



Edward River Industrial Land Background Report

Prepared for Edward River
Council

June 2021

HiIPDA
CONSULTING

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Quality Assurance

Report Contacts

Alex Peck

Consultant

BSci BSocSci MPlan MPIA

Alexander.Peck@hillpda.com

Supervisor

Elle Clouston

Acting Principal

B RTP Hons 1A MPIA MUDIA

Elle.Clouston@hillpda.com

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P20007 - Edward River Industrial Land Background Report and Strategy

Executive summary

The Edward River Industrial Land Strategy provides a concise representation of industrial land issues and opportunities within the Edward River LGA. The strategy has been prepared to guide the Council in planning for potential future growth in industrial land use, particularly in ensuring that appropriate land is available for future industry.

The key objectives of the strategy are to:

- Build on the key strengths identified in the *Economic Development Strategy* being market access, manufacturing, light industry, warehousing and agriculture
- Address supply and demand issues with a focus on the supply of land for larger industrial uses who require sites with an area greater than one hectare
- Provide actions to assist in overcoming 'land banking' issues which are hampering the supply of industrial land
- Identify areas for future expansion of industrial land where supported by a supply and demand analysis
- Identify actions to support the development of land in proximity to the airport that will support its redevelopment as a freight hub and in particular a business park
- Determine a servicing plan to provide infrastructure to existing and future zoned industrial land which is currently not serviced.

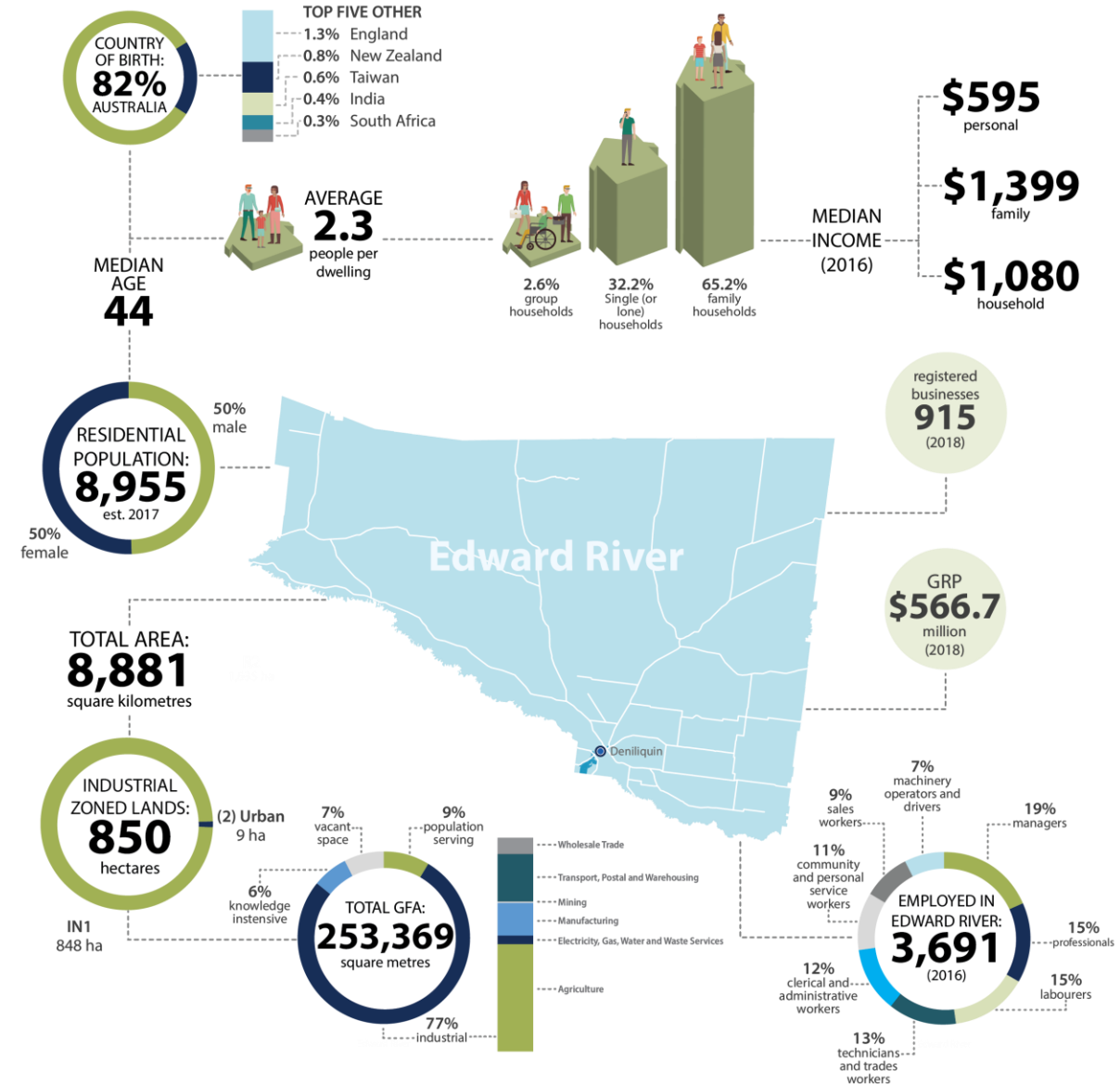
This strategy provides a snapshot of the current industrial land usage within Edward River, informed through a survey of the industrial land itself and engagement with business, community and council stakeholders. As such, the strategy provides analysis around existing uses and identifies issues, opportunities and challenges for industry in Edward River.

Scope of study

Industrial land for the purposes of this audit is land zoned IN1 under the Deniliquin LEP 2013 and 2 Urban under the Deniliquin 1997 LEP, which continues to apply to the River (Davidson Street) precinct. These areas are located entirely within the former Municipality of Deniliquin, and therefore the town of Deniliquin itself.

The strategy is informed by a comprehensive review of current policy, literature and market trends to ensure alignment with the broader strategic context and appropriate response to the local context and market need.

Socio-economic profile



Land use audit

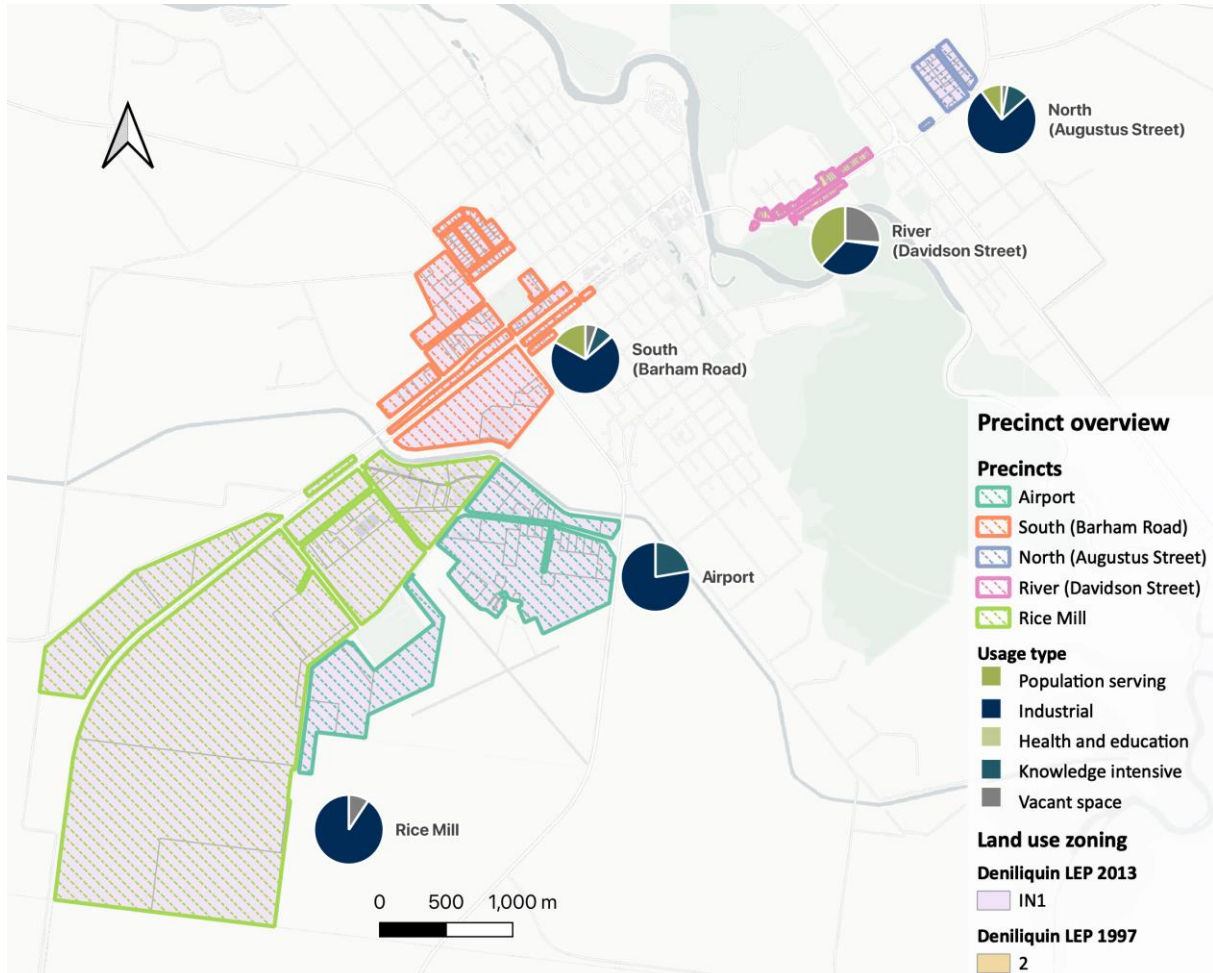
To inform the employment land analysis and gauge future land and planning requirements, HillPDA undertook a detailed floorspace audit. As part of the on-ground audit, HillPDA representatives visited each industrial precinct. For each lot, the surveyor noted down the business name/s; the industry type/s at the ANZSIC 1-digit code level or broad retail type; the proportion of the building the business was occupying and the level in the building. Building envelope data was mapped against the cadastre with the total building gross floor area (GFA) calculated per lot. The GFA was then matched against the on-ground audit data, producing a profile of GFA for each usage category at a lot level. ABR data and internet searches were used to spot check information.

Industrial precincts

As part of the audit, five precincts were identified within the LGA. These precincts provided around 850 hectares of appropriately zoned land.

The land use audit found that the five employment precincts contained around 253,369 square metres of employment and residential space.

Precinct overview with land use breakdown



Future floor space requirements in the LGA have been forecast based on long term growth in residents aged 15 years and over, combined with existing employment trends in the LGA. Modelling these trends, it is estimated that occupied floor space requirements will increase from 234,588 square metres in 2016 to between 238,675 square metres and 242,930 square metres by 2041. This represents an increase of between 4,086 square metres and 8,342 square metres over the period.

Typically, employment precinct development in more built-up centres has a developable floor space ratio (FSR) of around 0.3:1. Applying this average FSR to the forecasted increase in floor space results in demand for an additional 1.4 to 2.8 hectares of land. In rural locations, the built FSR can be lower, as is the case in Edward River. Applying the average built FSR for Edward River industrial land would result in demand for an additional 2.3 to 4.6 hectares.

While the amount of existing floor space and land is adequate to meet this forecast demand, there are limited lots that are vacant, serviced, and available for immediate development. Furthermore, to respond to the directions in the Economic Development Strategy and position the LGA to take advantage of any new opportunities, it was identified that a greater diversity of land offering would be beneficial.

The Strategy identifies strategic directions and actions to promote and attract industry investment and prepare the LGA for future opportunities.

Delivering employment lands for a sustainable future will require some decisive actions by Council. Five strategic directions have been identified to guide the supply, development and utilisation of employment lands in Edward River LGA.

1

Promote that Edward River is ‘open for business.’

1. Consider the development of an industrial investment prospectus
2. Fast-track industrial development applications and processes
3. Work with proponents to resolve development issues early
4. Develop and maintain a local industry capability database
5. Host and support local industry capability building workshops
6. Develop a standalone ‘business and industry’ tab on the Council’s website.

2

Target key industries for attraction and expansion

1. Target industries including manufacturing, renewables, heavy and ‘dirty’ industry, aviation, agri-business and transport, logistics and warehousing
2. Undertake key industry engagement
3. Identify external industry forums and trade shows to represent and promote Edward River
4. Facilitate connections and partnerships with TAFE NSW, high schools and local businesses
5. Actively promote business support services
6. Advocate for improvements in the allocation of water for farmers and industry
7. Develop a fact sheet to inform businesses and potential investors on water allocation options in Edward River
8. Encourage local makers and creators in the LGA to enhance productivity and become small-scale start-up businesses.

3

Secure a pipeline of employment land

1. Consider rezoning the land in the River precinct to B6 Enterprise Corridor
2. Consider releasing more land to the north of the existing South Precinct along Ochertyre Street
3. Consider releasing more land to the east of the current North Precinct
4. Consider developing a land register of existing property owners interested in selling land for industrial purposes
5. Consider reviewing and updating LEP planning permissibility tables
6. Consider amending the development control plan to streamline controls and reduce complexity
7. Consider developing a detailed infrastructure program that establishes timeframes and feasibility for trunk infrastructure delivery
8. Consider developing an early infrastructure delivery policy.

4

Provide development support and partnership opportunities

1. Prepare a development application template
2. Utilise an independent development assessment officer
3. Prepare a register of local consultants
4. Consider opportunities to enter into joint ventures with potential industrial developers
5. Establish a business assistance program that actively supports businesses to navigate the legislative, business and planning framework.

5

Enhance and promote lifestyle and services

1. Consider undertaking a centre activation strategy
2. Continue to deliver the main street program
3. Continue to attract and support the growth of events and festivals
4. Facilitate and empower the community to develop and launch a Deni brand
5. Develop, establish and promote a regular Deniliquin town evenings and weekends event program.



INTRODUCTION

1.0 INTRODUCTION

HillPDA has been engaged by Edward River Council to undertake a review of the industrial lands within the Edward River Local Government Area (LGA) and produce a strategy that analyses existing issues in the provision of industrial lands and presents future opportunities.

1.1 Background

Edward River Council formed in 2016 following the amalgamation of the former Conargo Shire and Deniliquin Council. Council currently has several projects focussed around improving the economy and making Edward River a great place to live. The Deniliquin Airport expansion project is of particular relevance to this study. The airport is a critical piece of infrastructure essential to addressing the need for improved air services to and from the region as well as supporting several agribusinesses and emergency services.

Riverina Murray Regional Plan 2036 establishes a framework to grow the region's cities and local centres, support the protection of high-value environmental assets and make developing a strong, diverse and competitive economy central to building prosperity and resilience in the region. It guides the NSW Government's land use planning priorities and decisions for the next 20 years, providing an overarching framework to guide subsequent and more detailed land use plans, development proposals and infrastructure funding opportunities.

The *Edward River Community Strategy Plan (CSP)* identifies targets that assist the community in providing a strong economic future with the development of key assets that will support various industries and businesses. Council seeks to ensure its future by providing employment and training opportunities. Council also understands the need to provide for its built environment with a strong infrastructure base.

The *Economic Development Strategy 2018-2021 (EDS)* identifies several actions that directly relate to the development of the Industrial Land Study based around the six strategic themes of:

- Attract new business investment
- Support existing businesses to grow
- Infrastructure provision
- Innovation, education and skills development
- Revitalise and activate the CBD
- Market the region.

The above strategies and plans establish the foundations for the preparation of the Industrial Land Study.

1.2 Study objectives

The objectives of the study are to:

- Build on the key strengths identified in the EDS being market access, manufacturing, light industry, warehousing and agriculture
- Address supply and demand issues with a focus on the supply of land for larger industrial uses who require sites with an area greater than one hectare
- Provide actions to assist in overcoming ‘land banking’ issues which are hampering the supply of industrial land
- Identify areas for future expansion of industrial land where supported by a supply and demand analysis
- Identify actions to support the development of land in proximity to the airport that will support its redevelopment as a freight hub and in particular a business park
- Determine a servicing plan to provide infrastructure to existing and future zoned industrial land which is currently not serviced.

1.3 Scope of report

The Industrial Land Study is a planning review undertaken at an LGA level to align local planning with State Government objectives to understand future land requirements and suitable locations for growth. The report presents findings from research and does not represent the views of the Council.

Any land suggested for future employment purposes would need to be considered by the Council. There is no commitment to rezoning such land to business or industrial zoning through an amendment to the Local Environmental Plan. Rezoning is subject to a separate process. Any recommendations in the study are for the sole consideration by Council and are not Council’s policy or legislation.

To recognise changes in the market, a review of employment lands should occur every five years or so.

1.4 What are industrial lands

As defined by the Department of Planning, Infrastructure and Environment’s (NSW DPIE) Employment Lands Development Monitor (ELDM), employment lands are defined as:

“land zoned for industrial or similar purposes in planning instruments. They are generally lower density employment areas containing concentrations of businesses involved in manufacturing; transport and warehousing; service and repair trades and industries; integrated enterprises with a mix of administration, production, warehousing, research and development; and urban services and utilities.

They are vital to the functioning of our urban areas, providing space for:

- *Essential services such as waste and water management, repair trades and construction services*
- *Warehousing, logistics and distribution centres*
- *Areas for businesses that design, manufacture and produce goods and services”.*

Employment lands in Edward River primarily encompass land zoned as IN1 General Industrial. For this study, deferred areas zoned (2) Urban under the Deniliquin LEP (1997) are also included.

1.5 Location context

Figure 1: Geographic context showing major capitals



Figure 2: Context within Edward River LGA



Edward River LGA is in the rural Upper Murray region. The LGA is mostly rural with other small towns including Blighty, Booroorban, Conargo, Mayrung, Pretty Pine and Wanganella. The area's commercial, administrative and industrial functions centre on Deniliquin, which is also the major population centre.

Deniliquin is strategically positioned at the intersection of the Cobb and Riverina Highway and several other significant regional routes including the railway to Melbourne. Significantly, the town straddles the Edward River, offering the only crossing point for some distance in either direction. The town's history and development are linked strongly to the river and the surrounding farmland.

Industries within Deniliquin are oriented towards services for the agricultural businesses that occupy the rural areas surrounding the town, including equipment manufacturing, produce storage, saleyards, processing and transport. Consequently, these industries are highly susceptible to seasonal impacts. Current issues with the availability of irrigation water have heavily affected local farmers and that impact has flown on to businesses that rely on their custom. Moreover, this impact has altered the perception of viability for operating or undertaking business in the area.

Deniliquin's industrial areas are characterised by businesses of varying scale from hobby industries to significant regional enterprises, particularly associated with construction and road freight.

1.6 Consultation summary

Targeted stakeholder engagement with businesses and other related parties (as requested by Council) has informed this study. Consultation included semi-structured face-to-face interviews conducted with stakeholders in November 2019 and semi-structured telephone interviews conducted in November and December 2019.

Key issues that emerged included:

- Higher upfront costs for development
- Difficulty attracting skilled labour to the LGA
- Difficulty in securing finance for new ventures for major lenders
- Lack of affordable industrial land for expansion in certain areas
- Lack of infrastructure to support new industrial development in others
- Barriers to accessing and ease of the planning system.

The consultation informed the precinct analysis and profiles.



STRATEGIC POLICY CONTEXT

2.0 STRATEGIC POLICY CONTEXT

2.1 Regional

2.1.1 A 20-Year Economic Vision for Regional NSW (July 2018)

The plan identifies Edward River as forming part of the wider Murray Functional Economic Region (FER), classified as an inland region, which also includes Berrigan and Murray River LGAs. The FER is projected to experience the second strongest population growth amongst inland FERs. This vision aims for stronger regional economies and communities, driven through improved access to community services and education, enhanced connectivity between regional centres, improved digital service availability and by providing attractive environments in which to live and work. This vision aligns with NSW regional freight and transport strategies and the Riverina Murray Regional Plan.

2.1.2 Riverina Murray Regional Plan 2016-2036

The *Riverina Murray Regional Plan 2016-2036* establishes a framework for growth in the area's regional cities and local centres. It aims to support the protection of high-value environmental assets and makes developing a strong, diverse and competitive economy central to building prosperity and resilience in the region.

The Plan highlights the strategic location of the LGA for accessing east coast freight and logistics networks, particularly in the context of freight hubs and intermodal facilities and the opportunity afforded by better integrating these facilities with industrial precincts.

The Plan recognises the importance of growing agricultural and value-added manufacturing sectors, particularly in the context of access to regional transport networks, which afford excellent access to overseas export markets.

The Plan also highlights the importance of ensuring efficiencies in service provision between regional centres and that regional cities (Albury, Wagga Wagga and Griffith) are well-positioned to support smaller regional centres like Deniliquin.

Key goals:

- A growing and diverse economy:
 - Protect agricultural land
 - Promote and grow agribusiness (review local plans, prevent encroachment of incompatible land uses)
 - Expand advanced and value-added manufacturing (promote investment, encourage co-location of industries for efficiency)
- Efficient transport and infrastructure networks
- Strong, connected and healthy communities.

2.1.3 Murray Regional Economic Development Strategy 2018-2022

The *Murray Regional Economic Development Strategy 2018-2022* was developed through collaboration between councils across the Murray Functional Economic Region FER (consisting of Edward River Council, Berrigan Shire, Murray River Council, Campaspe Shire [Vic], Gannawarra Shire [Vic] and Moira Shire [Vic]). The Strategy sets out a long-term vision and plan for the economic development of the region.

The Strategy identifies three key sectors for action across the region, with (selected) priority actions to drive their delivery:

- **Enhance market access** and competitiveness for the agriculture and food product manufacturing sectors through strong transport infrastructure
 - Upgrade Echuca Moama bridge
 - Support planned improvements to rail connections from Deniliquin to Echuca freight connections
 - Implementation of the Deniliquin Airport Expansion project
 - Address issues at the Port of Melbourne that limit the ability of producers to get products to market in a timely fashion
- **Sustain and enhance utilities** such as water, energy and telecommunications to strengthen the agriculture and food product manufacturing sectors
 - Natural gas infrastructure enhancement in Deniliquin
 - Development of a CBD Masterplan for Deniliquin
- Continue to **develop and grow the tourism sector** to diversify the Region’s economy
- Boost and sustain the **supply of skilled workers** for the core industries of agriculture, manufacturing and tourism with regional skills development and attraction programs
 - Investigate options to develop a long-term workforce strategy for the Region
 - Investigate and work with existing education institutions to develop courses for regional needs
 - Development of a Regional Micro-Enterprise Strategy to attract professional, financial services, social services and allied health.

2.1.4 RAMJO Statement of Strategic Regional Priorities 2018-2022

The Riverina and Murray Joint Organisation (RAMJO) consists of NSW councils within the Murray Region extending north to Carrathool, east to Narrandera and Albury and west to Murray River. Key strategic priorities identified in the *RAMJO Statement* include:

- Improve water security
- Improve energy security and affordability
- Improve transport connectivity
- Improve digital connectivity
- Boost industry/workforce/jobs.

2.1.5 Regional Development Australia (RDA) Murray Strategic Plan 2019-21

RDA Murray Strategic Plan July 2019 to June 2021 incorporates ten local government areas across the Upper Murray, Albury, Riverina, Western Murray Valley and Sunraysia regions. It promotes economic growth across the region through partnerships with business and government at all levels. Most relevant amongst the RDA Murray’s strategic priorities are initiatives for the attraction of new business investment and growth of existing businesses across the Murray in a way that maximises opportunities, reduces costs and builds economic resilience. The plan also highlights the need to attract a skilled workforce and support population growth across the region.

2.2 Local

2.2.1 Edward River Community Strategic Plan 2018-2030

The *Edward River Community Strategic Plan 2018-2030* is positioned above all other Council plans and policies in the strategic planning hierarchy. The plan identifies the Edward River community's main priorities and aspirations for the future and outlines strategies to achieve them. Key focuses are:

- Diversify and grow agricultural production, pursue options for value-adding and develop opportunities for domestic and international export markets
- Champion the industries and sectors that underpin the economy
- Streamline processes and identify efficiencies to assist investors, developers, builders and event organisers
- Support education providers by advocating for funding, support and facilities
- Maximise funding opportunities to renew and upgrade the built infrastructure.

2.2.2 Edward River Economic Development Strategy 2018 – 2021

The *Economic Development Strategy* was developed as a framework to drive economic growth within the region and enhance the prosperity of Edward River.

Key strengths of the LGA were identified as:

- Lifestyle – including liveability, affordability and access to services
- Market access – referring to the region's position at the junction of major road freight routes, as well as at the railhead of a link to Port Melbourne and Geelong
- Healthcare and social assistance – including the existing hospital and aged care facilities
- Education – highlighting the density of education services in Deniliquin, including schools and the recent upgrades to the TAFE (Connected Learning Centre)
- Retail – highlighting Deniliquin's role as a regional retail centre and the importance of retail to the region as an employer
- Manufacturing, light industrial and warehousing – emphasising the concentration of manufacturers and engineers supplying the agricultural sector, as well as potential to attract similar industries that are being pushed out of Melbourne
- Tourism (the visitor economy) – built upon the region's natural assets, its festival calendar (the Ute Muster) and potential agritourism offerings
- Agriculture (food and fibre) – the agricultural strength and identity of the region, particularly cereals and opportunities in cotton

The strategy identifies five priorities areas to target economic growth, including:

- Agriculture
- Food production and value-adding
- Freight and logistics (road, rail and air)
- Arts, culture and creative economy
- Population and visitor growth.

Key relevant issues identified in the strategy were:

- Attracting and retaining employees
- Technology and communication
- Energy, particularly access to natural gas
- Water security and climate change

- Perceptions of a region in decline
- Limited business collaboration.

Six strategic themes were identified to support the implementation of the Economic Development Strategy. These included:

- Attract new business investment
- Support existing businesses to grow
- Provision of infrastructure
- Innovation, education and skills development
- Revitalise and activate the CBD
- Market the region.

These themes and relevant actions have been considered during the development of the Industrial Land Study.

2.2.3 Edward River Advocacy Strategy

The *Advocacy Strategy* arises from the Community Strategic Plan. It identifies five key areas of work in which the Council will need to collaborate with State and Federal Governments to achieve outcomes for the community.

The key initiatives relevant to industrial lands are:

- Deniliquin Airport Expansion (arising from Airport Masterplan)
- Upgrading Deniliquin High School (science labs, industrial arts/technology centre and the hospitality room)
- Murray Darlin Basin Plan – no farther reduction in productive water for the region
- A new truck stop with associated facilities near the Deniliquin Saleyards
- Mobile telecommunication blackspot improvement.

2.2.4 Edward River at Deniliquin Flood Study (2014)

This study consists of the local floodplain risk management options and plan, adopted by Edward River Council, as required by the NSW Government. Relevant directives from the plan include:

- Implement a Flood Planning Area (FPA) and associated mapping
- Application of flood controls in areas where a building entitlement exists which cannot be removed by voluntary purchase or rezoning to minimise risk over time
- Apply an appropriate zone to the Davidson Street (Deferred Matter) area
- Introduce flood controls via an updated DCP and Flood Planning Levels Policy
- Amend the Local Environment Plan
- Update Section 149 Planning Certificates within the FPA to reflect the associated risk level

The industrial areas which fall within the FPA are identified as part of the precinct profiles in Section 5.

2.2.5 Deniliquin Regional Airport Master Plan (2011)

The Airport Masterplan was prepared for the former Deniliquin Council to provide a roadmap for the future development of the airport in the context of it as an item of key infrastructure for the Riverina – Upper Murray region, as well as to guide development and maintenance of the facility by outlining future capital costs. The masterplan advocated for the expansion of emergency services facilities on the site, as well as charter and private aviator facilities. There is a longer-term goal to extend the runway to 1,950 metres to accommodate larger planes and, specifically, regular public transport services.

2.2.6 Deniliquin Airport Expansion Project Business Case (2018)

The Airport Expansion Project advocates for significant expansion of Deniliquin Airport into a regional air freight facility, with a particular focus on expanding the export of niche agricultural produce within the region.

The Business Case advocated for funding to:

- Extend the existing airport runway to 1,960 metres (from 1,214 metres) to cater for freight-dedicated Boeing 737s
- Develop a sophisticated export supply chain, via the Wellcamp Airport in Queensland, to access foreign export markets.

The Business Case envisioned that the exports would include a combination of fresh produce types (meat, nuts, fruits and vegetables). Further, it proposed the development of a business park on land within the airport site, including downstream produce processing and aviation-related industries (e.g. a flight school). At a later stage exploration of indoor farming initiatives were advocated south of the airport.

2.2.7 Deniliquin Airport Expansion Market Review and Opportunity Assessment (March 2019)

This report determines relevant business or aviation activities that Deniliquin Airport could capitalise on in the future, following an assessment of air freight opportunities. The report considered six areas of market opportunities:

- Flight training – continuing to develop a relationship with an existing part-time provider
- Aircraft maintenance – would develop with increased aircraft activity
- Residential airpark – likely with development of plans and marketing
- Aviation tourism – likely with investment in appropriate facilities
- Non-aeronautical development – the potential for the development of a business park
- Defence services – unlikely without strategic interest.

2.2.8 Deniliquin Airport Expansion (Agrifood Exports, July 2019)

This report explored the viability of specific recommendations in the Airport Expansion Business Case relating to agri-food exports. The report concluded that it is highly unlikely that there would be sufficient high-value agri-food freight to support a scheduled airfreight service and that the proposed alliance with Wellcamp would not be viable. The report suggested that the Council cannot rely on this as an export sector without water reforms and that council should undertake planning to protect and expand the agri-food sector in conjunction with nearby regional councils.

2.2.9 Draft Edward River Council Agribusiness Masterplan 2019-2024

The Agribusiness Masterplan aims to examine the state of the industry in Edward River and identify ways in which it can adapt and thrive amid changes in the economic and climate conditions. While predominantly focussed on agriculture, the plan prioritises leveraging existing infrastructure and industry, attracting capital for growth and ensuring that the workforce grows, and that knowledge is retained.

2.2.10 Draft Edward River Agribusiness Prospectus

The Agribusiness Prospectus has been developed as a document to be provided to prospective business investors considering Edward River Council as a potential business location. The prospectus highlights the areas key strengths and sectors of opportunity. While predominantly focussed on agricultural investment, the prospectus identifies leading and emerging industries where the LGA is competitive, including agricultural-supporting sectors such as agribusiness service providers, engineers, manufacturers and the presence of ample

warehousing and zoned land. The prospectus highlights the Council's capacity to assist in businesses interfacing with the planning system.

2.2.11 Deniliquin Natural Gas Feasibility Study

This study investigates the feasibility of constructing a natural gas pipeline to Deniliquin. Natural gas supply was identified as an essential energy supply for the potential expansion of industries in the town. The study concluded that it was not feasible to supply the town with gas, particularly due to network and supply constraints.

2.2.12 Deniliquin Masterplan (2018)

The Deniliquin Masterplan builds upon the Deniliquin Public Space Strategy to recommend opportunities for Council to improve liveability, accessibility, as well as create a sense of destination for the Deniliquin town centre. The masterplan predominantly focusses on design aspects but includes a recommendation to separate heavy vehicle and tourist movements through the town. Specifically, this is recommended at the Crispe Street-Cobb Highway intersection, directing heavy vehicle movements via the Cobb Highway bypass and smaller vehicles (tourists and potential tourists) via the town centre on Crispe Street (subject to RMS approval). This would see heavy vehicle movements refocussed along existing heavy vehicle routes around and through industrial areas.



TRENDS AND INFLUENCERS

3.0 TRENDS AND INFLUENCERS

Over the years, Deniliquin has been faced with a declining population, tightening water allocation and drought, which has had flow-on implications on the social and economic prosperity of the town. Despite these challenges, businesses and the Edward River community have remained resilient. Exploration of emerging trends and regional influencers may assist in identifying opportunities for greater employment and economic prosperity.

CONNECTIVITY



- Located at the junction of Cobb Highway, the Riverina Highway and several other major roads, Deniliquin is well-positioned to distribute to South Australia, Victoria, across New South Wales and southern Queensland. Growth in the transport and logistics industry would be dependent on strengthening in agribusiness or diversification to manufacturing, which would require the supply of product to and from the area.
- Positioned just north of the New South Wales and Victoria border, there is the capacity to provide a road train assembly area that enables coupling and decoupling of the road trains before they enter Victoria.
- Deniliquin benefits from direct access to a rail freight line to Melbourne. This creates an opportunity for a regionally significant intermodal terminal that can bring product directly from Victoria ports for road distribution. For an intermodal to work there needs to be a product that can be transferred back to Melbourne to reduce empty container movement. While the drought limits agriculture at the moment, there could be capacity to enhance manufacturing to contribute products for distribution. Any rail intermodal would be a long term option dependent on the growth of other industries.



Figure 3: Transport connectivity

LIFESTYLE AND COMMUNITY



- Edward River's strength is its community and the sense of belonging and connectivity you experience when in towns. Celebrating and promoting the rural lifestyle can assist in attracting workers to the area. Part of the lifestyle appeal is having services and infrastructure available that create opportunities for socialising and that make day-to-day life easier and more affordable. Like many regional councils, the cost of delivering services is more than the revenue that council receives. This makes it difficult for smaller regional councils to compete with larger centres to attract and retain residents. In the case of Deniliquin, Echuca and Moama are the larger competing centres that offer a greater diversity of services.
- While attracting 'tree changers' is typically associated with retirees, there is also opportunity to appeal to younger families and professionals that are seeking a more affordable and community oriented alternative to big town life. An active and vibrant main street, that provides a diversity of uses is always helpful when promoting a town. Strong education options and social and networking infrastructure are also important. Showcasing the successes of local businesses, development and innovations taking place with active advocacy for the region will show that the area is open for business.

INFRASTRUCTURE



- For industries to locate to an area, they need confidence that there is the available infrastructure to support their future growth and development. Having a clear plan to address infrastructure shortfalls and the timing for delivery can build confidence in the market. Current limitations include:
 - The capacity of the electrical network to facilitate the development of the Airport Precinct
 - Sewer and water connectivity to some properties, particularly to the south of the Airport and Rice Mill Precinct and in the North Precinct (sewer)
 - Limited road capacity, in some areas, for B-Double movement in the South (Barham Road).
 - While there are currently no water restrictions on town water in Deniliquin, the water allocations have restricted the availability of water supply for some industries across the Murray Region. Uncertainty regarding the allocation and availability of water has affected market sentiment across the region and can be a deterrent for businesses looking to relocate or establish.
 - The gravity-fed, low-pressure water system means that certain industrial development is required to have onsite water storage tanks to be able to meet fire safety standards. This can add expense for new development that can affect project viability.
 - Reticulated gas supply in Edward River LGA is unavailable, which can impede certain types of industries from establishing in the area. Edward River Council has previously investigated the availability of natural gas, and it is currently not a feasible option to pipe or truck in.
-

INVESTIGATION GROWTH INDUSTRIES **Renewables**



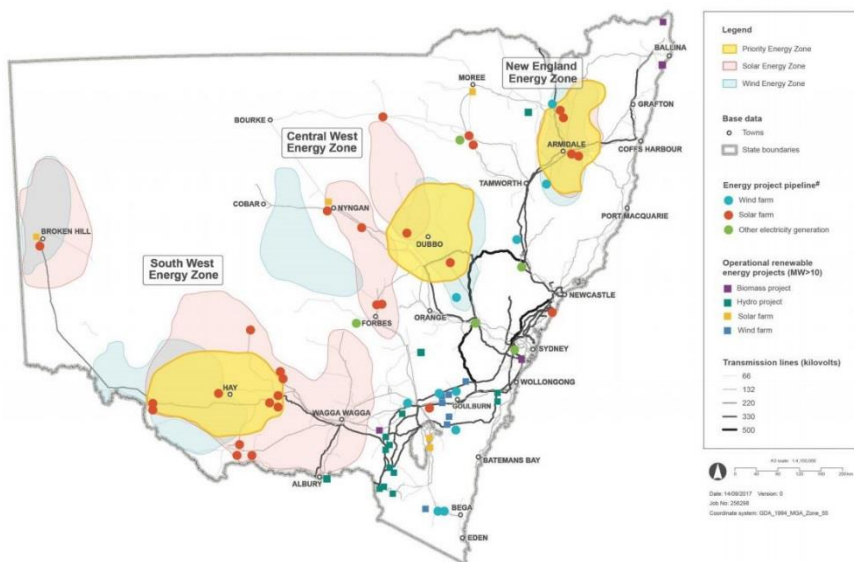
The take up of renewable energy is rapidly growing, with renewables supplying half of the National Electricity Market (NEM) for the first time in 2019. The introduction of new transmission infrastructure, like the proposed NSW-SA high voltage interconnector, and supply stabilising infrastructure, like the expanded Hornsdale Power Reserve (“Tesla battery”) in South Australia and Snowy 2.0 will add further viability to renewable energy projects, particularly in regional areas, with a better climate and more affordable land.

The proposed South West Renewable Energy Zone (REZ) will harness the additional transmitting capacity of the proposed NSW-SA interconnector with accompanying investment in local transmission infrastructure to drive renewables investment across the region.

Edward River LGA already sees some interest in this industry with two solar farms with DPIE approval in the LGA, and further regional investment could see this industry as an emerging specialisation for the wider area. This expansion of renewables would require additional industrial and administrative support, which could support growth within industrial areas around Deniliquin, as well as providing additional financial opportunity for farmers, particularly in times with lower water available.

Edward River’s northern regions are already well positioned to take advantage of this, but an expansion of the zone and accompanying infrastructure further into the LGA could yield greater advantages for Deniliquin itself. As such, renewable energy presents opportunities to diversify the region’s economy.

Further information: Renewable Energy Zones



The NSW Government, as part of the NSW Transmission Infrastructure Strategy, delivered in 2018, identified three future Renewable Energy Zones (REZs). REZs are defined as energy-rich areas in which coordinated development of new grid infrastructure allows the connection of multiple generators (such as solar and wind farms) in the same location.

The Central-West region is the planned location for the first pilot REZ because it benefits from significant existing investment and investor

interest, with around 4,500 megawatts of projects either approved or in the planning system, relatively low build costs, and a strong mix of energy resources. Already, there has been significant investment in energy projects in the region with localised solar projects, with the REZ and accompanying infrastructure allowing that investment to be scaled up to service a much wider region.

Of the other two planned zones, South West REZ will include regions in the north of Edward River LGA, to take advantage of the future NSW-SA high voltage interconnector, which is planned to pass near to Hay. The additional investment in localised grid infrastructure will present an opportunity for further specialisation in local industries towards servicing renewable technologies as well as providing opportunities for farmers and other landholders to diversify their income base, increasing resilience in drier conditions.



Agribusiness

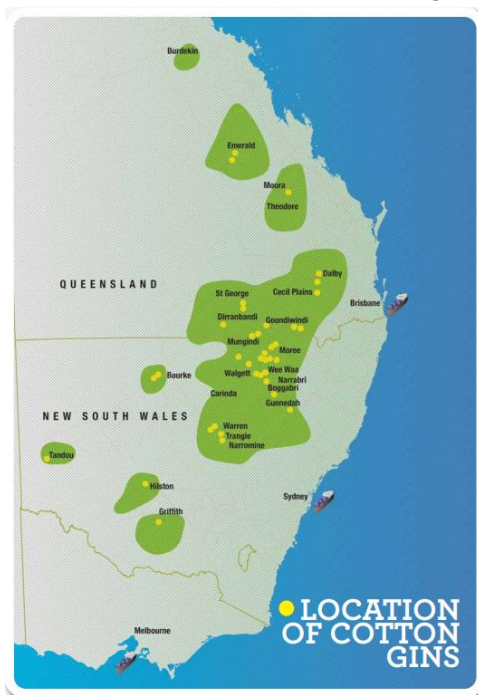
Agriculture continues to be the critical industrial driver for the region, with the greatest proportion of businesses, most considerable capital turnover and greatest number of employees operating in the agriculture, forestry and fishing sector. This has flow-on opportunities for agribusiness and related sectors. Deniliquin’s already has an evolving agri-business support sector with many established businesses providing services including food processing, land and produce sales, equipment fabrication and transport. While risks remain due to climate and water security, Edward River’s innovative and adaptive culture is seeing a shift to new opportunities.

The agricultural industry will continue to be at the forefront of regional development, leveraging the area’s natural endowments and continued strong demand for produce. Recent growth in cotton and the emerging opportunities of beef and lamb feedlots and vegetable processing create industrial land opportunities previously not seen in the region.

Downstream processing and agri-business supply chain support are opportunities worth further exploring on industrial land, particularly as land prices rise in the main processor areas of Shepparton and Echuca. There are also opportunities to foster greater partnership and entrepreneur interest by providing business support programs, promotion and networking opportunities. Driving continued innovation and workforce development through partnerships with education and research institutions would also support the sector. The agribusiness prospectus developed for Edward River LGA is positive step towards supporting the growth of this industry.

Further information: Cotton gins

Cotton gins are factories that support the processing of cotton, which involves separating the lint from the seed. As can be seen in the figure to the right, most of the Australian cotton gin



locate around the main cotton-growing areas in the north of the Murray Darling Basin. The reducing water allocations are driving farmers in the Riverina area to seek out improved returns per megalitre of water and see cotton as an attractive option. This will increase the demand for cotton ginning, with the highly accessible location of Deniliquin a reasonably good option, particularly considering the connections with the rail.

Similar to rice, cotton irrigation is water-intensive, and water allocations remain tight. The lack of rain and lower water allocations means that cotton farmers are yielding at significantly lower volumes. So, while cotton will likely be a stable commodity that can be leveraged in the future, it is still highly water-dependent.

Source: Cotton Australia 2013, Cotton Education Kit



Transport and logistics

The transport and logistics sector continues to play an essential role across regional NSW, with continuing growth in goods and an evolving technological landscape opening up new opportunities for transport related industries. NSW Government strategies highlight transportation as an existing strength and continued focus for the region.

While in urban centres, there exists a long-term employment risk from the introduction of autonomous vehicles, the infrastructure outlay required in regional areas means that the outlook for employment sees demand continuing to increase. On a local level, continued improvement in regional infrastructure, most notably the upgrade of the Echuca-Moama bridge, will improve the reach and capacity of existing road freight operations in Deniliquin.

The opportunity exists to further leverage the existing, mostly untapped, intermodal capacity associated with Deniliquin's railhead. The success of any venture in this regard will be dependent on the volume of freight that it can attract and quality of surrounding transport infrastructure to facilitate links into and from Deniliquin.

With an already strong transport and logistics base, it is important and necessary to ensure that road and land infrastructure is sufficient to meet their needs. This includes advocating on behalf of local industry with agencies at all levels of Government.



Fellows Bulk Transport - Successful transport logistics company in Deniliquin

Source: Trucksafe.com.au



Manufacturing and construction

The continued pressure for industrial conversion to residential and high demand (driven by e-commerce) for industrial space in Melbourne sees traditional urban service industries pushed out due to affordability. While western Melbourne is benefitting from the growth, some industries would still be finding it difficult to re-establish due to the rising land values.

Regional centres, which offer lower-cost industrial land, with an appropriate combination of nearby services and connections, can capitalise on this trend by capturing manufacturers no longer requiring or able to afford an inner-city location.

Edward River can capitalise on its existing complementary industrial base in engineering, fabrication, transport and logistics to position itself as a location of choice for prospective industries. Actively promoting and advertising the affordability of the region and making relocation attractive through incentives may help foster growth in the manufacturing sector. Opportunities to explore include pre-fabrication, steel product manufacturing, renewable product manufacturing (i.e. solar panels, water tanks) and transport equipment manufacturing. Encouraging local businesses to work together to drive innovation and promote the benefits of operating in the LGA can also strengthen interest (See case study).

Case study: Central Coast Industry Connect



Central Coast Industry Connect is a non-profit umbrella organisation of businesses and industries (manufacturing and related sectors) operating on the Central Coast of NSW. The organisation aims to establish links and foster connections between manufacturing, industry and business in the region. The organisation works in conjunction with all levels of government, local and regional education providers and the wider community to add wealth to the broader community and create opportunities for growth and development across the region.

In 2019, they launched the Central Coast Food Alliance; an industry-led food cluster with funding from Food Innovation Australia Ltd, a Commonwealth supported agency. The Alliance brings together specialised agribusiness and food processing businesses with education, research and development agencies, with a stated goal of driving local growth and innovation in the sector.



Aviation

Smaller regional airports have been capitalising on their additional available airspace and lower maintenance costs by offering space at lower prices. Recently residential sky parks have proven successful in driving tourism in centres with smaller airports, providing accommodation for tourists and aviation enthusiasts, including those looking for fly-in accommodation, for example in Temora (see case study). These businesses can operate at relatively low cost and draw in additional tourism and related aerospace services to regional airports.

With a continuing international and domestic pilot shortage, regional airports have seen an expansion to flight training facilities. In contrast, others have actively sought out smaller training providers to offer dedicated flight training services (see case study).

It continues to be a long term aspiration to develop the airport's capacity further, however, this remains contingent upon securing funding for the necessary infrastructure upgrades (particularly runway extension).

Case Study: Tamworth Regional Airport and BAE Systems Australia Flight Training



Photo credit: Peter Hardin 30 September 2019

Tamworth Airport's operation dates back to the Second World War and has retained defence infrastructure, private aviation training colleges, and the Westpac helicopter services. Tamworth Airport has two runways parallel to each other, each servicing commercial and non-commercial planes.

In 2015, a master plan was commissioned to give direction to the growing regional airport. To increase capacity for non-commercial aviation and training, additional hangars were planned, and an upgrade of aviation training facilities (BAE Systems) was undertaken.

The BAE Systems Australia Flight Training facility provides an integrated campus incorporating accommodation, education, training and maintenance facilities. It is considered a leading aviation training academy, holding military air force training contracts with the Australian, Singapore, Royal Malaysian, Royal Brunei and Papua New Guinea Air Forces.

The airport has experienced consistently positive outcomes from pushing to expand its existing industries with direct communication with institutions like Qantas and the Department of Defence. Council has already met with a number of state government departments regarding an airport freight strategy with State funding the main linchpin in unlocking the opportunity.

As the ADF centralise their pilot training facilities to Sale, new partners are coming on board to meet increased demand for commercial pilots with expanded specialised training facilities.

Further information: National pilot shortage



At present there is a global critical pilot shortage, with airlines across Australia and around the world requiring significant additional number of commercial pilots to meet growing demand¹. Australia is not immune from this shortage, with both Qantas and Virgin investing in in-house training programs in recent years to counteract the effects of an atrophying and ageing workforce. While two schools have been set up in regional locations, demand continues to be strong for additional pilots with Boeing predicting that 804,000 new pilots will be needed by 2038 to sustain the industry², with the Asia Pacific region leading that growth with demand at 266,000.

Smaller operators are struggling to find appropriately trained pilots to satisfy demand, with larger airlines drawing in skilled pilots. Opportunities exist to partner with flight training schools and smaller regional air operators (e.g. Rex, agricultural services, rural flying doctor services) to assist in providing space to train additional pilots.

Case study: Residential ‘Airpark’ Temora



Source: temora.nsw.gov.au

Residential Airparks (or Skyparks) are becoming increasingly popular across regional Australia, following on from their success in the USA where there are over 400 residential airparks. An airpark is a residential development within a regional airport precinct that provides direct access (within 100m) from home to hangar. The concept has been appealing to aviation enthusiasts and aviation business owners alike who see the convenience benefits. Residential lots generally vary from 1000sqm to 2500sqm.

¹ <https://www.abc.net.au/news/2018-07-22/airline-passengers-facing-perfect-storm-as-pilot-shortage-bites/10012624>

² <https://www.boeing.com/commercial/market/pilot-technician-outlook/>

NICHE INDUSTRIES Correctional facilities and prisons



Data from the Audit Office of NSW indicates that the NSW prison population grew by approximately 40 per cent between 2012 and 2018, an increase in growth rates over prior periods. The Department of Justice has initiated responses including doubling-up and tripling-up the number of prison beds in cells and reactivating previously closed prisons. The Audit Office concluded, however, that a longer-term strategy was needed to address the continuing increase, specifically through a larger scale, longer-term capital works program to meet the added demand.³

Land in rural areas is typically less expensive than the cost of land in cities and is, therefore, appealing for government or private prison operators. A more isolated location also makes escapes and land-use conflicts less likely.

There are numerous examples of additional employment and local expenditure that can accompany the development of a prison in a regional centre. There can also be a concern within the broader community about negative externalities. While the additional population and capital would support local retail and drive demand for services within the community, it can also affect land prices, community moral and be a disincentive to some investors.

Edward River's remote location and sufficiency of undeveloped land would be advantageous in the selection of a potential prison location. A detailed socio-economic impact assessment, including extensive community consultation, would need to be undertaken to determine if the benefits outweigh the negative impacts.



Recycling facilities

Waste reclamation and recycling continue to experience a rapid increase in demand, particularly from local government agencies. The recent issues around the export of recyclable items, coupled with the continuing expansion of demand for waste reclamation and recycling facilities, creates opportunities to site such facilities, where environmentally safe to do so.

The NSW Government, in its Circular Economy Policy Statement, identified the need to streamline the approval and operation of new recycling facilities as well as the expansion of existing facilities while balancing the safety of human health and the environment. It also identifies the need to partner with industry bodies and local government to develop the necessary capacity and demand.

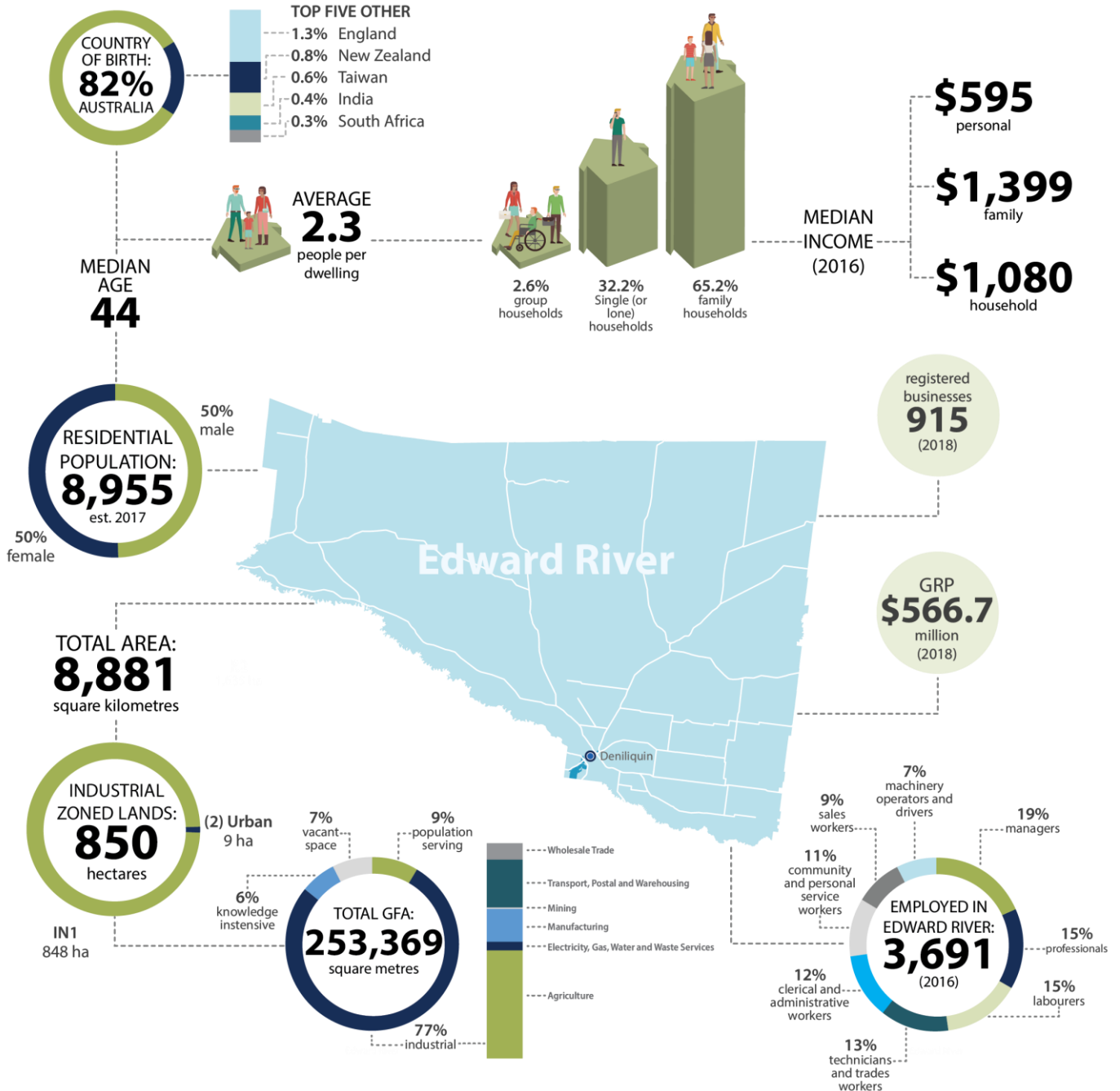
There also exist further synergies with Edward River's existing strengths in transport and logistics, particularly road freight, in collecting distributing recyclable items and products. Further expansion of other local industries like fabrication and manufacturing could also be developed around recycling.

³ <https://www.audit.nsw.gov.au/our-work/reports/managing-growth-in-the-nsw-prison-population>

SOCIO-ECONOMIC AND EMPLOYMENT

 RURAL FIRE BRIGADE
DENILIQUN

4.0 SOCIO-ECONOMIC AND EMPLOYMENT



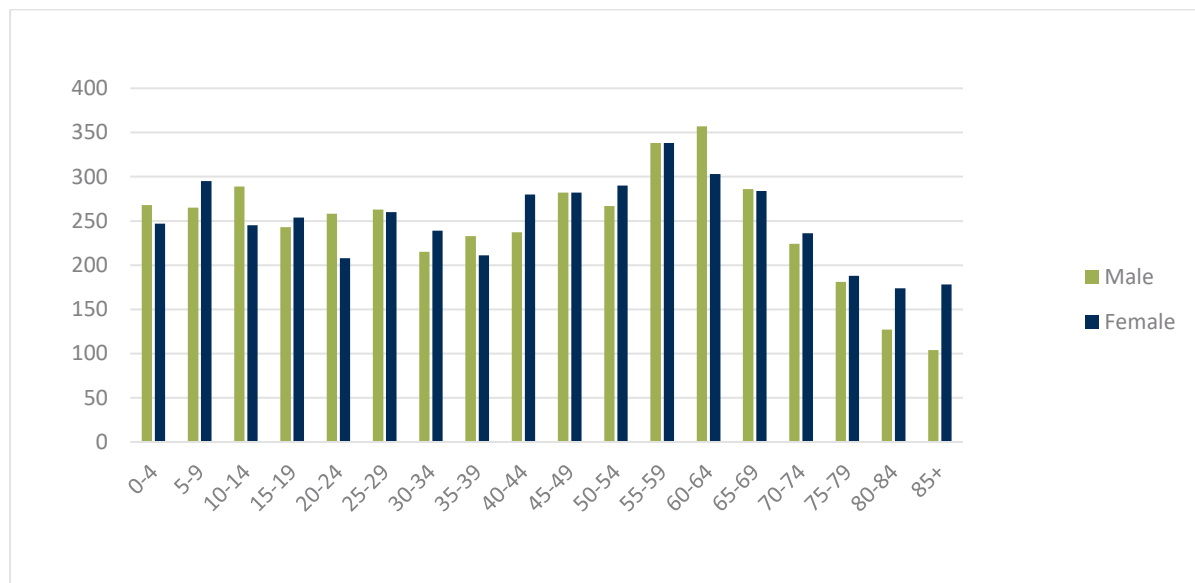
4.1 Socio-economic profile

4.1.1 Resident population and age composition

Over ten years to 2016, the population within Edward River decreased by a net 256 residents or 2.8 per cent, to 8,849 residents. ABS estimate that the population was approximately 8,955 as of 2017.

Over this period, the average resident of Edward River has become older, with the population aged 50 years and over increasing by 597, and population under 50 years decreasing by 853.

Figure 4: Edward River LGA age distribution



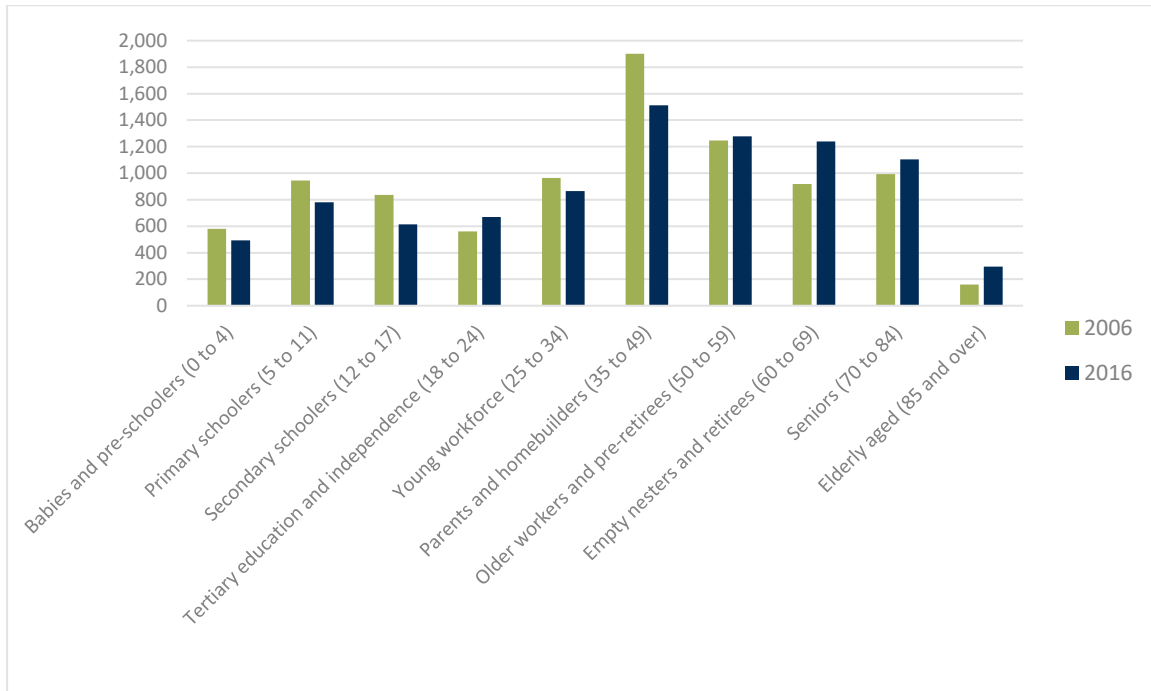
Source: ABS 2017

The median age of the LGA is 44 years old, about a year older than the median age for the Rest of NSW (GCCSA). Like most of regional NSW, Edward River has an ageing population.

The demographic of parents and homebuilders age (35 to 49 years), continue to be the largest demographic, making up 17 per cent of the population as of 2016. This is despite the age group also contracting the most rapidly over the decade to 2016 (-387).

Although the tertiary and independence age group (18 to 24 years) grew over the same decade (+100 persons), as a total proportion of the population, it declined (from 8 per cent in 2011 to 7.9 per cent in 2016). All other age groups under 50 years old contracted over the decade to 2016. As a result, the population of Edward River is displaying more rapid ageing, which would increase the demand for aged care and health-related services to be provided in and around Deniliquin.

Figure 5: Edward River LGA’s population growth by service age group



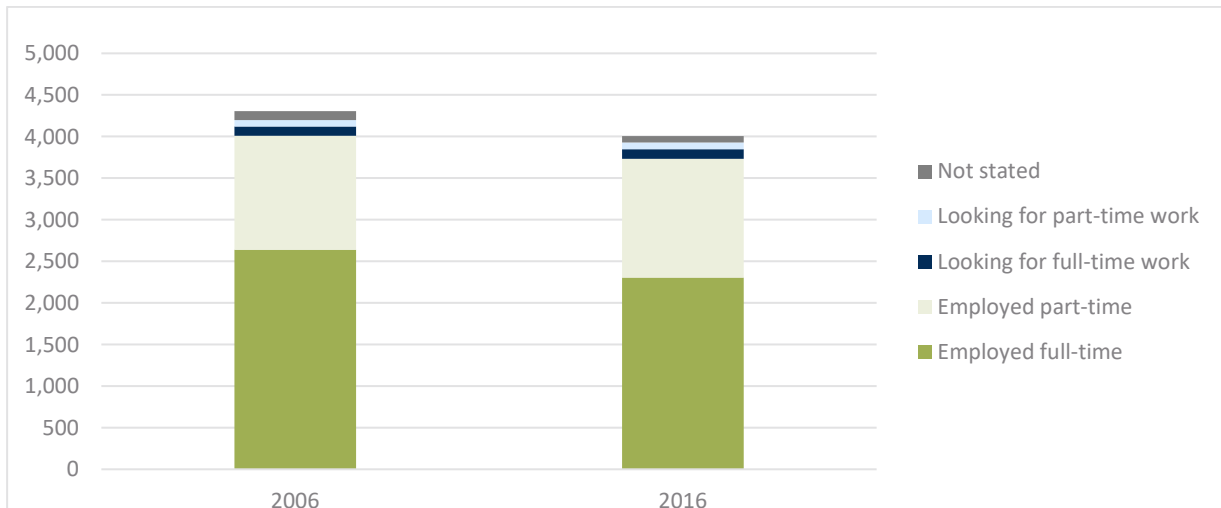
Source: Community id

4.1.2 Employment status

In 2016, around 4,006 people living in Edward River were in the labour force, comprising about 55 per cent of the population aged over 15 years. Of the residents in the workforce, 57 per cent worked full-time and 36 per cent part-time. A further 197 residents or 4.9 per cent were unemployed, an increase of 0.6 per cent over the level recorded in 2006 (4.3 per cent). The unemployment rate within Edward River has remained well below the average for Regional NSW, which has remained above 6 per cent over the same period that Edward River has remained below 5 per cent. With more recent impacts to the LGA’s local economy arising from the drought since 2016, local unemployment may have also increased.

Over the last ten years, there has been a growing proportion of people being employed part-time (+4.1 per cent) with a corresponding decrease in the proportion of full-time employed residents (-12.7 per cent).

Figure 6: Employment status



Source: ABS 2016

4.1.3 Industry of employment and location quotient

Over ten years to 2016, employed residents in Edward River decreased by 299 residents or 7%. Despite this decrease, some industries experienced growth (although in some cases off a low base) over the period, these were:

- Health care and social assistance - 90 additional jobs (22 per cent)
- Construction - 64 additional jobs (30 per cent)
- Administrative and support services - 24 additional jobs (39 per cent)

The top five declining industries were:

- Agriculture, forestry and fishing – 219 fewer jobs (26 per cent)
- Retail trade – 160 fewer jobs (32 per cent)
- Wholesale Trade – 33 fewer jobs (27 per cent)
- Information media and telecommunications - 25 fewer jobs (54 per cent)
- Education and training – 23 fewer jobs (7 per cent).

Table 1 provides a breakdown of employment by industry sector when compared to Regional NSW. Comparatively, accommodation and food services demonstrate the most considerable proportional differentiation (16.6 per cent Edward River, compared to 5.7% for Regional NSW).

Table 1: Employment by industry in Edward River and Regional NSW

	Edward River LGA		Regional NSW (GCCSA)	
	Total	Per cent	Total	Per cent
Accommodation and Food Services	633	16.59%	62,555	5.67%
Administrative and Support Services	8	0.21%	26,925	2.44%
Agriculture, Forestry and Fishing	298	7.81%	66,320	6.01%
Arts and Recreation Services	100	2.62%	14,086	1.28%
Construction	275	7.21%	95,770	8.67%
Education and Training	88	2.31%	22,175	2.01%
Electricity, Gas, Water and Waste Services	339	8.89%	114,261	10.35%
Financial and Insurance Services	257	6.74%	86,995	7.88%
Health Care and Social Assistance	179	4.69%	43,985	3.98%
Inadequately described or not stated	24	0.63%	9,913	0.90%
Information Media and Telecommunications	81	2.12%	22,357	2.02%
Manufacturing	25	0.66%	15,417	1.40%
Mining	153	4.01%	50,141	4.54%
Other Services	85	2.23%	35,924	3.25%
Professional, Scientific and Technical Services	201	5.27%	79,529	7.20%
Public Administration and Safety	271	7.10%	99,607	9.02%
Rental, Hiring and Real Estate Services	496	13.00%	158,555	14.36%
Retail Trade	22	0.58%	13,706	1.24%
Transport, Postal and Warehousing	135	3.54%	43,467	3.94%
Wholesale trade	145	3.80%	42,468	3.85%
Total	3,815	100%	1,104,156	100%

Source: ABS 2016

Table 2 illustrates the change in resident employment industries over the past ten years and the areas resident employment specialisation. Resident employment in agriculture, forestry and finishing has decreased by just under 220 people. The significant decrease in agriculture, forestry and fishing would have flow-on effects into related industries that service this industry sector.

Table 2: Resident employment by industry and location quotient

Industry	Edward River				LQ
	2006	2016	Change #	Change %	Comparable area Regional NSW
Accommodation and Food Services	256	257	1	0%	0.8
Administrative and Support Services	62	86	24	39%	0.7
Agriculture, Forestry and Fishing	847	628	-219	-26%	2.9
Arts and Recreation Services	20	22	2	10%	0.5
Construction	213	277	64	30%	0.8
Education and Training	292	269	-23	-8%	0.8
Electricity, Gas, Water and Waste Services	108	103	-5	-5%	2.1
Financial and Insurance Services	97	81	-16	-16%	1.1
Health Care and Social Assistance	408	498	90	22%	0.9
Inadequately described or not stated	93	147	54	58%	1.0
Information Media and Telecommunications	46	21	-25	-54%	0.7
Manufacturing	302	299	-3	-1%	1.3
Mining	14	10	-4	-29%	0.1
Other Services	132	134	2	2%	0.9
Professional, Scientific and Technical Services	157	152	-5	-3%	0.9
Public Administration and Safety	223	200	-23	-10%	0.7
Rental, Hiring and Real Estate Services	41	25	-16	-39%	0.5
Retail Trade	501	341	-160	-32%	0.9
Transport, Postal and Warehousing	181	177	-4	-2%	1.2
Wholesale trade	123	90	-33	-27%	1.2
Total employed persons aged 15+	4,116	3,817	-299	-7%	

Source: ABS 2016, population.id

Table LQ key:

Economic weakness/opportunity for growth	Similar in importance between areas	Major specialisation
------------------------------------------	-------------------------------------	----------------------

Location quotient (LQ) is a simple way of assessing which are the main industries in an area relative to a comparable area.

- Where LQ=1, the identified industry is as prevalent as in the comparable area
- An LQ greater than 1.2 indicates a significant specialisation of the industry in Edward River – indicating possibly a key economic strength. Higher numbers indicate a greater specialisation with anything exceeding 2 representing a major specialisation
- An LQ between 0.8 and 1.2 means the industry is broadly similar in importance in Edward River compared to Regional NSW
- An LQ under 0.8 indicates an industry which is more prevalent generally in Regional NSW than Edward River and may represent an economic weakness or opportunity for growth⁴.

From Table 2 it can be seen that, compared to Regional NSW, Edward River LGA has:

- A major specialisation in agriculture, forestry and fishing and electricity, gas, water and waste services
- A significant specialisation in manufacturing, transport postal and warehousing and wholesale trade

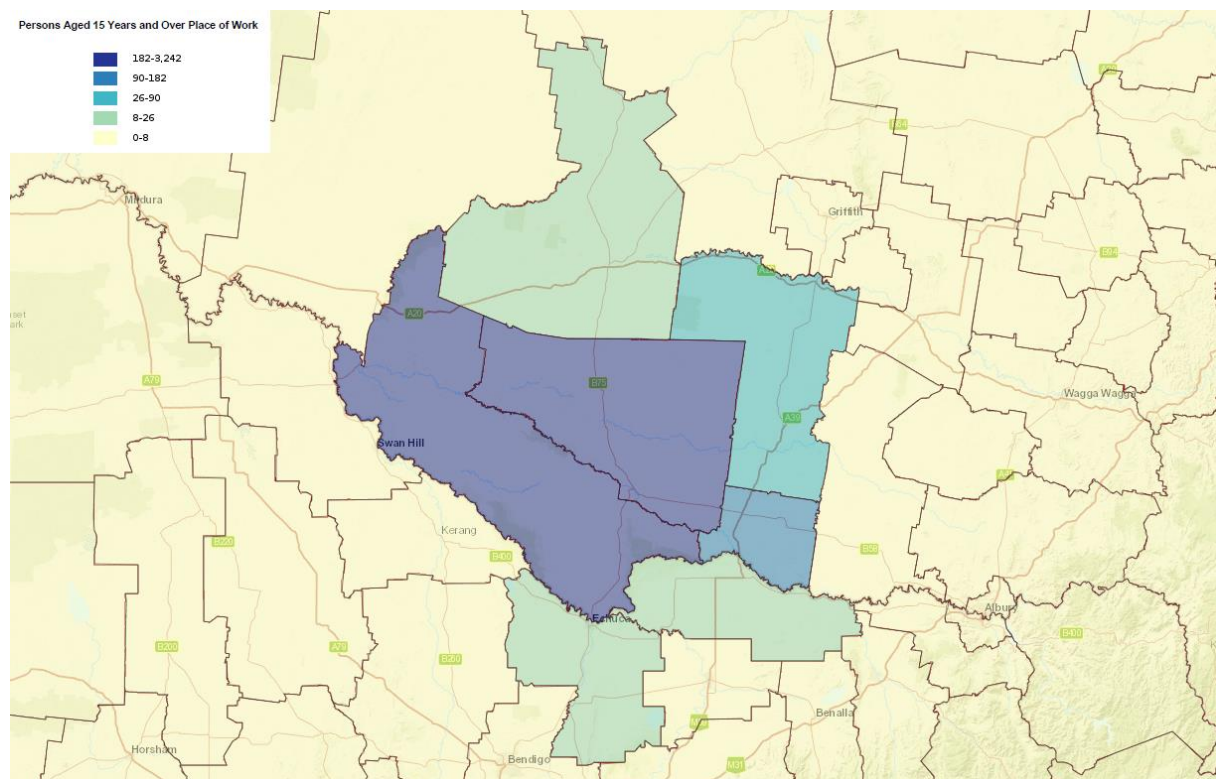
⁴ economy.id (2019)

- A weakness or opportunity for growth in mining; rental, hiring and real estate services; arts and recreation services; administrative and support services, information media and technology and public administration and safety
- All other industries were of similar importance within Edward River LGA and wider Regional NSW.

4.1.4 Where residents work

Around 3,242 or 86 per cent of Edward River residents worked within the LGA (self-containment rate). The second most common destination for residents to seek employment was Murray River LGA with 182 residents or 4 per cent working in the LGA. Workplaces without a fixed address (state-wide) were the third most common destination for work (around 145 residents or 4 per cent), followed by Berrigan LGA with around 2 per cent of residents working there and locations in Victoria, also with approximately 2 per cent.

Figure 7: Edward River LGA persons aged 15+ years place of work (LGA)



Source: ABS 2016

Table 3: Local residents place of work (2016)

Area	Number	Proportion
Edward River LGA	3,242	86%
Murray River LGA	182	5%
No Fixed Address (NSW-wide)	145	4%
Berrigan LGA	90	2%
Victoria (statewide)	71	2%
Other	60	2%

Source: ABS 2016

The relatively high resident self-containment rate of 86 per cent in Edward River is within the expected range for regional LGAs, with greater distances to other centres in adjacent LGAs.

4.2 Employment characteristics

Employment refers to persons aged 15 years and over, working in Edward River LGA, regardless of their place of usual residence.

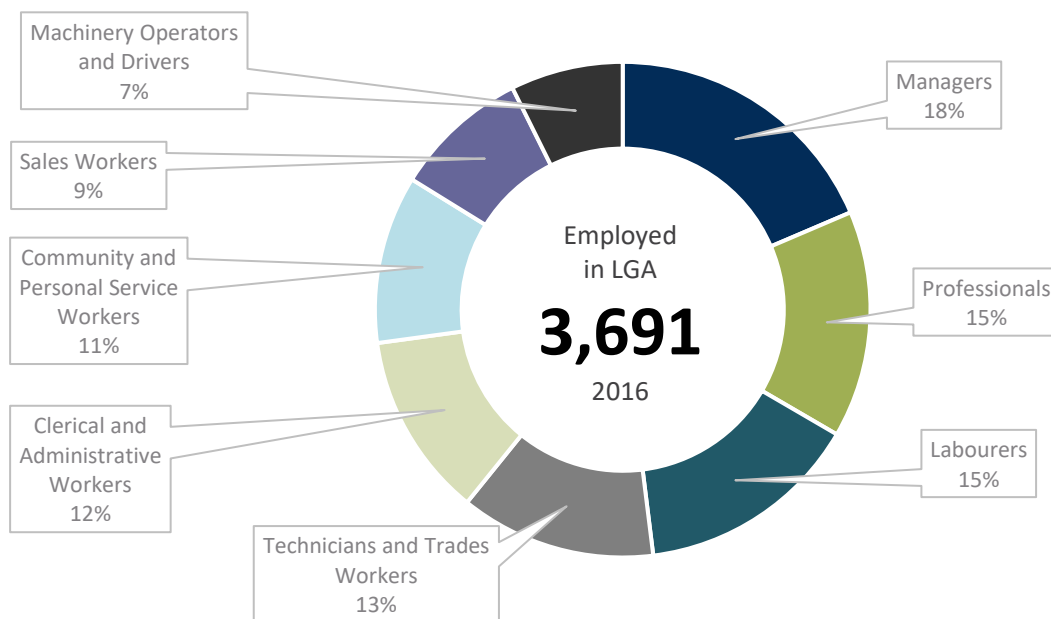
4.2.1 Terminology

In some sections in this Chapter and subsequent chapters, employment industries have been aggregated into four broad employment sectors. These are based on the Australian and New Zealand Standard Industrial Classification (ANZSIC). These four broad job sectors are as follows:

- **Knowledge intensive:** Information, Media and Telecommunications; Financial and Insurance Services; Rental, Hiring and Real Estate Services; Professional, Scientific and Technical Services; and Public Administration and Safety
- **Health and education:** Education; Health Care; and Social Assistance
- **Population serving:** Retail Trade; Accommodation and Food Services; Arts and Recreation Services; Construction; Administrative and Support Services and Other Services
- **Industrial:** Agriculture, Forestry and Fishing; Mining; Manufacturing; Electricity, Gas, Water and Waste Services; Wholesale Trade; and Transport, Postal and Warehousing.

4.2.2 Employment generation in Edward River

Figure 8: Local employment by occupation



As can be seen in Figure 9, over ten years to 2016, total jobs within Edward River decreased by 298 jobs to a total of approximately 3,554 jobs. Despite this overall negative growth in jobs, some industries experienced some growth in employment generated, with health care and social assistance and construction representing the largest growth.

In terms of broad industry sectors, the health care and education sector recorded slight growth over the period with a total increase in employment of around 85 jobs or 11.7 per cent (811 jobs total in 2016).

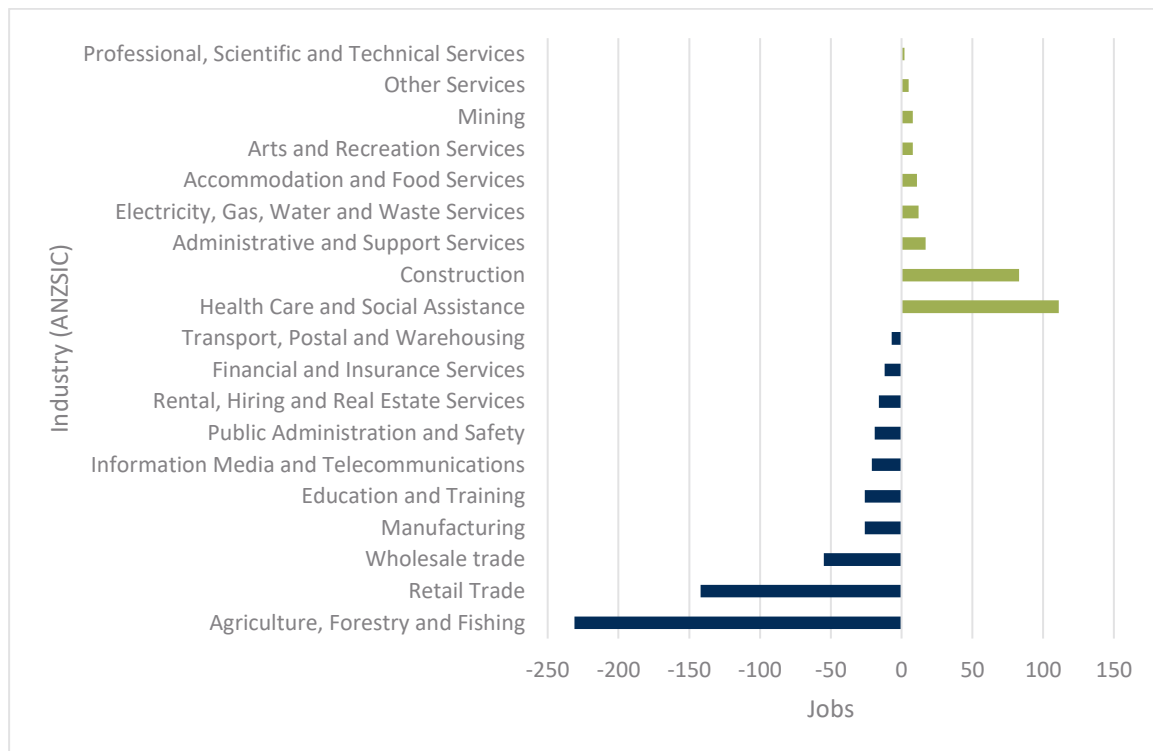
The most significant decline affected the industrial sector, which recorded a total drop in employment of around 299 jobs or a 20.3 per cent reduction over the decade to 2016 (1,171 jobs total in 2016). This significant

decline in employment would likely affect the amount of vacant floorspace within Deniliquin’s industrial precincts and hence the demand for additional space and land over the coming decade.

While the population serving sector declined, the decline was primarily driven by the retail industry, which recorded a decrease in employment of 142 jobs. Most other population serving industries experienced positive growth. The fall of commercial jobs would have a direct impact on the vitality and demand for space in the Deniliquin centre.

The knowledge intensive and population serving sectors experienced smaller contractions over the same period, losing 5.9 and 4.6 per cent, respectively, amounting to approximately 84 jobs in total.

Figure 9: Edward River LGA change in employment 2006-16 by industry



Source: ABS 2016

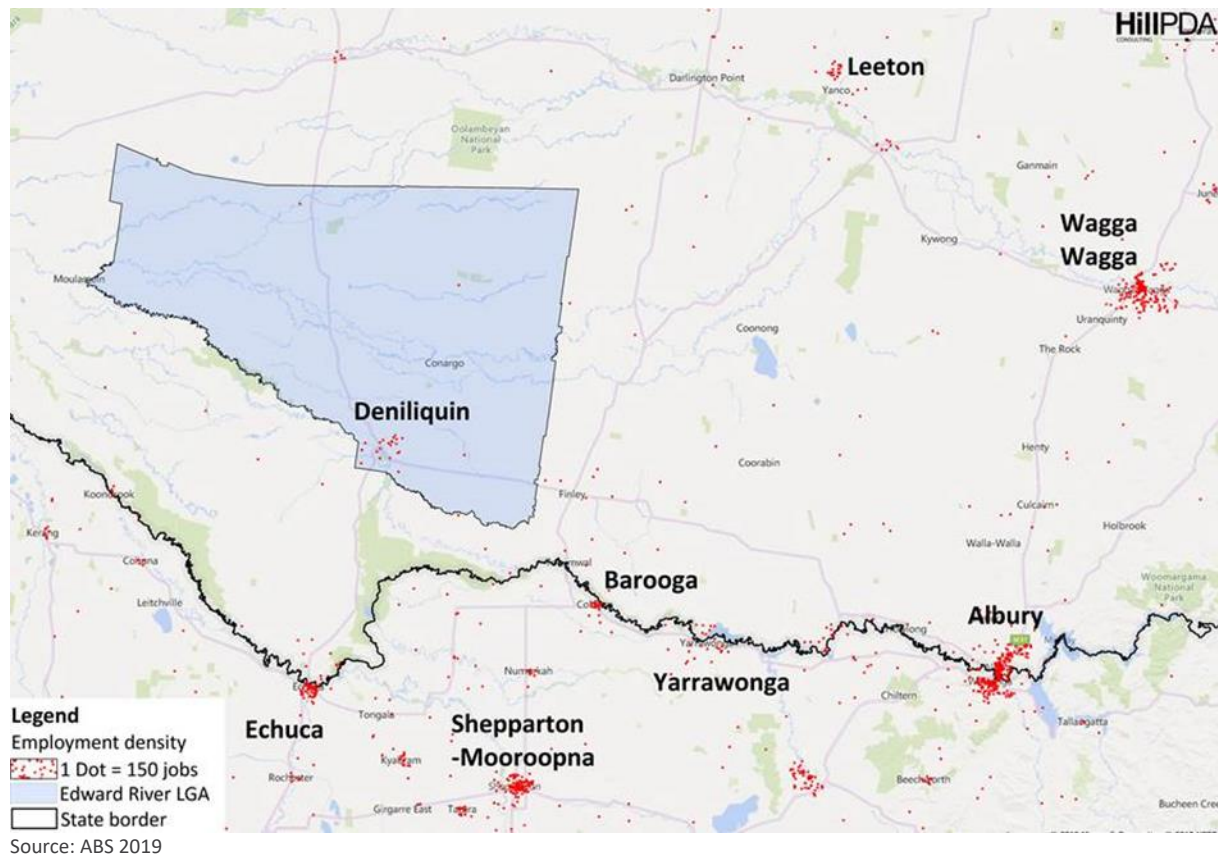
Although overall employment within agriculture, forestry and fishing has decreased over the last ten years (from 2006), it is difficult to track the employment categories that have been in major decline, as there has been significant growth in “not elsewhere classified” employment classifications increasing by 70, suggesting that some employment may have been reclassified.

4.2.3 Employment by location

Figure 10 shows the distribution of jobs across Edward River and the wider region. The dots correspond to an ABS geographical boundary known as a Destination Zone (DZ), which is the smallest boundary that employment journey to work data is provided. The placement of a dot within a DZ is random. As such, a mark might seemingly not be located within a centre/precinct; however, depending on the size of the corresponding DZ, it may be found in a commercial centre or employment precinct.

Despite this, the highest concentration of jobs in Edward River is in Deniliquin, with some employment located in more remote rural areas of the LGA. This is consistent with Deniliquin’s role as a major regional centre.

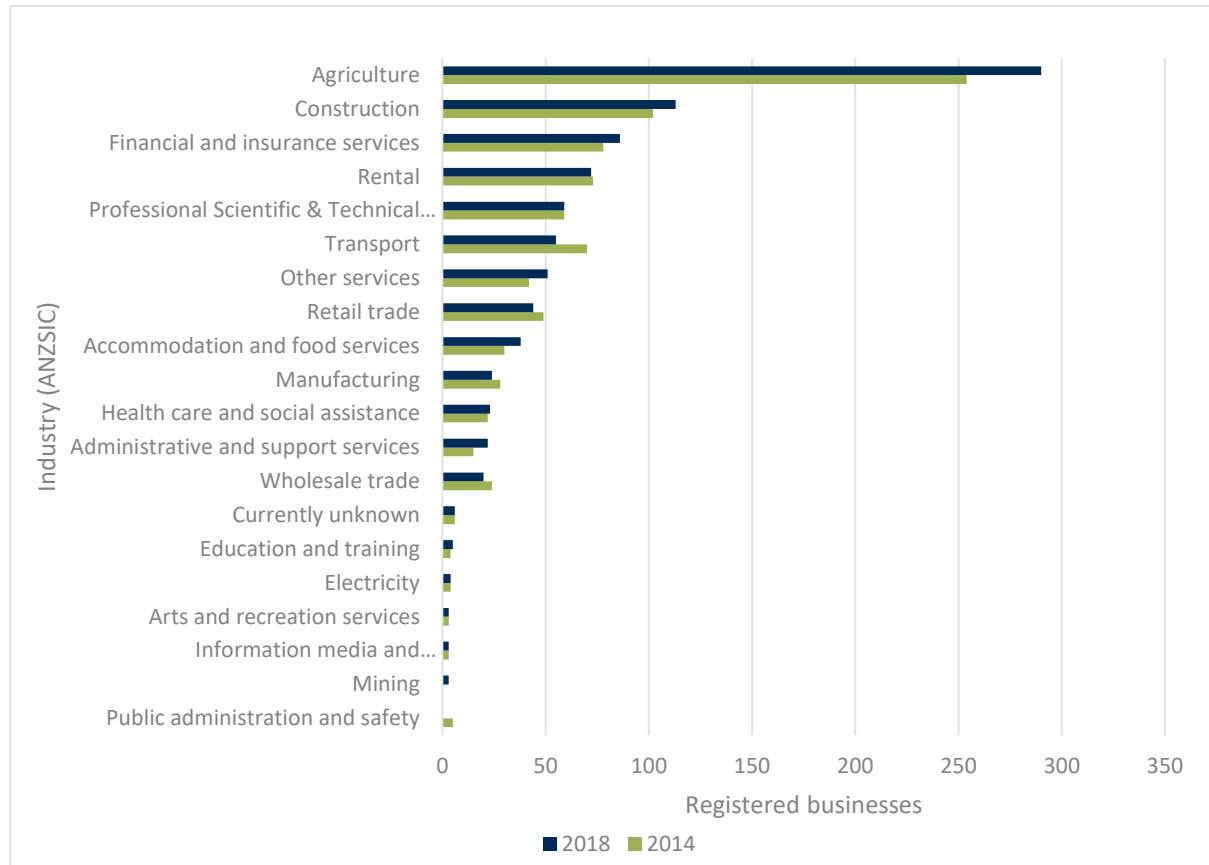
Figure 10: Employment density by destination zone 2016 – total jobs



4.2.4 Businesses

As can be seen in Figure 11, at 2018, there were 915 registered businesses in Edward River. The largest sector in which businesses typically had the highest turnover was Industrial; primarily driven by businesses in the agriculture, forestry and mining category, followed by transport postal and warehousing.

Figure 11: Local businesses by sector (2018)



Source: ABS 2019

The following table shows the turnover of the business sector in Edward River. The larger economic turnover businesses were typically in the Agriculture, forestry and fishing industry and the Transport, postal and warehousing industry.

Table 4: Businesses in Edward River by turnover (June 2018)

	Industry of business	Less than \$50k	\$50k - \$200k	\$200k - \$2m	\$2m - \$5m	\$5m - \$10m	\$10m+
Health & educ.	Education and Training	0	0	3	0	0	0
	Health Care and Social Assistance	0	11	10	3	0	0
Industrial	Agriculture, Forestry and Fishing	56	90	122	15	3	0
	Mining	0	0	0	0	0	0
	Manufacturing	6	3	11	0	3	0
	Electricity, Gas, Water and Waste Services	3	0	0	0	0	0
	Wholesale Trade	3	3	4	4	0	0
	Transport, Postal and Warehousing	6	12	35	5	3	3
Knowledge intensive	Information Media and Telecommunications	3	0	0	0	0	0
	Financial and Insurance Services	42	28	12	0	0	0
	Rental, Hiring and Real Estate Services	27	23	14	0	0	0
	Professional, Scientific and Technical Services	18	13	25	3	0	0
	Administrative and Support Services	4	10	12	0	0	0
	Public Administration and Safety	0	0	0	0	0	0
Population serving	Construction	12	36	55	3	0	0
	Retail Trade	6	11	16	4	3	0
	Accommodation and Food Services	3	14	20	0	3	0
	Arts and Recreation Services	0	3	0	0	0	0
	Other Services	5	18	25	0	0	0
	Currently Unknown	3	3	3	0	0	0

Source: ABS 2019

Businesses in Agriculture, forestry and fishing employed the largest number of workers (up to 3,500), despite also showing that a vast majority of businesses locally registered in that category were non-employing. The next largest sectors of employment were Construction (up to 1,550); Transport, postal and warehousing (up to 1,110) and Accommodation and food services (up to 1,015).

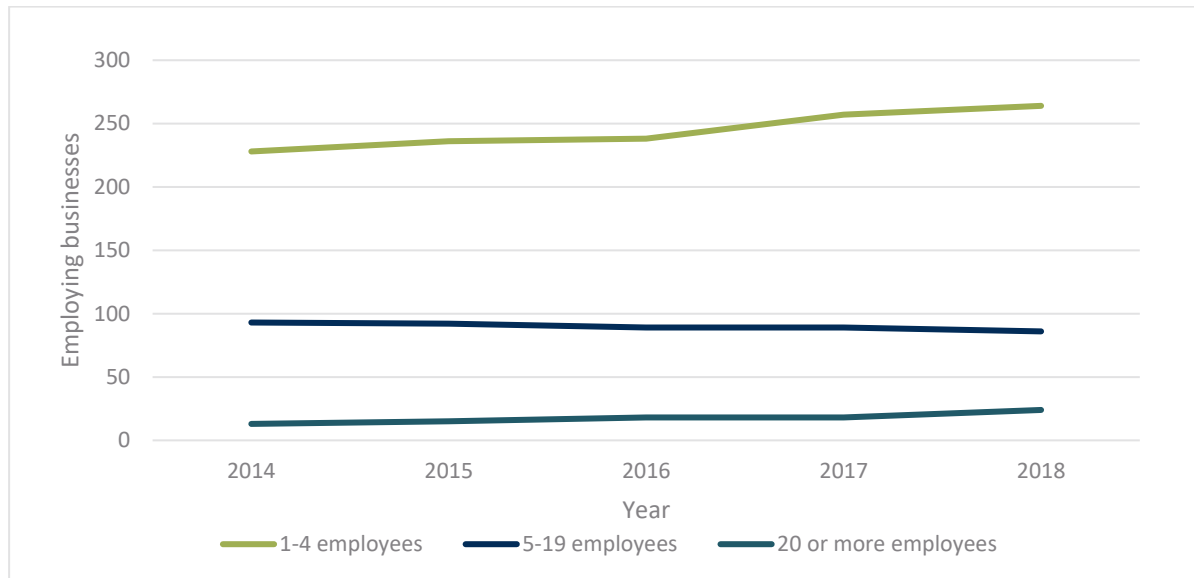
Table 5: Counts of businesses in Edward River LGA by employment size ranges (June 2018)

	Industry	Non-employing	1-19 Employees	20-199 Employees	200+ Employees
Health & education	Education and Training	0	0	3	0
	Health Care and Social Assistance	10	16	0	0
Industrial	Agriculture, Forestry and Fishing	199	90	9	0
	Electricity, Gas, Water and Waste Services	3	0	0	0
	Manufacturing	13	14	0	0
	Mining	0	3	0	0
	Transport, Postal and Warehousing	23	27	3	0
	Wholesale Trade	8	11	0	0
Knowledge intensive	Administrative and Support Services	9	15	0	0
	Financial and Insurance Services	73	16	0	0
	Information Media and Telecommunications	3	0	0	0
	Professional, Scientific and Technical Services	30	26	0	0
	Public Administration and Safety	3	0	0	0
	Rental, Hiring and Real Estate Services	59	8	0	0
Population serving	Accommodation and Food Services	9	22	3	0
	Arts and Recreation Services	3	0	0	0
	Construction	58	50	3	0
	Other Services	20	30	0	0
	Retail Trade	11	30	0	0
	Currently Unknown	6	3	0	0

Source: ABS 2019

Figure 12 below shows that in the four years leading up to 2018, Edward River saw growth in small businesses (1-4 employees), a gradual decrease in mid-size businesses (5-19 employees) and a slight increase in larger businesses (employing 20 or more workers).

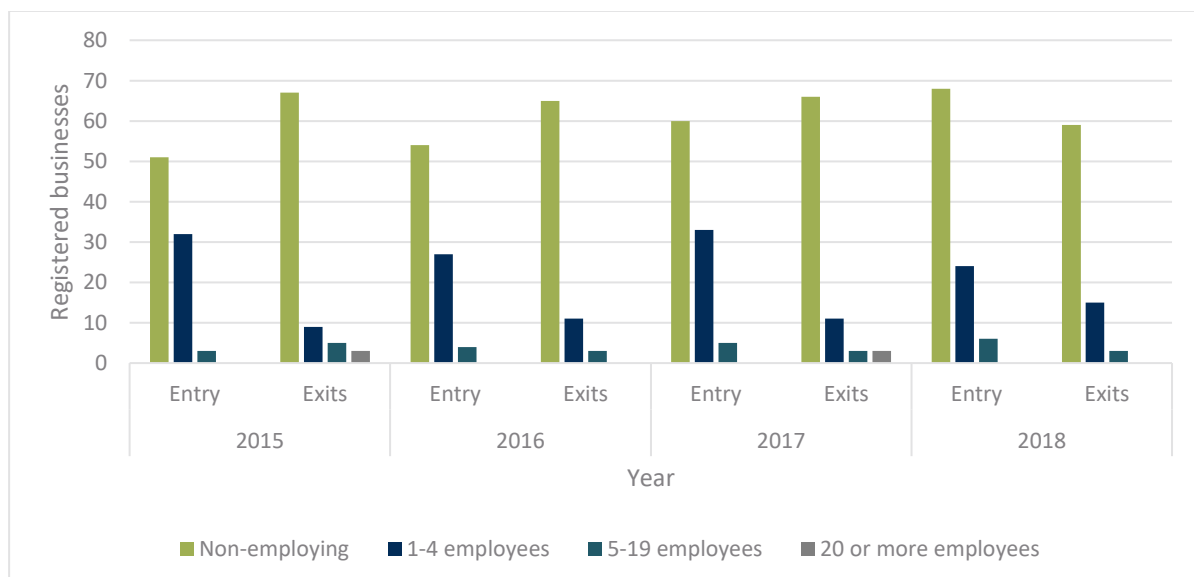
Figure 12: Number of employing businesses (30 June)



Source: ABS 2019

This data can be further analysed (see Figure 13) to determine the size of the businesses entering and exiting the LGA over the past four years to 2018. While the number of business exits of non-employing businesses has continually outweighed the number of business entries, what is positive is the number of small businesses is growing. Unfortunately, as seen in 2015 and 2017, the number of large business (over 20 employees) exits was not offset by entries and therefore resulted in a significant loss of employment opportunity.

Figure 13: Business entries and exits by number of employees



4.3 Regional centre comparison

The following table compares the socio-economic metrics of Deniliquin centre against other similar size regional centres. This indicates the centre's performance and whether the trends are broader or specific to Deniliquin.

Notably, compared to the other centres, Deniliquin's change in population has been dramatic, with the below figures showing a significant decline of 8 per cent when compared to what seems to be a healthier average growth of around 1.25 per cent. While the working population has also experienced a decline, positively, the dependency ratio has remained on the lower level when compared to other centres. This means that the area still retains a strong working population to support the wider LGA population.

Comparably, weekly personal and household incomes are healthy, and the unemployment rate is on the lower side. The number of registered businesses is low, with a need to enhance business attraction and retention. The distribution of registered businesses across the broad industry sector in Deniliquin are evenly spread (apart from Health and Education). The Industrial sector in the other centres is generally stronger comparably. Agriculture, forestry and fishing and Construction generally underpin the centre economies. Leeton and Forbes have a higher presence of industrial industries with Manufacturing or Transport, postal and warehousing making the top five industries. While Deniliquin has Transport, postal and warehousing, this sector could be further enhanced, as well as the Manufacturing sector to assist in further diversifying the economy.

Table 6: Comparison of similarly sized regional centres

	Deniliquin	Cootamundra	Young	Leeton	Forbes
Population (2016)*	6,836	5,671	7,169	6,928	7,033
Change 2006-16*	↓ 8.0%	↑ 1.9%	↑ 0.4%	↑ 1.5%	↑ 1.2%
Median age	45	51	40	40	41
Dependency ratio*	69%	88%	80%	66%	75%
Change 2006-16*	↑ 3%	↑ 16%	↑ 9%	↑ 1%	↑ 7%
Dwellings (2016)*	3,361	2,816	3,352	3,119	3,285
Change 2006-16*	↓ 3.3%	↑ 7.4%	↑ 5.3%	↑ 5.9%	↑ 5.3%
Average dwelling size*	2.0	2.0	2.1	2.2	2.1
Workers (POW) 2016*	3,205	2,699	4,377	4,244	3,988
Change 2006-16*	↓ 12.3%	↑ 4.3%	↓ 8.6%	↓ 5.5%	↑ 17.7%
Median weekly personal income (2016)	\$575	\$496	\$505	\$640	\$548
Median weekly family income (2016)	\$1,361	\$1,165	\$1,131	\$1,459	\$1,250
Median weekly household income (2016)	\$1,018	\$845	\$862	\$1,156	\$982
Unemployment rate (2016)	5.9	6.9	7.6	5.6	6.2
Registered businesses (June 2018)*	774	806	1,148	833	1,243

	Deniliquin	Cootamundra	Young	Leeton	Forbes
Registered businesses by broad sector* <ul style="list-style-type: none"> ■ Population serving ■ Knowledge intensive ■ Industrial ■ Health and education ■ Currently Unknown 					
Top 5 industries by registered businesses (ANZSIC 1-digit, June 2018)	1. Agriculture, Forestry and Fishing 2. Construction 3. Financial and Insurance Services 4. Rental, Hiring and Real Estate Services 5. Transport, Postal and Warehousing	1. Agriculture, Forestry and Fishing 2. Financial and Insurance Services 3. Construction 4. Rental, Hiring and Real Estate Services 5. Professional, Scientific and Technical Services	1. Agriculture, Forestry and Fishing 2. Construction 3. Rental, Hiring and Real Estate Services 4. Retail Trade 5. Financial and Insurance Services	1. Agriculture, Forestry and Fishing 2. Construction 3. Retail Trade 4. Rental, Hiring and Real Estate Services 5. Manufacturing	1. Agriculture, Forestry and Fishing 2. Construction 3. Rental, Hiring and Real Estate Services 4. Other Services 5. Transport, Postal and Warehousing

*Data compiled to SA2 boundaries, all other data has been compiled to Urban Centres and Localities (UCL) boundaries

Source: ABS 2019



4.4 LGA comparison

The following table compares the socio-economic metrics of Edward River LGA with the surrounding LGAs. This indicates the LGA's performance and competitive advantage/disadvantage.

Echuca in Campaspe, Victoria is the largest nearby centre and offers the district services and amenities that the small localities are not able to sustain due to population size. Moama, in Murray River Council, has benefitted from proximity to Echuca, with the LGA growing in population by around 500 people since the 2016 Census. Due to their proximity to the main Deniliquin centre and LGA population size, these two LGA's pose the biggest competitive threat to Edward River as they can sustain and attract more businesses, services and amenities.

Interestingly, Edward River still retains a strong GRP (in comparison to population size) and median household and personal income compared to the other LGA's. Positively, Edward River has the strongest proportion of employing businesses (41 per cent) when compared to the other LGAs. Further growth in the number of employing business entries would assist in sustaining and supporting the growth of the economy, likely increasing the expenditure in towns and at local businesses.

Table 7: Comparison of nearby LGAs

	Edward River	Berrigan	Murray River	Campaspe (Vic)
Total population (2018)	8,995	8,707	12,118	37,592
Working age population (15-64 years) (2018)	5,344	4,672	6,763	22,110
Median age (2018)	45	49	48	45
GRP (\$ millions) ⁵	616	494	644	2,105 ⁶
Median household income (\$, 2016)	\$721	\$645	\$692	\$693
Median personal income excl. Government pensions and allowance) (\$, 2016)	40,245	38,513	39,013	39,782
Total number of businesses (June 2018)	915	872	1,276	4,169
Number of employing businesses (June 2018) – (% of total registered businesses)	377 (41%)	345 (39%)	466 (37%)	1,556 (37%)
Business entries (June 2018)	97	105	125	395
Business exits (June 2018)	74	91	110	361

⁵ Riverina and Murray Joint Organisation (2018), *Statement of Strategic Regional Priorities 2018-2022*

⁶ economy.id (2019)



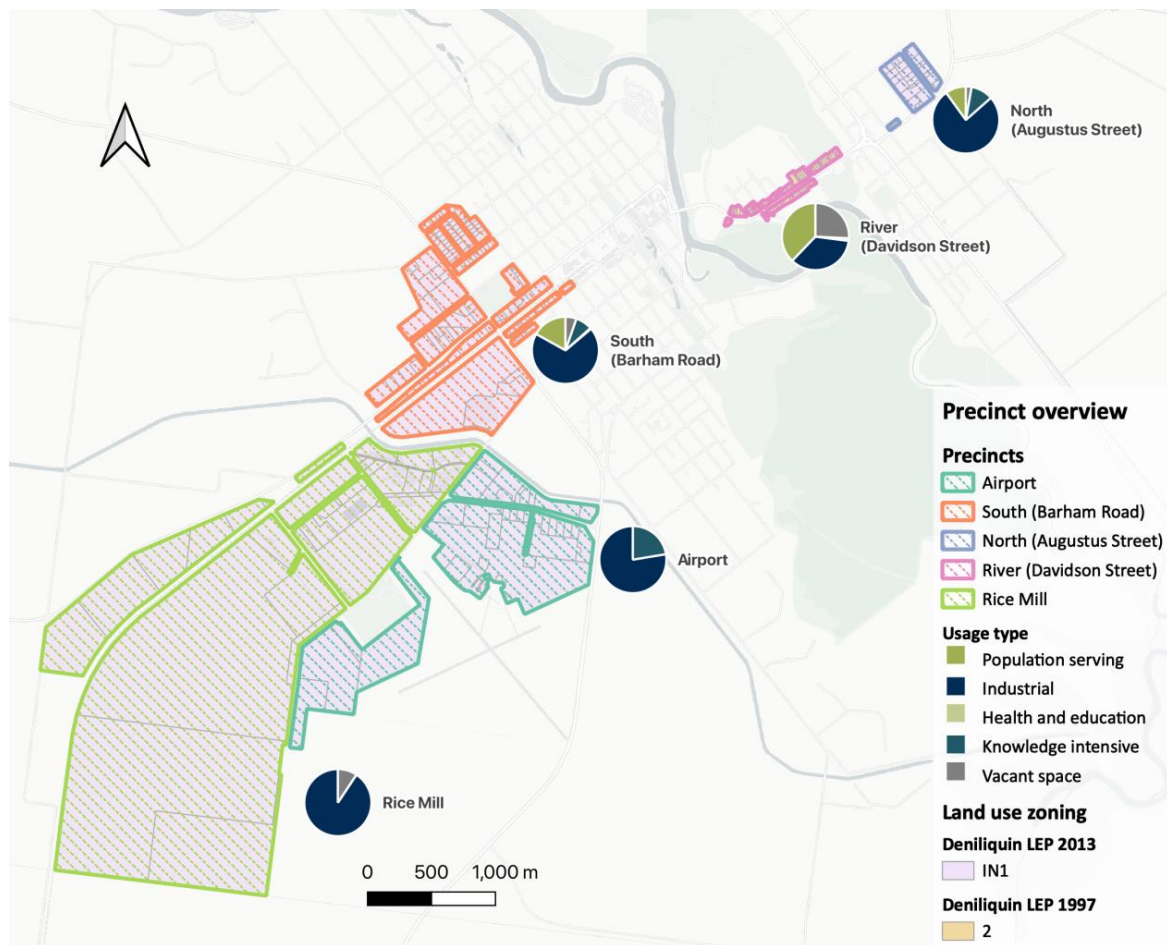
PRECINCT ANALYSIS AND PROFILES

5.0 PRECINCT ANALYSIS AND PROFILES

5.1 Precinct overview

For this industrial land audit, five employment precincts have been identified (see Figure 14). Industrial land for the purposes of this audit is considered to be land zoned IN1 under the Deniliquin LEP 2013 and 2 Urban under the Deniliquin 1997 LEP, which continues to apply to the River (Davidson Street) precinct.

Figure 14: Industrial land precincts for the land use audit



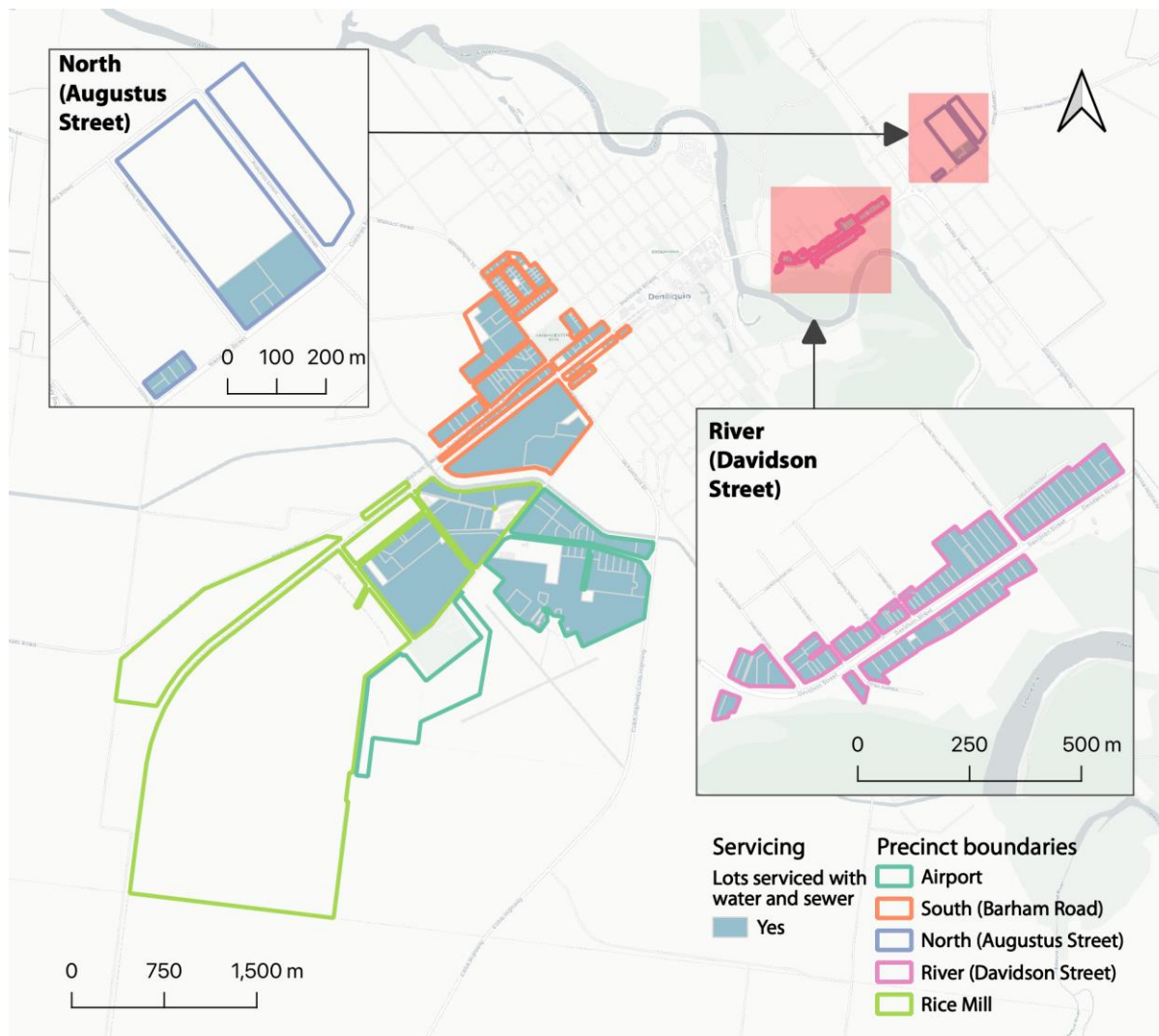
Source: HillPDA 2019

5.1.1 Land servicing and utilisation

Serviced land, in accordance with the DPIE Employment Land Development Monitor definition, is land that falls within five meters of a water and sewer pipeline or connection. This analysis has been undertaken through GIS and may have some anomalies. There may also be instances where properties are serviced by water, however, still have a septic system for sewage.

In total, Edward River LGA contains around 856 hectares of zoned employment land, of which, around 278 hectares of this land is serviced, and around 577 hectares is un-serviced (see Figure 15).

Figure 15: Serviced and un-serviced land



Source: HillPDA 2020

As can be seen in Table 8, the Rice Mill Precinct and Airport Precinct contain the largest proportions of un-serviced land. The River and South (Banham Road) precincts have the largest proportion of lots that are serviced. Access to serviced land means that lots are immediately available for development and do not require significant investment or delay. While there is land that is zoned, and in some instances available for development, the lack of servicing will result in delays and costs and therefore can be a deterrent for potential investors.

Table 8: Serviced and not serviced (water and sewer) land areas by precinct

Precinct	Zoned and serviced (ha)	Zoned and not serviced (ha)	Total (ha)
Airport	85.1	67.2	152.2
North (Augustus Street)	2.4	10.3	12.8
Rice Mill	81.3	485.3	566.7
River (Davidson Street)	7.8	0.8	8.7
South (Barham Road)	102.1	13.6	115.7
Total (ha)	278.7	577.4	856.1

To understand the pipeline of land available for immediate development an analysis of serviced land has been undertaken (see Table 9). The analysis considers the amount of service land that is:

1. Vacant, serviced and not utilised
2. Utilised but contains no built structures
3. Underutilised, where the built structure FSR is below the average built FSR for the LGA.

The average built FSR for industrial land in Edward River LGA is 0.18:1. While this is low, it is reflective of the LGA's regional setting and availability of land.

Land that is vacant, serviced and not utilised is considered ready for immediate development. Of the 278 hectares of land that is serviced, 46 hectares is available for immediate development, mostly within the South Precinct and the Airport Precinct. Considering the limited market demand, there is less incentive for land that is underutilised to be purchased and redeveloped to a higher-order use.

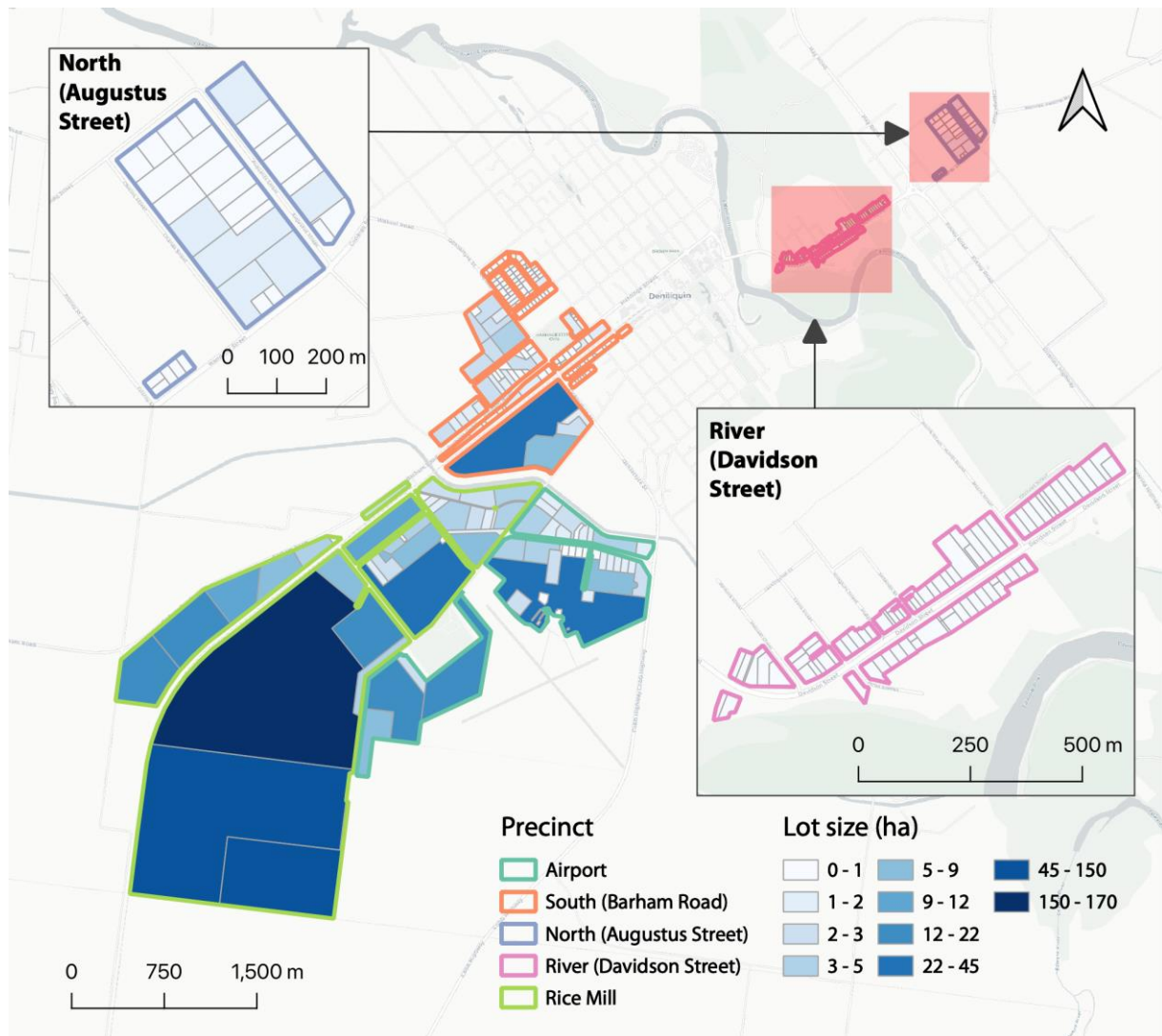
Table 9: Serviced (water and sewer) vacant and underutilised land by precinct

Precinct	Serviced vacant land (ha)	Serviced vacant land in use (built FSR below 0.01) (ha)	Serviced underutilised land (below average built FSR) (ha)
Airport	5.9	17.4	57.2
North (Augustus Street)	0.2	0.7	1.1
Rice Mill	2.9	8.9	56.0
River (Davidson Street)	0.1	0.6	1.8
South (Barham Road)	37.7	22.1	27.3
Total (ha)	46.9	49.7	143.5

5.1.2 Lot size distribution

To further understand the characteristics of the land in the Edward River industrial precincts, an analysis of lot size distribution has been undertaken. Figure 16 illustrates the distribution of lot sizes across the LGA regardless of if they are serviced or un-serviced.

Figure 16: Lot size distribution



Source: HillPDA 2020

As can be seen in Table 10, the majority of serviced lots are less than 2 hectares in size, which is appropriate for most smaller-scale industrial and urban service uses. There are limited large lots available with access to services. Those that are available are in the Airport Precinct, Rice Mill Precinct and the South Precinct.

Table 10: Lot size distribution for zoned (IN1 and 2) and serviced (water and sewer) lots across LGA (no. of lots)

Precinct	0-2 ha	2-5 ha	5-12 ha	12-45 ha	45-150 ha
Airport	20	5	1	-	1
North (Augustus Street)	9	-	-	-	-
Rice Mill	4	5	4	1	-
River (Davidson Street)	72	-	-	-	-
South (Barham Road)	105	8	1	1	-
Total no. of lots	210 lots	18 lots	6 lots	2 lots	1 lot

Source: HillPDA 2020 (using Edward River Council servicing GIS)

Table 11 illustrates that the majority of large lots are currently not serviced, and there are a considerable number of smaller infill lots that would benefit from services.

Table 11: Lot size distribution for zoned (IN1 and 2) and not serviced (water and sewer) lots across LGA

Precinct	0-2 ha	2-5 ha	5-12 ha	12-45 ha	45-150 ha
Airport	22	4	1	2	-
North (Augustus Street)	21	-	-	-	-
Rice Mill	12	5	2	4	3
River (Davidson Street)	10	-	-	-	-
South (Barham Road)	27	2	-	-	-
Total no. of lots	92 lots	11 lots	3 lots	6 lots	3 lots

Source: HillPDA 2020 (using Edward River Council servicing GIS)

Of the vacant serviced land, the Airport Precinct and South Precinct contain the greatest proportion of lots ready for immediate development; these are mainly of a small scale. The larger lot has already been flagged for a potential transport intermodal terminal (subject to approval). Of the lots that are serviced and underutilised, the South Precinct has the greatest capacity for additional development. In contrast, the Airport Precinct has the greatest diversity in the size of lots available.

Table 12: Lot size distribution of vacant or underutilised land parcels

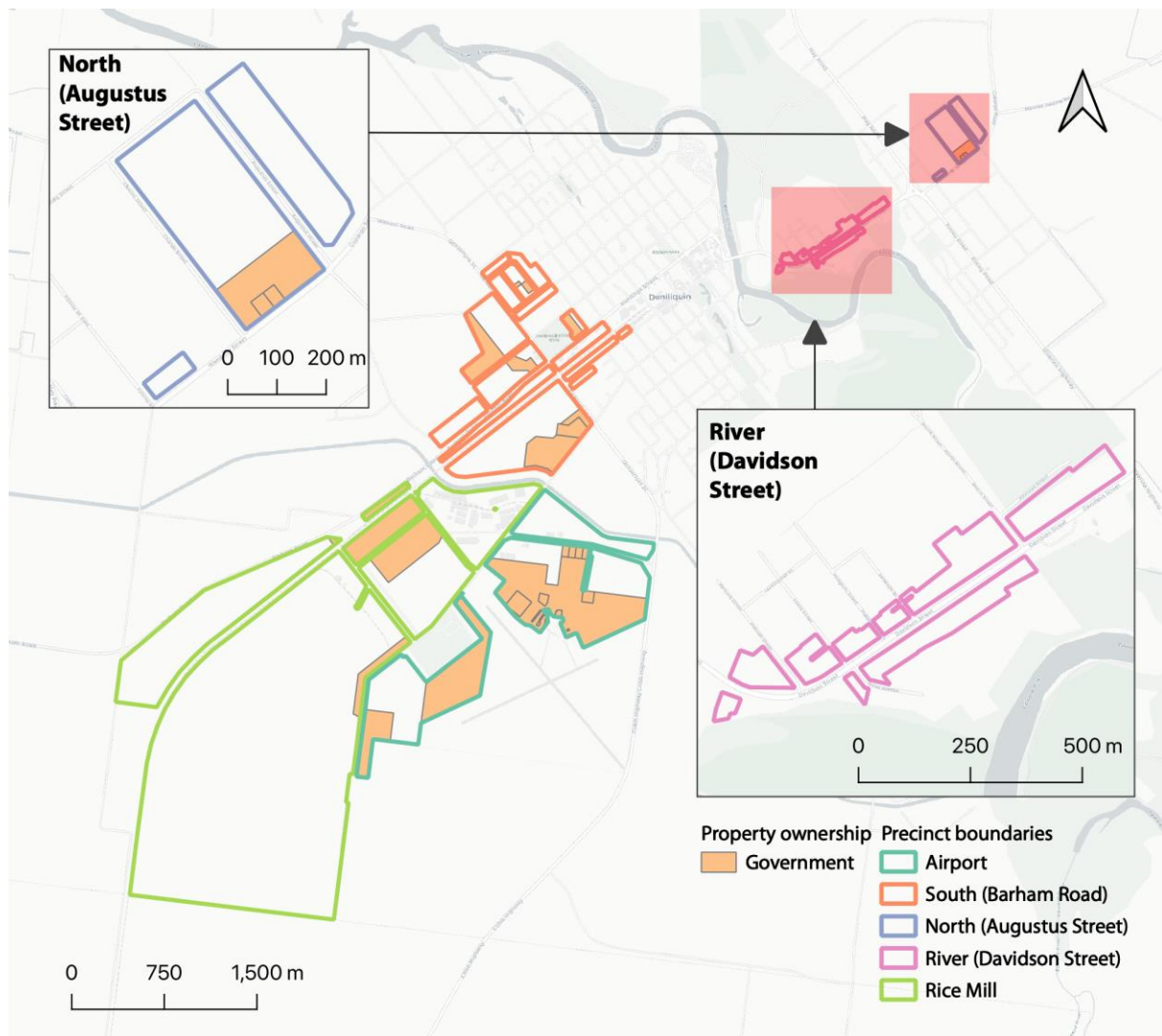
Precinct	Serviced vacant land (no. of lots)					Serviced underutilised land (no. of lots)				
	0-2	2-5	5-12	12-45	45+	0-2	2-5	5-12	12-45	45+
Airport	4	1	-	-	-	11	4	1	-	1
North (Augustus Street)	2	-	-	-	-	2	-	-	-	-
Rice Mill	-	1	-	-	-	3	2	3	1	-
River (Davidson Street)	2	-	-	-	-	24	-	-	-	-
South (Barham Road)	3	2	-	1	-	52	6	1	-	-
Total no. of lots	11	4	-	1	-	92	12	5	1	1

5.1.3 Land ownership

An analysis of land ownership can also identify opportunities and constraints to development. In some instances, where land is surplus to government requirements, there is an opportunity for government-owned land to be leveraged for development purposes through joint ventures. As can be seen in Figure 17, land in the Airport Precinct and South Precinct have the largest number of government-owned parcels.

Further subdivision of land parcels in the Airport Precinct should not be undertaken without first understanding industry land requirements through targeted consultation.

Figure 17: Government and Local Aboriginal Land Council land ownership



Source: HillPDA 2020, adapted from Edward River Council GIS

5.2 Analysis principles

Several principles contribute to the suitability of land when analysing existing supply and determining future employment land use requirements. These are overviewed below.

<p>People – diverse opportunities for employment and learning</p>	<p>Land – adequate, appropriate and long term supply of land</p>	<p>Built form – suitable space that meets current and future needs</p>
<p></p> <ul style="list-style-type: none"> • The proximity of a skilled and available local workforce • Provides for a diversity of employment opportunity including part-time, full time or casual work • Opportunities for further education and up-skilling including the availability and accessibility of suitable educational institutions, training courses and apprenticeship programs in the LGA. 	<p></p> <ul style="list-style-type: none"> • The quantum of land or space available for rent/purchase on the market at any given time • A suitable pipeline of appropriately zoned land to meet current and future requirements • Land constraints can be feasibly addressed • Affordability of land from a sale and rent perspective • The scale of sites is suitable for the needs of a given industry. 	<p></p> <ul style="list-style-type: none"> • Flexibility and adaptability in planning controls • Incentives for new industrial development to meet current and future needs • Appropriateness of zoning and planning controls to facilitate the business requirements.
<p>Infrastructure –is aligned with current need and future growth</p>	<p>Economic – a sustainable and productive long-term economy</p>	<p>Place – an attractive place of employment</p>
<p></p> <ul style="list-style-type: none"> • Appropriate and available water and wastewater services, sewerage and electricity • Appropriate road classification for vehicle movement 	<p></p> <ul style="list-style-type: none"> • Opportunity to cluster and agglomerate • Opportunity to leverage available infrastructure and industries • Number and types of competing businesses and centres either to support clustering opportunity or influence demand. 	<p></p> <ul style="list-style-type: none"> • The appeal of social infrastructure and networking services to attract and retain employees to the LGA • An attractive and safe urban environment • Affordability and suitability of residential accommodation within reasonable proximity of employment • The proximity and access to support services such as local shops, entertainment, childcare, schools, doctors etc.

5.3 Precinct suitability analysis

The following table compares and analyses each precinct against the guiding principle analysis framework identified above. The analysis has been informed by GIS mapping layers, stakeholder consultation and expert judgement.

Table 13: Precinct suitability analysis

		Rice Mill	South (Barham Road)	Airport	River (Davidson Street)	North (Augustus Street)
PEOPLE	Skilled workforce	Average				
	Diverse employment opportunities	Poor	Average	Poor	Average	Average
	Upskilling opportunities	Average				
LAND	Quantum of land availability	Good	Good	Good	Poor	Poor
	Pipeline of land	Good	Average	Good	Poor	Poor
	Flooding	Good	Good	Average	Poor	Poor
	Bushfire	Average	Good	Average	Average	Average
	Contamination	Average	Average	Poor	Average	Average
	Land affordability	Good				
	Suitable and diverse site sizes	Average	Average	Good	Poor	Poor
BUILT FORM	Planning controls	Average	Average	Average	Poor	Average
	Incentives	Average				
	Zoning	Good	Good	Good	Average	Good
INFRASTRUCTURE	Accessibility (road)	Average	Good	Good	Good	Average
	Reticulated water	Average	Good	Average	Good	Good
	Reticulated sewer	Average	Good	Average	Good	Poor
	Internet	Average	Good	Average	Good	Average
	Electricity	Average	Good	Average	Good	Good
ECONOMIC	Cluster and agglomeration potential	Average	Average	Good	Average	Average
	Leverage existing industries	Poor	Good	Good	Average	Good
	Diversity of businesses	Poor	Good	Average	Average	Average
PLACE	Access to services	Poor	Good	Poor	Average	Poor
	Attractive urban environment	Poor	Average	Average	Average	Average
	Residential affordability	Good				

5.4 Broader observations

The following observations were raised during field inspections and by stakeholders during the engagement process.

- Major influencers
 - Seasonal effects (drought, climate)
 - Availability of services in town (compared to competing centres)
 - The attractiveness of the town centre
- Employment
 - Most employers said they did not have too much trouble finding employees generally
 - Skilled employees are more difficult to secure. Businesses generally try to retain skilled workers after their apprenticeships
 - The view was expressed that skilled workers, like others would not move or travel to Deniliquin without reason (e.g. family)
 - Some stakeholders indicated that they thought that immigration to the LGA was at an all-time low
- Development
 - Smaller developers identified upfront costs as a disincentive to development, particularly relating to regulated servicing requirements (e.g. headworks, telecommunications, fire standards)
 - Some stakeholders expressed concern that upfront and ongoing costs for development were not competitive with other nearby centres (e.g. Moama), which also benefit from a greater diversity of services and amenities
 - It was generally felt that there was sufficient land for existing and future industrial uses
- Industrial services
 - The existing suite of supporting industries was identified as a strength of the centre, particularly about agribusiness, engineering/manufacturing and transport, freight and logistics
 - Stakeholders working closer to agriculture felt there was no requirement for any additional infrastructure until the water problems are resolved
- Positioning
 - The price of the land itself was identified as an attractive factor for some stakeholders
 - The position of the town at the junction of major road freight corridors was considered a strength
 - Cost of housing was considered cheaper, particularly when compared to Echuca and Moama
 - Density and diversity of services and retail offerings in nearby centres was attracting people away, even for shopping (e.g. Dan Murphy's). This was perceived to snowball the situation as once people or services leave, others tended to follow
- Climate / Environment
 - The current difficulties with water availability were considered a significant issue for businesses that rely on income from services provided to or from the agricultural sector
 - Stakeholders working closely with the agricultural industry expressed more significant concerns and believed confidence would not return, particularly until the agriculture sector prospered.
 - More significant concerns around the perceptions that were arising from the drought and water availability and negative media
 - Anecdotally banks and financial institutions have been refusing to provide finance for new local projects making it more challenging to attract investment to the area
 - A few stakeholders stated that adapting to prevailing drought conditions would present a challenge
 - Longer-term stakeholders believed that the local economy would rebound with rain
 - The view was expressed that there are still efficiencies to be gained by surrounding farmers that are yet to emerge

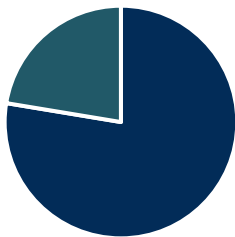
- Opportunities
 - Caravan fabrication and storage
 - Businesses being pushed out of Melbourne
 - Residential Skypark (at the airport)
 - Manufacturing road transport trailers
 - Boat storage
 - Boat manufacturing
 - Attracting government investment (e.g. prison)
- Perceptions of council operations
 - Many of the larger business stakeholders were happy with council interactions, feeling that owing to the size of the LGA it was an easy organisation to deal with
 - Several stakeholders felt that council should adopt a more entrepreneurial approach, looking at how it can not only attract businesses in line with competing centres but also counteract the additional draw of service density in those competing centres (e.g. Echuca, Albury). It was stated that the approach needs to be innovative and the Council may need to seek out new ideas, including (but not limited to):
 - › Peppercorn leases
 - › Making land available for agreed outcomes
 - › Rate cuts
 - It was stated that an expectation of full cost recovery from industrial development was unrealistic
 - Some stakeholders felt that the Council could do more to cooperate with and support smaller developers in interacting with the planning system as well as providing support to prospective businesses on how to establish new businesses
 - Some stakeholders felt that the Council needed to move more rapidly on development opportunities
 - Some stakeholders expressed the view that rate concessions would not help alone.

5.5 Airport precinct

The Airport precinct is south of Deniliquin town centre at the intersection of Cobb Highway and Cemetery Road.

Land area:	152 hectares	Occupied GFA:	34,608 square metres
Gross floor area (GFA):	34,608 square metres	Vacant GFA:	0 square metres

Breakdown:



- Population serving
- Industrial
- Knowledge Intensive
- Vacant space

Average built FSR: 0.17

Type:	GFA (sqm)	Per cent
Agriculture	0	0%
Electricity, Gas, Water and Waste Services	0	0%
Manufacturing	8,210	24%
Other Services	0	0%
Public Administration and Safety	7,750	22%
Transport, Postal and Warehousing	9,357	27%
Vacant space (unoccupied)	0	0%
Wholesale Trade	9,291	27%
Grand Total	34,608	100%

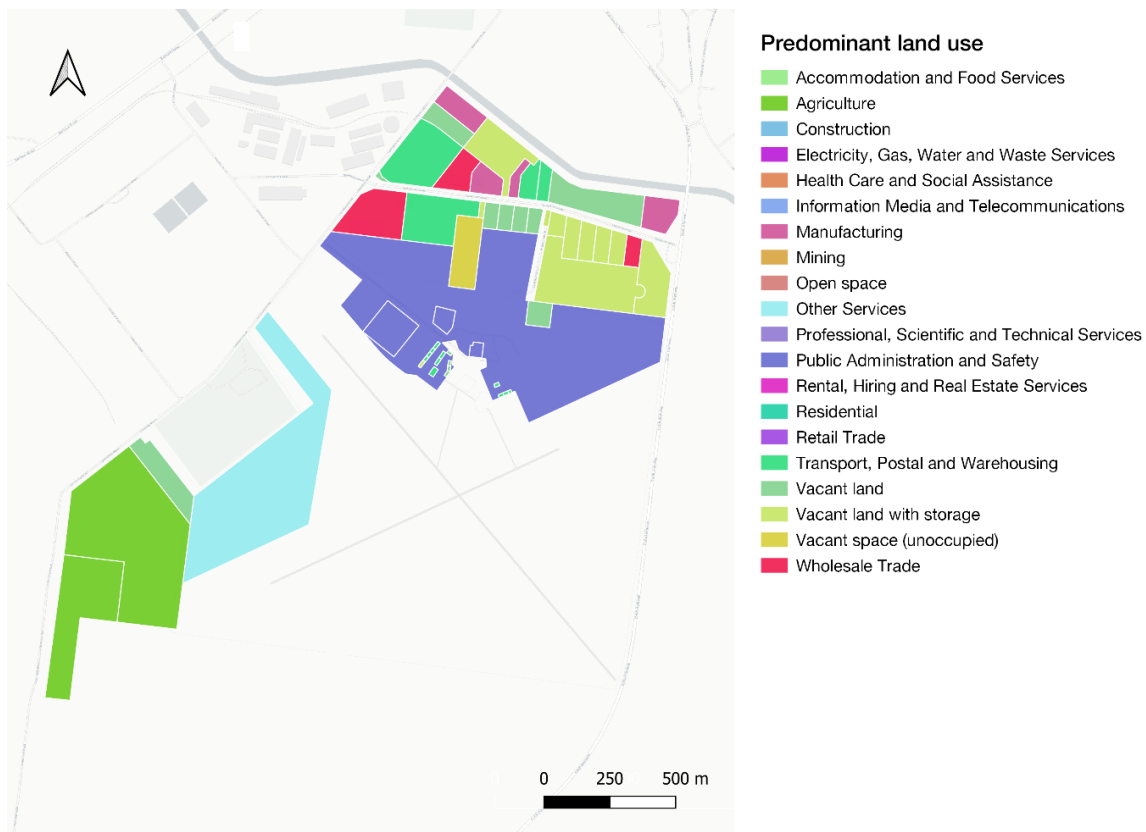
Figure 18: Airport precinct aerial



5.5.1 Predominant land use

Land uses within the Airport precinct relate to the presence of the airport itself, with several businesses and government services (e.g. NSW Fire Brigade training centre, NSW Fire Management Centre) locating within the airport area. In addition, several aircraft storage hangars are being constructed within the airport. Other major landholders exist on the serviced lands directly north and north-west of the precinct including bulk agricultural and fuel wholesalers and significant road freight businesses.

Figure 19: Airport predominant land use distribution



5.5.2 Land utilisation

As can be seen in Figure 20, the utilisation of land in the Airport Precinct is relatively low, and vacant land ready for immediate development is limited. Of vacant land, as can be seen in Figure 21, the lot sizes are relatively small in comparison to the types of industries that have been developing in the area or the land is owned by the Local Aboriginal Land Council.

There is an opportunity for the underutilised land around the Airport to be further developed for industrial purposes in line with the Deniliquin Airport Masterplan.

Figure 20: Land utilisation within precinct based on built FSR per lot

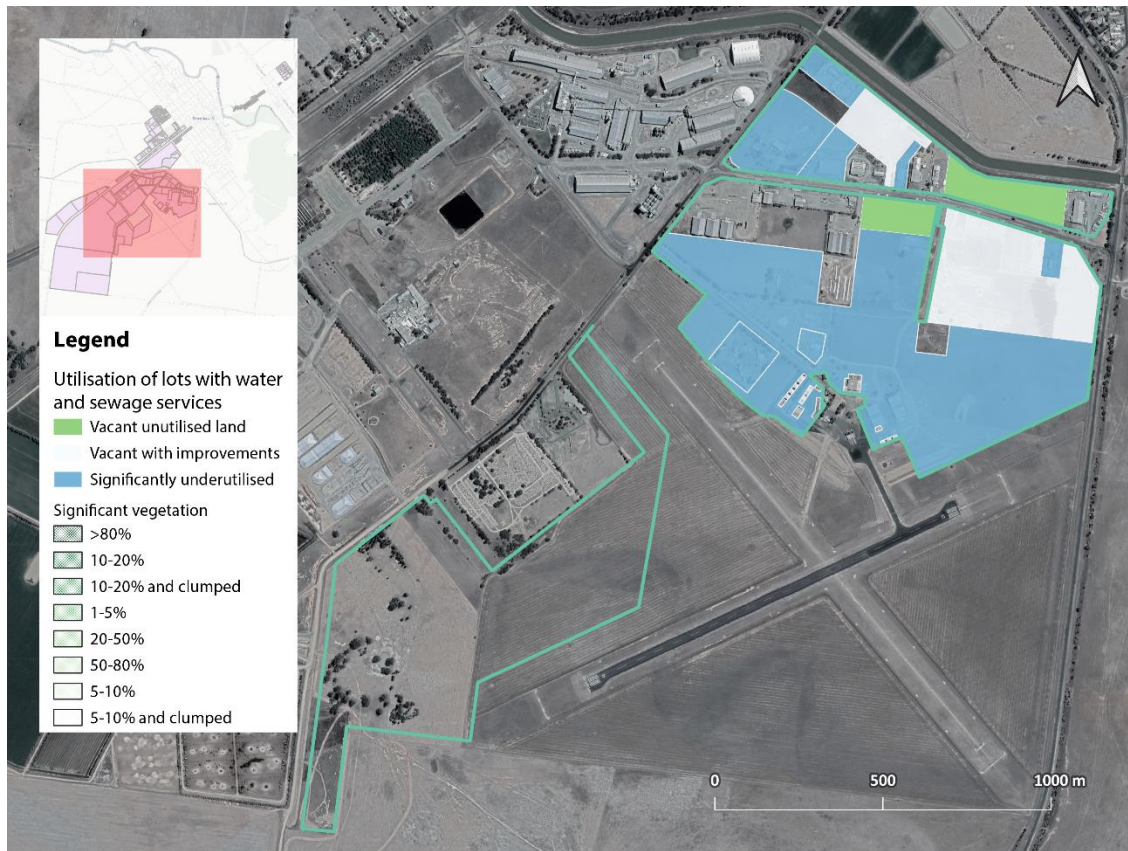


Figure 21: Lot size within the Airport precinct



5.5.3 Environmental constraints

The precinct would be unaffected in a 1 in 20 flood event and would only be at low risk at its easternmost extremity during a 1 in 100 flood event. Most of the precinct falls within the provisional Flood Planning Area gazetted by the council (300mm extent).

Council has assessed over 80 per cent or 122 hectares of the precinct as being affected by some form of contamination. Approximately 75 per cent of that contamination is from fuel, which affects the airport and most of the areas surrounding it. Below this, contamination arising from agricultural land use is the next largest contaminant.

Approximately 33 hectares or 22 per cent of the land within the Airport precinct is bushfire prone, and this land is predominantly to the south of the precinct, where the uses are more agricultural. Almost all the land is rated to a level 3 bushfire hazard.

5.5.4 Ownership

Most land in this precinct is within the airport, of which Council is the significant owner.

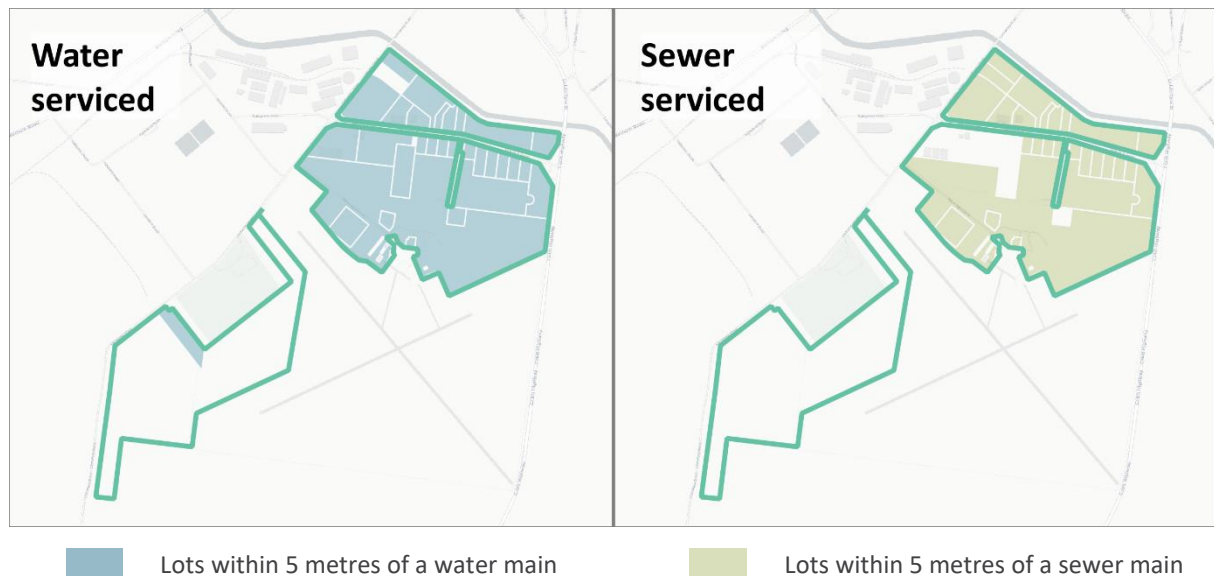
5.5.5 Development activity

There are currently no firm developments within the precinct.

5.5.6 Precinct infrastructure

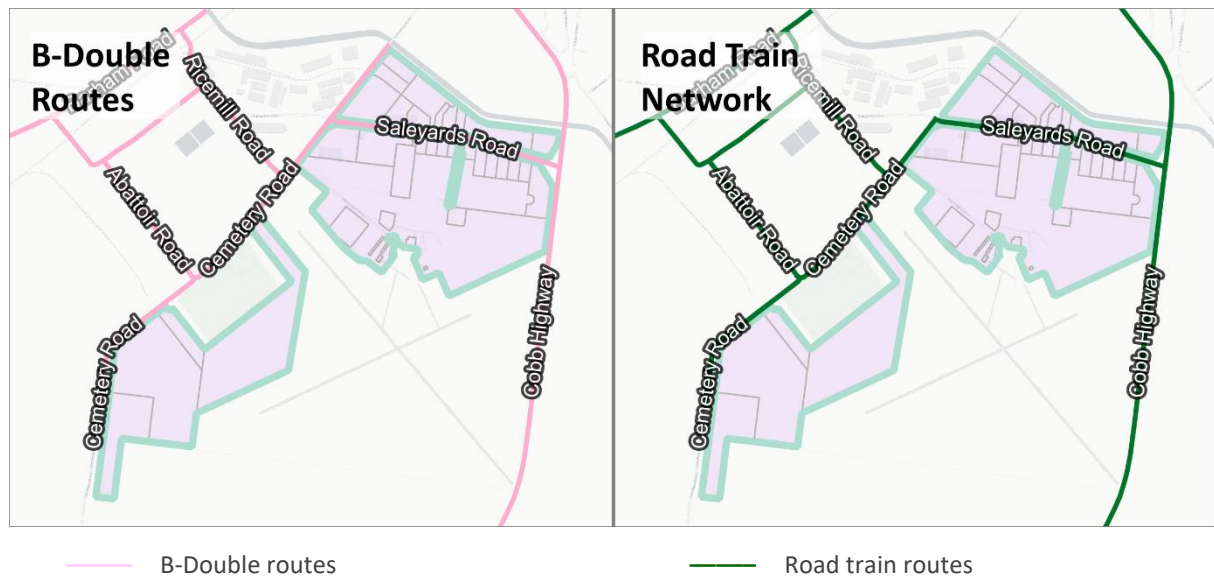
The northern part of the precinct, surrounding the airport, is predominantly serviced by both reticulated water and sewer. The southern part of the precinct, which is predominantly open land is not presently serviced.

Figure 22 Water and sewer serviced lots (less than 5 metres) within the Airport Precinct



The precinct is accessible by B doubles and road trains with an east-west route through the precinct available via Cemetery and Saleyards Roads, where a number of road freight businesses are based. The precinct is bounded to the east by the Cobb Highway, which is the major southern road link from Deniliquin to the Victorian border at Moama and Echuca.

Figure 23: Roads gazetted for b-double and road train access



5.5.7 Precinct observations

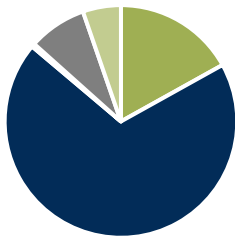
- The precinct contains Deniliquin Airport, which was the subject of the Airport Masterplan that proposed activating the area through the establishment of an air freight hub. Opinion amongst the stakeholders consulted was that this would not stack up financially or have the development interest
- This precinct has benefitted from a few recent developments, significantly the construction of the NSW Fire Management Centre and NSW Fire Brigade Training Centre
- Stakeholders suggested that there is some potential for downstream food processing around horticulture or intensive meat production
- Council owns five serviced lots suitable for industrial uses, which remain vacant
- Possible industries with opportunities arising from the airport
 - Residential sky village / Skypark – residential accommodation for airport users, fly in and stay with private hangars
 - Flight training school
 - Aviation equipment manufacturing
- Poor servicing to the south of the precinct has seen the industrial zoned areas being utilised as feedlots
- There was stakeholder criticism of non-airport related industries being approved on land adjacent to the airport (e.g. agricultural machinery manufacturing)
- Some stakeholders had a view that the council-owned lots around the airport should be made available at low cost or free of charge to encourage industry
- There was a perception that the extension of the runway has been shelved with the masterplan
- Possible future expansion of the airport may be constrained with respect to runway height envelopes
- Federal funding for resurfacing the existing runway has been allocated
- There are limitations on the power supply within this precinct. A significant expansion of industry here would require and additional substation to be constructed to the south of the canal. The view was expressed that this substation should be a Council priority
- Some stakeholders suggested that anything to the south of the aerodrome on the western side of the Cobb Highway should be for agriculture purposes
- Stakeholders indicated that land to the south-eastern side of the Cobb Highway could be future industrial development. Part of the unsealed runway would need to be dispensed to facilitate this.

5.6 South (Barham Road) precinct

The South precinct is located off Barham Road to the south of the town centre. The precinct is characterised by a mixed of businesses and hobby industries.

Land area:	117 hectares	Occupied GFA:	81,619 square metres
Gross floor area (GFA):	86,189 square metres	Vacant GFA:	4,570 square metres

Breakdown:



- Population serving
- Industrial
- Health and Education
- Knowledge Intensive
- Vacant space

Average built FSR: 0.17

Type:	GFA (sqm)	Per cent
Accommodation and Food Services	300	0%
Agriculture	5,370	6%
Construction	5,514	6%
Electricity, Gas, Water and Waste	7,748	9%
Health Care and Social Assistance	400	0%
Telecommunications	404	0%
Manufacturing	18,233	21%
Mining	1,238	1%
Other Services	8,272	10%
Professional, Scientific and Technical	2,100	2%
Public Administration and Safety	2,829	3%
Rental, Hiring and Real Estate	1,636	2%
Retail Trade	499	1%
Transport, Postal and Warehousing	24,353	28%
Vacant space (unoccupied)	4,570	5%
Wholesale Trade	2,724	3%
Grand total	86,189	100%

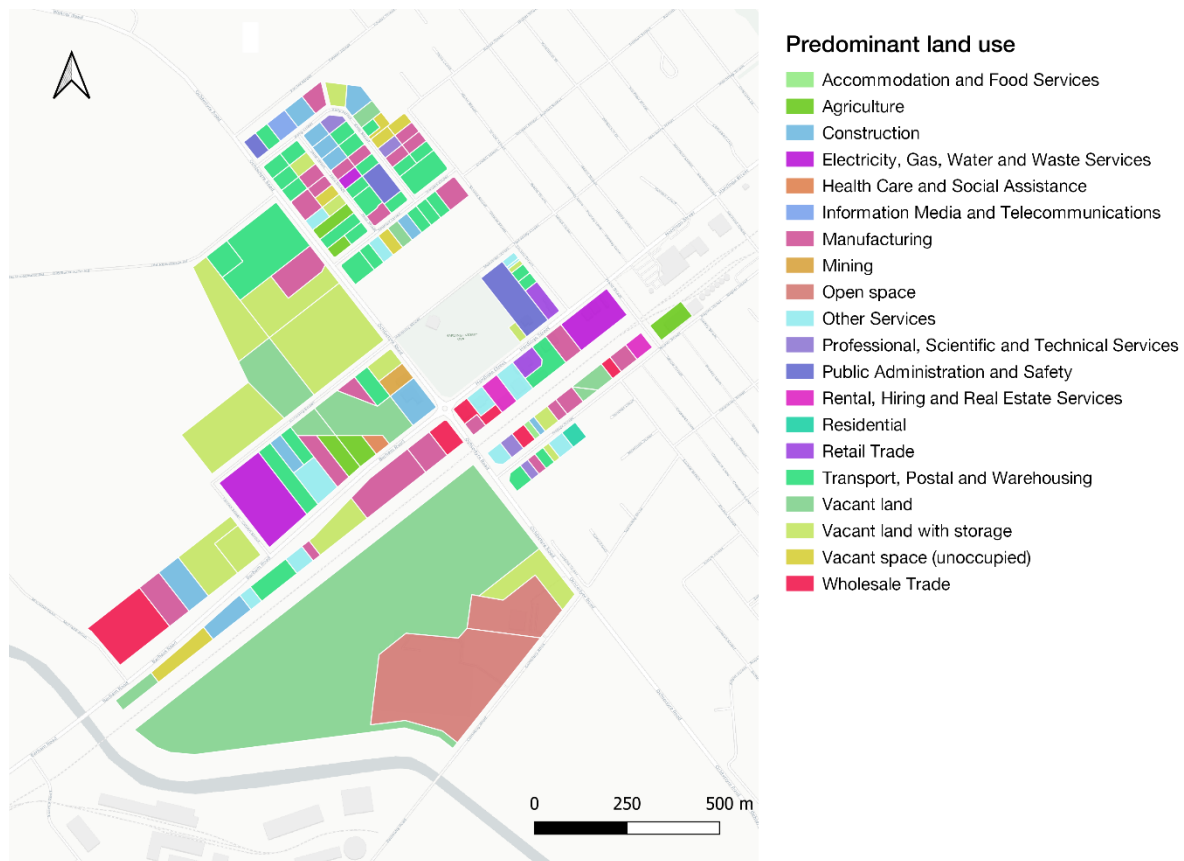
Figure 24: South precinct aerial



5.6.1 Predominant land use

Transport and manufacturing are the two major land uses within this precinct, with freight businesses, storage, a sawmill and steel fabricators amongst the largest land uses. Following this, there is a significant proportion of “Other”, which is predominantly made up of auto-repair and servicing businesses. The precinct also includes some council land to the south, which is now being used for recreational purposes (recently developed sports grounds).

Figure 25: South precinct predominant land use distribution



5.6.2 Land utilisation

As can be seen in Figure 26, the utilisation of land in the South Precinct is relatively high, particularly in the northern and eastern areas of the precinct, which are positioned closest to the centre of Deniliquin. There are some vacant lots with services available ready for immediate development, with these lots being of varying sizes. There are a significant number of serviced lots below the average industrial built FSR.

Despite the relatively high level of development within this precinct, there are opportunities for some infill development on vacant lots with immediate availability of services. These lots could be brought to the market relatively quickly.

Figure 26: Vacant and underutilised lots (based on built FSR) with access to water and sewage



Figure 27: Lot size within the South (Barham Road) precinct



5.6.3 Environmental constraints

There are no flood-prone areas within or adjacent to the precinct.

Council has assessed over 41 per cent, or 33 hectares, of land within the precinct as being affected by some form of contamination. Approximately 41 per cent of that contamination is from fuel, possibly arising from extensive urban services (e.g. agricultural and automotive service and repair, as well as extensive transport services within the precinct. Below this, contamination arising from agricultural land use is the next most significant.

There is no land within the precinct classified as bushfire prone. However, some properties along the northern edge, border an area with a higher hazard rating.

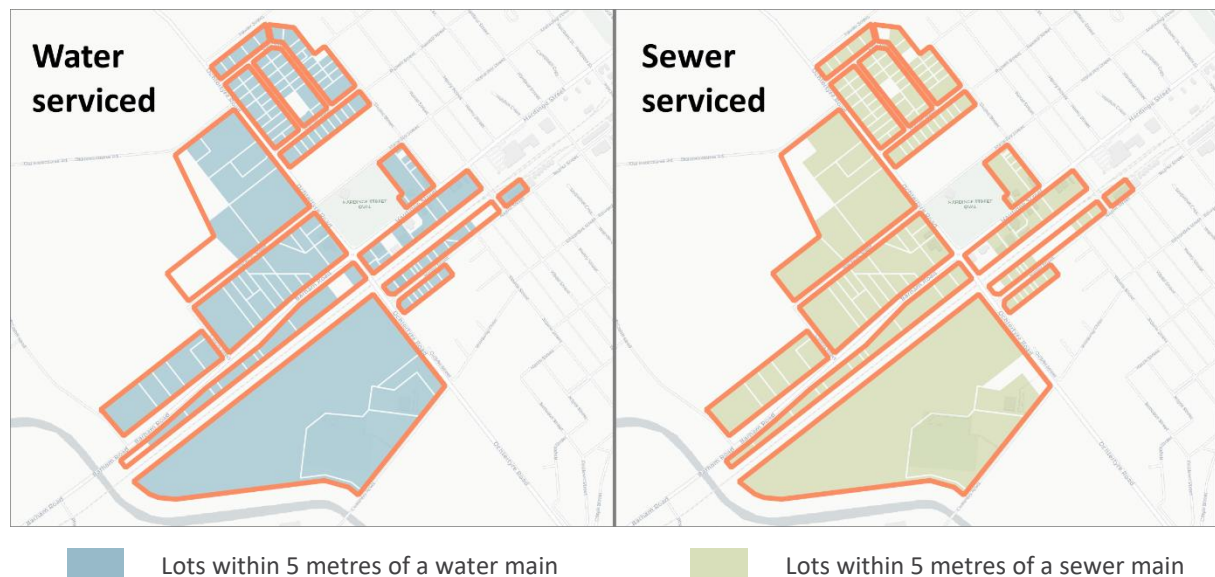
5.6.4 Development activity

Council is currently planning on consolidating the two existing council depots into the northern site, resulting in the present southern depot being rendered superfluous. Consequently, the council are currently seeking expressions of interest from developers regarding the existing depot.

5.6.5 Infrastructure

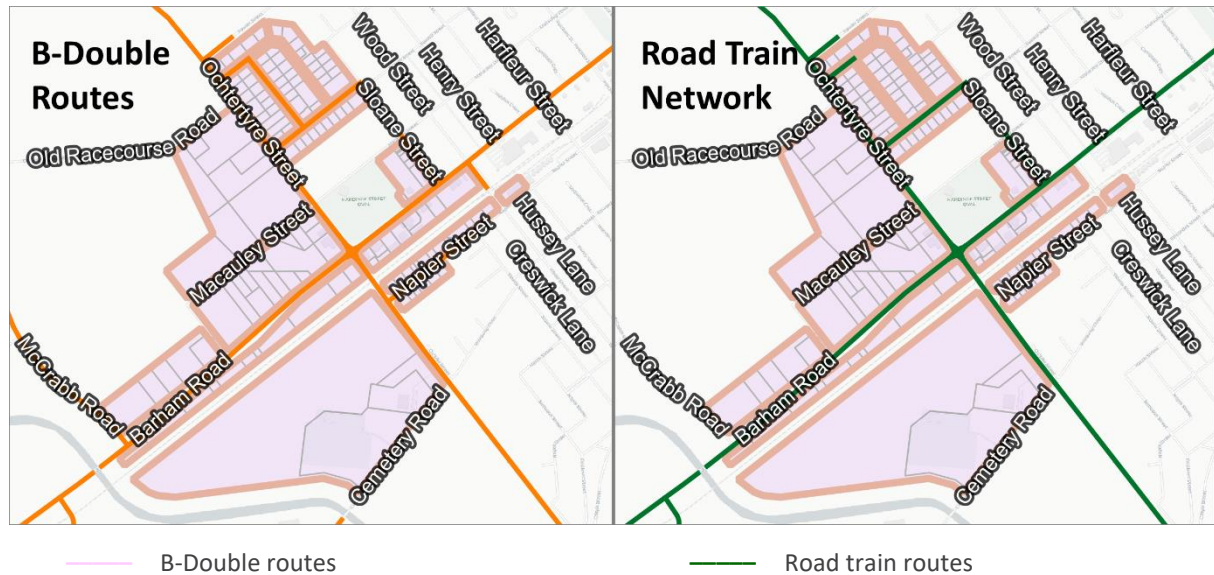
The relatively central location of this precinct within Deniliquin affords it better access to reticulated water and sewer services, with most lots being serviced, or within 5 metres of a service.

Figure 28: Water and sewer serviced lots (less than 5 metres) within the South (Barham Road) Precinct



This precinct is well served by road train and B-double routes, lying at the junction of the three major routes to the south and west of the Edward River and the main crossing at Deniliquin. Some of the local roads within the industrial areas have been gazetted as being appropriate for B-Double

Figure 29: Roads gazetted for b-double and road train access



5.6.6 South precinct observations

- This precinct is well-positioned relative to the town centre and as such is substantially established, with a great deal of existing industry and established uses, particularly storage
- Issues to do with road quality, particularly to the north of the precinct off Ochtertyre Street have been flagged and incorporated as a priority as part of the Council works program to address drainage issues
- To the south, there exist significantly large undeveloped lots, which are under consideration for a future intermodal facility
- The southern council depot is situated on the northern side of Barham Road, and it has recently been sold for industrial uses. Some contention exists that this could have been better used with uses that would bring more relevance to Barham Road as a major thoroughfare (e.g. bulky retail, or an attraction like the Purtil's Transport Museum)
- Some stakeholders would consider sites further out along Ochtertyre Street/Wakool Road as prime industrial land if they were to be rezoned
- It was suggested that a potential truck stop site could be accommodated on council land opposite the sewage treatment works. This site is large but would place a potential truck stop away from existing road train and B-double corridors
- Some businesses import materials to the region via rail and distribute by road
- It has been suggested that the basketball stadium to the south could be better zoned as RE.

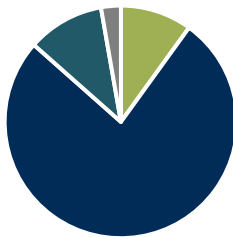
5.7 North (Augustus Street) precinct

The North precinct is located north of the Deniliquin town centre on the other side of Edward River.

Land area: 13 hectares **Occupied GFA:** 13,518 square metres

Gross floor area (GFA): 13,901 square metres **Vacant GFA:** 384 square metres

Breakdown:



- Population serving
- Industrial
- Knowledge Intensive
- Vacant space

Type:	GFA (sqm)	Per cent
Agriculture	1,559	11%
Construction	1,087	8%
Manufacturing	2,540	18%
Other Services	298	2%
Public Administration and Safety	1,489	11%
Transport, Postal and Warehousing	6,545	47%
Vacant space (unoccupied)	384	3%
Grand Total	13,901	100%

Average built FSR: 0.16

Figure 30: North precinct aerial



5.7.1 Predominant land use

The land use survey revealed that transport, postal and warehousing industry has strong representation within the precinct, largely as the result of large storage sheds. Several steel and other manufacturing businesses are based within the precinct, as well as the construction industry. Murray Constructions is a major business operation in this location that provides construction services to the wider region, particularly to the north. Agribusiness is also present with wool buyers and markers and Elders having storage based in the area.

Figure 31: North precinct predominant land use distribution



5.7.2 Land utilisation

As can be seen in Figure 32, the utilisation of land in the North Precinct is higher than the average across the LGA. The precinct contains no vacant land and all sites are currently utilised, albeit at a relatively low density. While the precinct is more isolated in its location, it does play an important role in servicing areas to the north of the main town centre. It also negates the need for large vehicles to cross over the Edward River and travel through town.

As can be seen in Figure 33, lots sizes are on a small scale; however, there is a range available. The area would benefit from additional land inclusive of some large lot sizes being made available. This would enable existing industries that have identified a desire to expand operations, to remain in the precinct. As specified in Figure 17, the large site to the south-west of the precinct is Crown Land and contains items of Aboriginal significance and therefore is not appropriate for expansion. Land to the south-east of Wanderer Street and the lower end of Conargo Road, directly opposite the existing industrial area would be a suitable location to investigate as an expansion area.

Figure 32: Vacant and underutilised lots (based on built FSR) with access to water and sewage

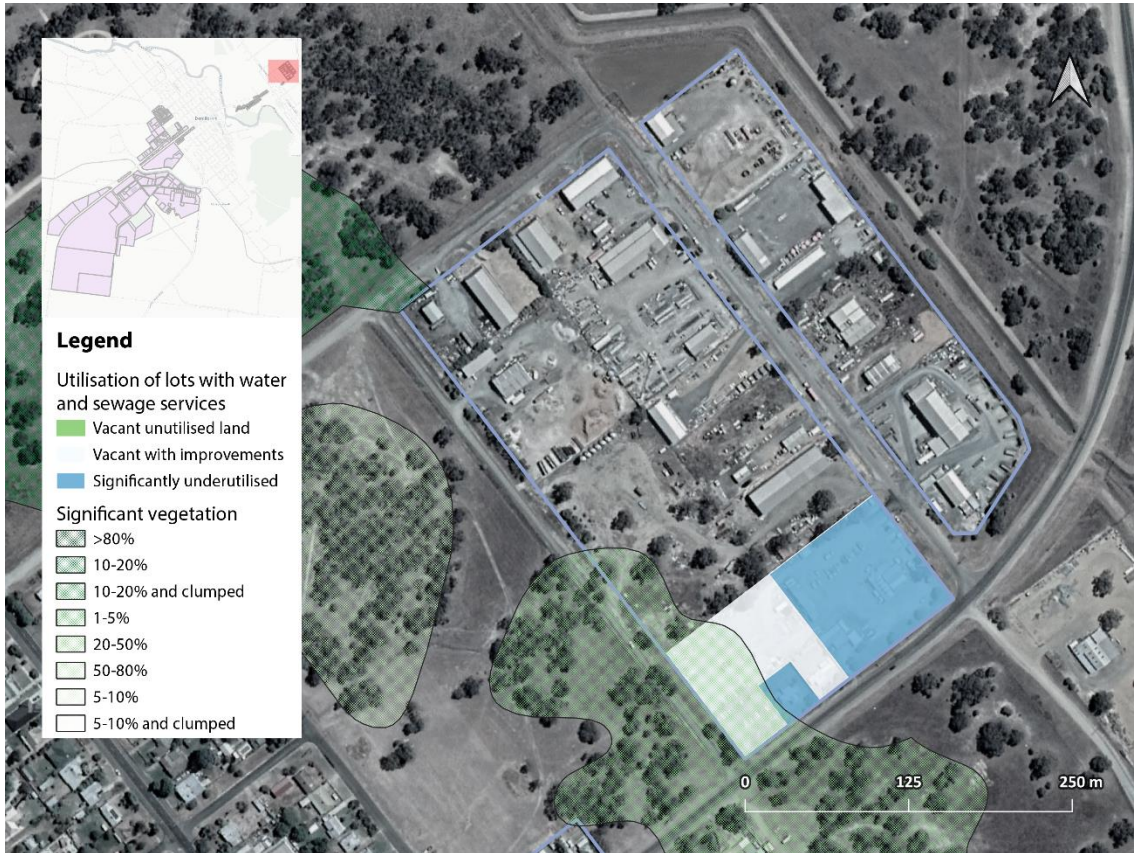
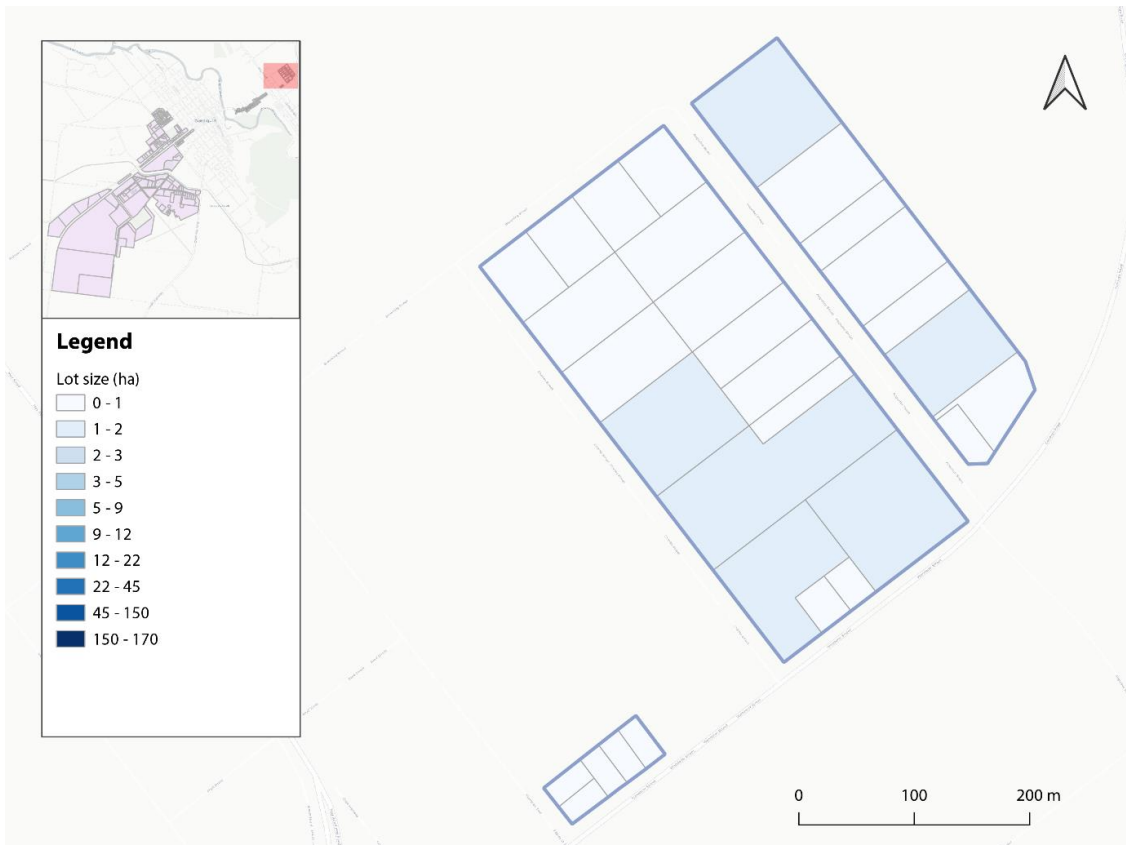


Figure 33: Lot size within the North (Augustus Street) precinct



5.7.3 Environmental constraints

This precinct is at risk from flooding, owing to its position on the north side of the river. The precinct is not at risk at the 1 in 20 flood level, however the 1 in 100 level presents flood hazards. The precinct entirely falls within the provisional Flood Planning Area gazetted by the council (300mm extent).

More than half of the land in the precinct has been assessed by the council as contaminated. The major cause of this contamination within the precinct arises from fuel, which accounts for almost half of contaminated areas. Contamination arising from agricultural uses and uses associated with junkyard storage account for over 40 per cent of remaining contaminated lands.

The precinct is surrounded by woodland on all or most of its aspects. While the land within the precinct itself is not classified as bushfire prone, the areas surrounding it are considered to be category 3 for bushfire risk.

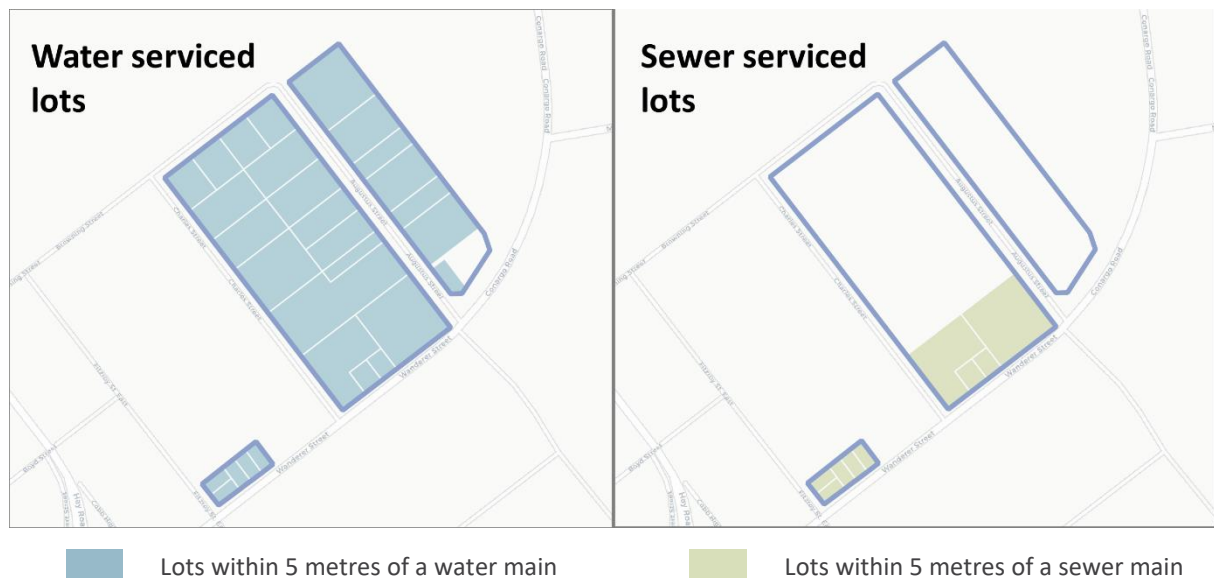
5.7.4 Development activity

Council is currently planning on consolidating the two existing council depots into the northern site and expanding the depot operations. Another major landowner is also seeking to expand operations in the precinct significantly.

5.7.5 Infrastructure

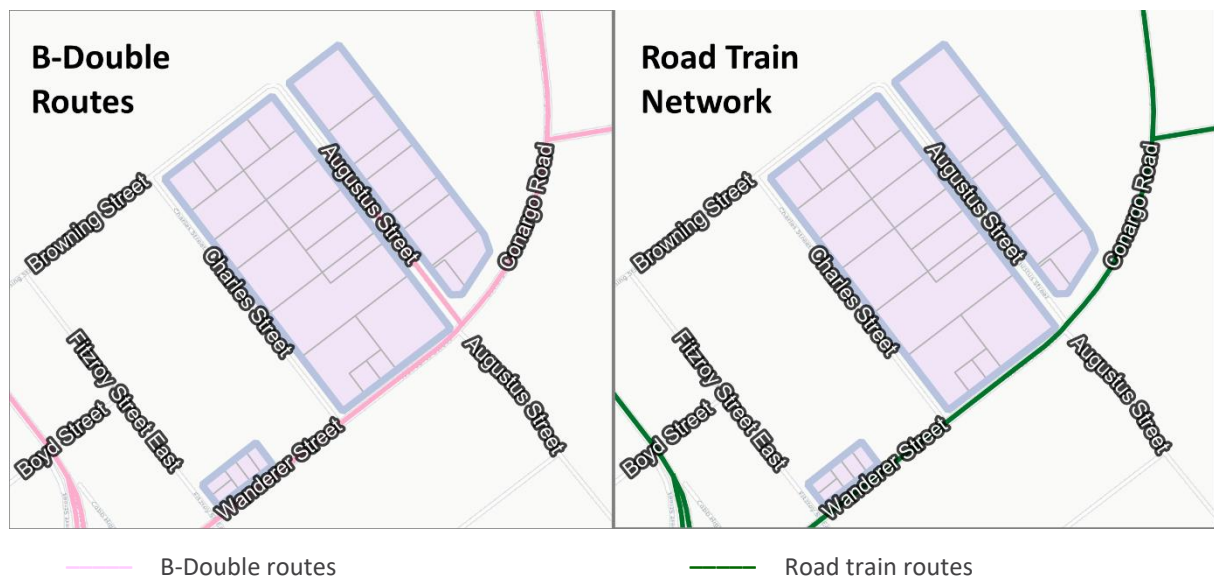
Lots within the precinct are well serviced by water, with all lots serviced by reticulated water. The area is poorly serviced by the sewer system, with lots to the south along Wanderer Street only serviced by reticulated sewer. The remainder of lots relies on septic systems. The area depends on open drainage, with minimal guttering and stormwater drainage. Subject to feasibility and further investigation, consideration could be given to extending the sewer reticulation system to this area.

Figure 34: Water and sewer serviced lots (less than 5 metres) within the North (Augustus Street) Precinct



The precinct lies to the north of Conargo Road, a major route leaving Deniliquin to the north gazetted for use by both B doubles and road trains. Within the precinct, a short section of Augustus Street is gazetted as suitable for use by B Doubles.

Figure 35: Roads gazetted for b-double and road train access



5.7.6 Observations

- Major landholders in this area include Edward River Council, with the northern council depot located to the south of the precinct. The council have a planned consolidation of operations at the southern depot to this location
- Stakeholders identified the precinct's location as a key advantage, being the only industrial land to the north of Deniliquin. It was said that this location affords better access to areas to the north by not requiring vehicles to travel through the town centre
- Businesses currently situated in the north precinct suggested that they would be highly unlikely to move to alternate locations to the south. They would prefer if more suitable land were made available in the north area
- Significant constraints on the capacity for some owners in this area to expand. No surrounding land available, and what exists is somewhat fragmented in terms of ownership.
- Some constraints on adjacent areas restricting the possible expansion of this industrial area:
 - Crown land to the south-west is constrained by the existence of items of Aboriginal cultural and heritage significance on site
 - Crown land to the south-east suggested for rezoning to extend the industrial area, however biodiversity issues exist on that site
- This area has the potential to be serviced through an extension of low-pressure reticulated sewer services.

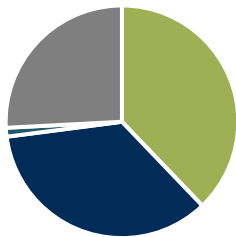
5.8 River (Davidson Street) precinct

The River precinct is an established precinct relatively central to the town. The precinct is oriented along the Davidson Street interface with good exposure to passing trade.

Land area: 9 hectares **Occupied GFA:** 12,435 square metres

Gross floor area (GFA): 16,764 square metres **Vacant GFA:** 4,329 square metres

Breakdown:



- Population serving
- Industrial
- Knowledge Intensive
- Vacant space

Average built FSR: 0.27

Type:	GFA (sqm)	Per cent
Accommodation and Food	366	2%
Agriculture	760	5%
Manufacturing	854	5%
Other	1,333	8%
Professional, Scientific and Technical	206	1%
Retail Trade	4,646	28%
Transport, Postal and Warehousing	1,337	8%
Vacant space (unoccupied)	4,329	26%
Wholesale Trade	2,934	18%
Grand Total	16,764	100%

Figure 36: River precinct aerial



5.8.1 Predominant land use

The land usage within this precinct is more diverse than others owing to it falling within Zone No (2) Urban (under the Deniliquin LEP 1997). This older zoning allowed for various types of compatible urban development, excluding extractive industries; intensive livestock keeping establishments; mines; offensive or hazardous industries; quarries. As a result of this, the precinct includes a significant number of residential dwellings (not counted towards industry). Additionally, the proportion of population serving uses within the precinct is significantly higher, driven predominantly by retail trade along Davidson Street. A higher proportion of vacancy exists within larger buildings that appear disused or vacant. Major active businesses include vehicle retail and hire, as well as agribusinesses.

Figure 37: precinct predominant land use distribution



5.8.2 Land utilisation

This precinct is highly developed and relatively well serviced. Owing to the residual zoning under the 1997 Deniliquin LEP, this precinct includes a large number of additional uses compared to the other precinct, particularly larger-format wholesalers and retailers. As such, lots are mostly utilised above the average FSR, with no substantive vacant and serviced lots.

With a relatively high level of development and smaller lot sizes, there are minimal opportunities for industrial expansion within the River (Davidson Street) Precinct.

Figure 38: Vacant and underutilised lots (based on built FSR) with access to water and sewage

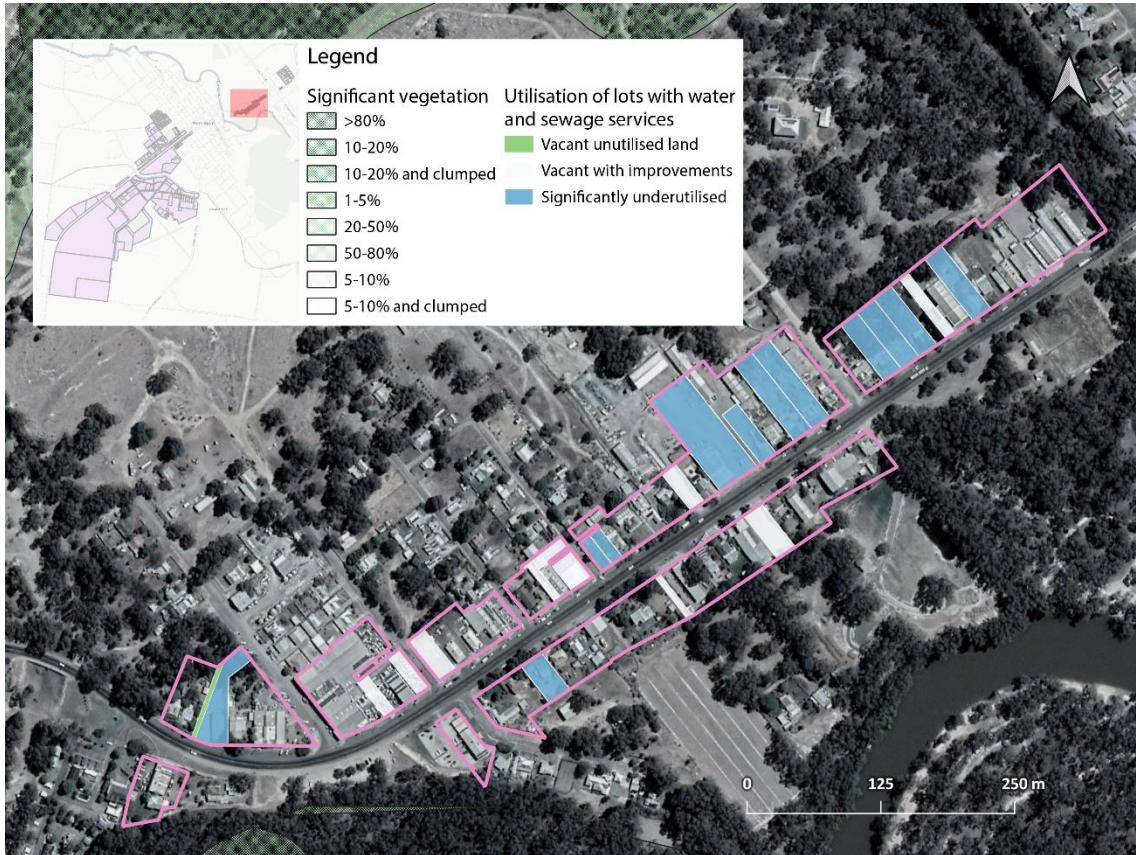
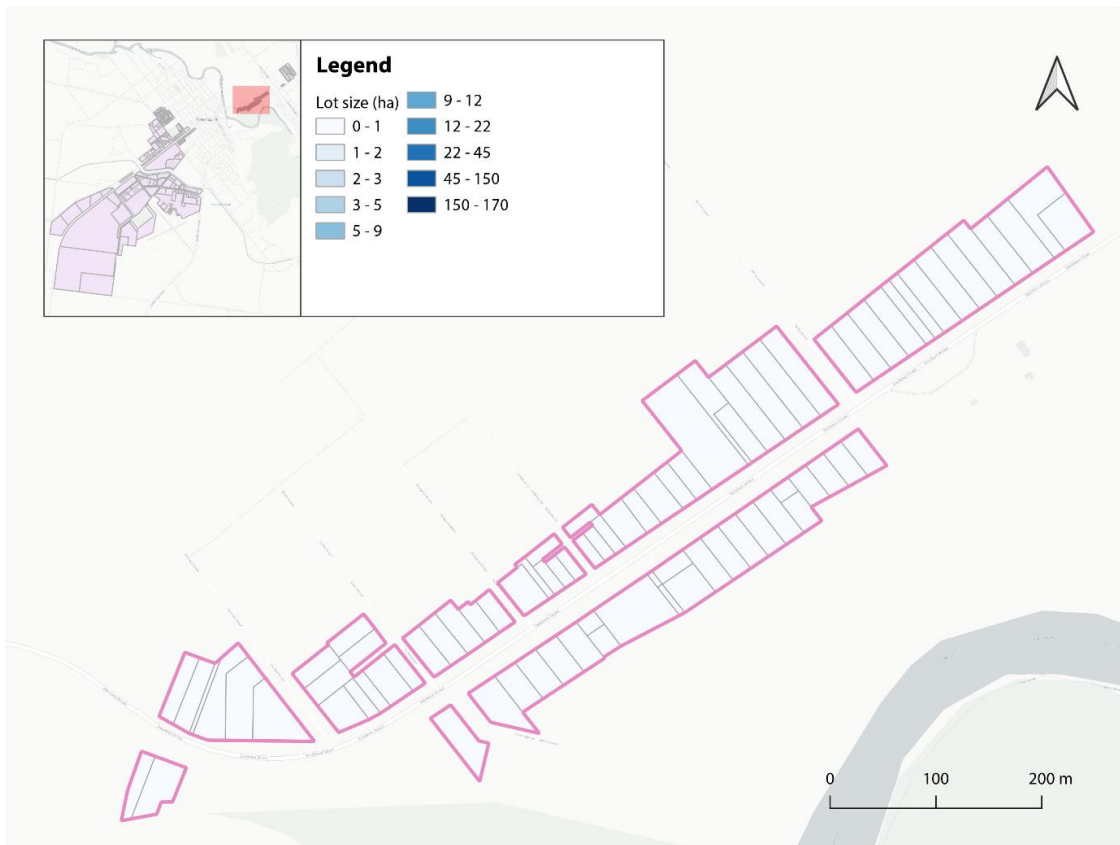


Figure 39: Lot size within the River (Davidson Street) precinct



5.8.3 Environmental constraints

As the precinct lies within the floodway, it is highly susceptible to impacts from flooding. During a 1 in 50 flood event, areas to the north of Davidson Street are considered to be predominantly in low hazard areas, or no hazard at all, while properties on the southern side are considered to be high hazard areas. At a 1 in 100 flooding event, the entire precinct is deemed to be hazardous, with most lots classified as being in high hazard areas.

The council classifies approximately 34 per cent of land within the precinct as being affected by some form of contamination. Of that land, approximately 67 per cent is affected by fuel contamination, followed by 25 per cent affected by contamination relating to agricultural activity.

Approximately 5.4 hectares or 62 per cent of land within the River precinct is bushfire prone. This is mostly the result of the precinct’s woodland setting. Of that land, approximately 85 per cent is of low risk, while 15 per cent is moderate risk.

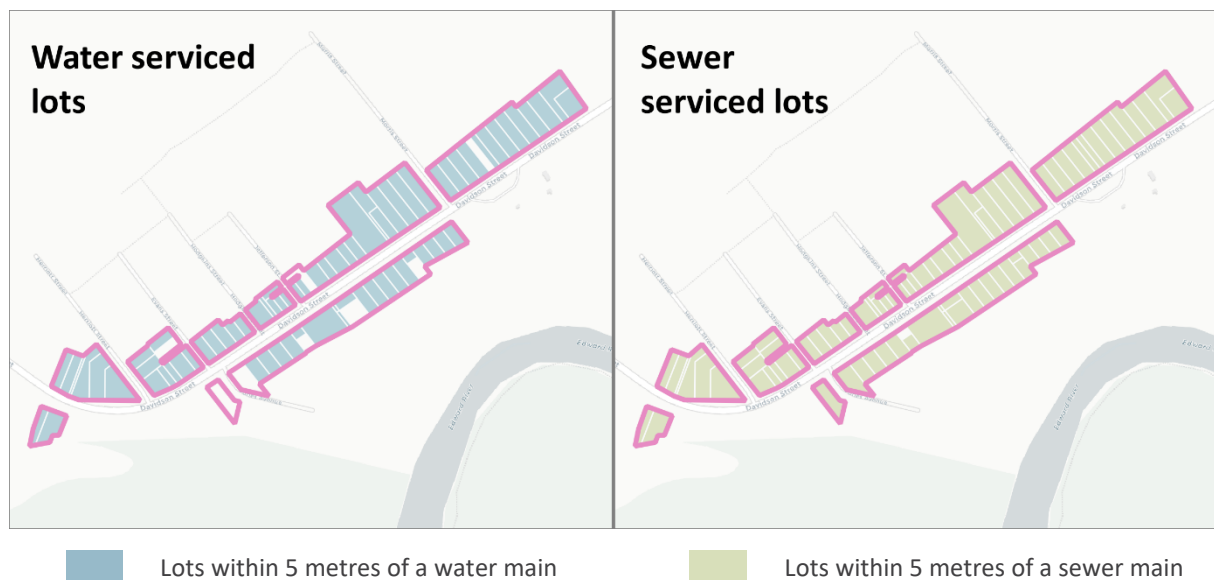
5.8.4 Development activity

New developments within the precinct are associated with the reconstruction of Edward River Oval and Tennis Courts.

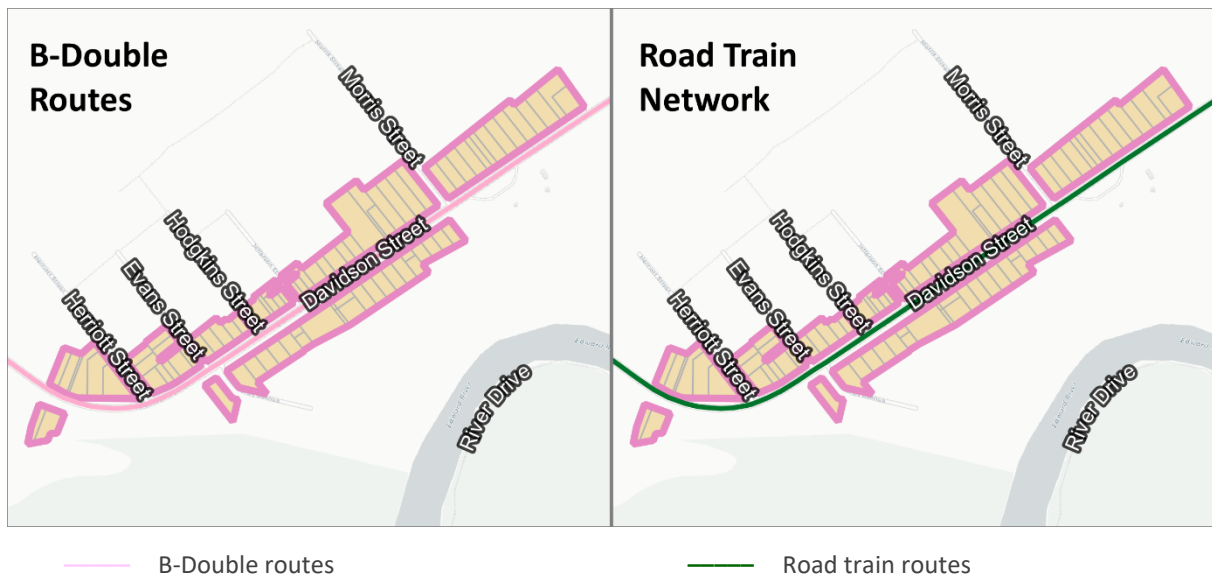
5.8.5 Infrastructure

The lots within the precinct are almost entirely within the range of reticulated water and sewer systems, which run along Davidson Street.

Figure 40: Water and sewer serviced lots (less than 5 metres) within the River (Davidson Street) Precinct



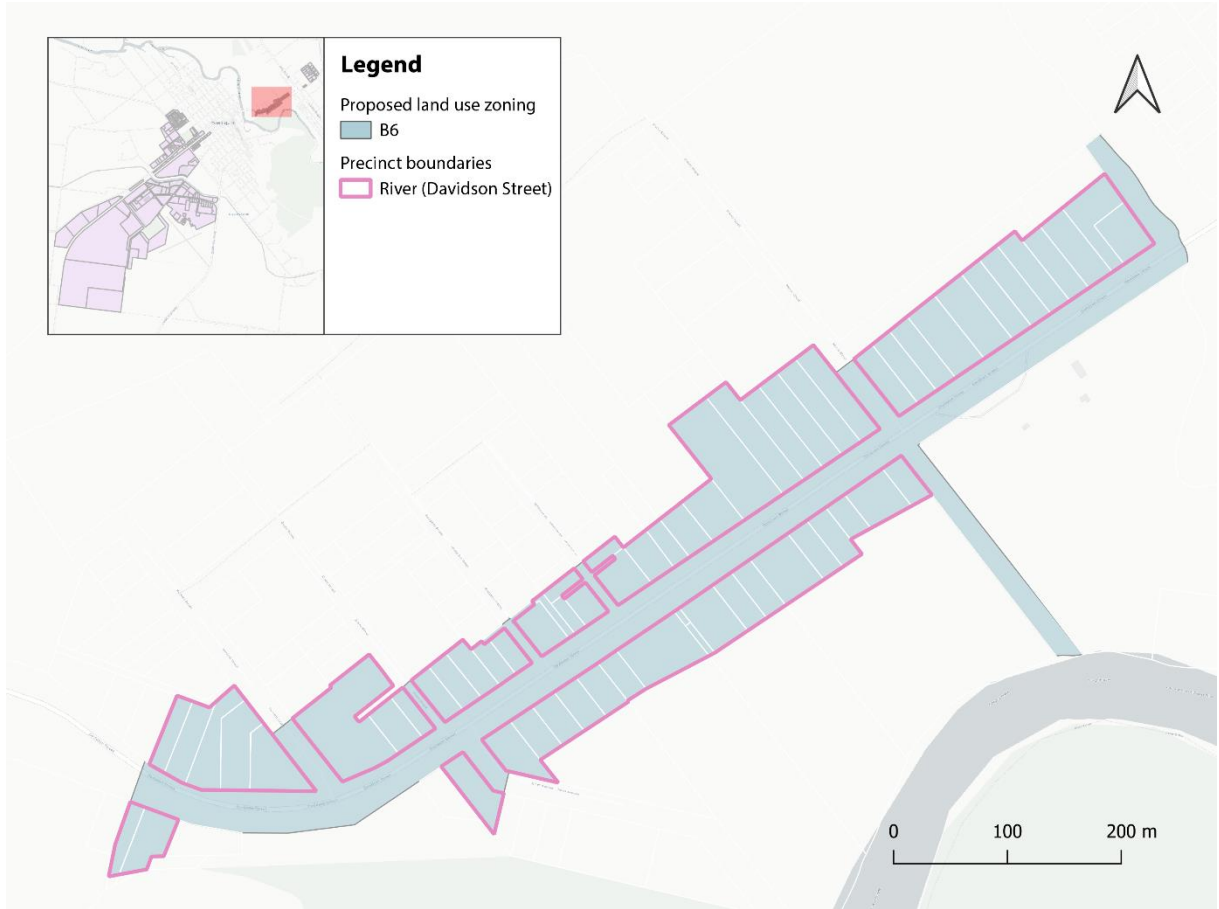
The precinct is longitudinal, fronting Davidson Street, which acts as the major crossing of the Edward River for road freight either side of the river. As such Davidson Street is gazetted for use by both B doubles and road trains.



5.8.6 Observations

- Owing to this precinct's more generalised zoning, development here is a mix of car dealerships, agribusiness and other retail and industrial uses, as well as significant residential. As a result, there is a higher level of vacancy, primarily amongst retail premises
- The precinct includes some sheds that appear disused on the southern side of the road
- On the south side of the road, adjacent to the park, a caravan pump-out station has been constructed to service road touring traffic
- Council is considering moving the existing rural zones surrounding this precinct to E3 Environmental Management and the existing urban zone that forms the precinct itself to B6 Enterprise Corridor (shown below in Figure 41).

Figure 41: Proposed B6 zoning

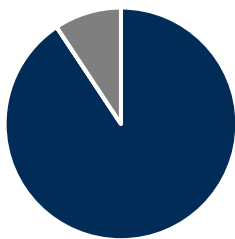


5.9 Rice Mill precinct

The Rice Mill precinct is located to the south of Deniliquin town centre off Barham Road, Cobb Highway and Leetham Road. The Airport precinct adjoins the precinct to the north-east. A rail line transects the eastern side of the precinct.

Land area:	567 hectares	Occupied GFA:	92,409 square metres
Gross floor area (GFA):	101,907 square metres	Vacant GFA:	9,499 square metres

Breakdown:

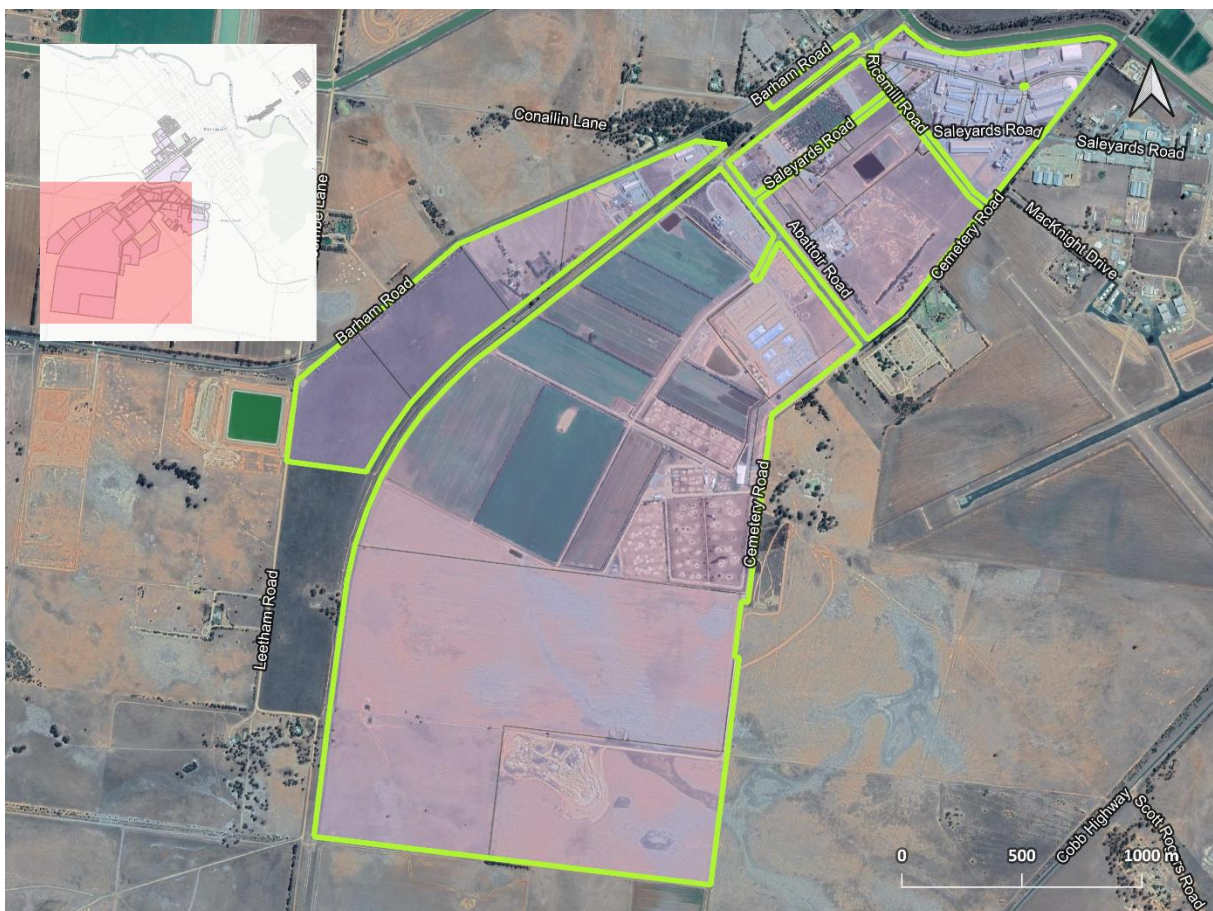


- Population serving
- Industrial
- Knowledge Intensive
- Vacant space

Type:	GFA (sqm)	Per cent
Agriculture	90,394	89%
Electricity, Gas, Water and Waste	0	0%
Manufacturing	51	0%
Public Administration and Safety	12	0%
Transport, Postal and Warehousing	1,952	2%
Vacant space (unoccupied)	9,499	9%
Grand Total	101,907	100%

Average built FSR: 0.79

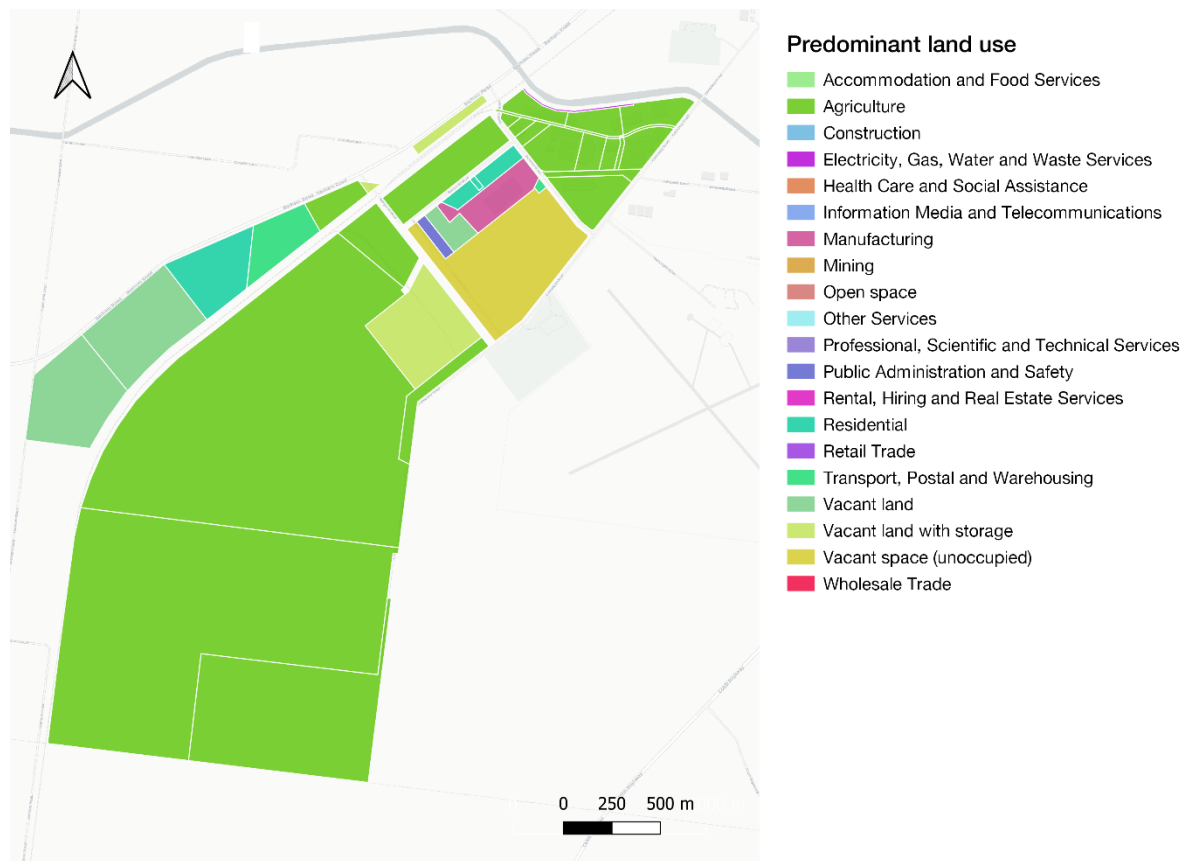
Figure 42: Rice Mill precinct aerial



5.9.1 Predominant land use

The land use audit revealed that a significant proportion (around 90 per cent) of the land within this precinct remains used for agricultural production (particularly the Sunrice mill and Graincorp). In addition, the presence of the saleyards and abattoir mean that land uses within the precinct are particularly attuned and susceptible to the performance of agriculture in the wider region. The significant proportion of vacant space (9 per cent of gross floor area within the precinct) is entirely located within the currently disused abattoir.

Figure 43: Rice Mill precinct predominant land use distribution



5.9.2 Land utilisation

This precinct has a significantly lower level of development, with the largest expanse of vacant or underutilised land. Only areas to the north of the precinct are serviced by both water and sewer, with these services not extending to the larger lots south of the abattoir. The land is currently being utilised for agricultural purposes that are not consistent with the objectives of the zone. There is little land presently available that is both vacant and serviced, but a significant amount of land that is underutilised. Opportunities to increase land utilisation further south could be realised with an extension of services and infrastructure.

Figure 44: Vacant and underutilised lots (based on built FSR) with access to water and sewage

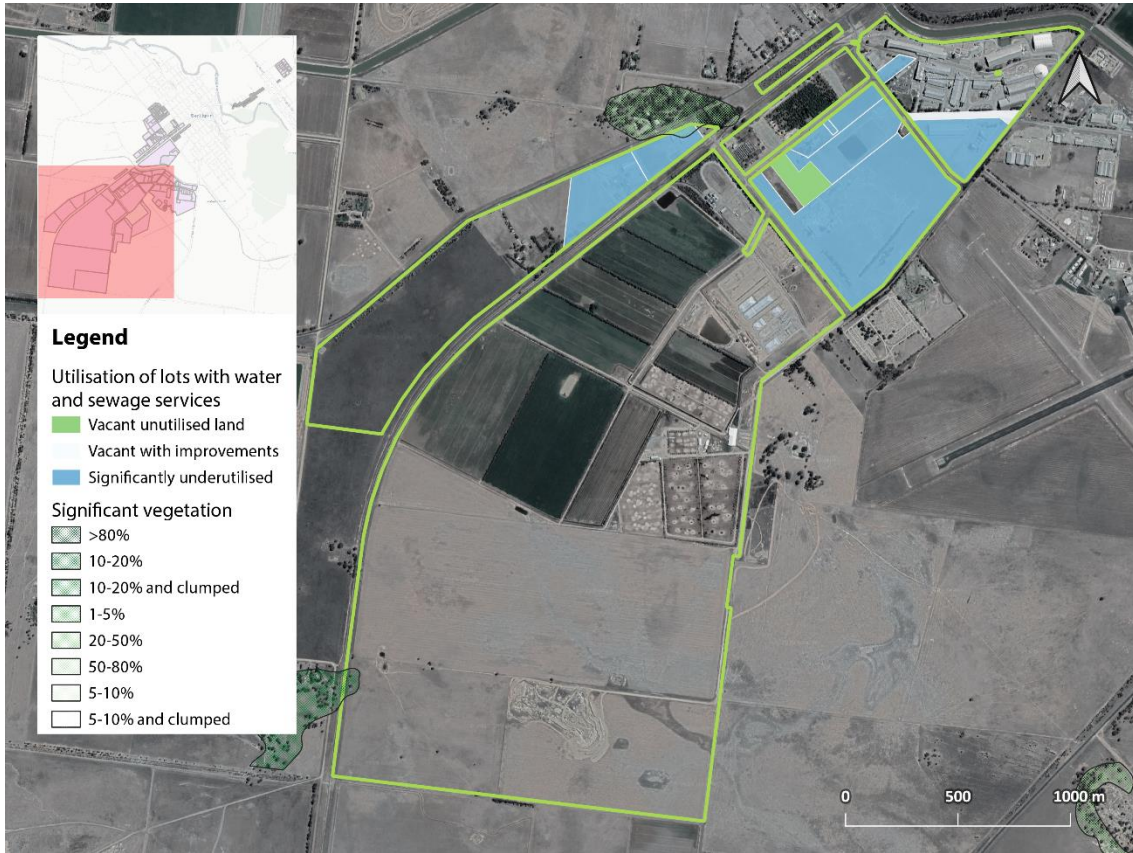
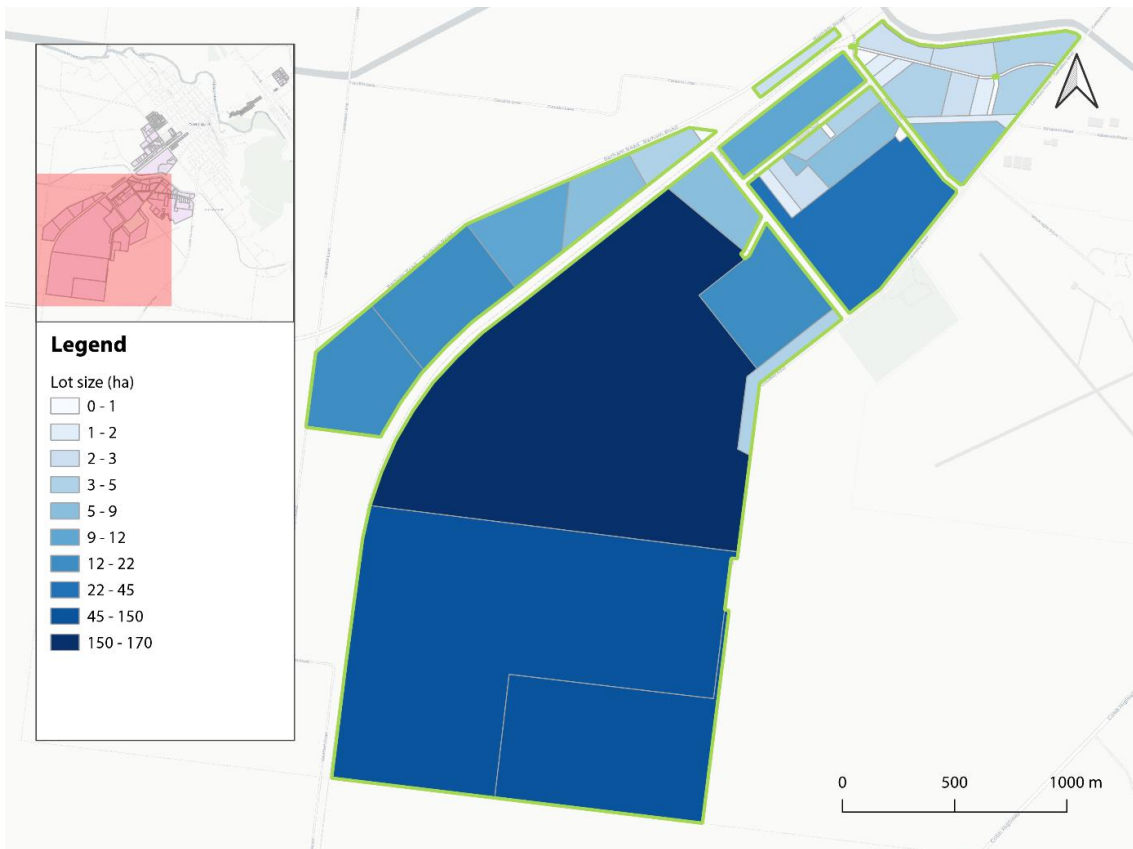


Figure 45: Lot size within the Rice Mill precinct



5.9.3 Environmental constraints

No areas within the precinct are at risk from 1 in 100 flooding events. The northern areas of the precinct, including the rice mill, saleyards and abattoir site are included in the provisional flood planning layer (300mm extent).

Approximately 265 hectares or 47 per cent of land within the precinct is classified as affected by some form of contamination. Of that land, around 92 per cent is affected by contamination relating to agricultural activity, followed by 10 per cent affected by fuel contamination.

Approximately 289 hectares or 51 per cent of land within the precinct is classified as bushfire prone. Most of this land is located to the west and south of the precinct, where land usage is predominantly agricultural, with an additional area within the saleyard site. Ninety-four per cent of this land is classified as Category 3 bushfire risk.

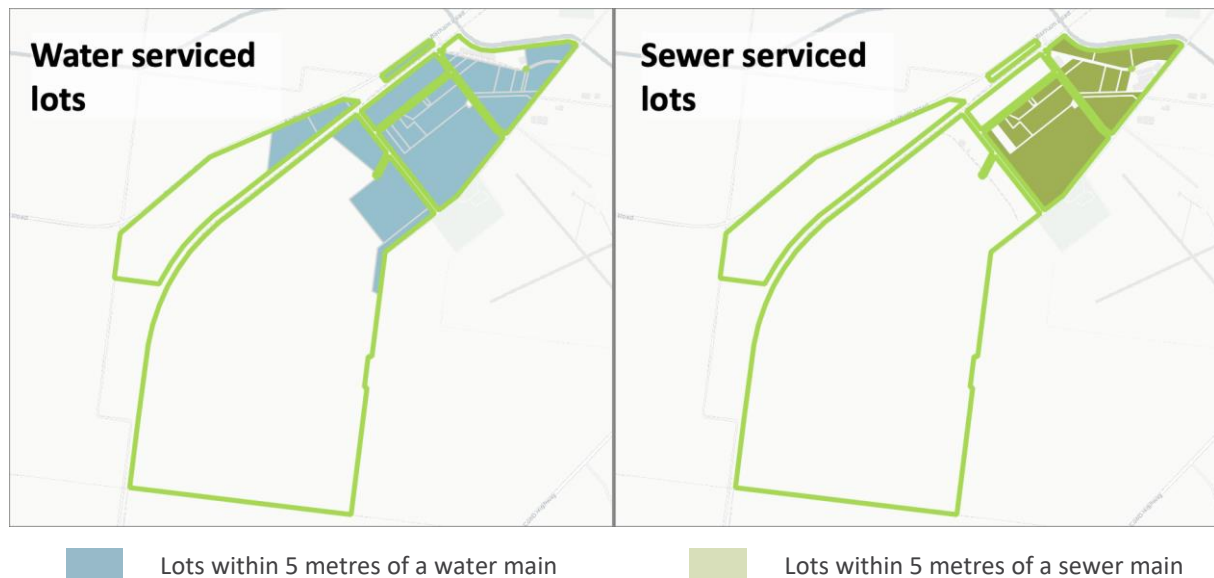
5.9.4 Development activity

There are currently no firm developments within the precinct.

5.9.5 Infrastructure

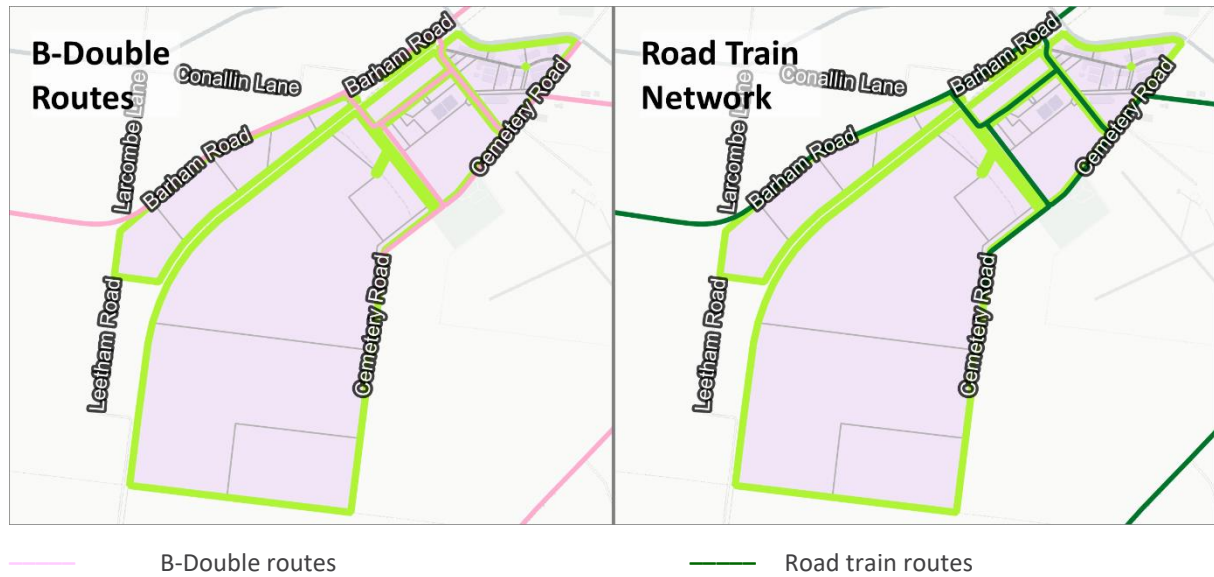
The more developed northern area of the precinct is well serviced by reticulated sewer and water systems. Lots south-west of Saleyards and Abattoir Road lack reticulated sewer, with water services available for lots further south-west. Deniliquin’s sewage treatment facility is located directly to the west of this precinct, across Leetham Road.

Figure 46: Water and sewer serviced lots (less than 5 metres) within the Rice Mill Precinct



The road freight network services the precinct to its north in the areas surrounding the rice mill, sale yards and abattoirs. To its north, the precinct is bounded by Barham Road, which is a prominent road link to the south west of Deniliquin. Most of the more poorly serviced areas to the south are not accessible for B doubles or road trains. The bridge over the canal on the eastern edge of the precinct is not rated above General Mass Limit (GML).

Figure 47: Roads gazetted for b-double and road train access



5.9.6 Observations

- This precinct has historically contained some of the largest employment generators within the LGA (e.g. the rice mill and abattoir). However, they have also been some of the most susceptible to changes in the economy of the wider region, with fluctuations in agricultural production significantly affecting employment within the precinct
- The industrial land to the far south lacks most types of servicing and is predominantly used as open agricultural land, predominantly as feedlots
- Limited servicing means that lands to the far south are not likely to be developed soon
- Road quality within the precinct is also an issue within the precinct with many roads not sealed
- Industry within this precinct has excellent access to major road freight routes to the south
- This precinct was previously to include the ethanol plant approved to the south of Deniliquin. The site remains vacant.



DEMAND ANALYSIS

6.0 INDUSTRIAL LAND MODELLING

The following Chapter projects the amount of additional employment space to be accommodated within the Edward River employment precincts. This growth in demand is required to support the surrounding resident, worker and visitor community. The Chapter estimates how much floorspace/land would be needed to accommodate this projected growth.

Given there are no employment projections for the LGA, HillPDA has projected demand for employment space based on the relationship between population growth and employment demand. This is a “population-based” method. The projections consider the anticipated demographic and labour market profile of Edward River’s future population, coupled with the ability of the LGA to generate and provide these jobs.

In short, this method assumes that any growth in working-age residents (defined as residents aged 15 years and above) will have a corresponding growth in the demand for increased employment opportunities to be provided in the LGA. Given the non-metropolitan nature of Edward River and its high self-containment rate of just over 86 per cent, it is assumed that any outgoing employment⁷ is compensated by inbound employment. As such, an increase of 1 working resident equals an equivalent 1 job growth in the LGA.

6.1 Population-based forecast broad approach

A high-level description of the population-based method is as follows:

1. Forecast the resident population aged 15 years and above over the next 22 years (2041) based on historical growth rates sourced from the ABS.
2. Determine the proportion of residents participating in the workforce – based on historic ABS employment to population ratios⁸.
3. Determine the number of employed residents working within Edward River’s employment precincts based on outcomes of the land use audit, average employment densities and 2016 resident working profile at the ANZSIC 1-digit code – convert to a proportion of total employment as of 2016.
4. Apply Step 3’s proportion to total employed residents to determine the amount directed and working within the LGA’s employment precincts.
5. Convert employment to floorspace by applying average employment densities, that is, the amount of floorspace required per employee.
6. Determine the net increase in floorspace demand by subtracting current floorspace provision from demand.
7. Proportion net growth in demand to individual employment precincts based on their current market share.

6.1.1 Population projections

NSW Department of Planning, Industry and Environment (DPIE) has recently released their 2019 population projections. It is projected that the Edward River population will decrease from around 8,990 residents in 2019 to 8,085 by 2041. This represents a total decrease of around 905 persons or 8.5 per cent over the 22-year period. This forecast would result in a significant decline in employment demand and subsequently, space in the LGA.

⁷ Persons living inside the LGA but travel to work outside the LGA

⁸ The number of employed persons expressed as a per centage of persons aged 15 years and over

Table 14: NSW DPIE 2019 population projections

Age group	2016	2021	2026	2031	2036	2041	Change
0-14	1,645	1,568	1,466	1,381	1,323	1,254	-391
15+	7,346	7,273	7,237	7,151	7,000	6,830	-516
Total	8,991	8,841	8,703	8,532	8,323	8,084	-907

Source: NSW DPIE 2019 population projections

Council expressed concern with the DPIE population forecasts and requested that HillPDA undertake our high-level independent predictions based on historical trends.

Assessment of population growth over the period between 1991 and 2016 has revealed an overall, steady reduction in the Edward River population. Having said this, evaluation of residents aged 15 years and over from 1991 to 2016 reveals that this age group has experienced fluctuating growth over the census periods.

Overall, persons aged 15 years has increased slightly over the 25 years, with significant growth being experienced over the 2011-16 period with an additional 297 residents. In comparison, younger residents have significantly decreased over the period.

Table 15: Historic population change 1991-2016

Age group	1991	1996	2001	2006	2011	2016	Change
0-14	2,257	2,196	2,125	1,943	1,718	1,574	-683
15+	7,136	7,170	7,064	7,104	6,871	7,168	32
Total	9,393	9,366	9,189	9,047	8,589	8,742	-651

Source: ABS

We have applied various growth rates observed in the above table to project growth in residents aged 15 years and over. Two scenarios were developed, these being:

- Low scenario – applies the annual growth rate between 1991 and 2016.
- High scenario – applies the annual growth rate between 2006 and 2016.

Applying these growth rates, it is estimated that over the next 25 years, residents aged 15 years and over are forecast to increase by between 128 and 260 residents.

Table 16: Resident population 15+ years projections 2016-41

Scenario	2016	2019	2021	2016	2031	2036	2041	Growth
Low	7,268	7,283	7,293	2,017	7,345	7,370	7,396	128
High	7,268	7,299	7,319	2,018	7,422	7,474	7,527	259

Source: HillPDA

6.1.2 Employed residents

Of the additional 128 to 260 residents, not all would be employed and working. Some would be unemployed and looking for work, some would be retired, or some would be full-time parents/careers.

To determine the likely number of residents that would be working, an assessment of historic employment ratios, that is the proportion of employed residents to working aged population, was undertaken.

This assessment reveals that the ratio has steadily decreased over the 25-year period from 58.4 per cent to around 52.5 per cent. This decrease is likely reflective of Edward River's ageing population over the period.

Despite this trend, for this assessment, we have assumed a stabilisation in this ratio at 52.5 per cent. It is noted that any further reduction would result in no further growth in employed residents. This target is in accordance with the vision of the Economic Development Strategy to encourage population and employment growth.

Table 17: Historic employment to population ratios

Segment	1991	1996	2001	2006	2011	2016
Working residents	4,169	4,312	4,100	4,117	3,855	3,817
Proportion to population 15+ years	58.4%	60.1%	58.0%	57.4%	55.6%	52.5%

Source: ABS

Applying this ratio, it is estimated that employed residents will increase from 3,817 in 2016 to between 3,884 and 3,953 by 2041. This represents an increase of between 67 or 135 employed residents over the period.

Table 18: Employed residents 15 years and over 2016-241

Scenario	2016	2019	2021	2026	2031	2036	2041	Growth
Low	3,817	3,825	3,830	3,844	3,857	3,871	3,884	67
High	3,817	3,833	3,844	3,871	3,898	3,925	3,953	136

Source: HillPDA

The next step is to estimate the number of workers contained/accommodated in the LGA's employment precincts.

6.1.3 Employment within employment precincts

The following methodology estimates the amount of employment contained within the LGA's employment precincts.

1. Reviewed the 2019 land use audit to assess the types of industries currently contained within the LGA's employment precincts and their occupied floorspace.
2. Developed a land-use matrix for the LGA's employment lands.
The land use matrix determines the proportion of employment, by ANZSIC 1-digit, that should be accommodated in various land zonings. For example, it is expected that 95% of manufacturing employment would be contained within employment precincts. At the same time, only a small proportion of accommodation and food services would be directed/accommodated in these precincts.
The land use matrix was informed by our experience, the type of jobs, land use audit and types/amount of zonings in the LGA.
3. Applied the land use matrix proportions to employed residents to estimate the amount working in employment precincts.
4. Converted employment to floorspace by applying average employment densities to the number of workers until the land-use results by industry type resulted.
5. If the resulting employment densities were unreasonable, the land use matrix industry proportion(s) were changed until a satisfactory density resulted.

Using this methodology, it is estimated that of the 3,817 working residents, 1,378 or 36.1 per cent worked within the LGA's employment precincts. This total employment accounts for the 15 industries currently located in the LGA's employment precincts. This proportion was then applied to forecast the number of employed residents.

This proportion has averaged around 37 per cent over the 1991-2016 period, however, for this assessment we have applied the 2016 proportion of 36.1 per cent to the forecasted growth in employed residents.

Using this methodology, it is estimated that jobs generated in the LGAs employment precincts will increase from 1,378 in 2016 to between 1,402 to 1,427 jobs by 2041. This represents an increase of between 24 and 49 jobs over the period.

Table 19: Change in jobs located in employment precincts

Scenario	2016	2019	2021	2026	2031	2036	2041	Change
Low	1,378	1,380	1,382	1,387	1,392	1,397	1,402	24
High	1,378	1,383	1,387	1,397	1,407	1,417	1,427	49

Source: HillPDA

6.1.4 Floorspace requirements

Employment is converted to floorspace based on an average employment density. In the previous task, it was found that across the precincts, there is an average density of 1 employee per 170sqm.

This average was then applied to the projected growth in employment to estimate the amount of occupied floorspace required.

Using this methodology, it is estimated that occupied floorspace requirements will increase from 234,588sqm in 2016 to between 238,675sqm and 242,930sqm by 2041. This represents an increase of between 4,086sqm and 8,342sqm over the period.

Typically, employment precinct development in more built-up centres has a developable FSR of around 0.3:1. Applying this average FSR to the forecasted increase in floorspace results in demand for an additional land of between 1.4 to 2.8 hectares. In rural locations, however, the built FSR can be lower, as is the case in Edward River. Applying the average built FSR for Edward River industrial land would result in demand for an additional 2.3 to 4.6 hectares.

There is around 18,780sqm of vacant floorspace across the five employment precincts. This forecasted net increase in occupied floorspace only equates to between 22 per cent and 44 per cent of this existing vacant floorspace. Assuming this space is taken up, no additional land stocks would necessarily be required based on this assessment.

Table 20: Occupied floorspace requirements 2016-41

Scenario	2016	2019	2021	2026	2031	2036	2041	Growth
Low	234,588	234,928	235,269	236,120	236,971	237,822	238,674	4,086
High	234,588	235,439	236,120	237,822	239,525	241,227	242,930	8,342

Source: HillPDA

However, assuming this additional space is distributed across each precinct based on its current market share, the following table identifies the take-up in each precinct.

Given that there is no vacant floorspace currently in the Airport precinct, demand for additional space is forecast range between 558sqm and 580sqm. All other precincts are expected to experience a take-up in their vacant space over the period. The exception to this is North (Augustus Street) precinct, which under the high scenario is forecast to have an additional demand of around 75sqm, however, this is deemed marginal and could be directed to other precincts.

Usually, some allowance for vacant space and additional demand should be planned. Given that the LGA would still contain between 11,655sqm and 15,255sqm of vacant floorspace, this should be enough to accommodate further forecast growth.

The *Economic Development Strategy* outlines opportunities to enhance employment and economic contribution to the LGA. The effective implementation of this strategy may enhance land use demand and improve population prospects.

To maximise opportunity, regardless of demand, Edward River needs to position themselves to respond quickly and enable priority delivery. This is discussed further in Chapter 8.0.

Table 21: Floorspace distribution by individual employment precinct

Precinct	2019 floorspace			Low scenario 2041			High scenario 2041			Net increase	
	Occupied	Vacant	Total	Occupied	Vacant	Total	Occupied	Vacant	Total	Low	High
Airport	34,608	0	34,608	35,166	0	35,166	35,747	0	35,747	558	581
North (Augustus Street)	13,901	384	14,285	14,125	160	14,285	14,359	0	14,359	0	74
Rice Mill	101,907	9,499	111,406	103,551	7,855	111,406	105,263	6,143	111,406	0	0
River (Davidson Street)	16,764	4,329	21,093	17,034	4,059	21,093	17,316	3,777	21,093	0	0
South (Barham Road)	86,189	4,570	90,759	87,579	3,180	90,759	89,027	1,733	90,759	0	0
Total	253,369	18,782	272,151	257,455	15,254	272,709	261,711	11,653	273,364	558	655

GAPS ANALYSIS

7.0 GAPS ANALYSIS

There is a need to evaluate the gaps and opportunities in the LGA to identify the strategic directions and priorities for employment land. The Economic Development Strategy established clear strategic themes that guide the evaluation undertaken in Table 22.

Table 22: Opportunities and gaps analysis

Strategic theme	Opportunity	Challenge	Gap
Attract new business investment	<ul style="list-style-type: none"> The diversity of industrial land and lot sizes available in the LGA is generally appropriate for attracting numerous industries Leverage the existing economic development role to promote further and support job growth in the region The liveability of the region and access to health, education community and natural assets The affordability of residential, commercial and industrial land Opportunity in agri-business processing leveraging off rising land prices in industrial estates in Victoria and consequential investment attraction. 	<ul style="list-style-type: none"> There is currently a limited market or interest in the available land The water security issue reduces the appeal of the area for industrial investment The LGA's economy is highly dependent on the agricultural base, with gaps in other sectors Industrial land is only available in the main town of Deniliquin – this is fairly normal for a regional LGA Access to gas is currently not viable Some agricultural processing facilities take up vast amounts of land, to attract these businesses land need to be available and serviced. 	<ul style="list-style-type: none"> Targeted program to attract manufacturing, transport and aviation industries A major government organisation to underpin employment base Secure access to affordable and safe energy sources Current provision of vacant land in some precincts does not have adequate infrastructure servicing.
Support existing businesses to grow	<ul style="list-style-type: none"> Deniliquin has several successful businesses that, if willing, could be used as positive case studies to attract further growth Greater networking and collaboration between businesses to drive new idea generation, clustering and competitive advantage. 	<ul style="list-style-type: none"> Jobs are available, but businesses find it difficult to attract workers The supply of industrial land for the LGA is currently concentrated in Deniliquin. The distribution and supply of land across Deniliquin is appropriate, however consultation with some businesses indicated that more land in the North precinct would be preferable The River and North precincts do not have a future supply or appropriate diversity of lots available The planning and business start-up process can be complex making it difficult for local employers to expand operations or start new businesses 	<ul style="list-style-type: none"> The feasibility of releasing more industrial land to the North of Deniliquin is unknown A business support program to assist new businesses to navigate the regulatory and planning system Facilitated networking and collaboration events.

Strategic theme	Opportunity	Challenge	Gap
		<ul style="list-style-type: none"> Perception regarding the appropriateness of businesses Council is contributing funding to. 	
Infrastructure provision	<ul style="list-style-type: none"> Prioritising the servicing of land and having 'market ready' site may help to stimulate business investment through targeted marketing channels 	<ul style="list-style-type: none"> Gaps in the provision of water and sewer infrastructure. Due to the limited funding streams, financing infrastructure delivery will need to be prioritised The feasibility of servicing and delivering infrastructure across the LGA. 	<ul style="list-style-type: none"> A priority infrastructure delivery plan and program to direct investment.
Innovation, education and skills development	<ul style="list-style-type: none"> The LGA currently has an established education system that can be further leveraged to attract new business Schools and tertiary clusters are well regarded. 	<ul style="list-style-type: none"> Fostering collaboration between schools and local industry Retaining young professionals in the LGA once finished school Diversifying the opportunities for employment to retain and attract more workers to the region. 	<ul style="list-style-type: none"> Clear pathways to employment in local industries Tailored education programs that support local industries Small business upskilling courses Subsidised entrepreneur and apprentice programs.
Revitalise and activate the CBD	<ul style="list-style-type: none"> A revitalised centre with strong amenity and services may assist in retaining and attracting more people to the area 	<ul style="list-style-type: none"> While the Deniliquin Masterplan has been drafted, it is primarily a design document focussed on street beautification. There is a need to undertake a more holistic review that more broadly explores the urban structure and economics of the environment. 	<ul style="list-style-type: none"> Need for a centre activation strategy that investigates economic, social and structural revitalisation opportunities.
Market the region	<ul style="list-style-type: none"> Targeting key industries and attempting to diversify the economic and employment base through active events, promotion, marketing and communication. 	<ul style="list-style-type: none"> Identifying the avenues that will return the highest job opportunities Uncertainty regarding water allocation Uncertainty regarding population decline Competition with larger centres that have a greater diversity of facilities Perception of affordability for day-to-day goods and services. 	<ul style="list-style-type: none"> Need to establish a clear value proposition Need to advocate for improved water security Industrial business prospectus.



STRATEGY

8.0 STRATEGY

8.1 Strategic directions

1 Promote that Edward River is 'open for business'

2 Target key industries for attraction and expansion

3 Secure a pipeline of employment land

4 Provide development support and partnership opportunities

5 Enhance and promote lifestyle and services

8.2 Timeframes and priority

This section details the directions and actions that are recommended for implementation to support industrial land development and transition in Edward River. Recommended timeframes and priorities to help achieve the directions and actions have been allocated as follows:

Timeframe		Priority	
Short term	0-2 years	High	Significant impact
Medium term	2-5 years	Moderate	Medium impact
Long term	5-10 years	Low	Low impact



Direction 1: Promote that Edward River is 'open for business'


Conveying the 'open for business' message is key in attracting and retaining businesses in the LGA. Feedback from consultation indicated that there were a number of perceptions around water allocation, availability of land and the rural lifestyle that needs to be overcome to shift the negative sentiments. It was also identified that the Council take a more entrepreneurial approach and actively and assertively advocate for better processes and attract new business opportunities to the region.

The *Economic Development Strategy* establishes strong directions and actions to promote a council that is ready and willing to accept new business opportunities. Additional actions can be undertaken to encourage industrial opportunities, as outlined in Table 23.

Table 23: 'Open for business' actions

Ref	Description	Responsibility	Timing	Priority
1.1	Marketing and branding Consider the development of an industrial investment prospectus that clearly articulates the opportunities and benefits of locating in the LGA. This should celebrate and profile the successes of existing businesses and provide pathways for investment.	Community and economic development	Short	Moderate
1.2	Council assistance Fast-track industrial development applications and processes for key industries.	Environment services	Short	Low
1.3	Council assistance Work with proponents on key development applications to identify and resolve issues early in the application process.	Environment services	Short	High
1.4	Business database Develop and maintain a local industry capability database in consultation with businesses in Edward River to enable easy partnership identification, promotion and clustering.	Community and economic development	Medium	Moderate
1.5	Capability building Host and support local industry capability building workshops and events, including inviting specialist to the region to share knowledge.	Community and economic development	Medium	Low

Ref	Description	Responsibility	Timing	Priority
1.6	<p>Communication and messaging</p> <p>Develop a standalone tab on Council’s website dedicated for business and investment. The current business support information is hidden under the community tab and is relatively limited. Consider expanding the content to include:</p> <ul style="list-style-type: none"> • Why do business in Edward River – a one page snapshot promoting doing business in Edward River <ul style="list-style-type: none"> – Quick stats and figures advertising the benefits – Business success profiles – regularly celebrating and promoting the local businesses in the community. • Business opinion survey (actively promoted and pushed through Chamber of Commerce and Council databases) • Learning, networking and event opportunities – upcoming networking events, online training courses, tailored workshops etc. • Funding opportunities – information about the different ways local businesses can access funding, including relevant links, guides and application forms • Quick links to relevant policy - the <i>business development policy</i> (identified on the Business Support page) and any other relevant policies for ease of reference. A search of the website was unable to find a ‘Business Development Policy’ despite the reference. Potential other relevant policies include: <ul style="list-style-type: none"> – Draft Investment Attraction and Expansion Policy – Waiving and refunding application fees policy (for clarity remove duplicated document with the Town Planning Policy – Waiving and Refunding Fees Policy). • Quick links to resources <ul style="list-style-type: none"> – Town planning applications and documents – Relevant regulations – Helpful websites for small businesses – Priority infrastructure delivery plan. 	Community and economic development	Short	Moderate



MURRAY CONSTRUCTIONS

Murray Constructions is a locally owned, family run, and operated business based out of Deniliquin. The business was founded over 30 years ago by Mr Ronald Murray Senior.

Originating as a company specialised in bridge building, it has since evolved to include manufacturing of prestressed, precast concrete products. It also offers ancillary services such as equipment hire, project management, demolition and removal services, earth boring, civil engineering works, fencing and tree felling.

Initially serving only the Deniliquin and Conargo Shire, it has expanded to service areas across the state. The companies exemplary track record continues to attract government contracts.

Direction 2: Target key industries for attraction and expansion

The Edward River economy is supported by a strong agriculture sector, albeit industry is heavily reliant on its prosperity. There is a need to create a sustainable and diversified industry base to strengthen industrial productivity and enhance job generation in the industrial areas. Actively targeting and facilitating the establishment of key industry clusters can assist in catalyse investment. As identified in Chapter 3.0 several emerging industries can be further explored as opportunities for Edward River LGA.

Based on consultation with local businesses and stakeholders, technical analysis and a review of the other technical specialist reports, a number of target industries emerged that could create opportunities for the industrial land. Table 24 explores the specific target industry opportunities and what it would mean for industrial land in Edward River LGA. Figure 48 illustrates potential future industry clusters.

Table 24: Target industry industrial land opportunities

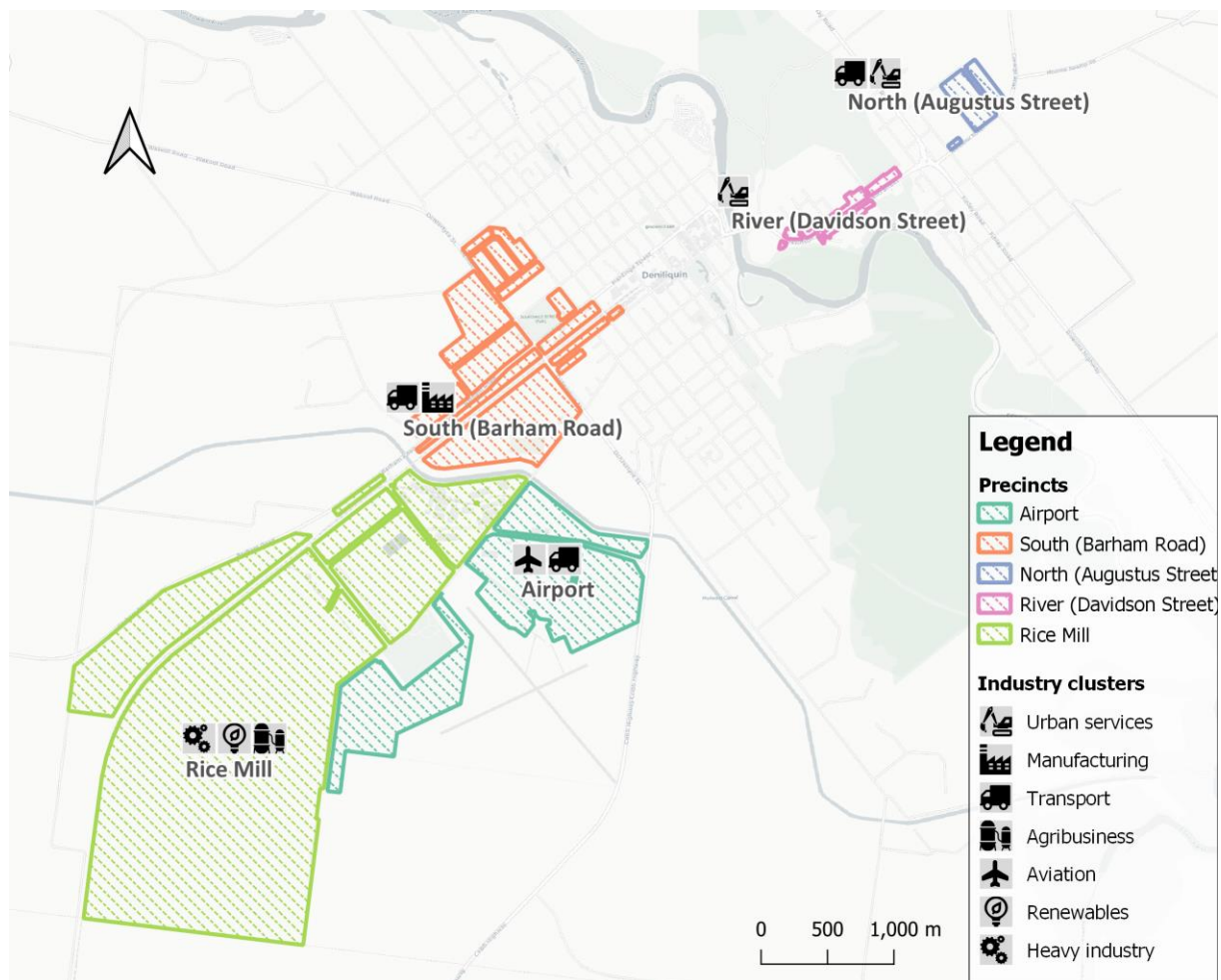
Target industry	Industrial land opportunities	Barriers
2.1. Manufacturing <ul style="list-style-type: none"> Steel product manufacturing Prefabrication Truck, trailer and caravan manufacturing Irrigation products 	<ul style="list-style-type: none"> Build on strong existing agricultural product and prefabrication manufacturers On-farm grain storage (silos) container manufacturing – to meet rising demand from croppers looking to control and maximise returns Strong transport and logistics connections with opportunities to target transport vehicle manufacturing including truck, trailer and caravans The area is known for its irrigation systems with potential to enhance manufacturing of specific products and offering of specialised services Growing demand for prefabrication and specialised advanced manufacturing/3D printing 	<ul style="list-style-type: none"> Costs of transporting products to Deniliquin Distance from potential suppliers and distributors Skilled-employee availability Re-location and establishment costs
Actions <ul style="list-style-type: none"> 2.1.1: Develop a manufacturing industry investment prospectus 2.1.2: Consult with the TAFE to consider options to integrate manufacturing courses 2.1.3: Define and grow the manufacturing cluster in the South Precinct where there is an existing concentration of manufacturing industry suppliers. 		
2.2. Renewables <ul style="list-style-type: none"> Solar Recycling facilities 	<ul style="list-style-type: none"> Solar panel manufacturing and maintenance Power banking and reserves similar to the 230 hectares Hornsdale Power Reserve Product recycling facilities that can leverage the rail and road transport connections. 	<ul style="list-style-type: none"> Cost of physical infrastructure connections to the grid Transporting recycling materials to and from supply locations The attraction of industry away from major population centres Limited infrastructure servicing in the Rice Mill precinct for solar uses
Actions <ul style="list-style-type: none"> 2.2.1: Undertake targeted engagement with existing operators outside of the LGA to determine what their requirements are and if locating to Deniliquin would be appropriate 2.2.2: Encourage and progress the establishment of the solar farm in the LGA 2.2.3: The Rice Mill precinct would be most appropriate for power banking reserves as it is 		

Target industry	Industrial land opportunities	Barriers
	<p>more isolated from the town and has significant land parcels available</p> <ul style="list-style-type: none"> 2.2.4: Seek to investigate establishing recycling facilities, if market interest exists) in the South Precinct, due to the strong connections to transport infrastructure. 	
2.3. Heavy and 'dirty industry'	<ul style="list-style-type: none"> Heavy and dirty industries are being pushed out of metropolitan areas and are also not permissible in a number of regional areas Unlike Murray and Berrigan Council's, heavy industry is a permissible use in the industrial land in the Edward Rive LGA While there is a need to plan for such uses carefully, the isolated nature of the Rice Mill precinct could be an appropriate location The land is not affected by flooding. <p>Actions:</p> <ul style="list-style-type: none"> 2.3.1: Engage with existing heavy industries in other LGA's to evaluate their land use requirements and perceptions of locating in a more remote town 2.3.2: If considered desirable, seek to work with Regional Development Australia to promote and advertise the opportunity. 	<ul style="list-style-type: none"> There is limited servicing in the Rice Mill Precinct Electricity substation capacity The use has been allowed in the LGA for a number of years, which potentially reflects limited demand.
2.4. Aviation	<ul style="list-style-type: none"> Adequate land available and masterplan established Established examples of residential sky parks in NSW Excellent flying conditions Existing aviation facilities already established Established Airport Working Committee. <p>Actions:</p> <ul style="list-style-type: none"> 2.4.1: Consult with Council's that have established residential sky parks to understand lessons learnt and things they would do differently 2.4.2: Seek to secure an interested pilot training provider. Potentially target the smaller organisations that may train regional airlines and small aircraft pilots 2.4.3: Market the opportunity of the airport masterplan, having consideration of the other uses that would be compatible 2.4.4: Consider protecting land close to airport infrastructure for aviation-related uses. 	<ul style="list-style-type: none"> Electricity substation capacity Subdivision required The desirability of residential at an airport considering amenity The capacity of runway considering funding was not granted for the runway extension Demand for maintenance facilities if other aviation industries are not successful Short-stay accommodation capacity at an affordable cost for pilots training Pilot training providers of a reasonable scale are in high demand at regional airports.
2.5. Agri-business	<ul style="list-style-type: none"> Growing Cotton Gin demand with the capacity to process and distribute from Deniliquin Australian grain, cotton and stock are of high demand in export markets Abattoir infrastructure repurposed to support smaller, high-value production Opportunity for the consolidation and distribution of rice hull and cottonseed by-product for feed rations and bedding for piggeries 	<ul style="list-style-type: none"> The attraction of investors would likely be dependent on the availability of high security, year-round water supply Indoor farming subject to sustainable energy supply Climate change and water security affecting yields Size of lots required to support some facilities – i.e. cotton gin (around 250ha)

Target industry	Industrial land opportunities	Barriers
	<ul style="list-style-type: none"> • Cotton seed by-product processing and packaging • As industrial land in areas such as Shepparton and Echuca become more expensive, traditional agri-businesses processors, such as dairy and vegetable processors in Goulburn Valley and Echuca, may seek more affordable industrial locations that have strong access to distribution networks and suppliers • If a sustainable energy supply is identified – opportunities for indoor farming could be revisited • Research and development networking and innovation facility. <p>Actions:</p> <p>2.5.1: Seek to investigate and liaise with the cotton industry on the opportunity to establish a cotton gin within Deniliquin. The Rice Mill precinct would be most appropriate for such a service as it has the largest amount of land available. Upgrades to the electricity substation would be required to ensure appropriate capacity. Subject to interest – sewer and water infrastructure servicing could be brought forward</p> <p>2.5.2: Investigate the feasibility of attracting and operating an agri-business research and development facility to explore new agri-business and food product processing opportunities for the region</p> <p>2.5.3: Engage with the existing owners of the rice mill and abattoir to investigate the opportunity to repurpose the in-active or underutilised infrastructure to enable opportunities to support smaller scale, premium production</p> <p>2.5.4: Actively research, explore and converse with the smaller food processing industries around Shepparton/Goulburn that might be at risk of being priced out of the market. Attempt to understand their requirements and what would attract them to Edward River LGA.</p>	<ul style="list-style-type: none"> • Attraction of operating on industrial land versus rural.
<p>2.6. Transport, logistics and warehousing</p> <ul style="list-style-type: none"> • Logistics interchange • Boat maintenance and dry storage 	<ul style="list-style-type: none"> • Existing strong road and rail linkages to ports in Sydney, Melbourne and Adelaide • Most industrial precinct roads support or can support heavy vehicle movements • Affordable back-loading rates due to frequent transport flow • Existing proposal for intermodal freight facilities are being developed to transfer cotton and other commodities to Victorian ports • Land availability for warehousing in both Airport Precinct and South Precinct • Proximity to Rice Mill infrastructure • Strong case studies of successful transport and logistics businesses • Dry storage facilities for summer boat users and campervans to support tourism. 	<ul style="list-style-type: none"> • Potential upgrade to the Tocumwal rail line required • Proximity from suppliers and end customers • Anecdotally limited additional market if the agriculture industry does not recover – would need a more diverse product base for more businesses to be viable • Further encouragement of tourism industry needed.

Target industry	Industrial land opportunities	Barriers
	<p>Actions:</p> <ul style="list-style-type: none"> 2.6.1: Continue to support the opportunity for a regionally significant transport and distribution interchange along the rail line by: <ul style="list-style-type: none"> Working with the intermodal proponent to gain concurrence approval from State agencies for the facility Supporting the preparation of the development application, with the potential to employ an independent assessor to evaluate the merits of the proposal Ensuring appropriate infrastructure connections to enable the development to proceed Investigating the opportunity for ancillary warehousing to promote further business opportunities. 2.6.2: Investigate demand for tourism vehicle storage facilities including a potential dry dock for boats and caravan/campervan storage 2.6.3: Seek to support the clustering of transport, logistics and warehousing in the North Precinct (subject to further land being made available) and South Precinct where there is an existing presence of the industry. 	

Figure 48: Potential industry clusters in precincts



In addition to the targeted industry actions, there are further actions that can be undertaken to attempt to enhance the diversity of businesses in the industrial precincts (see Table 25).

Table 25: Additional target industry actions

Ref	Description	Responsibility	Timing	Priority
2.7	<p>Key industry engagement</p> <p>A number of opportunities were identified in Table 24 that require further investigation and liaison with established industry providers in NSW. Speaking to existing operating companies and understanding their land use requirements and locational preferences can assist in defining a clear investment attraction proposition.</p>	Community and economic development	Short	High
2.8	<p>Business and investment attraction</p> <p>Identify external industry forums and trade shows to represent and promote doing business in Edward River and extend the reach of Edward River industry.</p>	Community and economic development	Short	Moderate
2.9	<p>Learning and education</p> <p>Facilitate connections and partnerships with TAFE NSW, high schools and local businesses to promote mentorship programs, apprentice programs and tailored industry short-courses for local industry.</p>	Community and economic development	Medium	High
2.10	<p>Promotion of business support services</p> <p>Actively promote the business support services available through local businesses and regional development platforms.</p>	Community and economic development	Short	Moderate
2.11	<p>Water security</p> <p>Continue efforts to advocate for improvements in the allocation of water for farmers and industry in Edward River LGA.</p>	Council State Government	Short	High
2.12	<p>Water allocation factsheet</p> <p>Consider developing a fact sheet to educate businesses and potential investors regarding the water allocation options and what it means for doing business in Edward River.</p>	Infrastructure	Short	High
2.13	<p>Small business readiness</p> <p>Through grants and business support programs, encourage local makers and creators in the LGA to enhance productivity and become small-scale start-up businesses. Consider the market interest and feasibility of providing or partnering to provide a multi-purpose industrial and commercial facility that may include a commercial kitchen, bottling, labelling and packaging capacity; workstations and a networking space.</p>	Community and economic development	Long	Low

DECENTRALISED DEMOUNTABLES



Decentralised Demountables has been operating in Deniliquin for almost 40 years. Starting out as a company specialised in the fabrication of school demountable classrooms for the NSW Government, the company has expanded into demountables for a wide range of purposes, including agricultural, commercial and residential applications. The company has also expanded into construction, specialising in the design and construction of a range of structures, from residential buildings (single dwellings and multi-unit developments), to the design, project management and construction of motel complexes and substantial aged care facilities. The company now provides services to a customer base that is nationwide and continues to operate from Deniliquin.

FELLOWS BULK TRANSPORT

Fellows Bulk Transport is a family-owned business that has been operating in Deniliquin since 1997. The company provides specialist, innovative and cost-effective solutions for bulk material transport, handling and storage. They serve a catchment including areas of Queensland, New South Wales, South Australia and Victoria transporting over 100,000 tonnes of bulk material every year. The company operates grain storage facilities in Deniliquin, Hay and Blighty. This company maintains its base of operations in Deniliquin and has a strong association between its identity and the town.



Direction 3: Secure a pipeline of employment land

Businesses vary in size and purpose and subsequently have differing land and floorspace requirements. Some industries require large land expanses with limited built structures for product storage and processing. Others require built structures to enhance environmental control and security. As is common in regional locations, the built density in industrial precincts is generally low. This is due to the types of uses operating in the precincts, limited market pressure and the perceived availability of additional land.

As identified in Chapter 5.0, Edward River has 16 lots that are vacant and serviced and ready for immediate development. The largest of these sites is currently the subject of a proposal for a transport intermodal. Additionally, 111 lots are identified as being used, however not to their highest potential and could pose further development opportunity if there is market interest.

In regional locations, if a site is being utilised, generally there is limited incentive for it to be purchased and developed for alternative use. Interested parties would instead look for larger land parcels that can be subdivided or vacant land. Considering the limited number of serviced, vacant land parcels available and the limited diversity in lot sizes, the pipeline of employment land is relatively limited.

While the demand modelling indicates that no additional land is required to facilitate the population growth, in order to target investment and growth, having a diversity of land available in different locations can assist in incentivising development and achieving the vision of the *Economic Development Strategy*. Land parcels that can be brought quickly to the market with limited infrastructure investment are preferable. For this reason, it is important to plan for a pipeline of appropriately zoned land with adequate infrastructure available. Changes in market condition will affect the take-up of land and the potential to recoup expenditure on servicing costs through the development process. While the study seeks to explore land requirements, it is also necessary to encourage demand through other initiatives as outlined in the *Economic Development Strategy* and strategic directions of this report.

Table 26 identifies actions to support the delivering of employment land on to the market.

Table 26: Securing a pipeline of employment land actions

Ref	Description	Responsibility	Timing	Priority
3.1	<p>Enterprise corridor</p> <p>Considering rezoning the land in the River precinct to B6 Enterprise Corridor (see Figure 49) to bring the zoning in line with the Standard Instrument Local Environmental Plan and create opportunities for a broader diversity of businesses along a major thoroughfare. Considering rezoning the land in the River precinct to B6 Enterprise Corridor (to bring in line with the standard instrument and create the opportunity for a broader diversity of businesses along a major thoroughfare.</p>	Environmental services	Short	Low

Ref	Description	Responsibility	Timing	Priority
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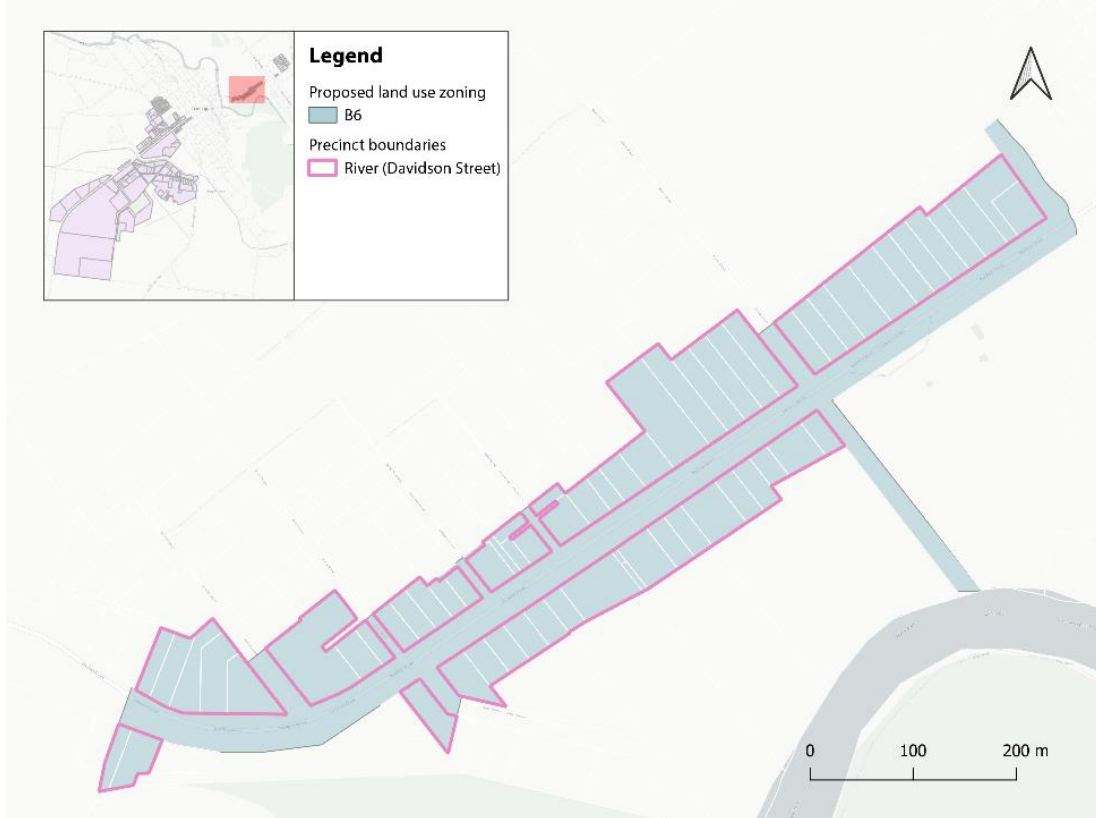


Figure 49: Proposed B6 Enterprise Corridor

<p>3.2</p>	<p>Ochertyre Street expansion opportunity</p> <p>The land use audit and precinct analysis demonstrate that while there is a large amount of underutilised land in the precinct, there is limited land that is vacant and available for immediate development.</p> <p>Stakeholder engagement further suggested that a release of more land along Ochertyre Street would be preferable and more appropriate for development than land currently zoned in the Rice Mill precinct. A potential release area for an IN1 General Industrial zone is identified in Figure 50.</p> <p>An analysis of trunk infrastructure and road servicing revealed that connection to the expansion area would likely be more feasible than connecting some of the existing zoned industrial lands. The area is currently zoned R1 General Residential. An RE1 Public Recreation zone, similar to that which runs along Harfluer Street to the north, could be provided to create a buffer from the established residential.</p> <p>It would be recommended that any future subdivision of land should be undertaken in consultation with the community, local businesses and target industries and include analysis of land-use conflicts with surrounding residences, any biodiversity issues and infrastructure capacity.</p>	<p>Environmental services</p>	<p>Medium</p>	<p>Moderate</p>
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Ref	Description	Responsibility	Timing	Priority
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Figure 50: South precinct expansion opportunity



3.3 Northern expansion opportunity

Environmental services Medium Moderate

The land use audit and precinct analysis demonstrate that there is limited land availability to the north of town. While properties in the North Precinct are relatively underutilised in terms of floorspace, they are all being used for an industrial purpose. This leaves limited opportunity for businesses that are operating in this precinct to expand operations in the same location as no sites are available.

- Subject to land use constraints investigation, including Aboriginal cultural heritage, consider servicing the area and exploring a rezoning of land to the east of the existing precinct as identified in Figure 51.

Ref	Description	Responsibility	Timing	Priority
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Figure 51: North precinct expansion opportunity



3.4

Register of interested parties

From time to time Council gets approached to assist in identifying land available for industrial development. Without knowing which owners are willing to sell their land, the Council is then placed in a difficult position to find sites that may be available.

To streamline this process, the Council could consider hosting an available land database that enables landowners to register their parcel for any future interested parties to consider. This would involve:

- Writing to industrial landowners to explain the intent of the database and have them put forward their details
- Maintaining the database
- Writing a disclaimer that states that no bias is placed on any particular parcel. While Council can assist in making the introductions, the ultimate purchase and agreement is the responsibility of and subject to the individual owners.

Alternatively, Council could partner with a local real estate agent to provide this service.

Community and economic development Medium Low

Ref	Description	Responsibility	Timing	Priority
3.5	<p>Local Environmental Plan - Planning permissibility</p> <p>Consider reviewing and updating the permissible uses in the Local Environmental Plan to bring them in line with the proposed changes (as highlighted green) in Appendix A. This includes:</p> <ul style="list-style-type: none"> • IN1 General Industrial: <ul style="list-style-type: none"> – With consent: car park – Prohibit: open cut mining • B6 Enterprise Corridor <ul style="list-style-type: none"> – With consent: cellar door premises, industrial training facility, respite day care facility, restricted premises – Prohibit: camping ground, caravan park, educational establishment, school, restriction facility, sewerage system, biosolids treatment facility, water recycling facility. 	Environmental services	Short	Low
3.6	<p>Development control plan</p> <p>The Development Control Plan is generally suitable to guide development in the LGA. The following recommendations have been provided for consideration to streamline and reduce complexity:</p> <p>Chapter 4 - Industrial Zones (IZ) and Chapter 3 – Commercial zone (CZ)</p> <ul style="list-style-type: none"> • Seek to move away from replicating controls that exist in other instruments (eg the one disability access space per 33 spaces requirement). • Clause 4.2 - Control 13 (Note 1). Consider removing requirement for manoeuvrability of at least a semi-trailer truck. This could be overly cumbersome for many industrial sites that would accommodate a 12m rigid. • Clause 4.4 – Control 2 (IZ) and Clause 3.4 Control 1 (CZ) - Consider providing clarification that the landscaping plan requirement can be in the form of a landscape concept plan and not a detailed landscaping plan. • Clause 4.4 – Control 2 (Note 1) and Clause 3.4 Control 1 (CZ) The ‘bond’ should be removed in favour of a vegetation management plan being required for a construction certificate or through conditions of consent. • Clause 4.10 – Control 6 – consider removing or amending the control so not to restrict or deter development opportunity as connections may prove un-feasible. There may be instances where development can occur without being connected to reticulated sewer and water, or an alternative agreement can be met with the Council. <p>Chapter 12 – Car parking</p> <ul style="list-style-type: none"> • For industrial development particularly, consider moving away from numerically based assessments and instead require traffic impacts to be assessed based on merit. 	Environmental services	Short	Moderate

Ref	Description	Responsibility	Timing	Priority
3.8	<p>Early infrastructure delivery policy</p> <p>Consider developing a “user pays” policy for larger developments that would bring significant investment and employment growth. The policy would enable priority infrastructure delivery, ahead of the infrastructure program, to support and attract larger industries interested in developing in the area.</p> <p>The policy would enable proponents to fund or construct trunk infrastructure and then dedicate the infrastructure to the Council. Where the developer is to occupy land owned by Council, Council could consider transferring or leasing the land to the developer at no cost, in return for the infrastructure costs being borne by the developer.</p> <p>This policy would be limited to developments that achieve a capital value or an onsite employment target.</p>	<p>Infrastructure</p> <p>Environmental services</p>	Short	High

Infrastructure plan and program

The proposed infrastructure delivery program can be seen in

Figure 52. Several factors were considered when developing the indicative plan, including:

- Feedback from consultation with the infrastructure services department at Council
- The extent of infrastructure in place that would be able to be leveraged
- The extent of infrastructure required to service the precinct
- The net economic and employment gain that could be achieved through delivery.

The indicative plan was developed through the precinct analysis previously overviewed. While it provides direction around phasing, if through targeted engagement, specific interest arises regarding a precinct, there could be an opportunity to prioritise delivery in partnership with the interested party.

1. The Ochtertyre Street expansion precinct provides an opportunity for incremental expansion of the South Precinct. There are existing infrastructure services that run along Ochtertyre Street that could offer cost-effective connections to bring a greater diversity of land parcels on to the market earlier.

Works program	Timeframe	Responsibility
Liaise with landowners to measure interest in future rezoning and potential sale and subdivision.	0-2 years	Council
Facilitate an Expression of Interest process to gauge interest in the location as an industrial precinct.	0-2 years	Council
Dependent on market interest, seek to undertake a joint venture planning proposal and subdivision plan that rezones the land for industrial purpose. The subdivision should provide a diversity of lot sizes to maximise flexibility.	2-5 years	Council/ Landowner
Enter into a joint venture, and facilitate timely road and service infrastructure delivery, free of charge to the developer, subject to a business commitment.	5-10 years	Council/ Landowner

2. The Airport Precinct North offers an opportunity for new business development with lower upfront investment costs; Council also has land holdings in this precinct and would be able to undertake joint venture projects.

Works program	Timeframe	Responsibility
Confirm and then market the existing master plan for the area to demonstrate subdivision capacity and intent	0-2 years	Council
Consider the option to incentivise development through peppercorn leasehold arrangements on Council land.	0-2 years	Council
Deliver, with proponent, sewer and water servicing subject to future subdivision and in line with the masterplan.	Flexible	Council

3. The North Precinct and north expansion area generally have reticulated water connections, however, are not connected to the sewer system. While the precinct is currently fully utilised, the infrastructure investment may enable greater utilisation of the sites.

Works program	Timeframe	Responsibility
Liaise with landowners to measure interest in future rezoning and potential site sale.	2-5 years	Council/ Landowner
Seek to undertake a planning proposal that rezones the land for industrial purpose.	2-5 years	Council
Extension of sewer reticulation to existing precinct and expansion area	0-2 years	Council
Facilitate timely road and service infrastructure delivery, subject to a business commitment.	Flexible	Council

4. The Rice Mill Precinct would require extensive infrastructure delivery to bring forward land parcels to be market-ready. The precinct would require phased infrastructure delivery.

a. Northern extent

Works program	Timeframe	Responsibility
Liaise with landowners to measure interest in a potential sale and subdivision.	10-20 years	Council
Prepare a structure plan for the precinct that includes a potential subdivision layout and infrastructure delivery program.	10-20 years	Council
Market and implement the subdivision and facilitate infrastructure delivery, including the extension of reticulation services and sealing of the roads.	10-20 years	Council

b. Southern extent

Works program	Timeframe	Responsibility
Liaise with landowners to measure interest in a potential sale and subdivision.	20+ years	Council
Prepare a structure plan for the precinct that includes a potential subdivision layout and infrastructure delivery program.	20+ years	Council
Market and implement the subdivision and facilitate infrastructure delivery, including new roads, reticulated sewer and water infrastructure and stormwater drainage.	20+ years	Council

Note: The priority of Phase 3 and Phase 4 could be reversed if targeted consultation results in a sizeable interested party wanting to move into the Rice Mill Precinct.

5. The Airport precinct south is limited by runway clearances and offers less intensive and long term industrial opportunity.

Works program	Timeframe	Responsibility
Liaise with landowners to measure interest in a potential sale and subdivision.	20+ years	Council
Prepare a structure plan for the precinct that includes a potential subdivision layout and infrastructure delivery program.	20+ years	Council
Market and implement the subdivision and facilitate infrastructure delivery, including new roads, reticulated sewer and water infrastructure and stormwater drainage.	20+ years	Council

Figure 52: Potential infrastructure delivery overview

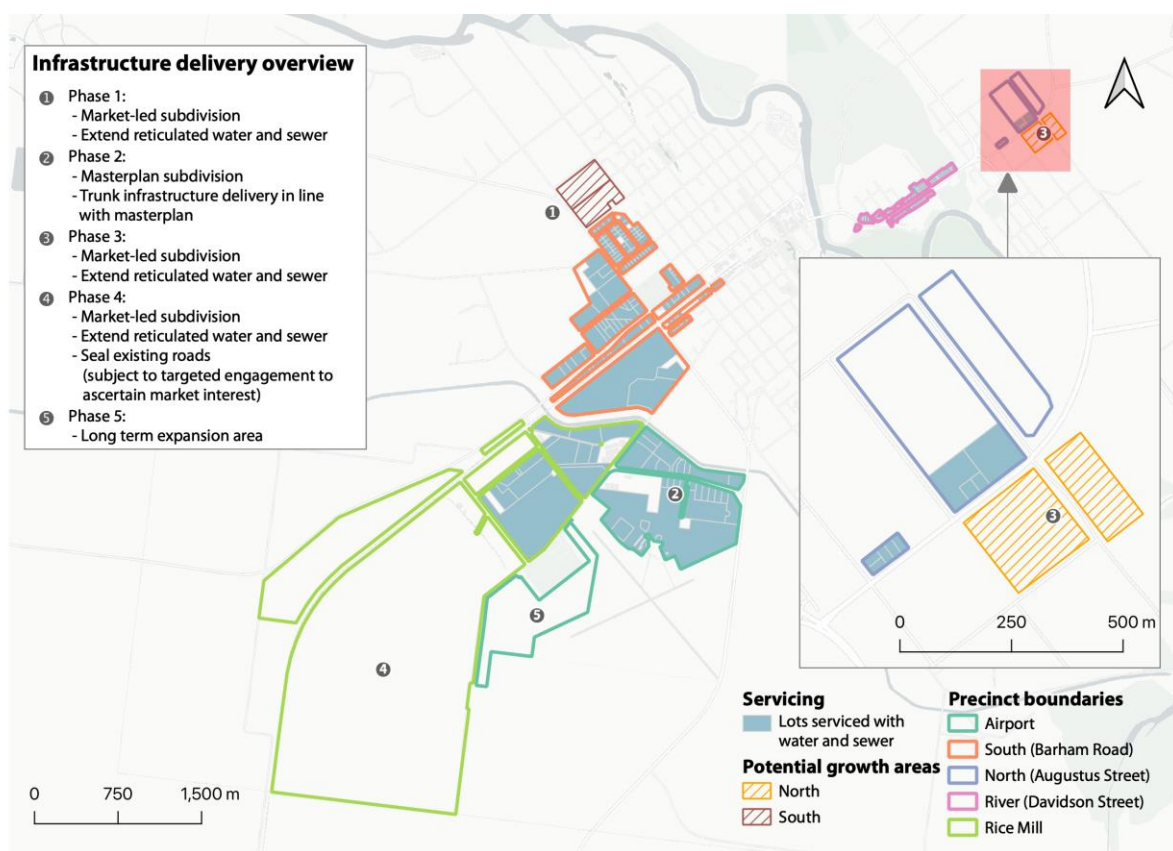




Image source: thecrossingcafe.com.au

Direction 4: Provide development support and partnership opportunities

The planning and development process can be difficult for those that do not regularly operate in the space. This can create a barrier for businesses and interested parties to establish and operate in a locality. Feedback from stakeholder engagement identified that a number of businesses find it challenging to navigate the planning and legislative system and would benefit from further support by the Council. Table 27 outlines actions that can be implemented to support and attract businesses to the region.

Table 27: Development support and partnership actions

Ref	Description	Responsibility	Timing	Priority
4.1	Development application template Prepare a Development Application template that can be utilised by prospective developers to guide them through the DA requirements and items that need to be explicitly addressed.	Environmental services	Short	Moderate
4.2	Independent assessment officer Where Council plays an active role in assisting businesses in the development applications, consider coordinating an independent assessment. The cost of this process could potentially be covered through the development application fee.	Environmental services	Short	Moderate
4.3	Consultant register Prepare a register of local consultants and draftspeople that can provide reasonable cost development application and plan drafting services. Host the register on the business tab page of the Council website (see action 1.6).	Environmental services Community and Economic Development	Short	Low
4.4	Joint ventures Consider opportunities to enter into joint ventures with potential industrial developers where Council retains ownership of the land and enables businesses to build and operate on the property. This may support and catalyse land in industrial precincts. Alternatively, the Council can provide an option to an investor to build (on Council land) and lease the building, subject to a tenant being found by Council. This reduces the upfront costs required by small businesses.	Council	Medium	High
4.5	Business assistance program Small businesses can be an asset for driving economic and employment growth, however they generally need greater support and assistance. Establish a business assistance program that actively supports businesses to navigate the legislative, business and planning frameworks and identifies opportunities for networking, leadership and mentoring programs.	Community and Economic Development	Short	Moderate

Direction 5: Enhance and promote lifestyle and services

A successful industrial sector is somewhat dependent on being able to attract workers and larger organisations to a town. A vibrant main street, a diversity of affordable retail uses, social infrastructure and community services all assist in making a place an attractive location to live and operate a business. An involved and empowered community can also assist in promoting and catalysing investment. As identified in the *Economic Development Strategy*, and reinforced during stakeholder conversations, people are leaving Deniliquin, both short term or long term, to access the greater range and more affordable services in Moama/Echuca. This expenditure leakage has already seen the closure of shops in the Deniliquin centre. This effect can become cumulative as the quality of use mix reduces and consumer options become more limited, furthering the number of businesses that close. Table 28 outlines actions to enhance and promote lifestyle and services.

Table 28: Enhance and promote lifestyle and services actions

Ref	Description	Responsibility	Timing	Priority
5.1	<p>Centre activation strategy</p> <p>Consider undertaking a centre activation strategy to complement the Deniliquin Masterplan. The Centre Activation Strategy would need to take a more holistic approach, including considering the urban structure and economic foundations of the centre.</p>	Community and Economic Development	Short	High
5.2	<p>Main street program</p> <p>Continue to deliver the main street program as part of the Deniliquin Masterplan, including the provision of the civic space.</p>	Council	Long	Low
5.3	<p>Festivals and events</p> <p>Continue to attract and support the growth of events and festivals to bring people to the LGA and promote the regional lifestyle. The investment that has gone into the festival ground at Deniliquin can be further leveraged to provide a larger events program, including more music festivals. Other events could include sporting events such as the 'Hell of the West' festival in Goondiwindi.</p>	Community and Economic Development Festival ground owners	Medium	Moderate
5.4	<p>Marketing and communication</p> <p>Facilitate and empower the community to develop and launch a Deni brand that encourages locals and visitors to 'buy local'.</p>	Community and Economic Development	Long	Moderate
5.5	<p>Night time and entertainment economy</p> <p>In collaboration with the community, develop, launch and promote a regular community events program that provides activities on weekends and evenings. The intent is to attract people into town and deter them from travelling to the bigger centres. Activities could include:</p> <ul style="list-style-type: none"> • Outdoor cinemas (during summer) • Skate park competition • Night markets • Car boot sale • Dance, ball or discos. 	Visit Deni Community and Economic Development	Medium	Moderate

Legend: x = Prohibited c = Permitted with Consent o = Permitted with out consent	Industrial Zones				Business zones			
	IN1 General Industrial				B6 Enterprise Corridor			
	Berrigan	Murray	Deniliquin	Recommendation	Berrigan	Murray	Deniliquin	Recommendation
agriculture (group term)	x	x	x	x		x	x	x
aquaculture	x	x	x	x		x	x	x
pond-based aquaculture	x	x	x	x		x	x	x
oyster aquaculture	c	c	c	c		c	c	c
tank-based aquaculture	c	c	c	c		c	c	c
extensive agriculture;	x	x	x	x		x	x	x
bee keeping	x	x	x	x		x	x	x
dairy (pasture based)	x	x	x	x		x	x	x
intensive livestock agriculture;	x	x	x	x		x	x	x
dairy (restricted)	x	x	x	x		x	x	x
feedlot	x	x	x	x		x	x	x
intensive plant agriculture;	x	x	x	x		x	x	x
horticulture	x	x	x	x		x	x	x
turf farming	x	x	x	x		x	x	x
viticulture	x	x	x	x		x	x	x
air transport facility (group term)	x	x	c	c		x	x	x
airport	x	x	c	c		x	x	x
heliport	c	c	c	c		x	x	x
airstrip	x	x	c	c		x	x	x
amusement centre	x	x	x	x		x	x	x
animal boarding or training establishment	c	c	c	c		x	x	x
boat building and repair facility	c	c	c	c		c	c	c
boat launching ramp	c	c	c	c		c	c	x
boat shed	c	c	c	c		c	c	x
camping ground	x	x	x	x		c	c	x
car park	c	x	x	c		c	c	c
caravan park	x	x	x	x		c	c	x
cemetery	x	c	x	x		x	x	x
charter and tourism boating facility	c	c	c	c		c	c	c
centre-based child care centre	x	x	x	x		c	c	c
commercial premises (group term)	x	x	x	x		c	c	c
business premises;	x	x	x	x		c	c	c
funeral home	c	c	c	c		c	c	c
office premises	x	x	x	x		c	c	c
retail premises;	x	x	x	x		x	c	c
cellar door premises	x	x	x	x		x	x	c
food and drink premises;	x	x	c	c		x	c	c
restaurant or cafe	x	x	c	c		x	c	c
take away food and drink premises	c	c	c	c		x	c	c
pub	x	x	x	x		x	c	c
small bar	x	x	c	c		x	c	c
garden centre	c	c	c	c		x	c	c
hardware and building supplies	c	c	c	c		x	c	c
kiosk	c	c	c	c		x	c	c
landscape materials supplies	c	c	c	c		x	c	c
market	x	x	x	x		x	c	c
plant nursery	c	c	c	c		x	c	c
roadside stall	c	x	x	x		x	x	x
rural supplies	c	c	c	c		x	c	c
shop;	x	x	x	x		x	x	x
neighbourhood shop	c	c	c	c		x	c	c
neighbourhood supermarket	x	x	x	x		x	x	x
specialised retail premises	x	x	x	x		x	c	c
timber yard	c	c	c	c		x	c	c
vehicle sales or hire premises	c	c	c	c		x	c	c
community facility	c	x	c	c		c	c	c
correctional centre	c	c	c	c		x	x	x
crematorium	c	c	c	c		c	x	x
depot	c	c	c	c		c	c	c
eco-tourist facility	x	x	x	x		c	c	c

Legend: x = Prohibited c = Permitted with Consent o = Permitted with out consent	Industrial Zones				Business zones			
	IN1 General Industrial				B6 Enterprise Corridor			
	Berrigan	Murray	Deniliquin	Recommendation	Berrigan	Murray	Deniliquin	Recommendation
educational establishment (group term)	x	x	x	x		c	c	x
school	x	x	x	x		c	c	x
electricity generating works	c	c	c	c		c	x	x
emergency services facility	c	c	c	c		c	c	c
entertainment facility	x	x	x	x		c	c	c
environmental facility	c	c	c	c		c	c	c
environmental protection works	o	o	o	o		c	o	o
exhibition home	x	x	x	x		c	x	x
exhibition village	x	x	x	x		c	x	x
extractive industry	c	c	c	c		x	x	x
farm building	x	x	x	x		x	x	x
flood mitigation works	c	c	c	c		c	c	c
forestry	x	c	x	x		x	x	x
freight transport facility	c	c	c	c		x	x	x
function centre	x	x	x	x		x	c	c
health services facility (group term)	x	x	x	x		c	c	c
medical centre	x	x	x	x		c	c	c
health consulting rooms	x	x	x	x		c	c	c
hospital	x	x	x	x		c	c	c
heavy industrial storage establishment (group)	c	c	c	c		x	x	x
hazardous storage establishment	c	c	c	c		x	x	x
liquid fuel depot	c	c	c	c		x	x	x
offensive storage establishment	c	c	c	c		x	x	x
helipad	c	c	c	c		x	c	c
highway service centre	c	c	c	c		c	c	c
home based child care	x	x	x	x		c	c	c
home business	x	x	x	x		c	c	c
home occupation	x	x	x	x		c	c	c
home occupation (sex services)	x	x	x	x		c	c	c
industrial retail outlet	c	c	c	c		c	c	c
industrial training facility	c	c	c	c		c	x	c
industry (group term)	c	x	c	c		x	x	x
general industry	c	c	c	c		x	x	x
heavy industry;	x	x	c	c		x	x	x
hazardous industry	x	x	c	c		x	x	x
offensive industry	x	x	c	c		x	x	x
light industry;	c	c	c	c		x	c	c
high technology industry	c	c	c	c		x	c	c
home industry	c	c	c	c		x	c	c
artisan food and drink industry	c	c	c	c		x	c	c
information and education facility	x	x	x	x		x	c	c
jetty	c	c	c	c		c	c	c
marina	x	c	c	c		c	c	c
mooring pen	x	c	c	c		c	c	c
moorings	x	c	c	c		c	c	c
mortuary	c	c	c	c		c	c	c
open cut mining	x	c	c	x		x	x	x
passenger transport facility	c	c	c	c		c	c	c
place of public worship	c	c	c	c		c	c	c
port facilities	c	c	c	c		c	c	c
public administration building	x	x	x	x		c	c	c
recreation area	c	c	c	c		c	c	c
recreation facility (indoor)	c	c	c	c		c	c	c
recreation facility (major)	c	c	c	c		c	x	x
recreation facility (outdoor)	c	c	c	c		c	c	c
registered club	x	x	x	x		c	c	c
research station	c	c	c	c		c	c	c
residential accommodation (group term)	x	x	x	x		x	x	x
attached dwelling	x	x	x	x		x	x	x
boarding house	x	x	x	x		x	x	x

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	Berrigan	Murray	Deniliquin	Recommendation	Berrigan	Murray	Deniliquin	Recommendation
dual occupancy	x	x	x	x		x	x	x
dual occupancy (attached)	x	x	x	x		x	x	x
dual occupancy (detached)	x	x	x	x		x	x	x
dwelling house	x	x	x	x		x	x	x
group home	x	x	x	x		x	x	x
group home (permanent)	x	x	x	x		x	x	x
group home (transitional)	x	x	x	x		x	x	x
hostel	x	x	x	x		x	x	x
mutli dwelling housing	x	x	x	x		x	x	x
residential flat building	x	x	x	x		x	x	x
rural workers dwelling	x	x	x	x		x	x	x
secondary dwelling	x	x	x	x		x	x	x
semi-detached dwelling	x	x	x	x		x	x	x
seniors housing	x	x	x	x		x	x	x
residential care facility	x	x	x	x		x	x	x
shop top housing	x	x	x	x		x	c	c
respite day care centre	x	x	x	x		c	x	c
restricted premises	c	c	c	c		x	x	c
restriction facility	c	c	c	c		c	c	x
roads	o	c	c	c		c	c	c
rural industry (group term)	c	c	c	c		x	x	x
agricultural produce industry	c	c	c	c		x	x	x
livestock processing industry	c	c	c	c		x	x	x
sawmill or log processing works	c	c	c	c		x	x	x
stock and sale yard	c	c	c	c		x	x	x
service station	c	c	c	c		c	c	c
sewerage system (group term)	c	c	c	c		c	c	x
biosolids treatment facility	c	c	c	c		x	c	x
sewage reticulation system	c	c	c	c		c	c	c
sewage treatment plant	c	c	c	c		x	x	x
water recycling facility	c	c	c	c		x	c/x	x
sex services premises	c	c	c	c		c	x	x
signage (group term)	c	c	c	c		c	c	c
advertising Structure	c	c	c	c		c	c	c
building identification sign	c	c	c	c		c	c	c
business identification sign	c	c	c	c		c	c	c
storage premises (group term)	c	c	c	c		c	c	c
self storage units	c	c	c	c		c	c	c
tourist and visitor accommodation (group term)	x	x	x	x		c	c	c
backpackers accommodation	x	x	x	x		c	c	c
bed and breakfast accommodation	x	x	x	x		c	c	c
farm stay accommodation	x	x	x	x		c	x	x
hotel or motel accommodation	x	x	x	x		c	c	c
serviced apartment	x	x	x	x		c	c	c
transport depot	c	c	c	c		c	c	c
truck depot	c	c	c	c		c	c	c
vehicle body repair workshop	c	c	c	c		x	c	c
vehicle repair station	c	c	c	c		c	c	c
veterinary hospital	c	c	c	c		c	c	c
warehouse or distribution centre	c	c	c	c		c	c	c
local distribution premises	c	c	c	c		c	c	c
waste or resource management facility (group)	c	c	c	c		c	x	x
resource recovery facility	c	c	c	c		c	x	x
waste disposal facility	c	c	c	c		c	x	x
waste or resource transfer station	c	c	c	c		c	x	x
water recreation structure	c	c	c	c		c	c	c
water supply system (group term)	c	c	c	c		c	c	c
water reticulation system	o	c	o	o		c	o	o
water storage facility	c	c	c	c		c	c	c
water treatment facility	c	c	c	c		c	c	c

Legend:	Industrial Zones				Business zones			
	IN1 General Industrial				B6 Enterprise Corridor			
	Berrigan	Murray	Deniliquin	Recommendation	Berrigan	Murray	Deniliquin	Recommendation
x = Prohibited c = Permitted with Consent o = Permitted with out consent								
wharf or boating facility	x	x	x	x		x	x	x
wholesale supplies	c	c	c	c		c	c	c

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SYDNEY

Level 3, 234 George Street
Sydney NSW 2000
GPO Box 2748 Sydney NSW 2001
t: +61 2 9252 8777
f: +61 2 9252 6077
e: sydney@hillpda.com

MELBOURNE

Suite 114, 838 Collins Street
Docklands VIC 3008
t: +61 3 9629 1842
f: +61 3 9629 6315
e: melbourne@hillpda.com

WWW.HILLPDA.COM