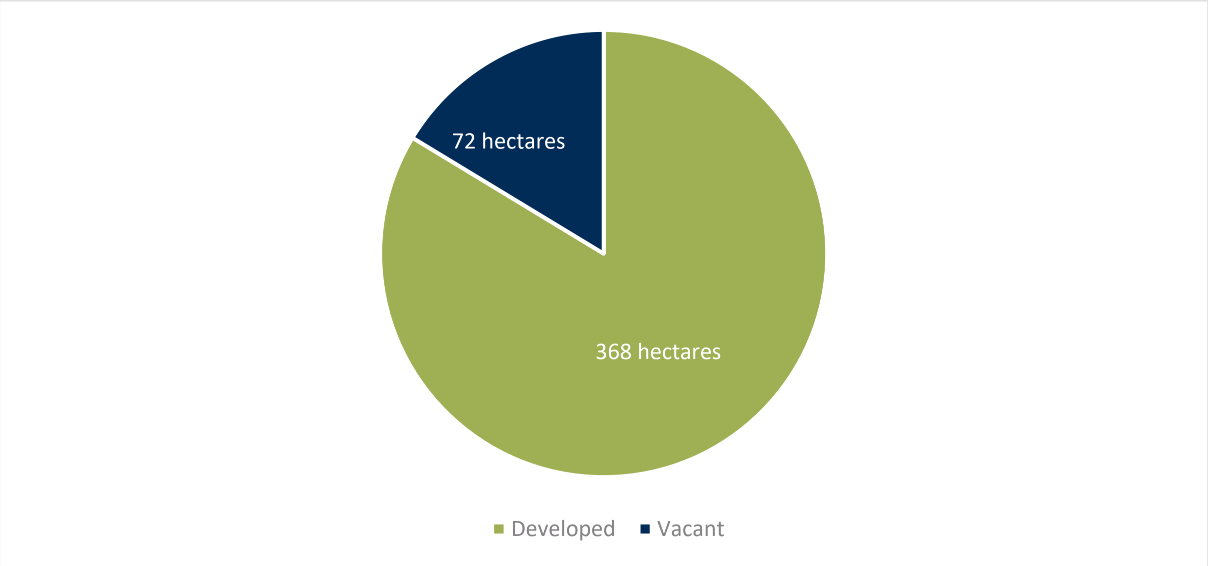
Figure 18: Development status, total employment land stocks, Gunnedah Shire



Source: HillPDA

Whereas the above figure includes RU5-zoned land, Figure 19 excludes RU5 land. Of this land, only 72 hectares (16 per cent) was vacant, with 368 hectares (84 per cent) considered developed.

Figure 19: Development status, total non-village employment land stocks, Gunnedah Shire



Source: HillPDA

The development status across each zone is provided in the below table.

Developed land includes all developed sites, even if not wholly used for employment purposes. As such, the RU5 total reflects the presence of possible home-based, farm-related, and other buildings.

The presence of a mining lease over rural lands may result in future mining activities and the need for additional E5 Heavy Industrial land. At this stage this need is not foreseen in the Strategy, as there will be general industrial land to cater for the majority of industrial uses.

Table 11: Development status by zone (hectares)

Zone	Developed	Vacant	Total	% vacant
E1	10.3	0.1	10.4	1%
E3	20.9	1.4	22.3	6%
E4	274.4	32.9	307.2	11%
E5	42.3	37.2	79.4	47%
MU1	20.0	0.3	20.2	1%
Sub-total (non-village)	***367.8***	***71.8***	***439.6***	***16%***
RU5	169.4	129.7	299.1	43%
Total	**537.2**	**201.5**	**738.7**	**27%**

Source: HillPDA

As Table 11 shows, 27 per cent of total employment land is vacant, compared to **only 16 per cent** if RU5 land is excluded.

The following table provides an overview of the amount of zoned employment land by development status across each precinct, comparing Gunnedah and surrounding villages.

Table 12: Development status by precinct (hectares)

Category	Precinct	Developed	Vacant	Total	% vacant
Villages	Breeza village	17.3	56.1	73.4	76%
	Carroll village	34.7	36.6	71.3	51%
	Curlewis village	53.0	3.8	56.9	7%
	Mullaley village	36.6	10.9	47.6	23%
	Tambar Springs village	27.7	22.3	50.0	45%
	Sub-total	*169.4*	*129.7*	*299.1*	*43%*
Gunnedah	Gunnedah town centre	51.1	1.8	52.9	3%
	Gunnedah industrial	316.6	70.0	386.7	18%
	Sub-total	*367.8*	*71.8*	*439.6*	*16%*
Total		**537.2**	**201.5**	**738.7**	**27%**

Source: HillPDA

EMPLOYMENT LAND DEMAND

6.0 EMPLOYMENT LAND DEMAND

This chapter projects the amount of additional employment land required to accommodate future employment and business growth in the towns, villages and industrial areas.

SUMMARY OF INSIGHTS

- Industrial space - It is estimated, under a base case that industrial demand will be 31,560 sqm of new industrial floorspace which would require an additional 14 hectares of appropriately zoned employment land. However due to mining expansion and Naomi Jobs Precinct, planning and vacancy (30%) a total net demand of around 22 hectares over the 17-year period would be required in industrial.
- Retail space - it is estimated that around 28,260 square metres of Gross Leasable Area (GLA) retail space could be supported across Gunnedah LGA as of 2024. Supportable space increases to around 32,625 square metres GLA by 2041 – an increase of around 4,145 square metres or 18 per cent over the period.
- Non-retail space - estimated that net growth in non-retail commercial-related jobs would drive demand for around an additional 2,000 square metres of space over the period.

6.1 Industrial land demand

This section projects the amount of additional employment space to be accommodated within Gunnedah Shire's industrial precincts. This growth in demand is primarily the result of employment growth identified in this section. It reflects the floorspace required to support the surrounding resident, worker and visitor communities. The estimated land area required to accommodate the projected growth in floorspace is then determined. Industrial land includes land zoned as E4 – General Industrial and E5 – Heavy Industrial.

6.1.1 Methodology

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

1. Analyse Transport for NSW (TfNSW) employment projections 2024 at the local government level.
2. Adjust TfNSW employment projections to (1) align with NSW Department of Planning, Housing and Infrastructure's (NSW DPHI) 2024 high population projections and (2) added 400 mining jobs. These two steps were to reflect the likely impacts of the recently approved Vickery Extension Project.
3. Estimate the amount of employment directed towards employment precincts, based on the industry type, land zonings, previous land use audits and market trends.

   This step is achieved by applying a distribution proportion to the net growth/decline in employment at the industry level. For example, 80-90 per cent of manufacturing would be expected to be directed towards employment precincts.
4. Convert net growth in employment directed towards employment precincts to floorspace by applying industry standard employment densities (the amount of floorspace required per worker) to the net growth/decline by industry type.

5. Convert floorspace requirements into demand for land by applying typical Floor Space Ratios (FSRs) for developments in employment precincts.
6. Estimate the additional demand for industrial zoned land resulting from the Vickery Extension Project and Namoi Jobs Precinct.

6.1.2 Employment projections

Employment projections are based on TfNSW's Travel Zone Projections 2024 (TZP24), released in January 2025. Employment projections are provided for each ANZSIC 1-digit industry sector annually from 2021 to 2031 and 5-yearly from 2031 to 2066.

Projections were based on the best available data as of early 2024 and the projections incorporate results of the National Census conducted by the ABS in August 2021.

HillPDA adjusted TfNSW's base projections to align with NSW DPHI's 2024 high-population projection scenario. This was done as this projection could be considered reflective of the likely population impacts resulting from the approved Vickery Extension Project. The estimated potential 400 new mining jobs from the expansion have been included in this adjustment.

Based on this, projections reveal that over the 17-year period to 2041, employment across Gunnedah Shire is forecast to increase by just over 770 jobs.

The top five growth industries, by net jobs, over the period are:

- Mining - 293 additional jobs
- Agriculture, Forestry and Fishing - 183 additional jobs
- Health Care and Social Assistance - 96 additional jobs
- Education and Training - 58 additional jobs
- Accommodation and Food Services - 56 additional jobs.

Table 13: Gunnedah LGA employment projections 2024-2041 (jobs)

Industry	2024	2041	Change #	Change %
Agriculture, Forestry and Fishing	901	1,084	183	20%
Mining	291	584	293	101%
Manufacturing	261	271	10	4%
Electricity, Gas, Water and Waste Services	81	85	4	5%
Construction	473	463	-10	-2%
Wholesale Trade	207	221	14	7%
Retail Trade	512	496	-17	-3%
Accommodation and Food Services	440	496	56	13%
Transport, Postal and Warehousing	274	281	6	2%
Information Media and Telecommunications	18	21	3	15%
Financial and Insurance Services	75	90	15	19%
Rental, Hiring and Real Estate Services	90	101	11	12%
Professional, Scientific and Technical Services	232	281	49	21%
Administrative and Support Services	210	221	11	5%
Public Administration and Safety	377	364	-13	-3%
Education and Training	543	601	58	11%
Health Care and Social Assistance	655	751	96	15%
Arts and Recreation Services	47	52	6	12%
Other Services	341	340	-1	0%
Total	**6,028**	**6,802**	**773**	**13%**

Source: Transport for NSW employment projections, January 2025 release – adjusted to NSW DPHI 2024 high-population projection scenario and HillPDA

6.1.3 Employment directed towards industrial precincts

This section estimates the number and type of jobs directed and accommodated within Gunnedah Shire's employment precincts. This is achieved by applying a distribution proportion to the net growth/decline in employment at the industry level. For example, 80-90% of manufacturing would be expected to be directed towards employment precincts, while 10-20% of retail would be directed to employment precincts.

HillPDA has undertaken numerous employment land field audits for local government areas across NSW and VIC. Specifically, HillPDA has undertaken audits of employment precincts in Hornsby, Ballina, Byron, Tamworth, Wollondilly, Strathfield, Bellingen, Lithgow, Clarence Valley and Coffs Harbour LGAs.

From these audits, it has been found that employment precincts contain a range of land uses with all broad industries sectors being represented. As such, forecasting demand based solely on changes in "traditional industrial uses" such as manufacturing, wholesale trade and/or storage/warehousing/logistics employment would result in an underestimate of a locations future employment land need.

Table 14 provides the proportion of employment that is estimated to be accommodated/directed to a region's employment precincts. These proportions have been based on experience and review of ABS place of work data for Gunnedah LGA at the ANZSIC 2-digit level.

Based on these assumptions, it is estimated that Gunnedah Shire's industrial precincts contained around 1,150 jobs in 2024. This is forecast to increase to around 1,205 jobs by 2041, representing just over 55 additional jobs over the 17-year period.

Table 14: Proportion and net additional employment accommodated in industrial precincts 2024-2041

Industry	% of employment accommodated/directed towards industrial precincts	Estimated jobs in employment precincts		
		2024	2041	Net job change
Agriculture, Forestry and Fishing	5%	45	54	9
Mining	5%	15	29	15
Manufacturing	90%	235	244	9
Electricity, Gas, Water and Waste Services	20%	16	17	1
Construction	10%	47	46	-1
Wholesale Trade	90%	186	199	13
Retail Trade	20%	102	99	-3
Accommodation and Food Services	10%	44	50	6
Transport, Postal and Warehousing	40%	110	112	3
Information Media and Telecommunications	3%	0	1	0
Financial and Insurance Services	3%	2	2	0
Rental, Hiring and Real Estate Services	20%	18	20	2
Professional, Scientific and Technical Services	3%	6	7	1
Administrative and Support Services	5%	10	11	1
Public Administration and Safety	20%	75	73	-3
Education and Training	3%	14	15	1
Health Care and Social Assistance	3%	16	19	2
Arts and Recreation Services	5%	2	3	0
Other Services	60%	205	204	-1
Total		**1,149**	**1,204**	**55**

Source: HillPDA

6.1.4 Net employment floorspace requirements 2024-2041

Employment is converted into floorspace needs by applying industry standard employment densities (the amount of floorspace required per worker) to the amount of employment directed towards industrial precincts between 2024-41. Employment densities for the industries of manufacturing, wholesale and warehousing have considered changing business practices and technologies, such as increased automation. These trends may decrease the amount of employment required for business operations but do not necessarily translate into decreased floorspace requirements. These industries have been adjusted (softened) to address changing employment densities over the coming decades.

Using this methodology, Gunnedah Shire's industrial precincts are estimated to accommodate around an additional 31,560 square metres between 2024 and 2041.

Table 15: Net industrial floorspace requirements 2024-2041 (sqm)

Industry	Net demand
Agriculture, Forestry and Fishing	274
Mining	439
Manufacturing	10,447
Electricity, Gas, Water and Waste Services	972
Construction	-30
Wholesale Trade	12,519
Retail Trade	-203
Accommodation and Food Services	140
Transport, Postal and Warehousing	6,128
Information Media and Telecommunications	2
Financial and Insurance Services	9
Rental, Hiring and Real Estate Services	842
Professional, Scientific and Technical Services	31
Administrative and Support Services	17
Public Administration and Safety	-79
Education and Training	43
Health Care and Social Assistance	72
Arts and Recreation Services	17
Other Services	-80
Total	**31,562**

Source: HillPDA

6.1.5 Base net industrial land demand 2024-41

Net growth in floorspace is converted into land requirements by applying typical Floor Space Ratios (FSRs) for developments in employment precincts.

Typically, the building areas of industrial developments do not encompass the entirety of the land parcels within which they reside. This results from the specific site requirements of typical industrial occupiers, which include setbacks from property boundaries, turning areas, parking areas, loading and unloading, landscaping, etc. In our experience, although employment (industrial) precincts have an allowable typically FSR of around 1:1—that is, the amount of floorspace that could be developed is equal to the properties' total land area—the actual built FSR ranges from between 0.3:1 to 0.6:1. For this assessment, HillPDA has applied a ratio of 0.3:1 to the industrial floorspace estimates and demand.

Using this methodology, it is estimated that the 31,560sqm of new industrial floorspace would require an additional 10.5 hectares of appropriately zoned employment land. It is also prudent to allow for some vacancy and additional capacity. As such, an additional 30 per cent in floorspace demand has been applied. This results in a total net demand of around 14 hectares over the 17-year period.

Table 16: Industrial land demand 2024-2046

	Net demand
Total occupied floorspace	31,560sqm
Land demand (occupied space)	10.5ha
Total land demand*	**13.7ha**

6.1.6 Namoi Basin coal mining expansion employment land demand impact

The estimated additional 400 jobs from the approved Vickery mine expansion would have flow-on impacts on the demand for industrial land in Gunnedah Shire. This results from additional support, servicing, production and consumption impacts that these jobs would generate and support across the economy.

For example, the NSW Government estimated that in 2022 the coal mining industry generated 22,000 direct jobs. These direct jobs supported around a further 89,000 indirect jobs[7] across NSW, implying that for everyone direct coal job, four further jobs were supported across NSW. From this, it can be estimated that the 400 new coal mining jobs could support 1,635 jobs across NSW.

Through the assessment of 2021 ABS Census information and 2021-22 Australian National Accounts Input-Output Tables, HillPDA has estimated the downstream impacts these jobs would likely have on Gunnedah Shire's employment profile.

This impact is estimated at around an additional 225 jobs across Gunnedah LGA. Based on industry types, it is estimated that 95 jobs would be accommodated within Gunnedah Shire's employment precincts.

It is estimated that these 95 new jobs would increase the demand for employment land by around six hectares. This has been estimated based on the below assumptions:

- 95 additional jobs
- average workspace ratio of 125sqm per worker
- an additional 30% demand allowance
- site coverage ratio of 30%.

This would increase the total demand across Gunnedah LGA from around 14 hectares to around 20 hectares.

6.1.7 Namoi Regional Job Precinct employment land demand impact

The Namoi region comprises Tamworth, Gwydir, Gunnedah, Liverpool Plains and Walcha Local Government Areas. Namoi is one of the largest producers of poultry, lamb and beef in NSW. The aim of the Namoi Regional Job Precinct is to support further opportunities to create jobs in sustainable intensive agriculture and livestock production.

The Department of Regional NSW engaged Atlas in 2022 to prepare a Secondary Intensive Agricultural Land Supply Assessment (the study) for the Namoi Regional Job Precinct. Secondary intensive agriculture was defined as the manufacturing and processing of intensive agricultural products and industries servicing intensive agriculture, including, inter alia, primary produce processing (e.g. abattoirs, meat processing facilities, grain mills), food and fibre product manufacturing and other related industries.

The study examined and forecasted the impact that increased employment within the poultry, lamb and beef agricultural sectors would have upon the demand for industrial land across the region.

Key findings from (and assumptions applied in) the study, which are of relevance to forecasting the demand for additional land within Gunnedah Shire, include the following:

1. Enhancements to the regional agricultural supply chain suggest that secondary intensive agricultural uses could account for up to 30% of total industrial land demand.
2. Potential land use conflicts from the operation of secondary intensive agriculture uses mean that appropriate buffers are required. Appropriate buffers were estimated at two-to-three times the upper end of projected demand, with the upper end of this buffer allowance being recommended.

[7] Strategic Statement on coal exploration and mining in NSW, NSW Government 2020

It is estimated that the Namoi Regional Job Precinct could increase the demand for industrial land within the Gunnedah LGA by almost 18 hectares. This has been estimated based on:

- Secondary intensive agricultural uses increasing the demand for industrial land by 30%. This was applied to the combined base net industrial land and Vickery mine expansion impact (~20 hectares). This resulted in just under 6 hectares of additional employment land being demand (19.9 hectares * 130% = 5.96 hectares).
- Application of a three-times buffer to the resulting demand from secondary intensive agricultural uses (3*5.96 = 17.88 hectares).

This would increase the total demand across Gunnedah LGA from around 20 to 38 hectares.

6.1.8 Total employment land capacity gap assessment

Demand for employment land was assessed under three scenarios, these being:

1. A base job demand that forecasts the demand for employment land based on NSW State Government employment projections. These were slightly amended to account for the direct mining jobs and from the recently approved Vickery mine expansion.
2. Vickery mine impact scenario, which estimated the additional demand for industrial land that the mine expansion could generate.
3. Namoi Regional Job Precinct impact scenario, which estimated the additional demand for industrial land that could result from increased secondary intensive agriculture uses.

As detailed in the table below, it is estimated that these three scenarios combined would demand ~38 hectares of zoned employment land.

Table 17: Summary of demand for employment land across Gunnedah LGA 2024-41 by scenario

Demand scenario	Demand (ha)
Base job demand	13.7
Vickery mine impact	6.19
Namoi RJP impact	17.88
Total demand	**37.75**

A land use audit undertaken as part of this study estimated that Gunnedah Shire LGA currently contained around 70 hectares of vacant zoned employment land. This implies that Gunnedah Shire LGA had sufficient capacity to meet its demand, with a surplus of around 32 hectares.

Although this study did not undertake a detailed constraints analysis, consultation with Council identified a parcel of land that is unavailable for development and should be removed from supply. This parcel (legally known as Lot 21 DP1133519) is Council owned and is a buffer to the Gunnedah Waste Management Facility.

Stakeholder engagement undertaken as part of this study identified land parcels less than one hectare as unsuitable for the current needs of industrial occupants.

Removal of these unavailable and unsuitable sites reduces the supply of vacant employment from approximately 70 ha to 20.5 hectares. This would result in Gunnedah LGA not meeting its employment land needs, with a deficit of around 17 hectares.

Table 18: Employment land capacity gap assessment summary

Category	ha
Total demand	37.8
Total available supply*	20.5
Resulting land capacity (surplus (+) / deficit (-)**	**-17.3**

**Employment land current zones and available for development, it excludes Council-identified constrained sites and sites under one hectare*

***The resulting land deficit will be rounded and referred to as 17 hectares.*

6.1.9 Additional employment land requirements recommendation

The previous findings identified the amount of developable land stocks that Gunnedah Shire would require to ensure supply sufficiency. Given that the economic implications of a deficit in supply are outweighed by providing an oversupply, it is recommended that the higher deficit scenario of 17 hectares be adopted.

Given that this deficit assumes that the current available zoned land that is unconstrained and meets current occupant needs has been taken up and developed, any demand deficit would likely need to be provided in the establishment of a new precinct(s) or expansion of existing ones, in an appropriate location.

In either case, a general rule of thumb in planning for new employment precincts is that around 10-20% of the land is taken up by other uses such as the development of internal roads, access, footpaths and other infrastructure and landscaping requirements.

Assuming 20% of the land is developed for non-employment purposes, **it is recommended that around 22 additional hectares of zoned employment land be planned and provided to ensure supply adequacy to 2041.**

6.2 Commercial floorspace demand

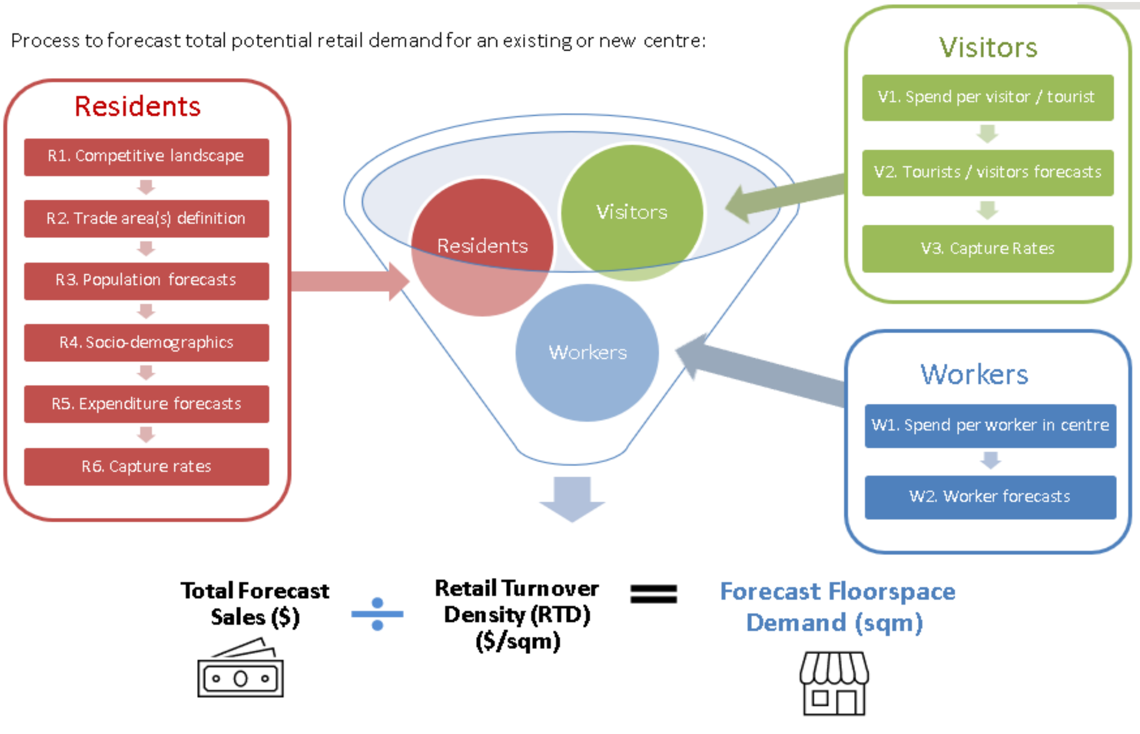
HillPDA undertook a demand assessment for commercial/retail floorspace across Gunnedah LGA. This is achieved using our bespoke expenditure model, which forecasts the quantum of retail floorspace that could be accommodated in the LGA based on an analysis of the catchment's socio-demographics, real expenditure growth, population growth, potential capture rates and benchmark retail turnover densities.

6.2.1 Methodology

Specific steps taken to determine the amount and type of retail space that could be supported in the LGA to 2041 were:

- Reviewed supply estimates, escape expenditure, capture from outside Gunnedah LGA spend and demand assumptions as detailed in the Gunnedah Shire Commercial and Industrial Land Use Strategy 2008
- Analysis of the current retail environment
- Determined and forecasted sources of expenditure (residents and visitors)
- Estimated the amount of expenditure retained in the LGA
- Converted retained retail spend into floorspace by applying average turnover densities.

Figure 20: Forecasting retail demand methodology



Source: HillPDA

6.2.2 Sources of expenditure and total spend estimates

The following details the sources of retail expenditure within Gunnedah LGA.

6.2.2.1 Resident growth and expenditure

Residents are the primary source of retail expenditure within Gunnedah LGA. Based on NSW Department of Planning, Housing and Infrastructure's 2024 population projections[8] high growth scenario, Gunnedah Shire's current (2024) population is estimated at around 13,290. This is forecast to increase to around 14,492 persons by 2041, representing an increase of around 1,202 or 9 per cent over the period.

This population generates an estimated $217 million in household expenditure as of 2024. This is forecast to increase to around $171 million by 2041, representing an increase of $53 million or 25 per cent over the period.

Table 19: Gunnedah Shire estimated total household retail expenditure by commodity type ($m)

Year	2024	2031	2036	2041
Population	13,289	13,806	14,159	14,492
Supermarkets and grocery stores	62.7	69.8	75.3	81.0
Specialised food stores	13.1	14.4	15.3	16.3
Bulky goods stores	36.4	39.7	42.1	44.7
Department stores	11.0	11.0	11.0	11.0
Apparel stores	20.8	22.5	23.8	25.1
Other non-food stores	31.6	34.5	36.6	38.8
Restaurants and fast-food services	34.6	38.6	41.8	45.0
Personal services	7.3	7.9	8.3	8.8
Total	**217.3**	**238.3**	**254.1**	**270.5**

Source: HillPDA

6.2.2.2 Tourist and visitor expenditure

According to Tourism Research Australia 2019 LGA profiles, tourists and visitors to Gunnedah LGA spent a combined $47 million in 2019.

These expenditure estimates include a range of expenditure categories, including accommodation, entertainment, light industries, travel and transport, and retail. Tourism Research Australia's visitor surveys show that around 36 per cent of total expenditure is on retail items. We have applied an annual growth rate of 1 per cent to expenditure estimates. This rate is around half the annual growth rate projected in the tourism forecasts for Australia from 2023 to 2028.

Based on this, it is estimated that in 2024 tourists and visitors to Gunnedah Shire generated $18 million in retail spend. This is forecast to increase to around $21 million by 2041, representing an increase of around $3 million or 18 per cent over the period.

6.2.3 Retail capture rates by broad store type

The previous section identified the total volume of retail expenditure from residents across Gunnedah Shire. However, not all this expenditure will be captured by retailers in the LGA. Reasons for this include:

- The proximity and size of surrounding shopping centres
- The lack of a major bulky goods cluster and department stores in a centre
- Residents leaving the locality to undertake discretionary shopping (in department stores, apparel stores and bulky goods stores in larger centres)

[8] These projections have been amended to account for a 2021 population undercount and 200 dwellings proposed by Whitehaven mining expansion

- Expenditure from residents who are on holidays/business trips or are away for other reasons for any extended period. This is counterbalanced to some extent by residents from outside the trade catchment visiting stores as they visit the area.

The capture rates applied in this study have been influenced by the Gunnedah Shire Commercial and Industrial Land Use Strategy 2008, Tourism Research Australia's visitor surveys, and our experience undertaking real demand studies. By applying these rates across the various retail categories, the study estimates the amount of retail spend captured in the LGA and, subsequently, the amount of floorspace this could support.

The capture rates applied are provided in the table below.

Table 20: Retail capture rates by broad type and trade segment (Gunnedah LGA)

Category	Resident Local Spend %	Visitor Local Spend %
Supermarkets and grocery stores	90%	17%
Specialised food stores	70%	10%
Bulky goods stores	-	0%
Department stores	60%	1%
Apparel stores	30%	2%
Other non-food stores	65%	14%
Restaurants and fast food services	70%	48%
Personal services	75%	8%
Total	**59%**	**100%**

6.2.4 Study area capture of retail spend

From the applied capture rates, it is estimated that retailers in Gunnedah Shire could potentially achieve total retail sales of around $160 million in 2024, increasing to $199 million by 2041 (measured in 2024 dollars). This represents an increase of around $40 million or 25 per cent over the period.

Table 21: Potential capture of retail trade in Gunnedah LGA 2024-2041 ($m)

Year	2024	2031	2036	2041	Growth
Supermarkets and grocery stores	65.1	72.4	77.9	83.7	18.6
Specialised food stores	11.9	13.0	13.8	14.6	2.7
Bulky goods stores	0.0	0.0	0.0	0.0	0.0
Department stores	7.4	7.4	7.5	7.5	0.0
Apparel stores	7.2	7.8	8.2	8.7	1.5
Other non-food stores	25.1	27.3	29.0	30.7	5.6
Restaurants and fast food services	35.2	38.9	41.8	44.8	9.6
Personal services	7.4	8.0	8.5	8.9	1.5
Total	**159.2**	**174.8**	**186.6**	**198.9**	**39.6**

6.2.5 Gunnedah Shire retail floorspace demand 2024-41

To determine the demand for retail floorspace, target turnover rates ($/ square metre, otherwise known as Retail Turnover Densities (RTDs)) have been applied to projected expenditure captured in Gunnedah Shire across various broad retail categories. The RTD rate broadly represents industry averages.

By applying the above RTD and a 10 per cent vacancy rate, it is estimated that around 28,260 square metres of Gross Leasable Area (GLA) retail space could be supported across Gunnedah LGA as of 2024. Supportable space increases to around 32,626 square metres GLA by 2041 – an increase of around 4,145 square metres or 15 per cent over the period.

Table 22: Gunnedah LGA retail floorspace demand 2024-2041 (GLA sqm)

Store type	2024	2031	2036	2041	Change
Supermarkets and grocery stores	5,803	5,860	6,293	6,608	6,926
Specialised food stores	1,455	1,465	1,544	1,601	1,656
Bulky goods stores	0	0	0	0	0
Department stores	2,490	2,491	2,503	2,506	2,505
Apparel stores	1,677	1,690	1,786	1,854	1,921
Other non-food stores	5,829	5,878	6,247	6,513	6,777
Restaurants and fast food services	6,273	6,331	6,766	7,085	7,409
Personal services	2,160	2,176	2,296	2,381	2,466
Total	**25,688**	**25,892**	**27,434**	**28,548**	**29,660**
Vacancy (10%)	2,569	2,589	2,743	2,855	2,966
Total shopfront space	**28,257**	**28,481**	**30,177**	**31,402**	**32,626**

6.2.6 Non-retail commercial floorspace demand

Demand for non-retail commercial related space is based on employment projections for the industry categories of:

- Information Media and Telecommunications
- Financial and Insurance Services
- Rental, Hiring and Real Estate Services
- Professional, Scientific and Technical Services
- Administrative Services
- Public Administration and Safety
- Allied health services.

As detailed in Section 6.1, job forecasts are based on TfNSW 2024 employment projections. This projection data set was amended to:

1. Reflect NSW DPHI's 2024 high scenario population projections.
2. Account for the 400 estimated directed jobs resulting from the approved Vickery mine expansion.
3. Include the downstream impact on employment from the Vickery mine expansion.

From the resulting employment projections, jobs directed towards employment (industrial) precincts being removed. An estimate of persons working from home was undertaken and removed based on 2021 Census information. Based on these assumptions, it is estimated that between 2024-41 an additional eight non-retail commercial-related jobs would be provided in the LGA's commercial centres. Based on an average job density of 20 square metres for each commercial job; 40 square metres for each allied health job; and a 10% vacancy allowance, it is estimated that net growth in non-retail commercial-related jobs would drive demand for around an additional 2,000 square metres of space over the period.

Table 23: Net non-retail commercial related space demand 2024-41

Land use	Net jobs	Job density	Floorspace demand (sqm)
Allied health	10	40	390
Commercial office	73	20	1,466
Total	**83**		**2,042***

Source: HillPDA. *Includes a 10% vacancy allowance

INDUSTRY ENGAGEMENT AND GAPS ANALYSIS

7.0 INDUSTRY ENGAGEMENT AND GAPS ANALYSIS

7.1 Engagement process

To assist with market research and the identification of any key issues, opportunities or gaps relating to employment land, HillPDA undertook the following engagement:

- One-on-one engagement with industry representatives
- Online focus group sessions: 3 facilitated discussions, with key stakeholders, real estate agents, Gunnedah Chamber of Commerce/businesses, and state agencies
- Internal Council workshop as well as a state agencies workshop, with Council staff in attendance.

7.2 Industry feedback

Stakeholders in Gunnedah Shire and state agencies provided feedback highlighting a range of strengths, weaknesses, opportunities and threats regarding employment land. Key issues or where focus can be provided in the Employment Land Strategy are summarised below.

There is a need for **larger industrial lots** (1ha+).

Headworks charges can make development unviable.

There is demand for more **heavy industrial** land.

Public realm and spaces could be improved to encourage people to visit and stay longer in the town centre.

Mixed-use zonings could facilitate a better mix of residential and employment land uses in Gunnedah CBD.

Commercial growth could be promoted by **relaxing development requirements**.

Gunnedah's commercial core could be reinvigorated with more retail and supported by **temporary worker accommodation**.

There is some **lack of development interest** in the LGA, particularly as other regional areas have fewer development service charge fees.

A summary is outlined on the following page in Table 22.

Table 24: Engagement findings

Strengths	Weaknesses
Key industries • The Department of Primary Industries and Regional Development is receiving enquiries into renewable energy, manufacturing, component recycling and horticulture in the area • The federal government is driving regional investment and interest in renewable energy • There are expected to be flow-on economic benefits (e.g. through subcontractors) as a result of planned mine expansions • Lake Keepit provides a natural asset with tourism opportunity **High demand** • There is strong local commercial development interest • Areas west of Gunnedah CBD are desirable for additional industrial land • Gunnedah's industrial precincts contain attractive synergies for businesses **Infrastructure** • Local road infrastructure can accommodate B-doubles and B-triples • Land around Blackjack Road is benefited by having town water supply **Planning alignment** • Council and stakeholders are aligned in preferring to consolidate Gunnedah town centre over new commercial expansion in the villages	**Land suitability** • There is a lack of future land for industrial zoning that has drainage, highway access and is unconstrained by flooding • There is a perceived lack of heavy industrial land in the LGA **Lot sizes** • A lack of large lots prevents large-scale businesses from moving to, or growing their business in, Gunnedah Shire • Sizes of lots with highway access (0.2-0.3ha) are too small for many uses other than for storage and similar small businesses • It is difficult to find lots above 1ha, and especially 5-10ha. This is despite trends of industries requiring larger floorplates, with businesses commonly wanting 1ha lots **Town centre** • Shop top housing is hindered by a lack of viability in the Gunnedah town centre • Flooding is an issue for some town centre sites, and thus the northern part of the CBD is underutilised • Some businesses are prevented from locating in central Gunnedah due to a lack of storage space • Gunnedah lacks the large-scale shops and services of other areas, which drives away some people, investment and jobs • Larger wholesale businesses may impact the functioning of Gunnedah town centre, due to traffic and space requirements. **Infrastructure** • Treated water is expected to be at capacity in 10 years, due to high levels of current water usage • There is inadequate sewer infrastructure for employment land development east of Gunnedah, where there is interest to rezone land • Available water pressures in industrial areas may add to development costs **Villages** • Villages outside Gunnedah have lower industrial development interest, and are often constrained to start business, as their services and patronage are in Gunnedah CBD
Opportunities	**Threats**
Growth • Mine closures in the Upper Hunter region may lead to population growth in Gunnedah Shire • Major local projects are expected to generate some demand for local contractors and suppliers • The Hunter Gas Pipeline could create opportunities for additional gas servicing in Gunnedah Shire **Emerging industries** • There are opportunities for more experiential tourism offerings in the LGA	**Competitiveness** • The rezoning of land peripheral to Gunnedah risks big-box retail businesses leaving the town centre • There are some instances of land banking in the LGA, and/or lack of development interest • If the AgQuip site is rezoned to industrial, there is a concern about rates rising and AgQuip leaving the area • Headworks charges and other service cost factors make Gunnedah Shire a less desirable location for businesses than surrounding areas (e.g. Tamworth)

- More accommodation (e.g. camping) could help to retain economic benefits from events like AgQuip in the LGA
- A brewery in the CBD could also attract more tourism

Planning flexibility

- There are opportunities to encourage more commercial uses in the town centre, including through relaxing requirements such as car parking
- Home-based businesses can provide economic contribution on non-employment land, but are often not exempt development (e.g. due to food preparation)

Mixed land uses

- An MU1 zoning on land near Barber and Marquis Streets could facilitate both commercial and residential growth
- Short-term/seasonal worker accommodation could be considered in commercial zones, which would aid town centre businesses
- Lanes behind shops could be activated to benefit businesses, also reducing crime risks. Although car parking is an issue, requirements could be relaxed

Town centre expansion/consolidation

- The openness of employment land zonings has led to interest in rezoning RU1 land east of Gunnedah
- There may be opportunities for larger-scale retail businesses (e.g. car dealerships) to move onto industrial land, leaving more space for denser retail and commerce in the CBD

Infrastructure

- Well-placed industrial land could be unlocked if improved access were provided between the Oxley and Kamilaroi Highways west of Gunnedah
- After 2030, there may be opportunity to develop an intermodal freight terminal around the rail loop owned by Council, though this requires working with the current operator of the loop
- Large areas for consolidated land release would enable servicing more easily than 'spot' rezoning. However, there is a perceived need to support current areas with more services.
- Septic systems can facilitate smaller-scale developments, especially as a lack of more comprehensive infrastructure development may prevent a range of industries from developing
- There are opportunities for improving public spaces in the town centre (e.g. shade in parks, a splash park)

Land suitability

- Business and industries are hindered to grow due to a lack of suitably sized employment land.
- Flood risk threatens some land/development in Gunnedah town centre

Land use conflicts

- The presence of residences has prevented industrial development at sites along highways
- Commercial development has been hindered by the predominance of housing in the town centre

Industry trends

- Hotels have recently closed in the town centre, impacting its commercial core
- When mines eventually close, Gunnedah Shire's economy will need to diversify.
- Renewable energy opportunities may be challenged by availability of workforces

EMPLOYMENT LANDS STRATEGY

8.0 STRATEGY

8.1 Statement of intent

By 2041, the Gunnedah Shire LGA will have a diverse and sustainable economy, supporting regional lifestyles while bolstering local resilience to external trends. Industrial land will attract businesses that serve the LGA's key industries. Commercial land will facilitate population-serving enterprises, contributing to vibrancy in Gunnedah CBD and surrounding areas. The economies of villages will remain stable, with employment land supporting ongoing land uses and job opportunities.

Large industrial lots will be available, enabling a range of industrial uses to grow and invest resulting in increased demand being met. There will also be sufficient commercial land to meet the needs of retail and broader commercial businesses and supporting community needs within the Shire. Key employment precincts will be delivered in accordance with the community's future needs, including industrial land to its west, highway-adjacent land to its east and commercial and retail expansion within the Gunnedah CBD.

In addition to supply, the LGA's employment land will be well-supported. Industrial land will have the right attributes for businesses to function effectively, with appropriate infrastructure, supporting the wider economy. Commercial land will benefit from investment in infrastructure as well as planning controls and initiatives that encourage private investment. Villages will also be supported, contributing to the economic vibrancy of areas around Gunnedah, in addition to Gunnedah Shire itself.

The Gunnedah Shire LGA will be well-placed to meet the future opportunities and challenges of changing industries. Mining, agribusiness and renewable energy industries will power the local economy in the short-to-medium-term. Simultaneously, the area will move towards economic diversification, supporting its ability to navigate long-term uncertainties. Industries will be attracted that support key local sectors, while new employment opportunities will be leveraged in growing industries. This will include both commercial and industrial businesses being attracted to the area through Council's various roles. These processes will raise the profile of the area as a place to do business.

Through the implementation of this Strategy, the LGA's future will be supported as a prosperous and stable regional area. Its diverse local community will be benefited by the nurturing and diversification of economic and employment opportunities.

8.2 Themes, strategic directions and actions

To deliver on the above intent, this Strategy is formulated around 3 themes: supply, support and attract. These themes articulate how Council can plan for employment land and the businesses that operate on it. Within each theme is a set of strategic directions, and actions that seek to achieve each direction's intended outcome.

Theme 1: Supply

To meet the growing demand for employment land in the Gunnedah LGA, it is projected that approximately 22ha of additional zoned employment land will be required by 2041. Alongside this, the LGA will need around 0.4ha of retail and 0.2ha of non-retail commercial floorspace. This demand will be driven by the combined forces of changing local industries, economic trends and population growth. Current supply is particularly insufficient to meet demand for larger industrial lots, with only 6 undeveloped lots each in 0.5-1ha and 1ha+ size ranges.

Larger industrial lots play a critical role in supporting the Gunnedah LGA's ongoing economic development, accommodating land uses that range from potential heavy industry to modern business parks. These lots would help the LGA to leverage its growing renewables sector, with the potential for new businesses ranging from manufacturing and support services to larger-scale circular economy processing. While there is interest in expanding industrial land on both the eastern and western fringes of Gunnedah, the latter is more desirable from an infrastructure and compatible land use standpoint. Renewable energy developments are also increasingly occupying land, which could limit future rezoning opportunities, reinforcing the need for adequate future industrial land.

A well-functioning commercial centre will also be essential in supporting the economic wellbeing of Gunnedah and nearby townships. Ensuring adequate commercial land supply is an important component of preserving a healthy retail/commercial core. There are opportunities to provide additional commercial land in Gunnedah, which could include up to 9.6ha of flood-affected land that may be suitable for more commercial uses in the future, rather than residential zoned land.

The following strategic directions and actions have been developed to respond to employment land supply needs in the Gunnedah LGA. Where relevant, specific sites for actions are illustrated in Figure 21, below this section.

Strategic direction 1.1. Ensure adequate supply of zoned and serviced industrial land

Based on a comparison of employment projections, industry factors and the intensity of different land uses, the LGA's industrial land demand is expected require 22ha by 2041. Delivery of this land will sustain future industries in the area, upholding its economy.

In addition to land delivery, it is important to ensure that industrial land has the right attributes. In particular, consultation and market research confirmed the need for larger industrial lots. Consultation has identified that there is strong demand for lots sized 0.5-1ha and above. Delivering lots at this scale would help enable a range of industrial uses, assisting the LGA's economic diversification. There may also be demand for heavier industrial lots, which may unlock new industry opportunities.

As new industrial land is delivered, it is important to ensure that adequate servicing is in place. Council is currently undertaking a review of the local Development Servicing Plan (DSP) to ensure that current and future industrial land can be feasibly serviced. Once the local servicing strategy is known, Council can be in a position to use the DSP to provide certainty for investors and possibly make funding applications to State and Federal Governments.

The intended outcome of the below actions is a well-functioning industrial land market, in which supply is available, prices are competitive, and land has desirable attributes for businesses, including adequate servicing.

Actions:

- 1.1.1. Prioritise the delivery of employment land with larger lot capacities and sizes (0.5-1ha and above).
- 1.1.2. Consider the provision of more heavy industrial land.
- 1.1.3. Undertake infrastructure planning to scope the feasibility of extending sewer and water servicing for potential new land releases.

Strategic direction 1.2. Ensure adequate supply of well-located commercial land.

Based on a comparison of retail/commercial trends and floorspace needs in the Gunnedah LGA, demand for commercial floorspace is expected to grow by 0.6ha by 2041. Such demand would comprise 0.4ha of retail and 0.2ha of non-retail (i.e. allied health and office space) demand. This is generally expected only to occur in the Gunnedah town centre.

As referenced in Action 1.2.2 below, there is support for moving supporting business who require large floorplate retail land uses away from Gunnedah's commercial core. This trend is likely to free up large sites for new active retail and commercial floorspace within the commercial core. As such, as outlined in Action 1.2.1, there may be a need to investigate additional urban centre areas for commercial or mixed uses. This could include urban areas that are flood prone, where these uses are potentially more suitable than residential development. Commercial development could occur on such land, for example, through having first-floor commercial space above ground parking or other less sensitive uses. No rezoning of flood affected land will be necessary.

Although Gunnedah's commercial land demand growth is projected to be gradual, it is important for Council to monitor ongoing interest, due to the role of commercial tenants in the vitality of the centre. As such, Council should maintain awareness of market interest for any future rezoning, by engaging with the private sector. Council, when appropriate, will undertake any planning regime changes when potential expansion of employment zones in the existing urban areas around the Gunnedah CBD is needed to ensure adequate supply of well-located commercial lands. Council can also encourage activation and demand through encouraging active transport movement within the Gunnedah CBD, with enhanced connections to parks and open space for workers to use during lunch or after work.

Commercial land uses should match the scale and nature of Gunnedah's existing centre. The town centre can therefore benefit from very large-scale retail uses moving to industrial land, where they may be more appropriate. Council should support this occurring, to protect and benefit fine-grained retail in the town centre. Importantly, this should be undertaken alongside the other strategic directions of this ELS that maintain demand among smaller commercial tenants, including through measures that improve the local public domain.

The below actions intend to help Gunnedah reach the outcome of a vibrant future town centre that serves the population, while providing local employment and economic opportunity.

Actions:

- 1.2.1. Scope market interest in changing commercial zones in the Gunnedah town centre area.
- 1.2.2. Seek to support very large-scale business uses moving into vacant industrial land, freeing up commercial land (refer to Figure 22).
- 1.2.3. Identify and support opportunities for more appropriate use of land zoned E1 and E3 in the Gunnedah town centre that may be affected by flooding.

- 1.2.4 Develop and implement as required, a zoning regime that supports identified expansion of employment zones in existing urban areas in and around the Gunnedah CBD.

Strategic direction 1.3. Progress the delivery of key employment precincts.

The Gunnedah LGA has a range of key sites that contribute to its economic potential. However, several of these sites may need Council assistance to be fully leveraged.

The Gunnedah rail loop is a Council-owned asset with the potential to contribute to transport and logistics industries. It currently fulfils an economic function in being used for an adjacent colliery. However, after that land use ceases, the loop presents an opportunity for an intermodal freight terminal to be developed. A terminal would seek to leverage proximity to the forthcoming inland rail development at Narrabri. Currently, the rail loop is set to be demolished, as part of colliery land rehabilitation. This creates a strong opportunity and need for Council to engage with private and public sector stakeholders to avoid demolition and maintain the loop's future potential. Consultation with Australian Rail Track Corporation (ARTC) will also be required.

Gunnedah's former abattoir is a well-located site that contributed to the local employment base in the past. The site is zoned E4 (General Industrial), and although applications have been made to develop the previous abattoir site, the operation of the consent is yet still to be implemented, leaving the site currently underutilised. The current development consent is for the subdivision into 24 lots with the construction of electrical generating works (solar energy system). Due to the site's locational suitability and historical employment significance, Council should work with private stakeholders to facilitate the sites' redevelopment for employment purposes.

The below actions aim to support the eventual outcome of development at both sites, helping to maximise some opportunities across Gunnedah Shire's key employment nodes.

Actions:

- 1.3.1. Work with private sector and NSW Government stakeholders to investigate options to avoid the demolition of Gunnedah's rail loop, to maintain its future potential, and establish an intermodal freight terminal (refer to Figure 22).
- 1.3.2. Assist the redevelopment of Gunnedah's former abattoir site for industrial and/or light manufacturing purposes, where possible (refer to Figure 22). Redevelopment of the site should encourage support for the proposed industrial precinct area.

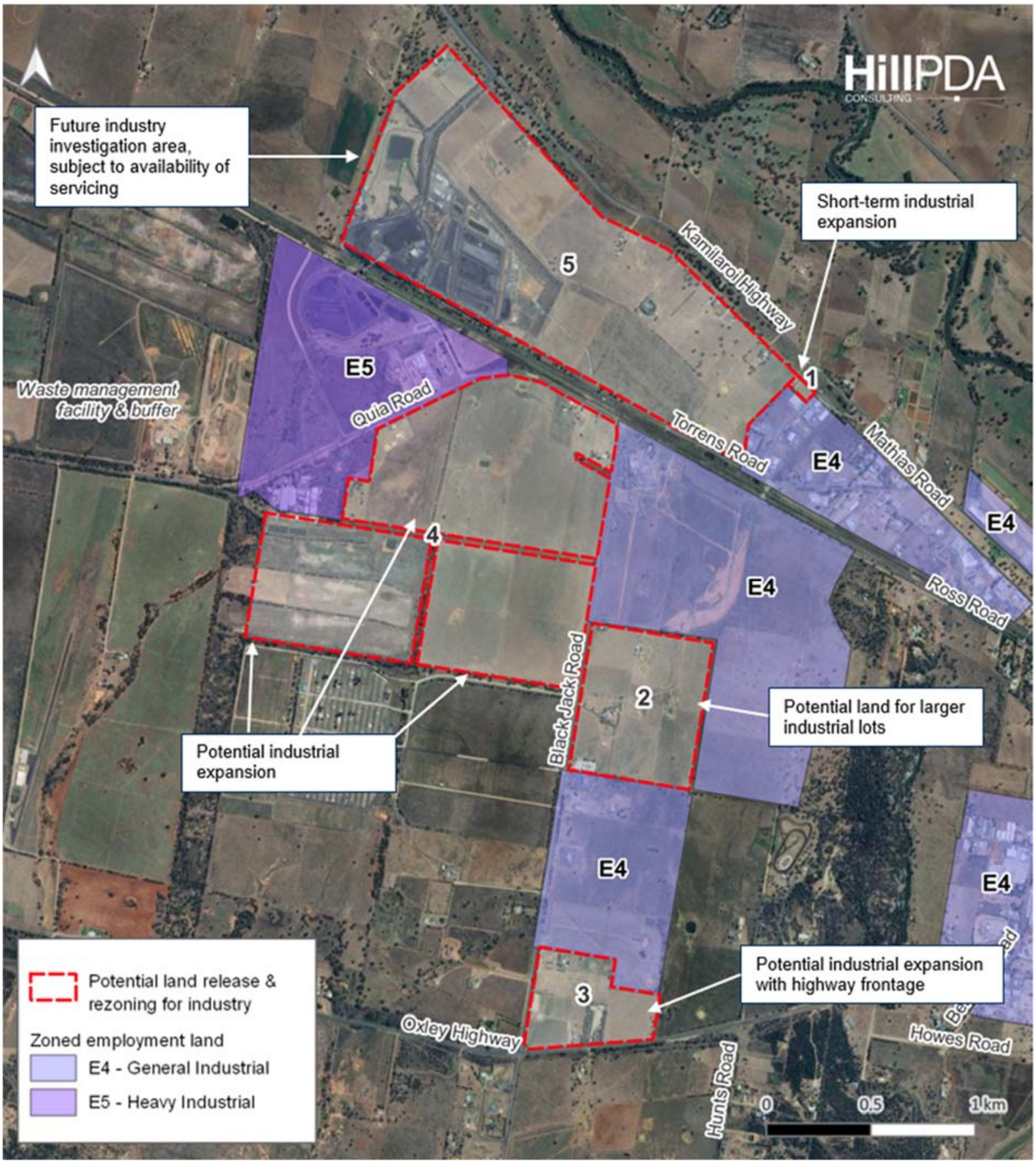
Strategic direction 1.4. Establish new industrial land to the west of Gunnedah CBD.

Currently, the LGA's most appropriate land for industrial expansion is to the west of Gunnedah CBD, near where most existing local industrial uses are located. This land is suitable as it is distant from residential land (avoiding land use conflicts), close to complementary uses, and near rail and highway infrastructure. Expanding this land would help the LGA to meet its future industrial land needs. This precinct will play a large role in accommodating the identified 22ha of industrial land demand for the growing region and population.

It is proposed to facilitate the expansion of the land around Blackjack Road where appropriate. The proposed industrial land to accommodate the industrial growth and the potential sequence of the land release is outlined in Figure 21.

The areas in Figure 21 (excluding area 5, being a longer-term investigation area) could provide a total of 239 hectares of employment land, more than meeting Gunnedah Shire's estimated need These areas could be staged/rezoned over time, timed according to demand and servicing options. A structure plan and/or staging plan that links land development with the water and sewer serving strategy and Development Services Plan, should be developed to provide the strategic framework for future servicing of development.

Figure 21: Potential industrial land release areas west of Gunnedah



Source: DPHI; Google; HillPDA

Council, in seeking to deliver industrial land on these sites, will seek funding to: -

- Prepare the base studies for the precinct, for example Aboriginal heritage and biodiversity studies, to provide certainty for future investment, and provide guidance for the future development/road linkages. . Liaison with various state agencies, such as Department of Climate Change, Energy, the Environment and Water (heritage division) Department of Regional Development NSW, Crown Lands and Transport for NSW, may be required.

- Liaise with Transport for NSW, which will be necessary to provide improved highway access, enabling the land's industrial potential.
- Prepare a staging plan linked to a Servicing Strategy to ensure coordination for the delivery of an area and ensure the structure plan/staging plan of employment lands accommodates the much needed 5-10ha employment land lots.

More broadly, the NSW Government's recent *Industrial Lands Action Plan* creates an opportunity to designate industrial land as regionally significant, which may assist Council in applying for State or Federal Government funding. Given the attributes of industrial land west of Gunnedah, it is recommended that Council push for a regionally significant designation, especially considering regional trends and initiatives, such as the Namoi Regional Job Precinct.

The intended outcome of the below actions is for Gunnedah Shire to have adequate industrial land that is 'investment ready' with infrastructure and the necessary studies to support large-scale investment.

Actions:

- 1.4.1. Work with landowners to facilitate appropriate small-scale industrial expansion in the short-term (refer to area 1 in Figure 21).
- 1.4.2. Engage with Transport for NSW to identify options for improving highway access in areas for potential staged industrial rezoning west of Gunnedah (refer to areas 2-4 in Figure 21) and engage with ARTC in regard to future intermodal and access arrangements.
- 1.4.3. Establish an investigation area to provide industrial land north-west of Allgayer Dr precinct, between Kamilaroi Hwy and the railway line (refer to area 5 in Figure 21).
- 1.4.4. Advocate to the NSW Government to designate existing industrial land around Blackjack Road as regionally significant, potentially supporting precinct expansion, as part of rezoning the lands.
- 1.4.5. Develop a structure plan and staging plan for the Industrial land to the west of Gunnedah CBD to support certainty for future rezoning, and as part of the process liaise with state agencies, such as Transport for NSW and Crown Lands.
- 1.4.6. Conclude and implement the Development Servicing Plan (DSP) for the industrial precinct to support infrastructure provision to the area.

Strategic direction 1.5. Support the appropriate development of highway-adjacent land to the east of Gunnedah.

Lot 1/DP841781, at the intersection of the Oxley and Kamilaroi Highways east of Gunnedah, has recently been approved for the additional permitted use of a highway service centre. This approval needs to be managed to ensure minimal conflicts with surrounding rural land, appropriate building controls and traffic movement, as the site forms the major entrance to Gunnedah CBD. The Gunnedah Shire's Development Control Plan (DCP) should be amended to include specific place-based guidelines that support the site's employment potential alongside the functioning of adjacent land.

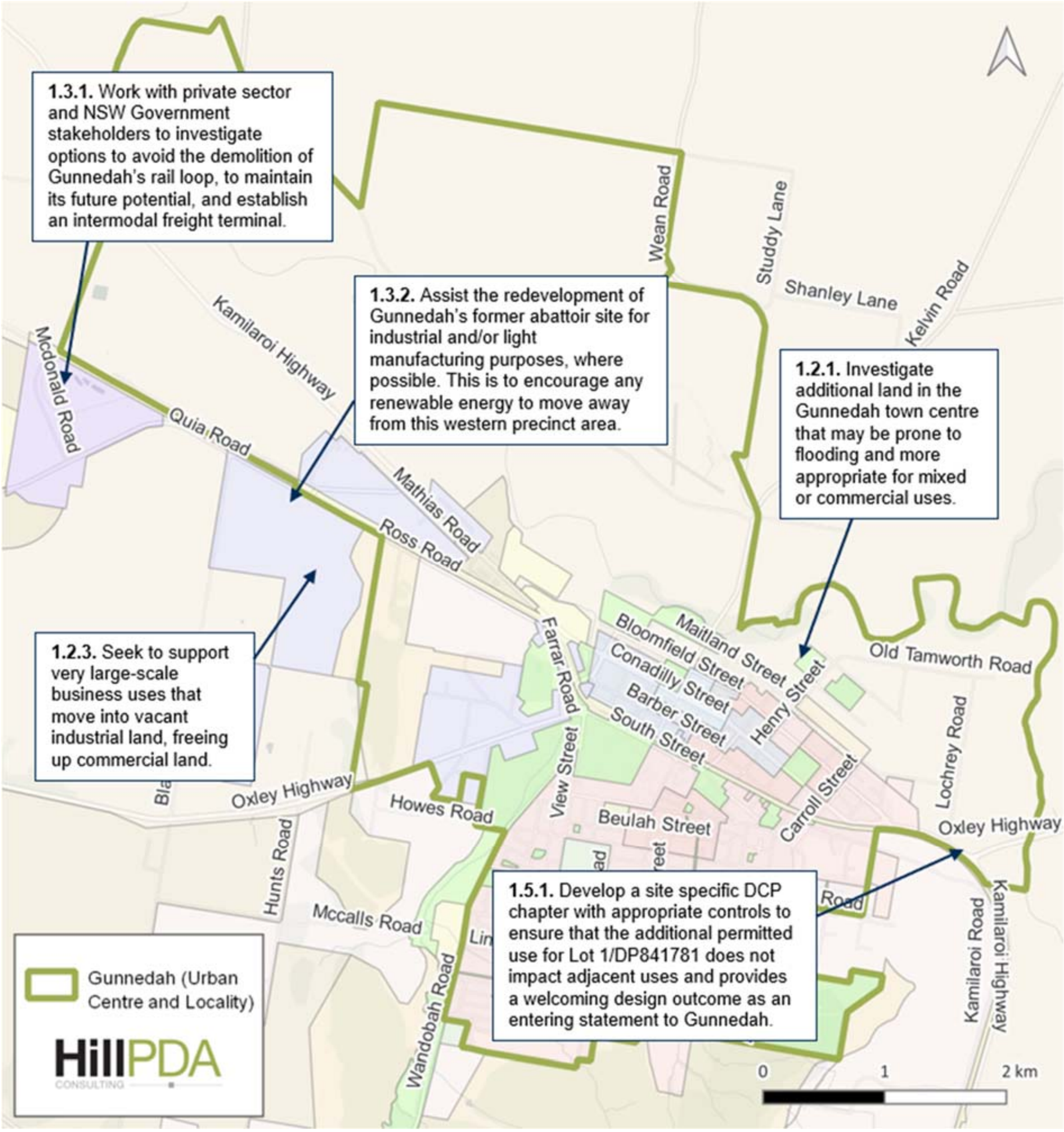
The below action supports the intended outcome of the site maximising its potential economic and employment use, while maintaining the integrity of adjacent sites.

Actions:

- 1.5.1. Develop a site specific DCP chapter with appropriate controls to ensure that the additional permitted use for Lot 1/DP841781 does not impact adjacent land uses (refer to Figure 22) and provides a welcoming design outcome as an entering statement to Gunnedah.

Figure 22 illustrates site-specific actions in their respective locations, in relation to Gunnedah.

Figure 22: Site-specific actions (theme 1)



Source: DPHI; CARTO; HillPDA

Theme 2: Support

The Gunnedah LGA has key industry strengths in agriculture, mining, wholesale trade, and other services, driving many of its employment land uses. To support the local economy, it is important to ensure employment land is available and functional. This includes maintaining the commercial viability of businesses in Gunnedah and its surrounding villages, where small-scale enterprises contribute to the LGA's broader economic base. It also includes ensuring that industrial land has the locational and infrastructure attributes to support businesses.

Growth in renewables and agribusiness sectors also create indirect and new business opportunities that rely on adequate land and infrastructure. This growth extends to supporting industries, such as energy manufacturing, engineering and support services; as well as agritourism, retail and wholesale trade.

Supporting industrial land will help to unlock new industry opportunities. Meanwhile, supporting public infrastructure in both Gunnedah and surrounding villages is necessary to sustain population-serving uses and enable future growth. Gunnedah's town centre contains opportunities for consolidating and enhancing commercial land uses, including through improvements to public amenity.

The following strategic directions and actions have been developed to support employment land in the Gunnedah LGA.

Strategic direction 2.1. Ensure that local planning controls support employment land.

Planning controls have the potential to support the functioning of employment land, through encouraging more businesses to develop and operate.

Minimum lot size provisions should be reviewed alongside community feedback to ensure that they enable the right kinds of industrial operators to locate in the LGA.

Future rezoned or identified industrial land on the west of Gunnedah shall provide a minimum lot size subdivision of 5,000sqm but preferably 1ha and larger to accommodate growing industrial/business needs. Planning applications within this western precinct should not support solar farms, but rather smaller scale renewable business as a biproduct of renewable energy. Support for agricultural use manufacturing or indirect business that support mining is also encouraged within the precinct.

The Namoi Regional Job Precinct may also provide opportunities for exempt and complying rural land uses that could provide additional employment and economic function.

The below actions seek to gain the outcome of both industrial and commercial land being well supported by planning controls.

Actions:

- 2.1.1. Ensure that minimum lot size provisions support larger industrial lots (0.5-1ha and above).
- 2.1.2. Once the Namoi Regional Job Precinct is confirmed, investigate possible exempt and complying uses to encourage investment and business on the identified lands.

Strategic direction 2.2. Use local planning initiatives to support commercial land in Gunnedah.

In addition to general planning controls, there are a range of options for Council to initiate commercial development and operation, particularly in central Gunnedah.

Land use permissibility could be reviewed in central Gunnedah's E1, MU1 and E3 zones to promote more commercial operations. Although these are already considered relatively flexible zones, additional future opportunities may arise for different types of development, creating a need for Council to monitor permissibility.

In the Gunnedah town centre, parking requirements can affect the viability of new commercial development, despite most streets permitting parking. As such, there is an opportunity to implement the Council's parking requirement policy in the CBD and encourage development, should Council consider it appropriate to do so. Businesses can also be encouraged to promote active transport with their staff which can be facilitated by linking in with Council's active transport pathways.

In addition to parking requirements, floor space ratio (FSR) could be changed in appropriate locations. This could achieve the twin benefits of improving development viability and concentrating commercial development in the Gunnedah CBD. On the land referenced in Action 2.2.5, or other land, a higher FSR could enable more development on amalgamated lots. It is recommended that Council give consideration of a potential increased FSR from 1.5:1 to 2:1 – 2.5:1.

The provision of additional 2,000sqm of office should be located within the Gunnedah CBD.

Council can assist the revitalisation of Gunnedah's town centre, by: -

- Installing place-based events and activations, and supporting the policy for outdoor dining and experiential retailing along Conadilly Street in particular
- Providing for LEP amendments to clause 2.8 to enable temporary pop up uses in the E1 zoned area to activate it and attract communities to visit the CBD.
- Incentivising, through planning controls, landowners to provide tree canopy and improved public domain outcomes to ensure a pleasant and functional public domain. These measures would help to bring more foot traffic into the Gunnedah CBD, growing businesses' customer bases and creating new marketing opportunities.
- Amending the LEP to include an incentive for a start-up workspace or business support hub within the CBD, which may not be included within the FSR.
- Amending the LEP to enable artisan food and drink industry to be included as an additional permissible use within the E3 zone in Gunnedah CBD.

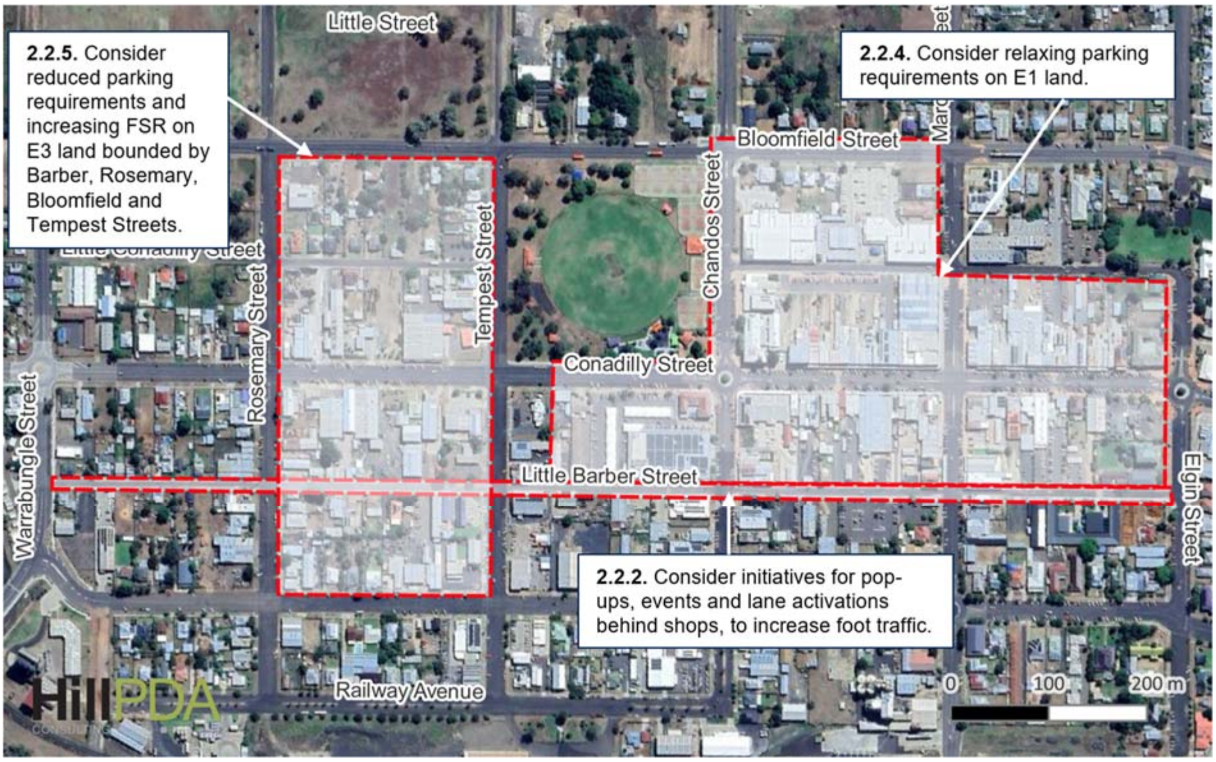
The below actions outline tasks that Council could undertake, to strengthen commercial performance in Gunnedah and its surrounds.

Actions:

- 2.2.1. Review land use permissibility in central Gunnedah CBD to encourage appropriate forms of retail trade.
- 2.2.2. Consider initiatives for pop-ups, events and lane activations behind shops, to increase foot traffic (refer to Figure 23).
- 2.2.3. Continue to deliver public domain improvements, to help activate central Gunnedah CBD.
- 2.2.4. Consider relaxing parking requirements on E1 land (refer to Figure 23) and linked with the Gunnedah Shire DCP 2025.

- 2.2.5. Consider reduced parking requirements and increasing FSR on E3 land bounded by Barber, Rosemary, Bloomfield and Tempest Streets (refer to Figure 23). Businesses can encouraged and promote active transport with their staff so to link in with Council's active transport pathways.

Figure 23: Site-specific actions (strategic directions 2.2)



Source: DPHI; CARTO; HillPDA

Strategic direction 2.3. Protect employment land uses in villages.

Employment land uses in villages may be considered particularly important, as they provide accessible jobs, goods and services to village communities. Villages may often have 1-2 key businesses, serving an important local economic role. As such, it is important to support the ongoing viability of employment land uses in villages, while fostering potential new enterprises.

Village-based businesses rely on adequate infrastructure to function. It is important that local road, drainage and other infrastructure be maintained in rural areas, to support businesses to function and receive visitors.

Due to low projected growth in villages, it is considered unlikely for any large-scale employment land uses to develop. However, there are opportunities for additional home-based businesses to operate, providing income streams and employment for village residents. Although the majority of the LGA's home-based businesses are concentrated in Gunnedah, Council could support more home-based businesses to operate at the village scale. This could be done by a development control plan (DCP) chapter, or other planning mechanisms, to provide basic guidelines for operation and to protect home-based businesses as a village land use.

The below actions seek to enable village-based businesses to continue to operate their economic function in rural communities.

Actions:

- 2.3.1. Support the functioning of village-based businesses, by continuing to deliver required infrastructure.
- 2.3.2. Consider a new chapter of the DCP or other arrangements to encourage more home-based businesses in villages.

Theme 3: Attract

The Gunnedah LGA's ongoing economic wellbeing will rely on attracting employment land users, in 2 key ways. Firstly, although mining will continue to guide the LGA's growth in the near-to-medium term, longer-term security will rely on economic diversification. This will include the growth of the renewables sector, which has the potential to generate jobs in a range of ancillary industries. Secondly, there is an ongoing need to attract businesses that leverage the LGA's existing strengths, such as shorter-term businesses linked to the mining industry, and population-serving industries that use goods, workforces and attributes already present in the LGA.

Attracting businesses and other uses of employment land is particularly important to boost the LGA's competitiveness alongside surrounding areas. The strategic directions and actions below seek to attract businesses to Gunnedah Shire that may otherwise choose to locate in comparable areas.

The following strategic directions and actions have been developed to attract desirable employment land uses to the Gunnedah LGA.

Strategic direction 3.1. Ensure that land is fit for industry needs.

The economic and employment potential of the LGA's employment land will be maximised by leveraging local strengths, supporting new opportunities, and boosting local competitiveness (especially with adjacent areas).

Attracting businesses to the LGA requires delivering the right infrastructure, while limiting costs to developers. Council is currently reviewing development servicing plans, which could identify opportunities to lower costs at the time of development. These opportunities should be considered, to ensure that developers are attracted to the LGA, and not to other areas with affordable servicing fees. Simultaneously, it is important to ensure that key infrastructure is in place to support Gunnedah Shire's industries. Power infrastructure is particularly important for the growing renewables sector, while potential supporting industries would benefit from water, sewer, road and drainage servicing.

Cultivating industries that support renewables will be important in maximising the LGA's economic benefit. There could be opportunities for manufacturing, machinery/equipment, and support services to develop alongside local renewable energy projects. There is a role for Council to engage with the market to identify if there are any particular land needs that would support these industries becoming established in the LGA.

Although the positive employment contribution of renewables is typically indirect, there are some forms of renewables that may have direct livelihood benefits for the community. Council should consider opportunities for circular economy land uses, which may require heavier industrial zonings. Regarding agribusiness, attracting opportunities to leverage existing strengths as the Namoi Regional Job Precinct is delivered, including in villages. This may mean partnerships with other Namoi regional councils and state government to ensure ongoing support for the economy.

The below actions seek to maximise local competitiveness by ensuring that employment land attributes are matched to industry needs.

Actions:

- 3.1.1. Review development servicing plans, identifying opportunities for affordable costs and to boost local competitiveness.
- 3.1.2. Ensure adequate power, water, sewer, road and drainage infrastructure to support the competitiveness of renewables and other industries.
- 3.1.3. Engage with the market to determine land needs for industries that support the renewables sector and make necessary planning framework changes to support the employment economy.
- 3.1.4. Explore the future use of heavy industrial land for circular economy opportunities.
- 3.1.5. Explore agribusiness opportunities relating to the Namoi Regional Job Precinct, including in villages.

Strategic direction 3.2. Encourage new commercial businesses to establish in Gunnedah Shire.

As the LGA's population grows, there will be new opportunities for commercial businesses to establish locally. The local value of these businesses would be maximised by leveraging the LGA's existing assets. There are several options that Council can use to support this occurring.

The NSW Government introduced Agritourism Reforms in 2022 that enable farm stay accommodation as exempt or complying development on RU1- and RU2-zoned land. Given Gunnedah Shire's strong agricultural output and reputation, there are opportunities for farm operators to diversify their business by providing such accommodation. To assist this process, Council may consider publicly communicating options available to local operators.

The Gunnedah Shire saleyards is a key local site, generating consistent economic activity in a well-placed position. There is the potential to further leverage its local contribution by Council or the landowner becoming involved in events on ancillary land. This would coincide with the delivery of the saleyard's masterplan, furthering its contribution to local culture, economy and employment.

There is also opportunity for Council to encourage new commercial businesses by assisting the delivery of experiential tourism offerings. With natural assets such as Lake Keepit and national parks, the LGA has the potential to grow its experiential tourism profile, which would bring positive benefits to existing and new commercial businesses.

The below actions seek to achieve the outcome of commercial business operators being encouraged to establish in Gunnedah Shire, as well as surrounding areas in the LGA, maintaining its commercial competitiveness.

Actions:

- 3.2.1. Provide public communication about state-wide agritourism reforms that may create more opportunities for agribusiness operators, particularly with regard to farm-stay accommodation.
- 3.2.2. Seek opportunities to host pop-up/market events on ancillary land (car park area or associated café/kiosk area) within Gunnedah Saleyards, as the site's masterplan is delivered.
- 3.2.3. Consider working with the private sector to deliver experiential tourism offerings.

Strategic direction 3.3. Raise Gunnedah Shire's profile as a place to do business.

As the local population grows, there is the opportunity for Gunnedah Shire's profile to be boosted as a location for regional businesses. Council can support this shift by encouraging new enterprises and supporting existing ones, particularly the annual AgQuip event.

Although the AgQuip event currently generates local jobs and economic activity, its contribution can be furthered through Council efforts to further raise the profile of the event, and to attract related tourism into the LGA, including through supporting local accommodation.

Council can generate local opportunities for start-ups and commercial enterprises. In particular, there is the option to collaborate with AusIndustry to scope locations for a start-up workspace. Council-owned land on Marquis Street may create one location where this can occur.

The below actions are oriented around boosting Gunnedah Shire's reputation among the business community, as a strong regional location in which to operate.

Actions:

- 3.3.1. Consider arrangements to incentivise start-up/commercial enterprises in Gunnedah, including through using Council-owned land on Marquis Street.
- 3.3.2. Continue to scope locations for a start-up workspace in Gunnedah, in collaboration with AusIndustry.
- 3.3.3. Continue to raise the profile of AgQuip as a significant regional event unique to Gunnedah Shire.
- 3.3.4. Seek to provide more local accommodation opportunities to leverage attractions such as AgQuip, including through public campgrounds or a tourist park.

8.4 Implementation Plan

This section outlines an Implementation Plan to realise the strategic directions and actions of the Strategy and guide its delivery. For each action, the Implementation Plan indicates Council's role, partners for collaboration, and the priority of the action.

To understand the Implementation Plan we provide the following explanation of meaning:

Council's role

Council will play different roles in the implementation of this Strategy. These will vary between the roles of Planner, Advocator, Collaborator, Deliverer, Facilitator/Educator and Regulator. A description of these various roles is provided below.

- Planner: implementing strategic planning responsibilities
- Advocator: representing community needs and interests to Commonwealth and State Governments and to the private sector
- Collaborator: working closely with businesses, industry, developers, investors, government departments and agencies and peak bodies
- Deliverer: coordinating delivery of community facility, service, works or products
- Facilitator/Educator: providing information to prospective investors, businesses and interest groups
- Regulator: ensuring that employment land meets urban planning, building and public health regulations and expectations.

Partners for collaboration

Council will have a range of potential partners for collaboration in delivering the Strategy. These are defined below.

- AusIndustry: program within Federal Department of Industry, Science and Resources
- DPHI: NSW Department of Planning, Housing and Infrastructure
- DPIRD: NSW Department of Primary Industries and Regional Development
- Service providers: public and private infrastructure providers
- Private sector: businesses and landowners
- TfNSW: Transport for NSW
- Other.

Priority

Actions have been prioritised into short, medium and long term, or ongoing (to be completed over the lifetime of the Strategy). Priorities should be periodically reviewed and reassessed in line with available budgets, resources and funding opportunities. Priorities are defined below.

- Short: action to occur over the next 1-2 years
- Medium: action to occur over the next 2-4 years
- Long: action to occur over the next 5+ years
- Ongoing: action to be undertaken on an ongoing basis.

Table 25: Implementation Plan

Strategy	Action	Council's role	Partners with Council	Priority
1.1. Ensure adequate supply of zoned and serviced industrial land.	1.1.1. Prioritise the delivery of employment land with larger lot capacities (0.5-1ha and above).	Planner	N/A	Medium
	1.1.2. Consider the provision of more heavy industrial land.	Planner	N/A	Medium
	1.1.3. Undertake infrastructure planning to scope the feasibility of extending sewer and water servicing for potential new land releases.	Planner	Service providers / private sector	Short
1.2. Ensure adequate supply of well-located commercial land.	1.2.1. Scope market interest in changing commercial zones in the Gunnedah town centre area.	Collaborator	Private sector	Ongoing
	1.2.2. Seek to support very large-scale business uses moving into vacant industrial land, freeing up commercial land (refer to Figure 22).	Collaborator	Private sector	Ongoing
	1.2.3. Identify and support opportunities for more appropriate use of land zoned E1 and E3 in the Gunnedah town centre that may be affected by flooding.	Planner	N/A	Medium
	1.2.4 Develop and implement as required, a zoning regime that supports identified expansion of employment zones in existing urban areas in and around the Gunnedah CBD.	Planner	N/A	Short
1.3. Progress the delivery of key employment precincts.	1.3.1. Work with private sector and NSW Government stakeholders to investigate options to avoid the demolition of Gunnedah's rail loop, to maintain its future potential, and establish an intermodal freight terminal.	Collaborator	Private sector / TfNSW	Long
	1.3.2. Assist the redevelopment of Gunnedah's former abattoir site for industrial and/or light manufacturing purposes, where possible. Redevelopment of the site should encourage support for the proposed industrial precinct area.	Collaborator	Private sector	Ongoing
1.4. Establish new industrial land to the west of Gunnedah CBD.	1.4.1. Work with landowners to facilitate appropriate small-scale industrial expansion in the short-term.	Collaborator	Private sector	Short
	1.4.2. Engage with Transport for NSW to identify options for improving highway access in areas for potential staged industrial rezoning west of Gunnedah.	Advocator	TfNSW	Medium
	1.4.3. Establish an investigation area to provide industrial land north-west of Allgayer Dr precinct, between Kamilaroi Hwy and the railway line.	Planner	N/A	Short
	1.4.4. Advocate to the NSW Government to designate existing industrial land around Blackjack Road as regionally significant, potentially supporting precinct expansion.	Advocator	DPHI	Short

	1.4.5 Develop a structure plan and staging plan for the Industrial land to the west of Gunnedah CBD to support certainty for future rezoning.	Planner	N/A	Short
	1.4.6. Conclude and implement the DSP for the industrial precinct to support infrastructure provision to the area.	Planner	Service providers	Short
1.5. Support the appropriate development of highway-adjacent land to the east of Gunnedah.	1.5.1. Develop a site specific DCP chapter with appropriate controls to ensure that the additional permitted use for Lot 1/DP841781 does not impact adjacent land uses (refer to Figure 21) and provides a welcoming design outcome as an entering statement to Gunnedah.	Regulator	DPHI / private sector	Ongoing
2.1. Ensure that local planning controls support employment land.	2.1.1. Ensure that minimum lot size provisions support larger industrial lots (0.5-1ha and above).	Regulator	DPHI	Ongoing
	2.1.2. Once the Namoi Regional Job Precinct is confirmed, investigate possible exempt and complying uses to encourage investment and business on the identified lands.	Planner	DPHI / DPIRD	Short
2.2. Use local planning initiatives to support commercial land in Gunnedah.	2.2.1. Review land use permissibility in central Gunnedah to encourage appropriate forms of retail trade.	Regulator	DPHI	Medium
	2.2.2. Consider initiatives for pop-ups, events and lane activations behind shops, to increase foot traffic.	Deliverer	Private sector	Short
	2.2.3. Continue to deliver public domain improvements, to help activate central Gunnedah.	Deliverer	N/A	Ongoing
	2.2.4. Consider relaxing parking requirements on E1 land (refer to Figure 23) and linked with the Gunnedah Shire DCP 2025.	Regulator	N/A	Medium
	2.2.5. Consider relaxing parking requirements and increasing FSR on E3 land bounded by Barber, Rosemary, Bloomfield and Tempest Streets.	Regulator	N/A	Medium
2.3. Protect employment land uses in villages.	2.3.1. Support the functioning of village-based businesses, by continuing to deliver required infrastructure.	Deliverer	N/A	Ongoing
	2.3.2. Consider DCP or other arrangements to encourage more home-based businesses in villages.	Planner	N/A	Short
3.1. Ensure that land is fit for industry needs.	3.1.1. Review development servicing plans, identifying opportunities for affordable costs and to boost local competitiveness.	Planner	Service providers / private sector	Short
	3.1.2. Ensure adequate power, water, sewer, road and drainage infrastructure to support the competitiveness of renewables and other industries.	Deliverer	Service providers / private sector	Medium

	3.1.3. Engage with the market to determine land needs for industries that support the renewables sector.	Collaborator	Private sector	Short
	3.1.4. Explore the future use of heavy industrial land for circular economy opportunities.	Planner	DPHI/ private sector	Medium
	3.1.5. Explore agribusiness opportunities relating to the Namoi Regional Job Precinct, including in villages.	Planner	DPIRD / private sector	Short
3.2. Encourage new commercial businesses to establish in Gunnedah Shire.	3.2.1. Provide public communication about state-wide agritourism reforms that may create more opportunities for agribusiness operators, particularly with regard to farm-stay accommodation.	Facilitator / Educator	DPHI	Short
	3.2.2. Seek opportunities to host pop-up/market events on ancillary land (car park area or associated café/kiosk area) within Gunnedah Saleyards, as the site's masterplan is delivered.	Deliverer	Private sector	Short
	3.2.3. Consider working with the private sector to deliver experiential tourism offerings.	Collaborator	Private sector	Medium
3.3. Raise Gunnedah Shire's profile as a place to do business.	3.3.1. Consider arrangements to incentivise start-up/commercial enterprises in Gunnedah, including through using Council-owned land on Marquis Street.	Collaborator	Private sector	Short
	3.3.2. Continue to scope locations for a start-up workspace in Gunnedah, in collaboration with AusIndustry.	Collaborator	AusIndustry	Ongoing
	3.3.3. Continue to raise the profile of AgQuip as a significant regional event unique to Gunnedah Shire.	Facilitator / Educator	Private sector	Ongoing
	3.3.4. Seek to provide more local accommodation opportunities to leverage attractions such as AgQuip, including through public campgrounds or a tourist park.	Deliverer	Private sector	Medium

8.5 Consistency with State Plans and Policies - New England North West Regional Plan 2041 and Planning Directions

The Employment Land Strategy strategic directions and actions support, and are consistent with the relevant state environmental planning policies objectives, the New England North West Regional Plan 2041 and retains Gunnedah CBD as a strategic centre to service the surrounding rural catchment, supports the growth associated with new economic initiatives and the social and economic sustainability of the LGA.

In particular, the strategic direction and actions achieve:-

- Objective 1 – the strategy identifies growth areas for employment lands that take into consideration environmental lands and future servicing.
- Objective 2 - Protects viable rural lands and supports the Namoi Regional Jobs Precinct to ensure the critical mass for producers and opportunities for agribusiness and manufacturing within the Shire.

- Objective 5 – Enhances the diversity of the Gunnedah CBD by supporting the viability of the centre, recognising the place, promote opportunities for employment and support growth of the commercial and retail uses to cater for the communities needs.
- Objective 6 – it provides a coordinated supply of well located lands for employment opportunities and growth to meet future demand.
- Objective 9 – providing direction and growth to support renewable energy and technologies.

This ELS also achieves one of the priorities identified for the future of Gunnedah Shire, and supporting new jobs for Namoi Regional Jobs Precinct. The ELS also provides direction to justify inconsistencies with Focus Area 1 Planning System, Focus Area 7 Industry and Employment and Focus Area 9.2 Rural Lands of the section 9.1 Ministerial Directions.

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