

PLACES OF PENRITH



TECHNICAL REPORT

PENRITH INDUSTRIAL PRECINCTS

June 2021

PENRITH
CITY COUNCIL

penrith.city



STATEMENT OF RECOGNITION OF PENRITH CITY'S ABORIGINAL AND TORRES STRAIT ISLANDER CULTURAL HERITAGE

Council values the unique status of Aboriginal people as the original owners and custodians of the lands and waters, including the land and waters of Penrith City.

Council values the unique status of Torres Strait Islander people as the original owners and custodians of the Torres Strait Islands and surrounding waters.

We work together for a united Australia and City that respects this land of ours, that values the diversity of Aboriginal and Torres Strait Islander cultural heritage, and provides justice and equity for all.

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ABBREVIATIONS

ABS	Australian Bureau of Statistics
DCP	Development Control Plan
DPIE	Department of Planning, Industry and Environment
ELDM	Employment Lands Development Monitor
EDS	Economic Development Strategy
ELS	Draft Employment Lands Strategy
GSC	Greater Sydney Commission
ha	Hectares
LEP	Local Environmental Plan
LGA	Local Government Area
LSPS	Local Strategic Planning Statement
NSW	New South Wales
SEPP	State Environmental Planning Policy
SME	Small and Medium Enterprise
sqm	Square metres
WPC	Western Parkland City
WSA	Western Sydney Airport
WSEA	Western Sydney Employment Area

INTRODUCTION

The Penrith Industrial Precincts Technical Report (the report) provides a profile of the Penrith Local Government Area's (LGA) five primary industrial precincts. The report brings together data on our employment lands from a number of different sources including the DPIE's Employment Lands Development Monitor and previous work completed by and for Council.

The report presents a comprehensive profile of land use in Penrith's industrial precincts including zoning, lot size, development and an outline of the businesses they support.

The report and the information it contains has been a key input in the development of Penrith's Draft Employment Lands Strategy.



Image: Aerial view of The xyz

REPORT STRUCTURE

The report provides an overview of Penrith’s employment lands in the context of the Greater Sydney Region. This is followed by a classification of all employment lands, highlighting the primary industrial precincts.

The report then presents a profile for each of the primary industrial precincts in a decreasing order of their size. Each precinct profile includes a description of its character, location in the LGA, planning context, land-use zoning, lot size, development status, occupancy status, employment, and industries.

DATA AND MAPS

Land-use zoning

The zoning map shows land for employment purposes based on the zoning for land uses in local and state planning instruments, Penrith LEP (2010) and in WSEA SEPP (in the case of Erskine Park only). The grey lines in each map represent the boundaries of lots using cadastre data sourced from NSW Land Registry Services. In some instances, a lot may be divided into different zones such as for environmental conservation or infrastructure. The developable land is that land within each precinct is the total area of the precinct less the land zoned for purposes other than employment, such as for roads and other infrastructure or for environmental conservation.

Lot size

The lot size categories used in this report are same as those applied in DPIE’s Employment Land Development Monitor (ELDM) 2020. The count of lots by lot size in the each precinct has been updated by Penrith City Council.

Development status

The development status map shows where land has been built upon or not. ‘Developed’ land is zoned employment land where there is a permanent structure in place at the time of data collection. ‘Developed’ includes lands where a permanent structure exists but may be vacant

at the time of data collection, known as ‘Vacant Space’ (see below).

Land zoned for employment but not used for employment purposes has been further defined as:

- o Vacant Land - land with no building, structure or immovable improvements.
- o Vacant Land with Storage - land that has no building structure but may be paved over and/ or is being used for storage such as for shipping containers or trucks.
- o Vacant Space - land that contains a building/ buildings, which are currently not being used.
- o Under Construction - land that contains a building that is under construction.

Aerial imagery was analysed along with business data to assess and assign development status for each lot.

Occupancy

The occupancy map shows lots (available for employment purposes) which contain multiple businesses, such as strata units, and those which contain only the one business. The data separates these two categories into Single Occupancy and Multiple Occupancy lots. This map is intended to demonstrate if there is a agglomeration of smaller businesses within a precinct compared precincts with larger businesses that require significantly more space.

Employment

This map shows employment in precincts according to four broad categories of industry . Employment by industry data for each precinct was sourced from customised dataset prepared for Penrith City Council by .id. The data shown is based on 2016 ABS Census to establish the most reliable baseline.

The Greater Sydney Commission (GSC) groups employment data by industry into four broad employment sectors. These categories are based on the Australian and New Zealand Standard Industrial Classification (ANZSIC). These four broad job sectors are shown in table 1.

Industry (ANZSIC)

The ANZSIC map provides more detailed analysis of employment by industry type within each precinct. The map shows the predominant industry in each lot, using the first division of the 2006 Australian and New Zealand Standard Industrial Classification (ANZSIC) of businesses contained within each lot. There are 19 codes from the ANZSIC first division.

The maps also shows the following categories for lots that did not match to the ANSZIC coding system:

- o Commuter Carpark (Emu Plains)
- o Infrastructure
- o Environmental Conservation
- o Multi-Use
- o Vacant Land, Vacant Space, Under Construction and Vacant Land with Storage
- o Other

In all maps, ‘Other’ land refers to land zoned for employment purposes, but its current or future use is unlikely to permit employment opportunity in the long term. This can include railway yards, water ways and potential commuter carparks.

If a lot has been deemed ‘Multi-use’ in the

ANSZIC map, this means there are several different businesses or a single business with multiple uses. Most of these lots will contain several smaller strata units in the one lot.

Data sources

The data to determine the predominant ANZSIC industry code combined data from

- o HillPDA 2020 Penrith Employment Land Use Study, prepared for Penrith City Council
- o Australian Business Register (ABR) Business Point Data
- o Google Business Data.

The number of lots and total size of lots representing different precincts was further sourced from NSW DPIE Employment Land Development Monitor (EDLM) 2020.

Internal analysis by Penrith City Council determined the occupancy and development status of each lot.

Some discrepancies between the totals in the data in the tables may occur as a result of ‘rounding up’ of decimals.

Table 1: GSC Employment categories by ANZSIC industry sectors

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

PENRITH EMPLOYMENT LANDS

PENRITH'S ECONOMY

The Penrith LGA is one of Greater Sydney's fastest-growing areas and its population is forecast to grow from 200,000 to 370,000 over the next twenty years.

Penrith has long been an important agricultural district. It also has several major industrial zones (the focus of this report) and is a commercial centre for Sydney's outer west and northwest. Construction and population-driven sectors – such as health care and social assistance, education and training, retailing, and accommodation and food services – are the largest employers.

The region's Gross Regional Product was \$11.3 billion in June 2020. This has increased

from \$9.40 billion in June 2018 – despite the COVID-19 pandemic. Much of this wealth has been generated by businesses in its employment lands.

The region is rapidly transforming as it becomes one of three metropolitan clusters in the Western Parkland City (WPC). The Western Sydney International (Nancy-Bird Walton) Airport and future Aerotropolis are located less than 10km from Penrith's CBD.

The development of WPC has brought significant investment into the region, including the Outer Sydney Orbital, Sydney Metro Western Sydney Airport, Western Sydney Freight Line, and M12 motorway.

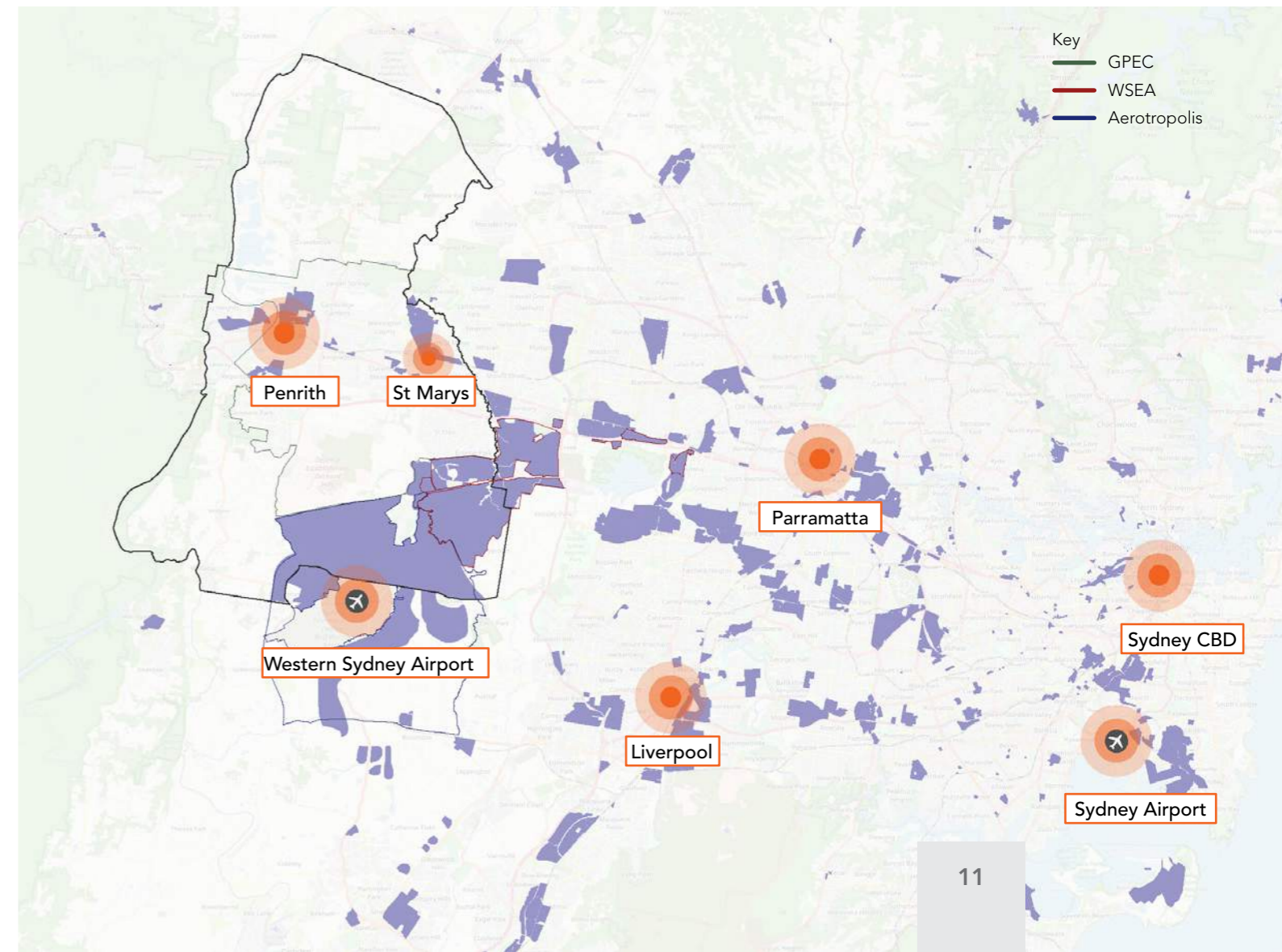


REGIONAL CONTEXT

Penrith's employment lands are important for Greater Sydney and the NSW economy. The latest data from the Employment Lands Development Monitor shows Penrith's employment lands represent 11% of Sydney's existing zoned and serviced land and 20% of Sydney's undeveloped and serviced land. Our employment lands will become even more important for Greater Sydney in future because

Penrith includes 40% of zoned employment land in the Western Sydney Aerotropolis and 60% of all Sydney's potential future supply. The Western City District Plan acknowledges the importance of Penrith's employment lands identifying our existing employment precincts to be retained and managed while our future employment lands in the Western Sydney Aerotropolis are to be planned and managed.

Map 1: Penrith LGA within the Greater Sydney Region



EMPLOYMENT PRECINCTS

Penrith has the benefit of having a full range of employment precincts as shown in table 2.

This report presents precinct profiles for Penrith's five primary industrial precincts to understand

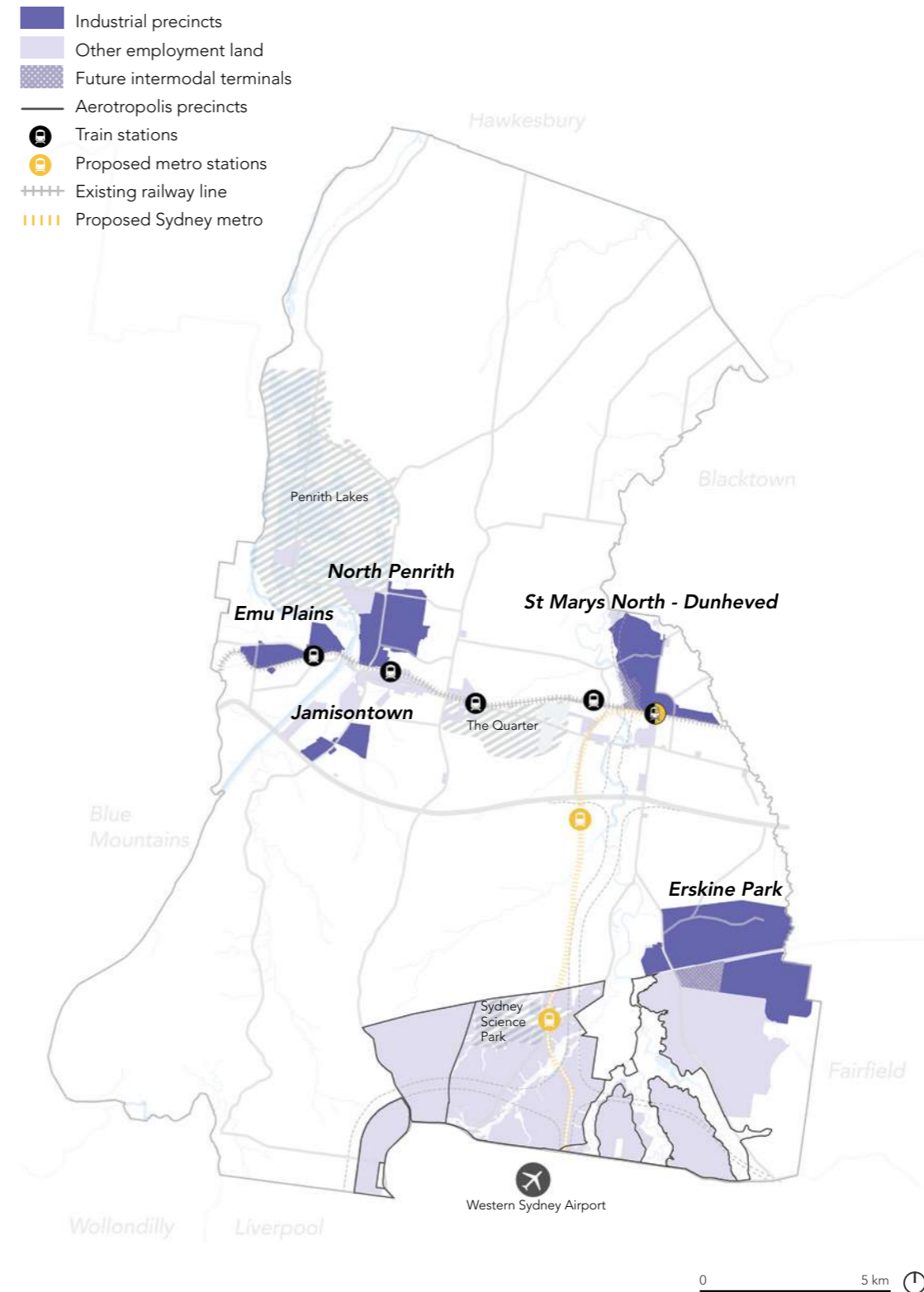
their strengths and characteristics and how we can best plan our future employment lands to complement the precincts we already have.

Table 2: Range of employment precincts in the LGA

Primary Precincts	
Classification	Precincts
Commercial	<ul style="list-style-type: none"> Penrith CBD St Marys town centre
Health and Education	<ul style="list-style-type: none"> The Quarter - Kingswood /Werrington
Industrial	<ul style="list-style-type: none"> Erskine Park St Marys North - Dunheved North Penrith Emu Plains Jamison town
Special Purpose (Tourism)	<ul style="list-style-type: none"> Nepean River Precinct
Secondary Precincts	
Classification	Precincts
Industrial	<ul style="list-style-type: none"> Kingswood Werrington Road St Marys - Great Western Highway St Clair
Business	<ul style="list-style-type: none"> Cambridge Gardens South Penrith Colyton
Future Precincts	
Classification	Precincts
Industrial	<ul style="list-style-type: none"> Mamre Road
Business	<ul style="list-style-type: none"> Sydney Science Park Werrington - Western Sydney University Penrith Lakes Nepean Business Park
Western Sydney Aerotropolis	<ul style="list-style-type: none"> Northern Gateway (outside of Sydney Science Park) Badgerys Creek, South Creek, Kemps Creek North Luddenham Agribusiness

MAP 2: Industrial Precincts

Location of industrial precincts in the LGA.



INDUSTRIAL PRECINCTS AT A GLANCE



Industrial Precinct	Total Developable Land (ha)	Total Vacant Developable land (ha)	Businesses	Jobs (2016)
Erskine Park	721.4	104.8	99	5,805
St Marys North - Dunheved	294.2	56.3	522	5,611
North Penrith	263.9	59.5	446	5,662
Emu Plains	128.1	28.4	195	2,781
Jamisontown	88.4	1.5	425	2,898
Total	1,496	250.4	1687	22,757

1. ERSKINE PARK

Overview

The Erskine Park industrial precinct is in the south-eastern corner of the Penrith LGA and serves as one of Greater Sydney's regionally important freight and logistics precincts. It is currently Penrith's largest industrial precinct with a total area of around 918 ha, of which 721 ha is zoned and serviced IN1 General Industrial. The topography is relatively flat with few site constraints, allowing a substantial number of larger lots. As a result the precinct is strongly suitable for major manufacturing, freight and logistics, and warehousing.

The precinct acts as a regional distribution centre, as it is strategically located close to the M4 Western Motorway and M7 Westlink Motorway, which provide good connectivity to other parts of Greater Sydney, Newcastle, the Central Coast, and Western NSW. The recent

construction of Lenore Drive has provided Erskine Park with a good connection to the M7 motorway.

Connectivity to the precinct is primarily by road transport with road and street widths suitable for articulated heavy vehicles. The main access roads of the precinct offer shared pathway access of good quality, safety and connectivity and there are limited bus transport services.

Erskine Park is characterised by large footprint typology including large multi-story industrial buildings and warehouses. The largest lot size is the 150,000 sqm site for the future Amazon fulfilment centre, located in the newly released Oakdale West precinct, south of the Sydney water pipeline. The building will provide a total of 200,000 sqm of floor space across 4 levels.

The precinct was gazetted for industrial purposes under the Western Sydney Employment Area State Environmental Planning Policy (2009) and is subject to a separate Development Control Plan. Most sites have been developed since 2009 and there are some good examples of high quality designed and landscaped buildings.

Open spaces in environmental conservation areas in the precinct provide quality greenery supported by street planting. A number of buildings in the area have setbacks with landscaping.

Provision of services for workers is limited to two cafes and one fast food restaurant and a few places for outdoor recreation. While there are a significant number of jobs across the precinct, the job density is relatively low because of the nature of the industries.



721 ^{HA}
Zoned and serviced industrial land



104 ^{HA}
Vacant, zoned and serviced industrial land



99
Businesses



5,805 Jobs (2016)

Job distribution

67% Industrial

18% Population serving

8% Knowledge intensive

7% Health and education



2,280 (39%)
Jobs in transport, postal and warehousing



1,190 (20%)
Jobs in manufacturing



Location within Penrith LGA

The precinct is in the south-eastern pocket of the Penrith LGA with a total area of 918 ha and forms part of the Western Sydney Employment Area. It lies adjacent to the recently rezoned Mamre Road industrial precinct and is close to the Western Sydney Airport and Aerotropolis precincts. Most of the precinct is located east of Mamre Road; however, it also includes a few lots west of Mamre Road. The Sydney Water pipeline cuts the precinct to the northern and southern parts. Lenore Drive and Erskine Park Road are the most important roads strengthening Erskine Park connectivity between Mamre Road and the M7.

Planning context

Erskine Business Park is part of the Western Sydney Employment Area (WSEA) which applies to land identified in the State Environmental

Planning Policy (Western Sydney Employment Area) 2009 (WSEA SEPP).

The WSEA is located within the vicinity of the intersection of the M4 and M7 Motorways. The WSEA straddles four local government areas (Penrith, Blacktown, Fairfield, and Holroyd) covering an area of approximately 2,450 ha.

The WSEA has delivered tens of thousands of jobs in freight and logistics, manufacturing, and other industrial businesses over the last 10 to 15 years. Most of the land zoned for industrial by the WSEA SEPP prior to 2020 has now been built.

The Penrith Development Control Plan 2014 also sets out several land-use controls for the precinct. It divides the precinct into a Northern Area and a Southern Area, separated by Lenore Drive. The southern area extends south below the Sydney Water pipeline as shown in Figure 2.

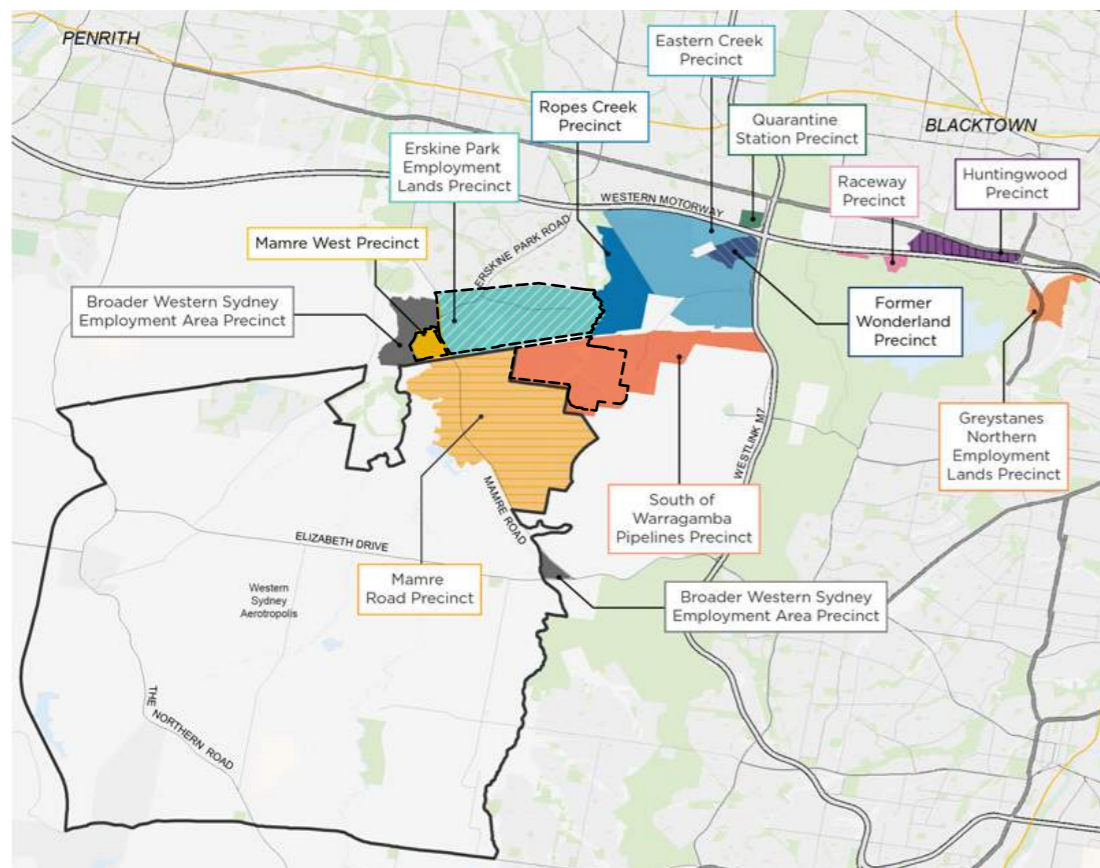


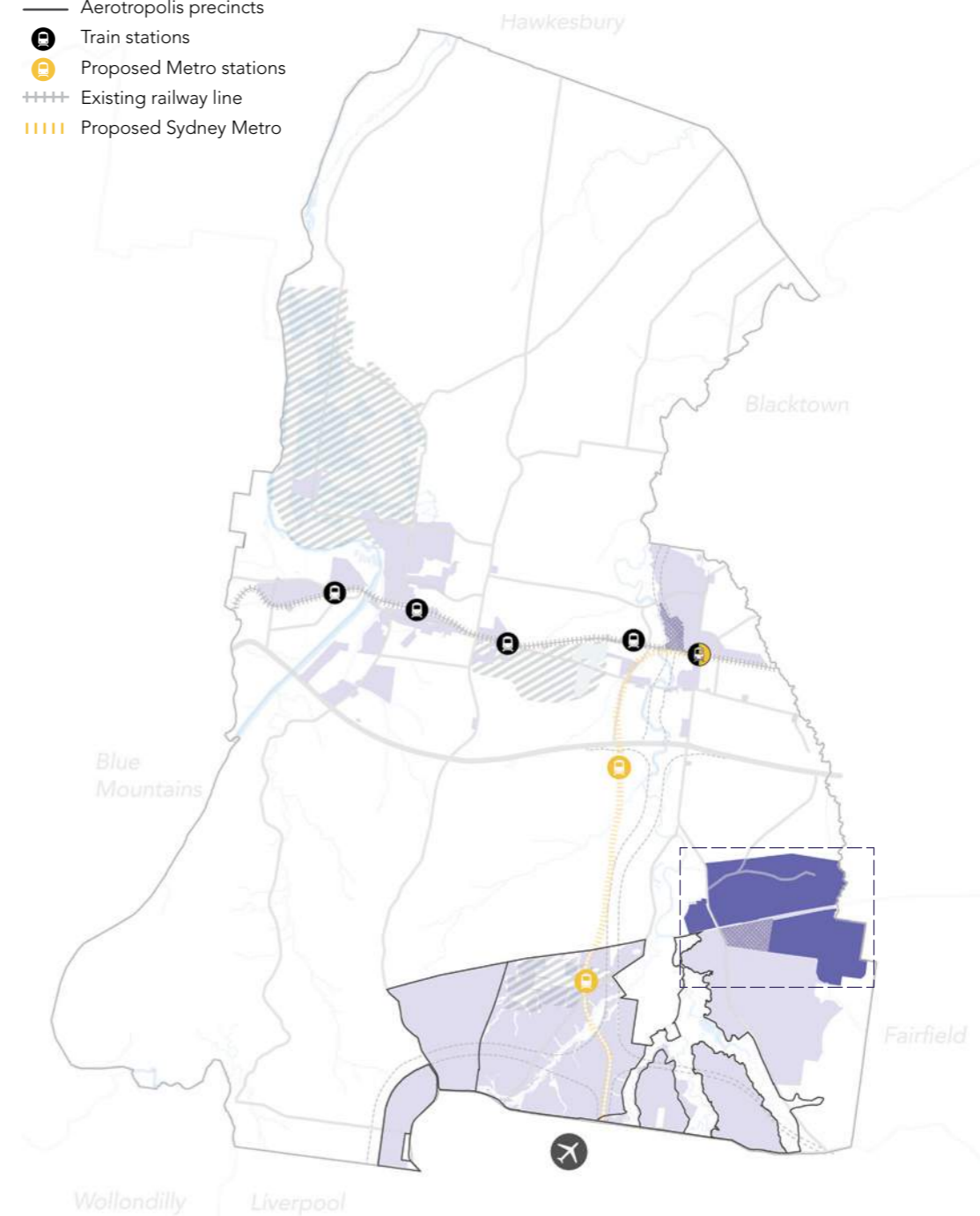
Figure 1: Erskine Park Industrial precinct within the Western Sydney Employment Area

Source: Overview of the Western Sydney Employment Area, 2016

MAP 3: Erskine Park Industrial Precinct

Location of Erskine Park industrial precinct in the LGA.

- Erskine Park industrial precinct
- Other employment land
- Future intermodal terminals
- Aerotropolis precincts
- Train stations
- Proposed Metro stations
- Existing railway line
- Proposed Sydney Metro



0 5 km

LAND-USE ZONING

The majority (71%) of the precinct is zoned IN1-General Industrial providing 721 ha of industrial land. Lands zoned E2-Environmental Conservation and SP2-Infrastructure make up 197 ha (29%) of the land area in the precinct.

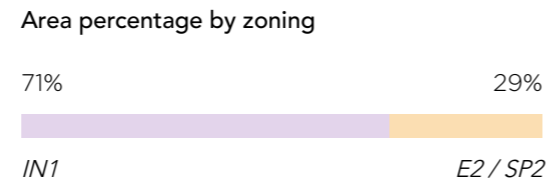
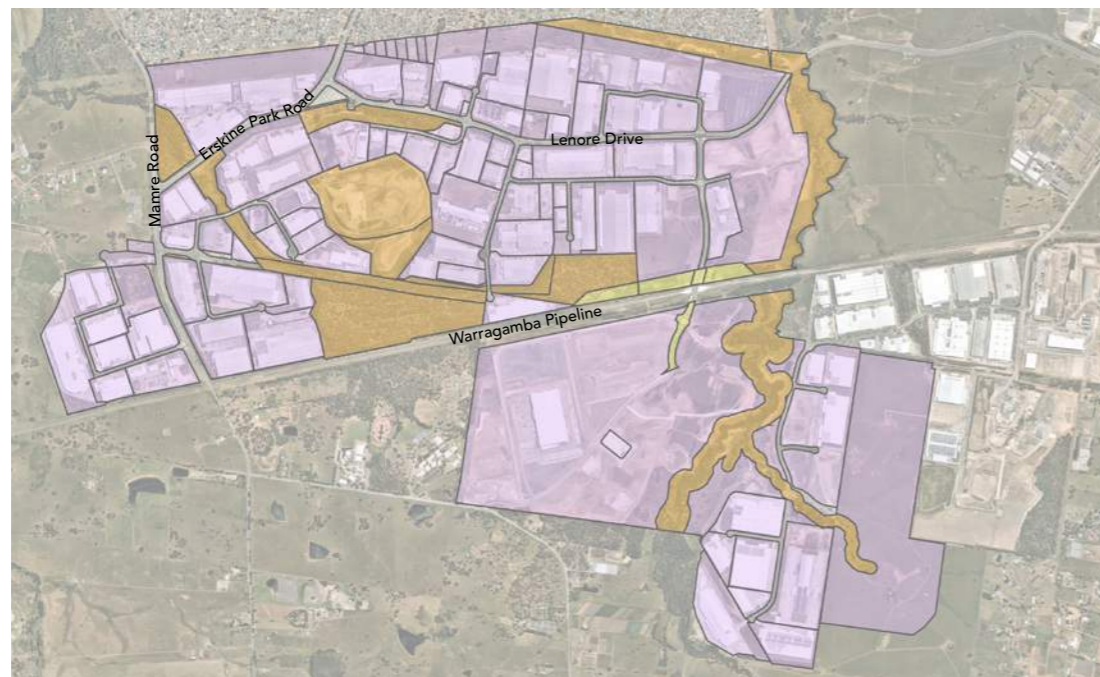


Table 1: Area by land-use zoning of Erskine Park industrial precinct

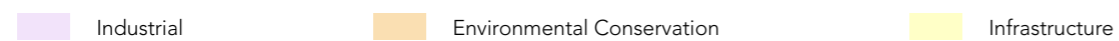
Land zone	Area (ha)	Percentage
Area zoned IN1	721	71%
Area zoned E2 or SP2	197	29%
Total Area*	918	100%

*Includes roads

Figure 2: Land-use zoning in Erskine Park industrial precinct



Legend



LOT SIZE

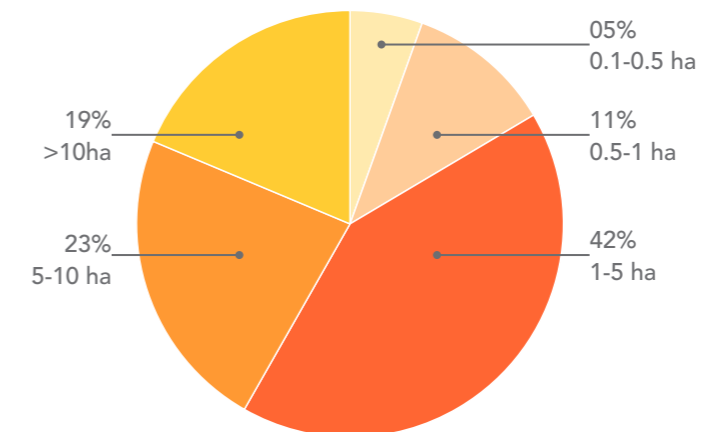
Unlike other precincts in the Penrith LGA, Erskine Park is mostly occupied by larger lots and 84% of all lots are 1 ha or more in size. Of the 91 lots in the precinct, the largest proportion (42%) of lots are between 1 to 5 ha. The second largest group (23%) are lots with an area of 5 to 10 ha.

Lots larger than 10 ha make up (19%). There are no lots smaller than 0.1 ha. The predominance of larger lots makes the precinct ideal for major manufacturing, freight and logistics, warehousing, and regional distribution industrial uses.

Table 2: Lot sizes in Erskine Park industrial precinct

Lot size	Number	Percentage
<0.1 ha	0	0%
0.1-0.5 ha	5	5%
0.5-1 ha	10	11%
1-5 ha	38	42%
5-10 ha	21	23%
>10 ha	17	19%
Total	91	100%

Figure 3: Proportion of lots by lot size of Erskine Park industrial precinct



DEVELOPMENT STATUS

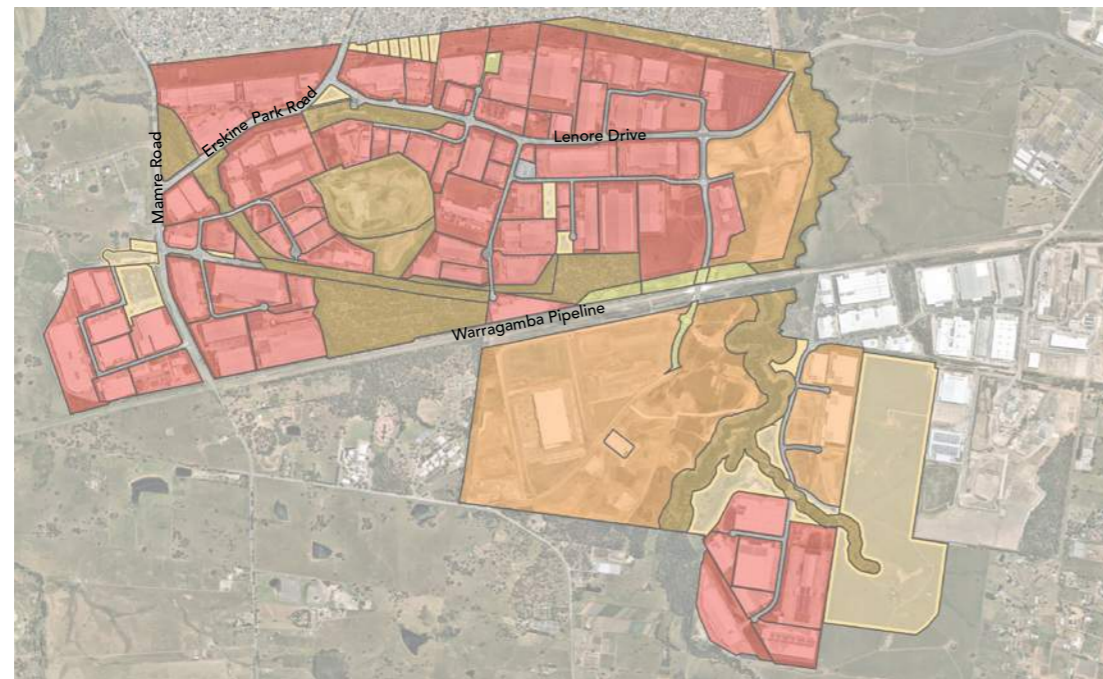
Of the total area of employment zoned land, 396.5 ha (or 55%) is fully developed, while 220 ha (or 30.5%) is under construction and 104.8 ha (or 14.5%) is undeveloped. Of the remainder, 105 ha is vacant land or vacant land with storage.

Around three-quarters of all lots in Erskine Park have been developed (69 lots of the 91 lots). Most of the developed lots are larger than 1

ha: 38 lots are between 1-5 ha, and 32 lots are larger than 5 ha. Three of the four lots under construction are larger than 10 ha.

In contrast, the majority of the vacant lots (17) and vacant lots with storage (1) in Erskine Park are less than 5 ha in size. Two of the 17 vacant lots are larger than 10 ha and only one vacant lot is between 5-10 ha.

Figure 4: Development status by lot size of Erskine Park industrial precinct



Legend

Developed

- Developed
- Under Construction

Vacant

- Vacant land with Storage
- Vacant Land

Other Uses

- Environmental Conservation
- Infrastructure

0 500m

Table 3: Development status by area of Erskine Park industrial precinct

Development Status	Area (ha)	Percentage
Developed	396.6	55%
Under Construction	220.0	31%
Vacant Land	103.8	14%
Vacant Land with Storage	1.0	0%
Total	721.4	100%

Figure 5: Development status by area of Erskine Park industrial precinct

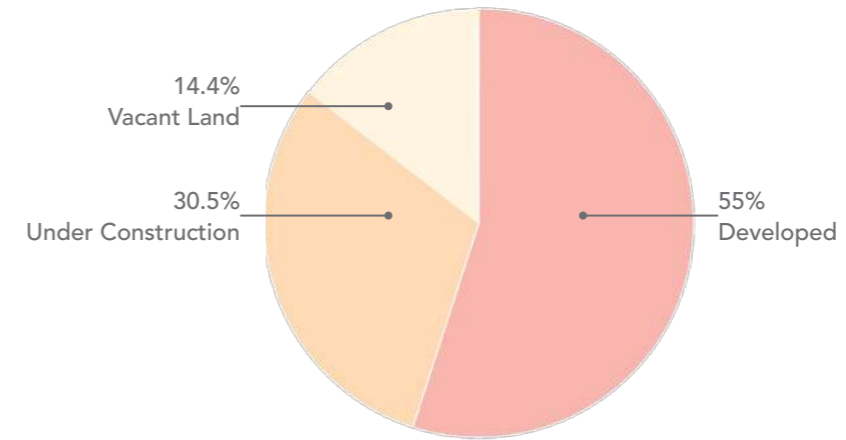
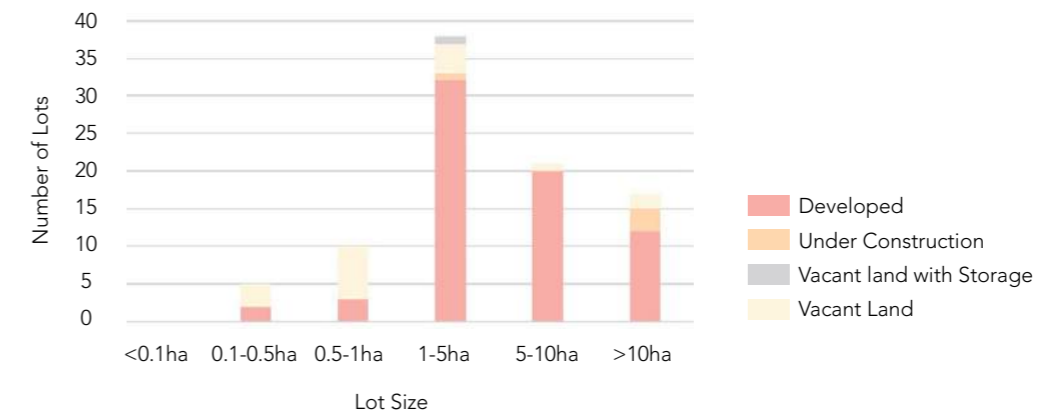


Table 4: Development status by lot size of Erskine Park industrial precinct

Lot Size	<0.1 ha	0.1-0.5 ha	0.5-1 ha	1-5 ha	5-10 ha	>10 ha	Total
Developed	0	2	3	32	20	12	69
Under Construction	0	0	0	1	0	3	4
Vacant Land	0	3	7	4	1	2	17
Vacant Land with Storage	0	0	0	1	0	0	1
Total	0	5	10	38	21	17	91

Figure 6: Development status by lot size of Erskine Park industrial precinct



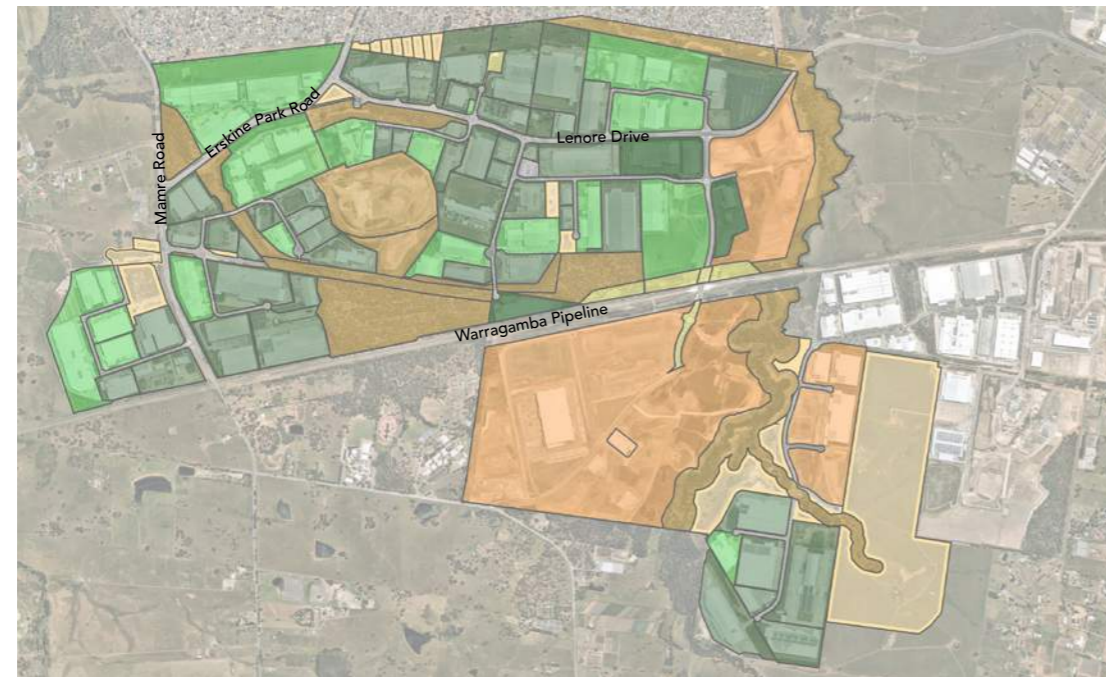
OCCUPANCY

Three quarters (52 lots) of the total 69 occupied lots in Erskine Park (excluding lots under construction) are under single occupancy. One quarter (17 lots) have multiple occupants.

Table 5: Occupancy status of Erskine Park industrial precinct

Occupancy	Number of lots	Percentage	Area (ha)	% of total area
Single Occupancy	52	75%	258.7	63%
Multiple Occupants	17	25%	154.9	37%
Total	69	100%	413.6	100%

Figure 7: Occupancy status of Erskine Park industrial land



Legend

Occupied

- Multiple Occupancy
- Single Occupancy
- Under Construction

Vacant

- Vacant land with Storage
- Vacant Land

Other Uses

- Environmental Conservation
- Infrastructure

0 500m

EMPLOYMENT

Employment in the precinct has grown by 38% in ten years from 2009 to 2019. The precinct provided 4,659 jobs in 2009, 5,805 jobs in 2016, and 6,424 jobs in 2019.

Employment in Erskine Park is predominantly in industrial sectors, with 72% of all jobs in the

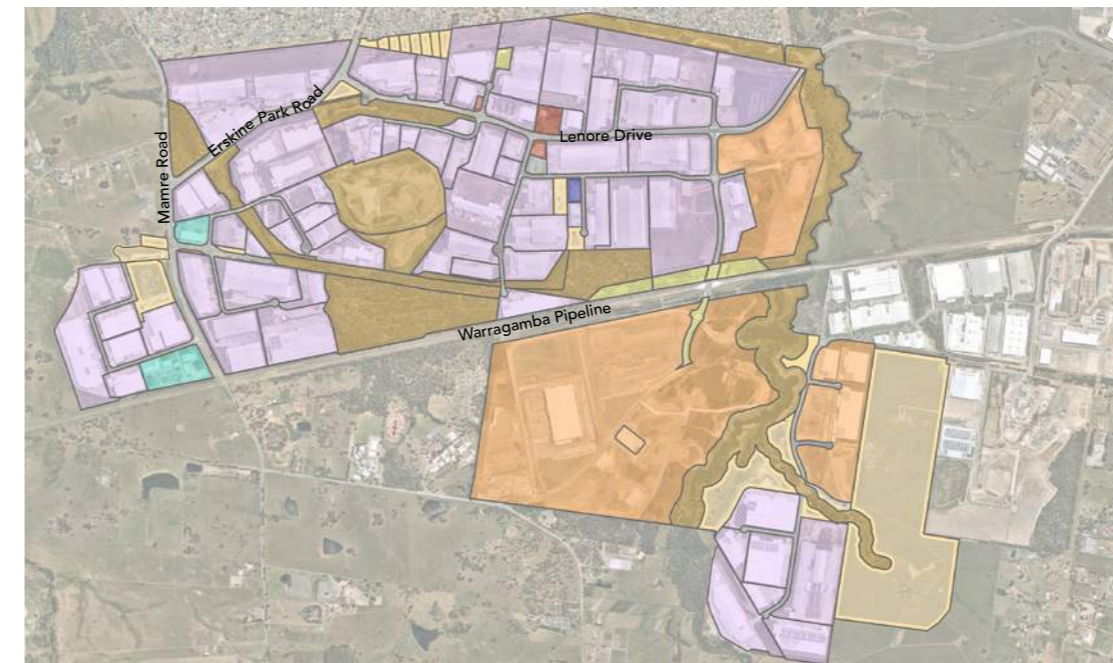
precinct in these industries.

Population serving, health and education and knowledge intensive sections provide 18%, 1% and 9% of the total jobs of the precinct, respectively.

Table 6: Land use and jobs by GSC employment code of Erskine Park industrial precinct

Employment Code	Land Area (ha)	% of total	Jobs	% of total
Industrial	367.7	94%	4177	72%
Population Serving	7.2	2%	1060	18%
Health/Education	1.0	0.25%	55	1%
Knowledge Intensive	13.4	3%	513	9%
Total	389.3	100%	5805	100%

Figure 8: Land use and jobs by GSC employment code of Erskine Park industrial land



Legend

Developed

- Industrial
- Population Serving
- Knowledge Intensive
- Health and Education

Vacant

- Vacant land with Storage
- Vacant Land

Other Uses

- Environmental Conservation
- Infrastructure

0 500m

INDUSTRIES

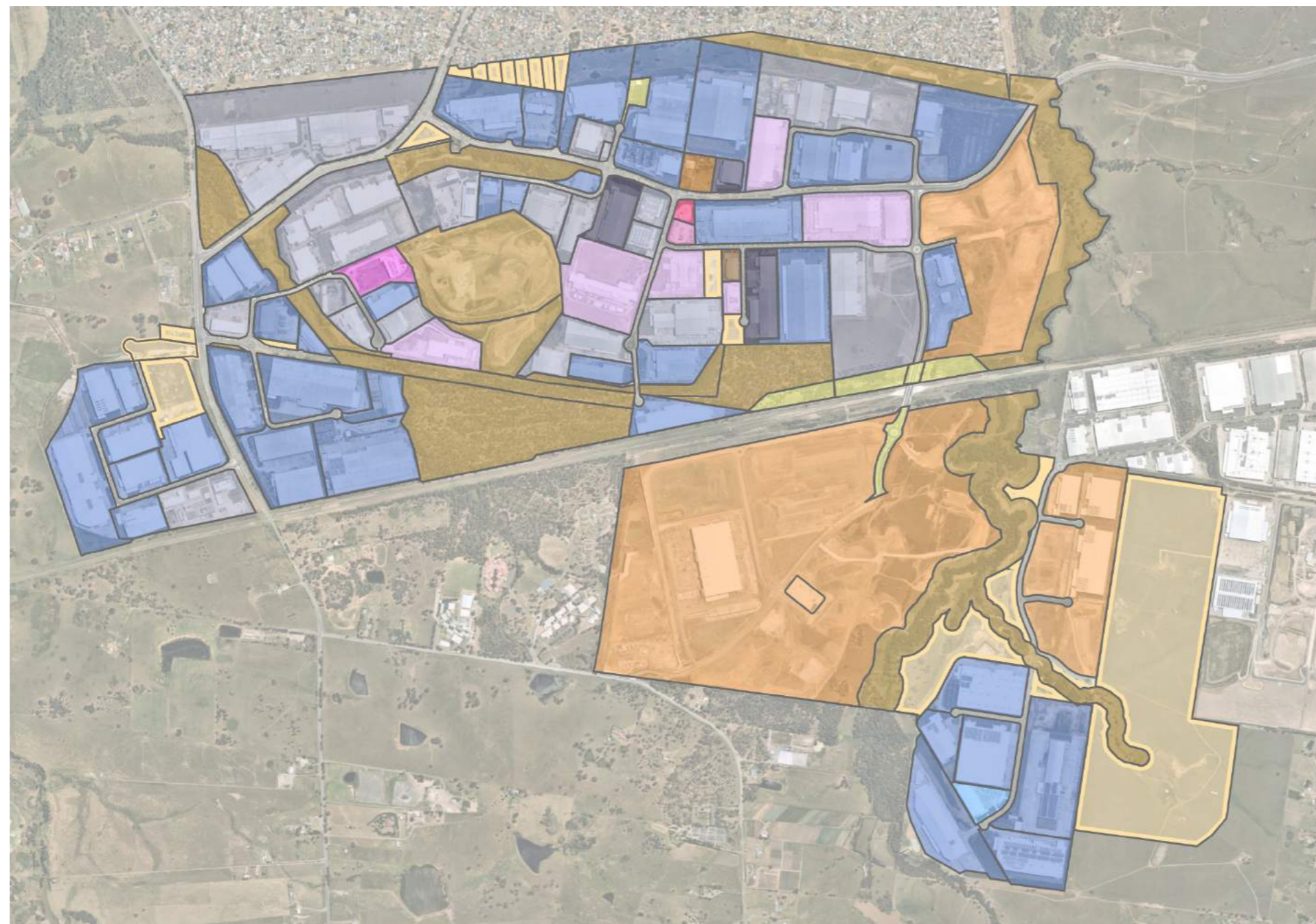
Transport, Postal and Warehousing is the largest industry and provides 2280 local jobs, representing 39% of all jobs in the precinct. This industry accounts for 43.1% of the total area of the precinct (311.1 ha).

Manufacturing is the second largest industry and provides 1190 local jobs, representing 20% of all jobs in the precinct. This industry covers 4.8% of the total area of the precinct (34.4 ha).

Retail Trade is the third largest industry and provides 759 local jobs, representing 13% of all

jobs in the precinct. Retail trade comprises 0.3% of the total precinct (2.3 ha) which consists of packing, warehousing and logistics serving the retail industry rather than directly to the public retail.

Figure 9: Land use by ANZSIC code of Erskine Park industrial precinct



Legend

Developed

- Education and Training
- Electricity, Gas, Water, and Waste Services
- Manufacturing
- Multi-Use
- Other Services
- Retail Trade
- Transport, Postal, and Warehousing
- Under Construction
- Wholesale Trade

Vacant

- Vacant Land with Storage
- Vacant Land
- Vacant Space - Unoccupied

Other Uses

- Environmental Conservation
- Infrastructure

0 500m

Table 7: Land use by ANZSIC code of Erskine Park industrial precinct

ANZSIC Code	Total Land Area (ha)	% of total	Jobs	% of total
Industrial				
Agriculture, Forestry and Fishing	0	0%	14	0.2%
Electricity, Gas, Water and Waste Services	3.5	0.5%	145	3%
Manufacturing	34.5	4.8%	1190	21%
Mining	0	0%	0	0%
Transport, Postal and Warehousing	311.1	43.1%	2280	39%
Wholesale Trade	18.6	2.6%	547	9%
Knowledge Intensive				
Administrative and Support Services	0	0%	175	3%
Financial and Insurance Services	0	0%	76	1%
Information Media and Telecommunications	0	0%	90	2%
Professional, Scientific and Technical Services	10.2	1.4%	30	0.5%
Public Administration and Safety	3.0	0.4%	27	0.5%
Rental, Hiring and Real Estate Services	0.2	0%	115	2%
Health and Education				
Education and Training	1.0	0.1%	6	0.1%
Health Care and Social Assistance	0	0%	49	1%
Population Serving				
Accommodation and Food Services	1.6	0.2%	13	0.2%
Arts and Recreation Services	0	0%	0	0%
Construction	1.1	0.2%	268	5%
Other Services	2.2	0.3%	20	0.3%
Retail Trade	2.3	0.3%	759	13%
Vacant				
Vacant land	103.8	14.4%	-	-
Under Construction	220.0	30.5%	-	-
Vacant land with storage	1.0	0.1%	-	-
Vacant Space (unoccupied)	7.3	1.0%	-	-
Total	721.4	100%	5,805	100%

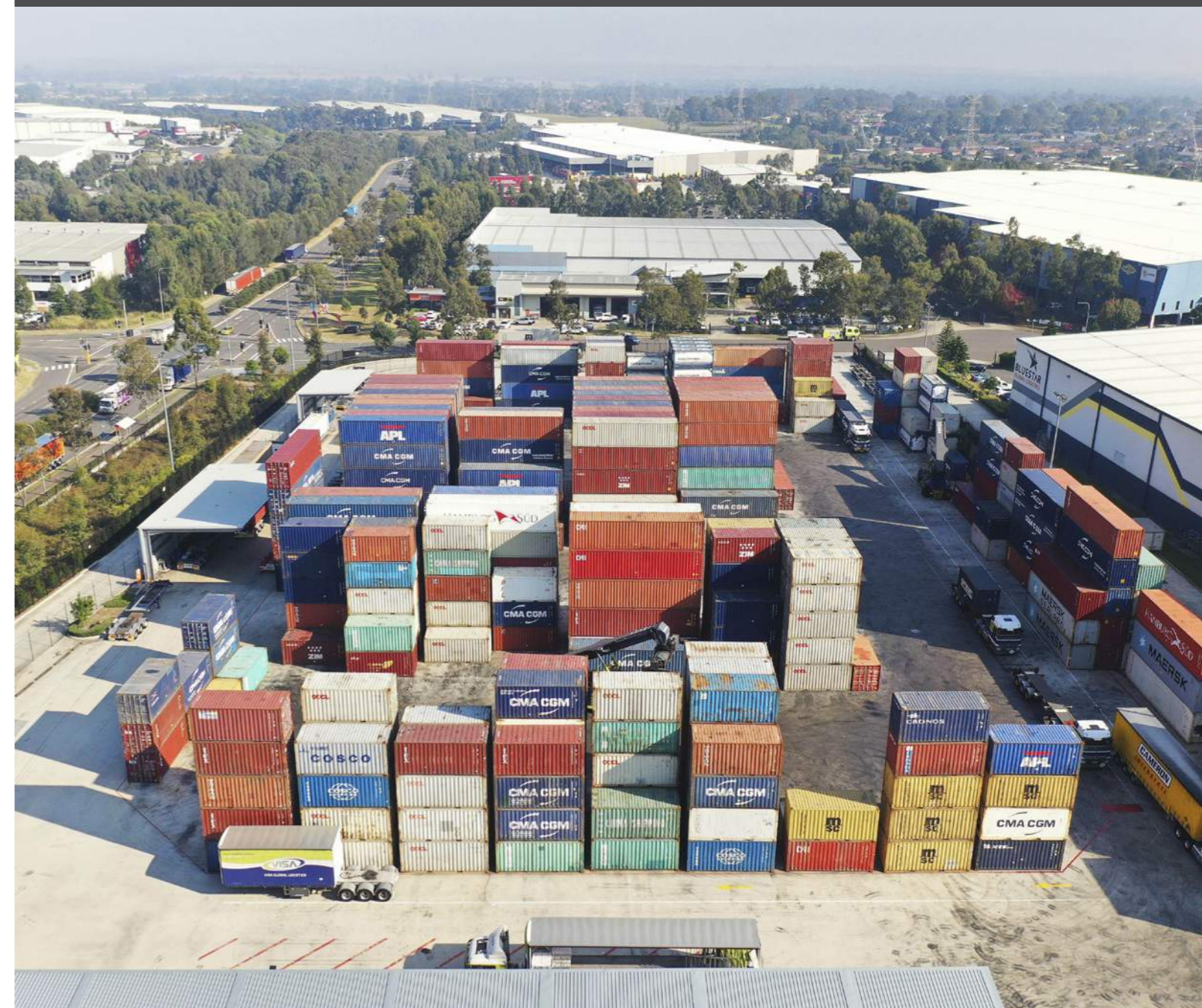
Top 3 industries by growth between 2009 and 2019

Transport, Postal and Warehousing experienced the greatest increase in local jobs since 2009 (1,044 local jobs), followed by Retail Trade (285), and Construction (198).

Business

The precinct is occupied by 99 businesses

and is known for its transport, postal, and warehousing activities. Most of these businesses are national and global enterprises, such as Linfox, Woolworths, DHL, and Toyota. Amazon's first robotic fulfilment centre is currently under construction and will be completed in late 2021. The fulfilment centre will have a total floor space of 200,000 sqm, spanning four levels, storing up to 11 million items, and supplying up to 1,500 jobs.



2. ST MARYS NORTH - DUNHEVED

Overview

The St Marys industrial precinct is located on the eastern side of the Penrith LGA and north of St Marys railway station, and is well-connected by major roads and rail. The precinct has a total area of 307 ha, and almost all (99 %) of the precinct is zoned IN1 - General Industrial. A small area of IN2 is situated across Forester Road. It is also one of the oldest industrial precincts in the LGA and primarily accommodates local businesses.

The topography is generally flat and the precinct primarily consists of curvilinear loop pattern of streets. The precinct is divided into 455 lots, which are mostly small sized lots of less than one hectare, which comprise 78% of the lots and relatively few (56) medium sized lots of between one and five ha.

The precinct has a long and rich industrial history dating back to the 1840s. Some of the distinctive industries of that time included tanneries, coach and wagon works, and brickyards. The precinct has since played an important role in manufacturing, and was the location of a large munitions factory during World War II. Some of the original munitions factory remains and has been put to new uses.

The precinct subsequently expanded north to Dunheved and east between Kurrajong Road and the rail line. The precinct remains a significant manufacturing precinct, including for defence industries, metal fabrication, structural engineering, recycling and chemical manufacturing. Currently, the top three industries in this precinct are manufacturing, construction, and wholesale trade. In 2019, the precinct provided a total of 6236 jobs.

The precinct is connected to the M4 motorway, via and Mamre Road, the Great Western Highway and Glossop Street. A new intermodal terminal is planned on the western side of the precinct which will repurpose the now abandoned Ropes Creek railway line that previously served the defence industries. Access to the site on the western side is by Werrington Road through Dunheved Road. The proposed upgrade of Werrington Road would help provide access to the intermodal, the Great Western Highway, and M4 without increasing congestion on the already busy Glossop Street.

Much of the precinct has a dense, compact character, with narrow roads and small-scale buildings, frequent use of brick and timber, low

kerbs, the standard landscaped setbacks, and open front fencing. Further, the low scale-built form, ranging from one to two storeys, with consistent vegetation and overhead power lines provide an important defining and unifying characteristic across the precinct. On some streets, the contrast of the 20th century old industrial and new buildings on either side of the streets exemplify the precinct's distinctive character and signals its evolving nature.

The St Marys Intermodal, under construction, is located in the south west corner of the precinct and has a highly strategic base due to its proximity to Western Sydney-based logistics and distribution centres.

The legacy of heavy industry in the precinct has meant some areas have become degraded. While new industrial buildings are revitalising the precinct, overall the amenity on the precinct could be improved by increasing in provision of dedicated footpaths, cycleways, open/public green space spaces, population serving facilities (like cafes and gyms for workers) and safety.



307 HA
Zoned and serviced industrial land



47 HA
Vacant, zoned and serviced industrial land



522
Businesses



5,611 Jobs (2016)

Job distribution



59% Industrial

30% Population serving

8% Knowledge intensive

2% Health and education



2,116 (38%)
Jobs in manufacturing



1072 (19%)
Jobs in construction



Location within Penrith LGA

St Marys North – Dunheved, an ‘L shaped’ industrial precinct, is strategically located north of St Marys railway station with its horizontal wing aligned to the Western Sydney Rail Line. It is bound by the South Creek to the west, Links Road to the north, and Forrester Road and Glossop Street to the east. From an aerial perspective, the precinct has a clearly defined area and is easily distinguishable from the fine-grain suburban figure-ground to the east and the open Greenfields to the west.

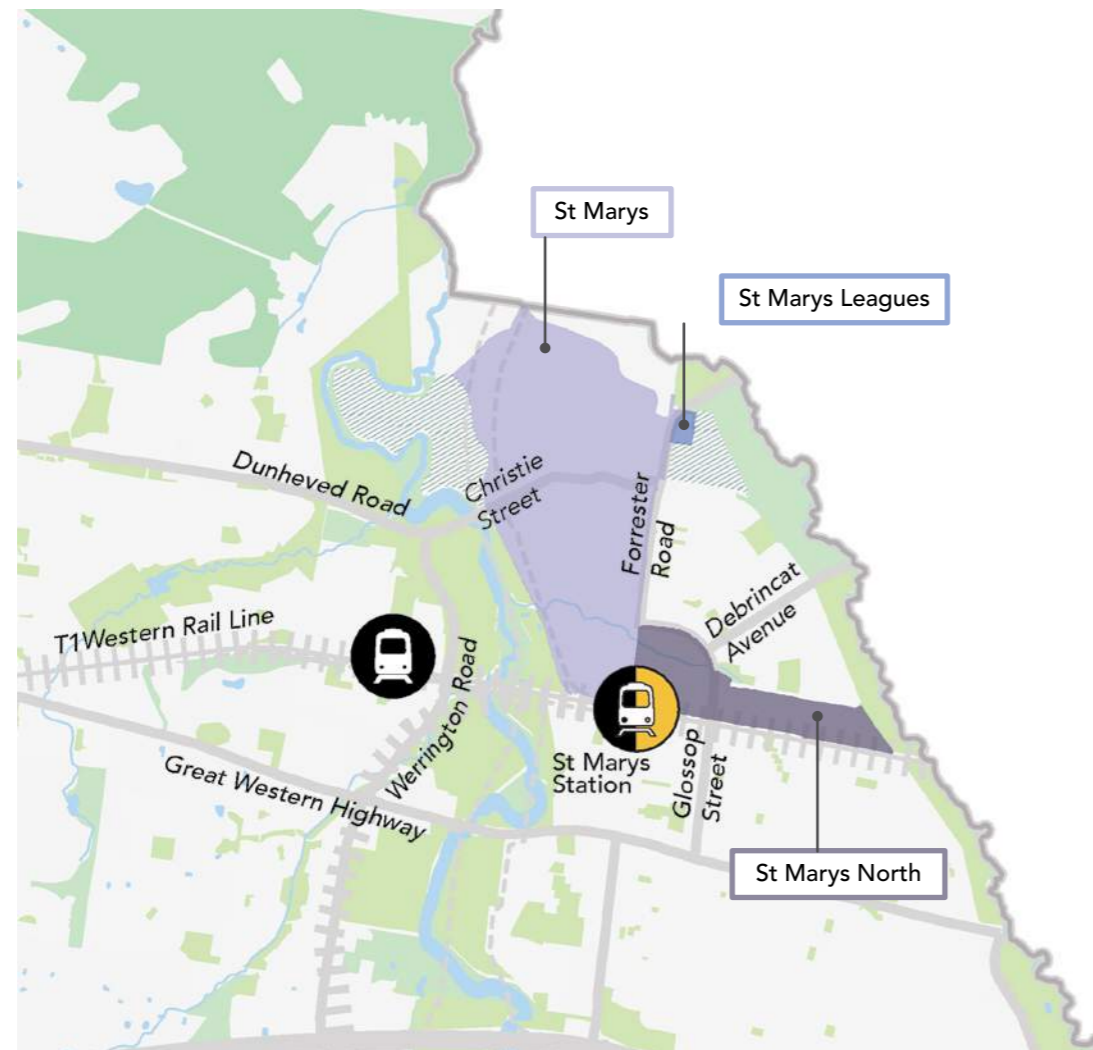
It obtains its locational importance due to its proximity to Great Western Highway, M4 motorway, Castlereagh and Mulgoa roads, and the St Marys train station (located just at the precincts southern boundary).

Planning context

St Marys – North Dunheved industrial precinct is zoned by the Penrith Local Environmental Plan 2010. The Penrith Development Control Plan 2014 also sets out many land-use controls for the precinct in Part D4 Industrial Precincts. The precinct is referred to as Precinct 1: Dunheved/St Marys (north of Christie Street), Precinct 2: Dunheved/St Marys (south of Christie Street), and Precinct 3: St Marys (east of Forrester Road) in Part D4 of the DCP.

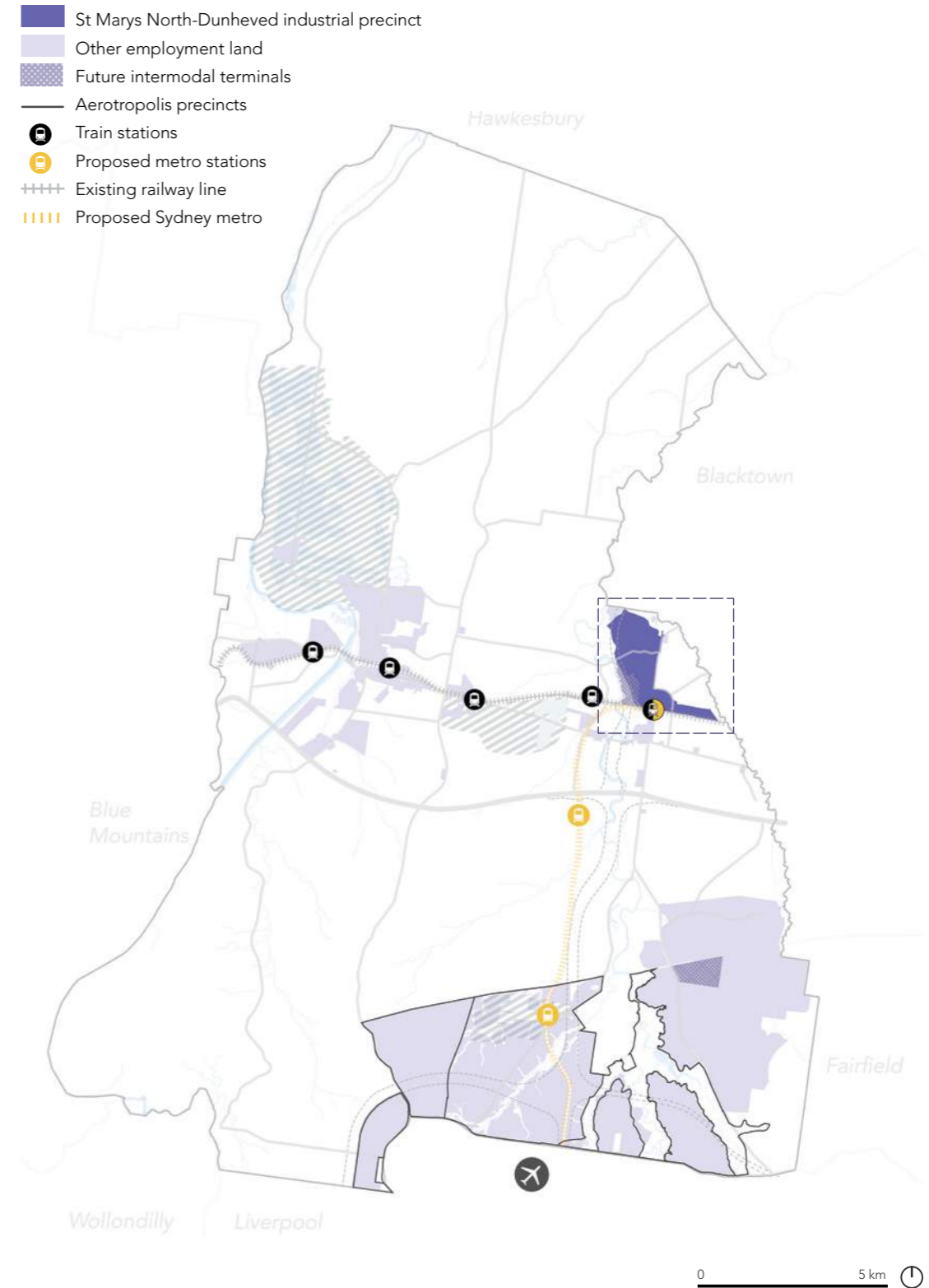
The precinct is also part of the Greater Sydney Employment Lands as put forth by the Employment Lands Development Monitor, 2020 (ELDM). The precinct is divided into three segments: St Marys, St Marys Leagues, and St Marys North.

Figure 1: Segments of St Marys North-Dunheved industrial precinct as per ELDM



MAP 4: St Marys North-Dunheved Industrial Precinct

Location of St Marys North-Dunheved industrial precinct in the LGA.



LAND-USE ZONING

St Marys industrial precinct has a total area of 306 ha, of which almost all ha (99%) of the area is zoned IN1 – General Industrial. This part supports traditional and non-traditional uses such as manufacturing, electricity, gas and water services, wholesale trade, construction, transport, postal and warehousing, and retail trade. The remaining 3 ha or 1% of the land is zoned IN2 Light Industrial. Currently the IN2 land that is zoned across Forrester Road from the

Dunheved portion of the precinct is not used as the former Masters Hardware chain closed.

Area percentage by zoning

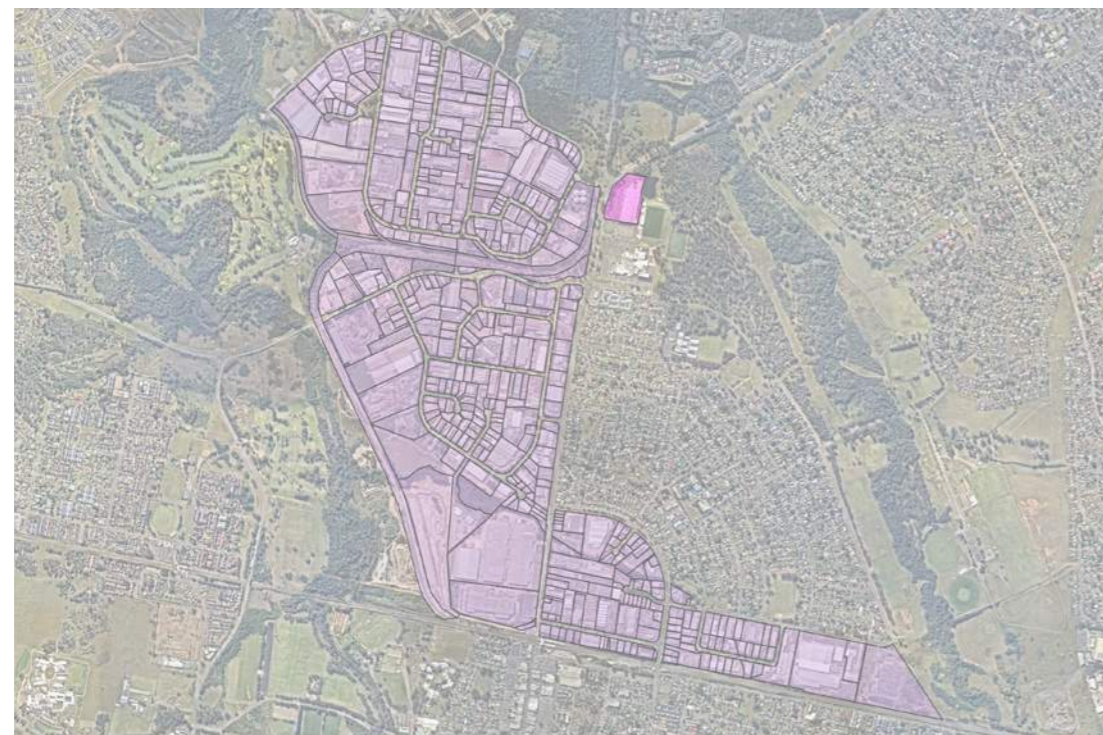


Table 1: Area by land-use zoning of St Marys North - Dunheved industrial precinct

Land zone	Area (ha)	Percentage
Area zoned IN1	303	99%
Area zoned IN2	3	1%
Total Area*	306	100%

*Includes roads

Figure 2: Land-use zoning in St Marys North - Dunheved industrial precinct



Legend

Industrial Light Industrial



LOT SIZE

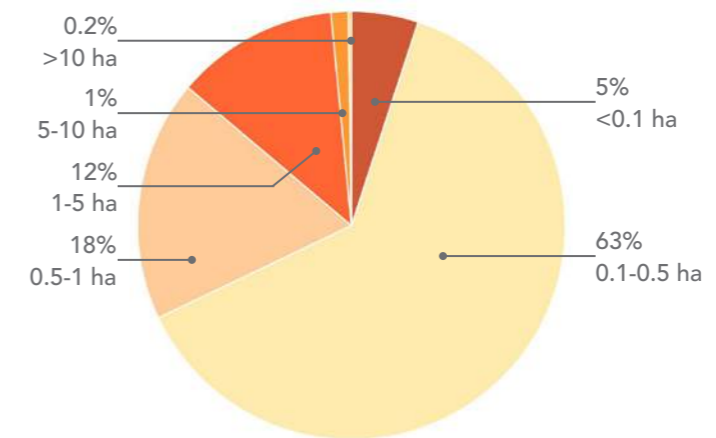
Like the Penrith LGAs other industrial precincts (excluding Erskine Park), St Marys is mostly occupied by small-scale lots. Of the 455 lots in the precinct, the largest proportion, 63% of the lots are 0.1 to 0.5 ha. Lots of sizes 0.5-1 ha and 1-5 ha make up 18% and 12% of all lots respectively. Lots smaller than 0.1 ha make up

5% of all lots. There are only 1% and 0.2% of lots 5-10 ha and greater than 10 ha respectively. The predominance of smaller lots sizes in the precinct makes it suitable for a variety of small-scale industries which do not need larger lots.

Table 2: Lot sizes in St Marys North - Dunheved industrial precinct

Lot size	Number	Percentage
<0.1 ha	23	5%
0.1-0.5 ha	286	63%
0.5-1 ha	83	18%
1-5 ha	56	12%
5-10 ha	6	1%
>10 ha	1	0.2%
Total	455	100%

Figure 3: Proportion of lots by lot size of St Marys North - Dunheved industrial precinct



DEVELOPMENT STATUS

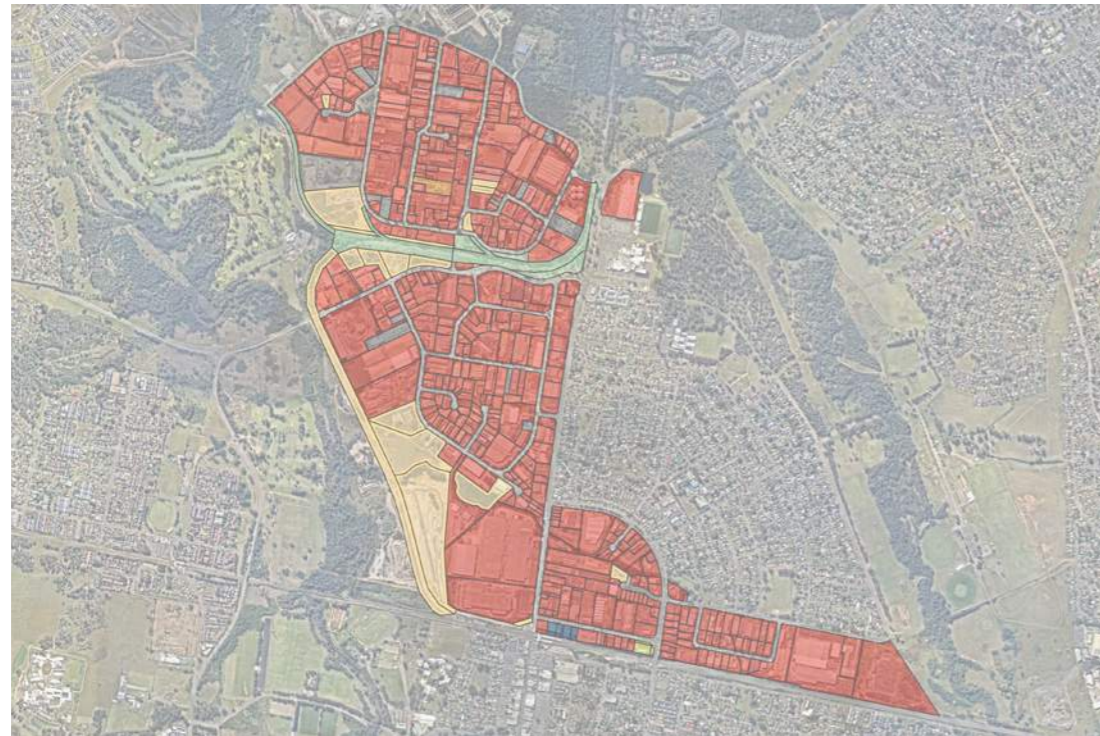
Almost four-fifths (78% or 237 ha) of the total of St Marys industrial precinct is fully developed. Less than 1 ha is under construction. Around, 15% or 46.5 ha is vacant land and 3% or 9.8ha is vacant land being used for storage. The "Other" category only applies to a very small portion of the precinct (4% or 11.5 ha) but is used to refer to land that is not developable in the immediate future and is likely to be used for non-employment purposes.

Most of the fully developed lots have an area of between 0.1 to 0.5 ha (261 out of 406 lots). The second largest group of developed lots (77 lots) are lots 0.5-1 ha, followed by 44 developed lots of 1-5 ha.

Of the vacant lots 8 are of 0.1-0.5 ha, 5 are of 1-5 ha, 3 are of both 0.5-1 ha and 5-10 ha.

The majority of vacant lands with storage, out of a total 18 lots are 0.1-0.5 ha (12 lots), while only 3 lots are of 1-5 ha.

Figure 4: Development status of St Marys North - Dunheved industrial precinct



Legend

Developed

- Developed
- Under Construction

Vacant

- Vacant land with Storage
- Vacant Land

Other Uses

- Commuter Car Park
- Infrastructure
- Other

Table 3: Development status by area of St Marys North - Dunheved industrial precinct

Development Status	Area (ha)	Percentage
Developed	237.0	78%
Under Construction	0.9	0.3%
Commuter Car Park	0.8	0.3%
Other	11.5	4%
Vacant Land	46.5	15%
Vacant Land with Storage	9.8	3%
Total	306.5	100%

Figure 5: Development status by area of St Marys North - Dunheved industrial precinct

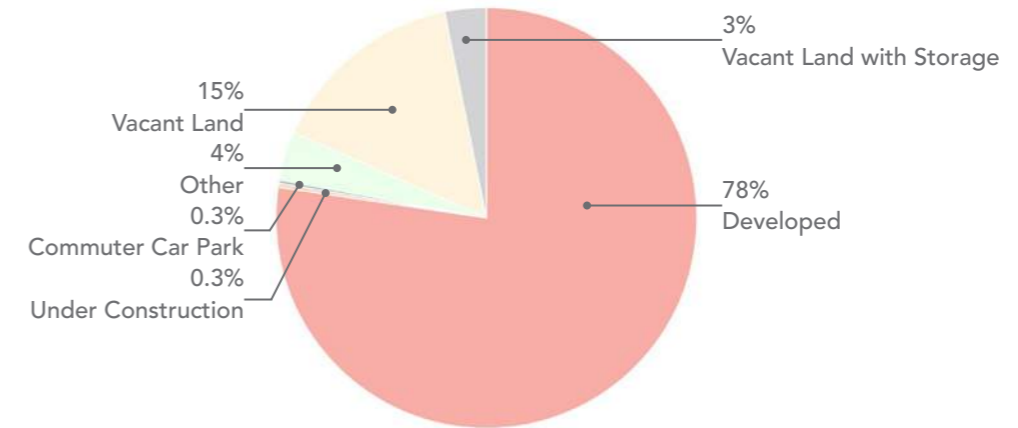
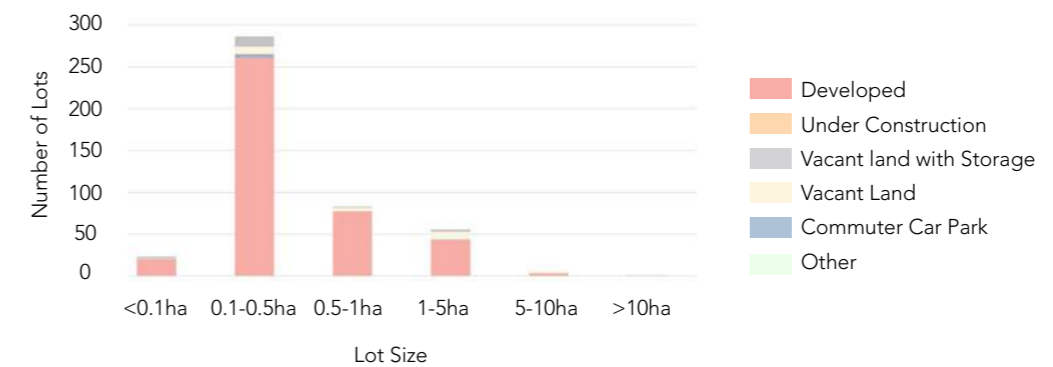


Table 4: Development status by lot size of St Marys North - Dunheved industrial precinct

Lot Size	<0.1 ha	0.1-0.5 ha	0.5-1 ha	1-5 ha	5-10 ha	>10 ha	Total
Developed	20	261	77	44	3	1	406
Under Construction	0	0	1	0	0	0	1
Commuter Car Park	0	4	0	0	0	0	4
Other	0	1	1	4	0	0	6
Vacant Land	1	8	3	5	3	0	20
Vacant Land with Storage	2	12	1	3	0	0	18
Total	23	286	83	56	6	1	455

Figure 6: Development status by lot size of St Marys North - Dunheved industrial precinct



OCCUPANCY

Out of the total 402 fully developed lots, 270 lots (67%) are under single occupancy, while 114 lots (28%) have multiple occupants.

Of the remaining occupied lots, 18 lots have buildings but these are unoccupied vacant space.

Table 5: Occupancy status of St Marys North - Dunheved industrial precinct

Occupancy	Number of lots	Percentage	Area (ha)	% of total area
Single Occupancy	270	67%	152.2	64%
Multiple Occupants	114	28%	64.8	27%
Vacant Space - Unoccupied	18	4%	19.5	8%
Total	402	100%	236.5	100%

Figure 7: Occupancy status of St Marys North - Dunheved industrial land



Legend

Occupied

- Multiple Occupancy
- Single Occupancy
- Other
- Under Construction

Vacant

- Vacant land with Storage
- Vacant Land
- Vacant Space - Unoccupied

Other Uses

- Commuter Car Park
- Infrastructure

0 500m

EMPLOYMENT

Total employment in the precinct in 2016 was 5611 jobs. Over half of the employment in the precinct are in the industrial sectors, followed by population serving sectors (16%), knowledge

intensive sectors (5%), and health and education sectors (0.1%). Employment in the precinct is estimated to have grown by 21% in ten years from 5,140 jobs in 2009 to 6,236 jobs in 2019.

Table 6: Land use and jobs by GSC employment code of St Marys North - Dunheved industrial precinct

Employment Code	Land Area (ha)	% of total	Jobs	% of total
Industrial	154.0	71%	3330	59%
Population Serving	48.4	22%	1694	30%
Health/Education	0.3	0.1%	113	2%
Knowledge Intensive	13.8	6%	475	8%
Total	216.5	100%	5611	100%

Figure 8: Land use and jobs by GSC employment code of St Marys North - Dunheved industrial precinct



Legend

Developed

- Industrial
- Population Serving
- Knowledge Intensive
- Health and Education

Vacant

- Vacant land with Storage
- Vacant Land
- Vacant Space - Unoccupied

Other Uses

- Commuter Car Park
- Infrastructure

0 500m

INDUSTRIES

Manufacturing is the largest industry in this precinct. This industry employs 2116 workers, representing 38% of all jobs in the precinct. It accounts for 19% of the total area of the precinct (58 ha).

Construction accounts for 1072 jobs, representing 19% of all jobs in the precinct. This industry covers 5% of the total area of the precinct (13.8 ha). Wholesale Trade is the third largest industry

in the precinct, employing 560 workers, representing 10% of all jobs in the precinct. Wholesale Trade comprises 6% of the total precinct (17.7 ha) which consists of packing, warehousing, and logistics.

Figure 9: Land use by ANZSIC code of St Marys North - Dunheved industrial precinct



Legend

Industrial Sectors

Industrial

- Electricity, Gas, Water, and Waste Services
- Manufacturing
- Transport, Postal, and Warehousing
- Wholesale Trade

Knowledge Intensive

- Administrative and Support Services
- Financial and Insurance Services
- Professional, Scientific, and Technical Services
- Rental, Hiring and Real Estate Services

Health and Education

- Education and Training

Population Serving

- Accommodation and Food Services
- Arts and Recreational Services
- Construction
- Other Services
- Retail Trade

Developed

- Multi-Use
- Under Construction

Vacant

- Vacant Land with Storage
- Vacant Land
- Vacant Space - Unoccupied

Other Uses

- Commuter Car Park
- Infrastructure
- Other

0 500m

Table 7: Land use by ANZSIC code of St Marys North - Dunheved industrial precinct

ANZSIC Code	Total Land Area (ha)	% of total	Jobs	% of total
Industrial				
Agriculture, Forestry and Fishing	0.0	0%	23	0%
Electricity, Gas, Water and Waste Services	31.1	10%	259	5%
Manufacturing	58.0	19%	2116	38%
Mining	0.0	0%	18	0%
Transport, Postal and Warehousing	7.2	2%	354	6%
Wholesale Trade	17.7	6%	560	10%
Knowledge Intensive				
Administrative and Support Services	0.1	0.04%	100	2%
Financial and Insurance Services	0.2	0.08%	32	1%
Information Media and Telecommunications	0.0	0%	12	0%
Professional, Scientific and Technical Services	1.5	0.5%	84	1%
Public Administration and Safety	0.0	0%	78	1%
Rental, Hiring and Real Estate Services	6.7	2%	169	3%
Health and Education				
Education and Training	0.1	0.03%	16	0%
Health Care and Social Assistance	0.2	0.06%	96	2%
Population Serving				
Accommodation and Food Services	0.6	0.2%	61	1%
Arts and Recreation Services	0.9	0.3%	32	1%
Construction	13.8	5%	1072	19%
Other Services	6.8	2%	353	6%
Retail Trade	7.0	10%	177	3%
Vacant				
Commuter Car park	0.8	0.3%	-	-
Under Construction	0.9	0.3%	-	-
Vacant land	46.5	15%	-	-
Vacant land with storage	9.8	3%	-	-
Vacant Space (unoccupied)	19.8	7%	-	-
Others				
Infrastructure	0.5	0.2%	-	-
Multi-Use	64.9	21%	-	-
Other	11.5	4%	-	-
Residential	0.0	0%	-	-
Total	306.5	100%	5611	100%

Top 3 industries

The greatest increase in jobs in the St Marys industrial precinct since 2009 has been 623 jobs in Construction. The next largest increase was 120 jobs in Transport, Postal and Warehousing and 94 jobs in Wholesale Trade.

Business

The precinct has 522 businesses and is known for its diverse mix of heavy industry. It is occupied by global enterprises, like Remondis (waste management and recycling) and

BITZER Australia (international manufacturer of refrigeration parts), and by nationally significant companies, like Sims Metal Australia (metal recycling) and Plasser (railway track maintenance machinery). The precinct also supports large locally-owned businesses, such as Cleanaway (waste management) and Corinthian Doors, and small and medium enterprises, such as Transport and Waste Solutions (provider of mechanical, electrical, and hydraulic services). It is also home to Sydney Water's wastewater treatment facility.



3. NORTH PENRITH

Overview

The North Penrith industrial precinct is centrally located in the Penrith LGA and is well-connected to major roads and rail. The total area of the precinct is 359 ha and is primarily zoned IN1 General Industrial (with a small component of IN2). Of the 330 ha of industrial zoned land, around 50 ha is used for manufacturing, construction, and urban services (recycling). The precinct has traditionally been popular amongst 'heavy' industrial users and has historically been well-buffered from surrounding sensitive uses, though this buffer has reduced with the development of the Thornton precinct (located north of Penrith railway station).

Topography is relatively flat with low levels of site constraints making the area strongly suitable for industrial uses. The main constraints are flooding and bushfires, as well as the presence of strata-titled properties, and the large sewerage treatment facility located in the centre of the precinct.

Amenity for workers is relatively limited. The precinct has few pedestrian pathways, cycleways, and parks, and limited landscaping and trees. However, there are several supporting services within the precinct for workers and the local population such as gymnasiums, an indoor sports centre, a swim centre, a rock-climbing

centre, and day-care centres. There are a variety of food premises too. The precinct is also reasonably close to the Penrith CBD which provides a very wide range of retail, personal, commercial, administrative, medical, and social services. These businesses increase activity and utility in the precinct.

The precinct has some potential for expansion and a further 47 ha is expected to be developed at the southern end of Penrith Lakes adjacent to the existing industrial area (known as "Nepean Business Park").



330 HA
Zoned and serviced industrial land



56 HA
Vacant, zoned and serviced industrial land



446
Businesses



5662 Jobs (2016)

Job distribution



68% Industrial

18% Population serving

7% Knowledge intensive

1% Health and education



1342 (24%)
Jobs in construction



1269 (22%)
Jobs in manufacturing

Location within Penrith LGA

The precinct is located less than 1km from Penrith's CBD, wedged between the Nepean-Dyarubbin River and Peachtree Creek, and suburban Cranebrook and North Penrith. The precinct hugs Castlereagh Road, Coreen Ave, and Andrews Road, and is proximate to other major thoroughfares: Mulgoa Road (which becomes Castlereagh Road), the Northern Road (via Coreen Ave), the Great Western Highway (2kms), the M4 motorway (4kms), and Dunheved Road (1km). Penrith railway station is located on the precinct's southern boundary

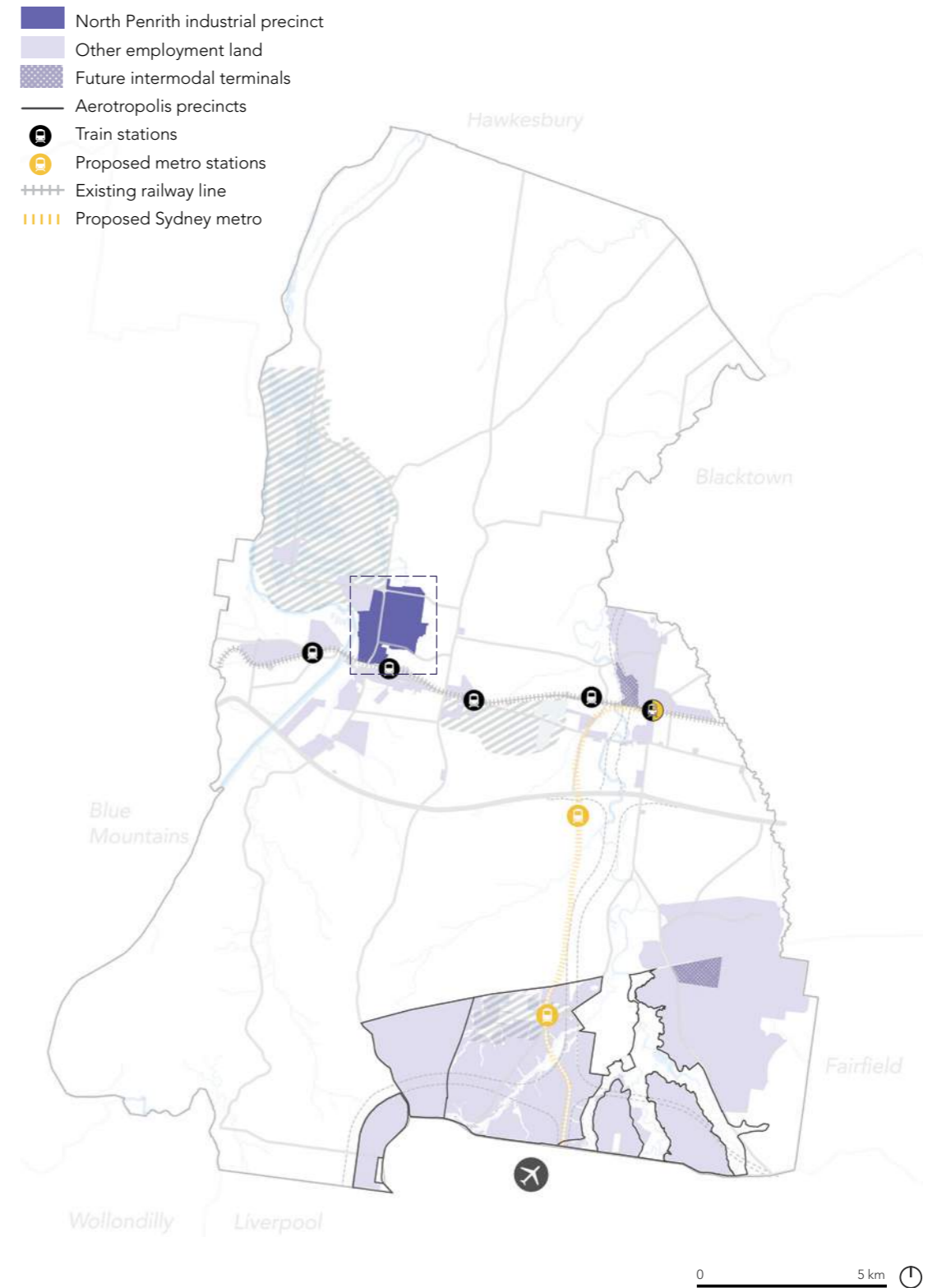
Planning context

The precinct is zoned by the Penrith Local Environmental Plan 2010. The Penrith Development Control Plan 2014 also sets out several land-use controls for the precinct in Part D4 Industrial Precincts. The precinct is referred to as Precinct 4 (west of Castlereagh Road) and Precinct 5 (east of Castlereagh Road) in this document.



MAP 5: North Penrith Industrial Precinct

Location of North Penrith industrial precinct in the LGA.



North Penrith

LAND-USE ZONING

The precinct is mostly zoned IN1 General Industrial (241ha), with a smaller area being IN2 Light Industrial (89 ha), located south of the special-use zone for the sewerage facility.

Area percentage by zoning

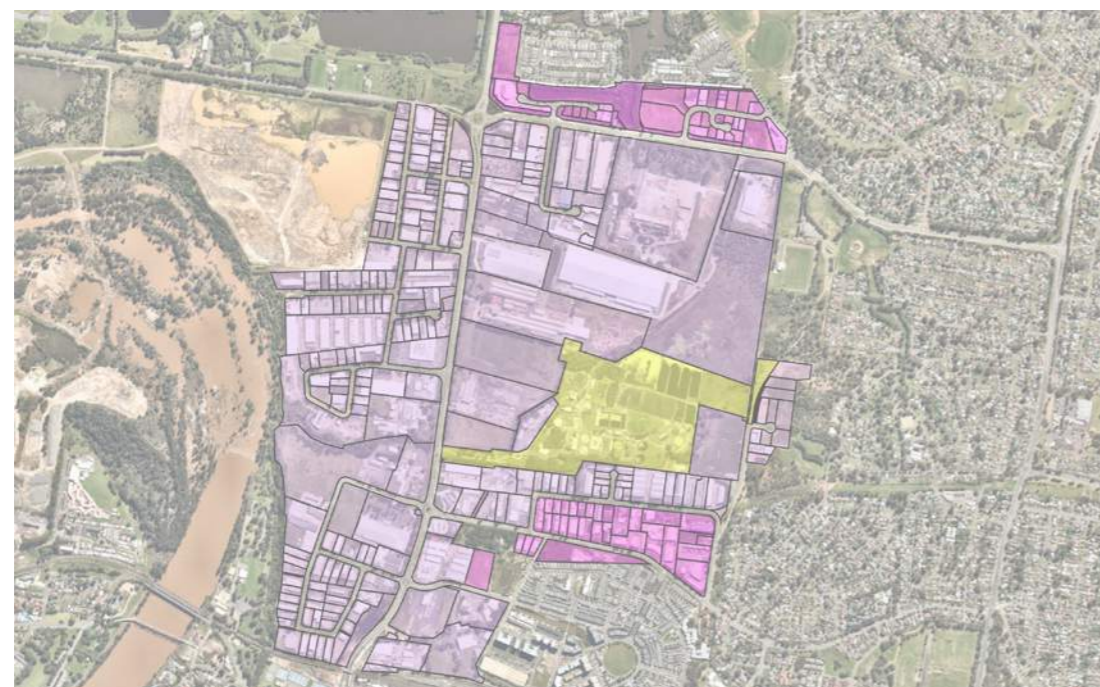


Table 1: Area by land-use zoning of North Penrith industrial precinct

Land zone	Area (ha)	Percentage
Area zoned IN1	241.0	67%
Area zoned IN2	89.2	25%
Area zoned SP2 Infrastructure	28.5	8%
Total Area*	358.8	100%

*Includes roads

Figure 1: Land-use zoning in North Penrith industrial precinct



Legend



LOT SIZE

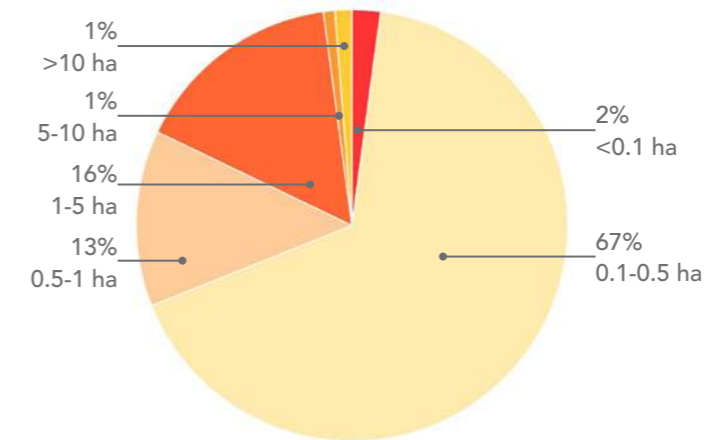
North Penrith has 307 lots, which are mostly small-scale lots. Around 70% of all lots are under 0.5 ha. Medium-sized lots are the next most common sized lots. There are 45 lots (15%) between 1-5 ha in size. Lots larger than 5 ha represent less than 3% of the precinct area. The

predominance of smaller lots in the precinct makes it suitable for a variety of small and medium local businesses.

Table 2: Lot sizes in North Penrith industrial precinct

Lot size	Number	Percentage
<0.1 ha	8	3%
0.1-0.5 ha	207	67%
0.5-1 ha	39	13%
1-5 ha	45	15%
5-10 ha	3	1%
>10 ha	5	2%
Total	307	100%

Figure 2: Proportion of lots by lot size of North Penrith industrial precinct



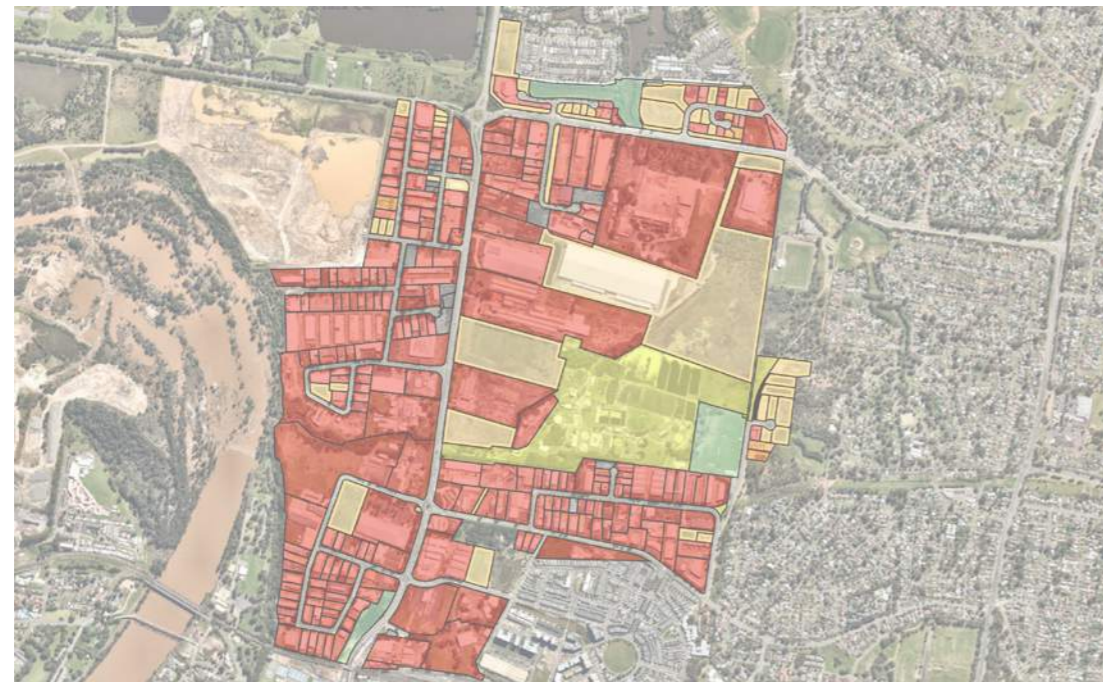
DEVELOPMENT STATUS

Just under two-thirds (62%) of the industrial land in North Penrith precinct is fully developed and 17% (56 ha) is vacant. A significant portion (20%) of the total land area of the precinct (categorised as "Other") is unable to be developed for employment purposes, for example, Hickeys Park and several sites that include dams and creeks.

Most of the developed lots (67%) are small and between 0.1-0.5 ha in size (157 of 235 in total).

Of the 48 vacant lots there are 34 lots between 0.1-0.5 ha in size with a further 12 ranging between 0.5-5 ha. There are also 12 vacant lots with storage between 0.1-1 ha in size. Therefore, the vacant lands available for future development largely reflect the lots already developed, meaning that future development of these sites is likely to deliver a similar type of building and business.

Figure 3: Development status of North Penrith industrial precinct



Legend

Developed

- Developed
- Under Construction

Vacant

- Vacant land with Storage
- Vacant Land

Other Uses

- Infrastructure
- Other

Table 3: Development status by area of North Penrith industrial precinct

Development Status	Area (ha)	Percentage
Developed	203.0	62%
Under Construction	1.4	0.4%
Commuter Car Park	0.0	0.0%
Other	66.4	20%
Vacant Land	55.9	17%
Vacant Land with Storage	3.6	1%
Total	330.3	100%

Figure 4: Development status by area of North Penrith industrial precinct

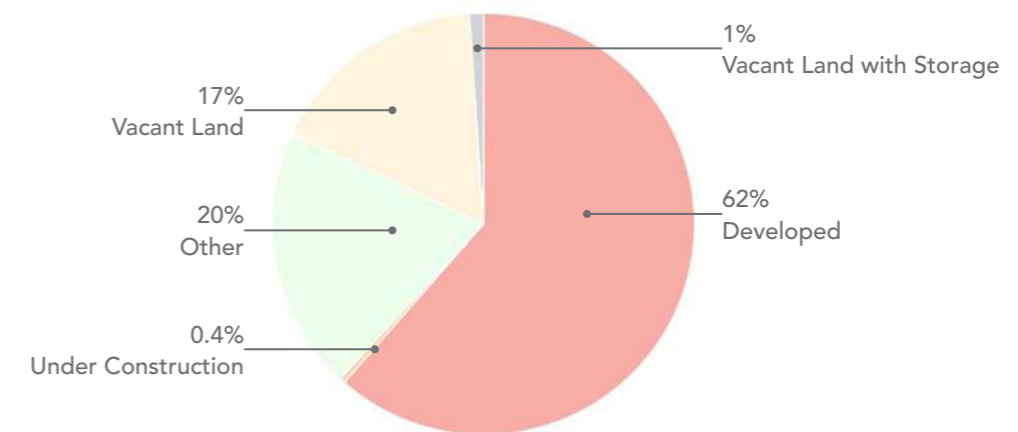
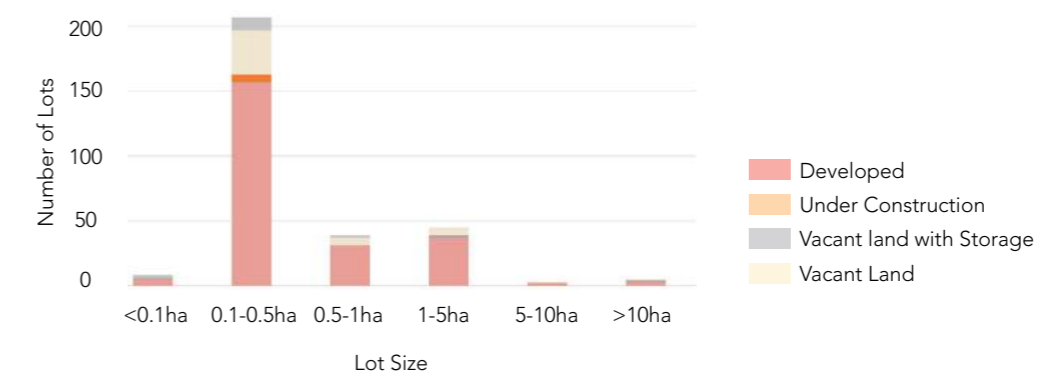


Table 4: Development status by lot size of North Penrith industrial precinct

Lot Size	<0.1 ha	0.1-0.5 ha	0.5-1 ha	1-5 ha	5-10 ha	>10 ha	Total
Developed	5	157	31	37	2	3	235
Under Construction	0	6	0	0	0	0	6
Commuter Car Park	0	0	0	0	0	0	0
Other	1	0	0	0	0	1	4
Vacant Land	0	34	6	1	1	1	48
Vacant Land with Storage	2	10	2	0	0	0	14
Total	8	207	39	3	0	5	307

Figure 5: Development status by lot size of North Penrith industrial precinct



OCCUPANCY

Just over half of the fully developed industrial lots (56%) have a single occupancy, and just over a third have multiple occupants (39%). Only 4% of developed lots are unoccupied vacant space.

The balance of single and multiple occupancy allows for a greater diversity of businesses in the precinct.

Table 5: Occupancy Status of North Penrith industrial precinct

Occupancy	Number of lots	Percentage	Area (ha)	% of total area
Single Occupancy	131	56%	110.1	54%
Multiple Occupants	91	39%	89.0	44%
Vacant Space - Unoccupied	10	4%	3.8	2%
Total	232	100%	202.8	100%

Figure 6: Occupancy Status of North Penrith Industrial Land



Legend

Occupied

- Multiple Occupancy
- Single Occupancy
- Other

Vacant

- Vacant land with Storage
- Vacant Land

Other Uses

- Commuter Car Park
- Infrastructure

0 500m

EMPLOYMENT

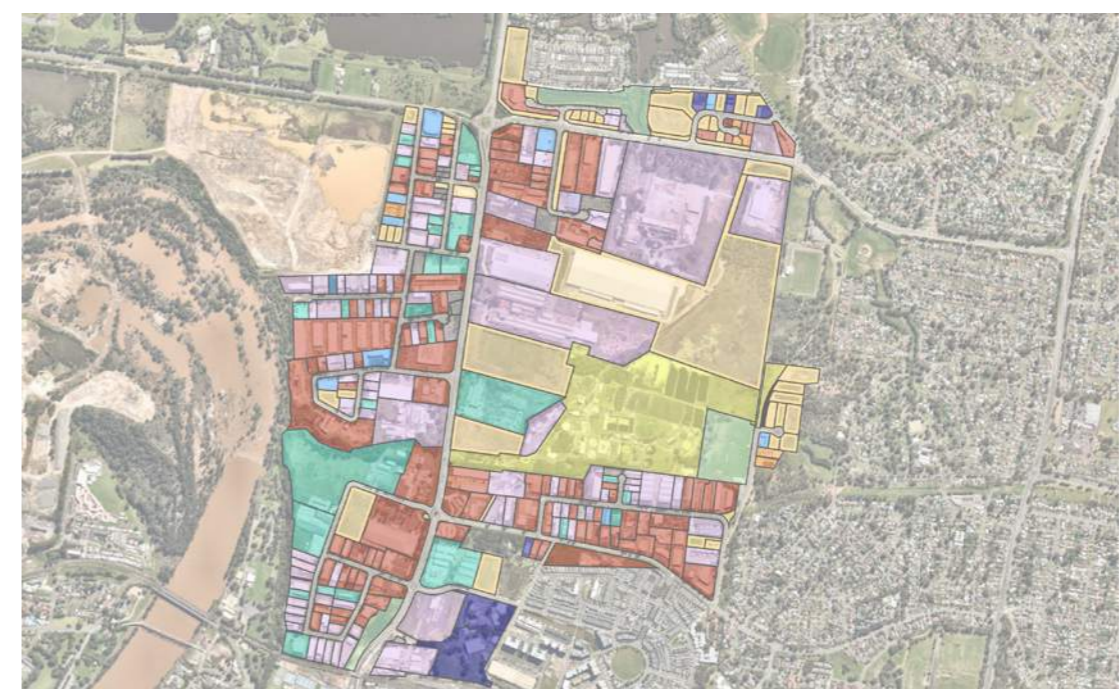
The precinct provided 5,662 jobs in 2016. Employment in the precinct has grown by 8% from 5,248 jobs in 2009. It is estimated that there were 6,363 jobs in the precinct in 2019. The

largest shares of employment in the precinct are in the industrial and population serving sectors, with 14% of jobs in the knowledge intensive sector.

Table 6: Land use and jobs by GSC employment code of North Penrith industrial precinct

Employment Code	Land Area (ha)	% of total	Jobs	% of total
Industrial	84.8	43%	2448	43%
Population Serving	79.3	40%	2723	48%
Health/Education	7.2	4%	87	2%
Knowledge Intensive	27.8	14%	404	7%
Total	199	100%	5662	100%

Figure 7: Land use and jobs by GSC employment code of North Penrith industrial precinct



Legend

Industrial Sectors

- Industrial
- Population Serving
- Knowledge Intensive
- Health and Education

Other Uses

- Infrastructure

Developed

- Under Construction
- Other

Vacant

- Vacant land with Storage
- Vacant Land
- Vacant Space - Unoccupied

0 500m

INDUSTRIES

In 2016, construction was the largest industry employing 1,342 workers, which represented 27% of all jobs in the North Penrith precinct. It accounts for 3% of the total area of the precinct (9.7 ha).

This high number of jobs in construction may be partly explained by workers being employed

by companies in the precinct but working elsewhere.

Manufacturing is the second largest industry and provides 1,269 local jobs, representing 22% of all jobs in the precinct. It accounts for 8% of the total area of the precinct (27.7 ha).

Retail Trade is the third largest industry and provides 818 local jobs, representing 13% of all jobs in the precinct. It accounts for 6.6% of the total area of the precinct (23.5 ha).

Figure 8: Land use by ANZSIC code of North Penrith industrial precinct



Legend

Industrial Sectors

Industrial

- Electricity, Gas, Water, and Waste Services
- Manufacturing
- Transport, Postal, and Warehousing
- Wholesale Trade

Knowledge Intensive

- Administrative and Support Services
- Professional, Scientific, and Technical Services
- Public Administration and Safety
- Rental, Hiring and Real Estate Services

Health and Education

- Education and Training
- Health Care and Social Assistance

Population Serving

- Accommodation and Food Services
- Arts and Recreational Services
- Construction
- Other Services
- Retail Trade

Developed

- Multi-Use
- Under Construction

Vacant

- Vacant Land with Storage
- Vacant Land
- Vacant Space - Unoccupied

Other Uses

- Infrastructure
- Other

0 500m

Table 7: Land use by ANZSIC code of North Penrith industrial precinct

ANZSIC Code	Total Land Area (ha)	% of total	Jobs	% of total
Industrial				
Agriculture, Forestry and Fishing	0.0	0%	86	2%
Electricity, Gas, Water and Waste Services	10.9	3%	13	0%
Manufacturing	27.7	8%	1269	22%
Mining	0.0	0%	86	2%
Transport, Postal and Warehousing	5.4	2%	672	12%
Wholesale Trade	6.8	2%	322	6%
Knowledge Intensive				
Administrative and Support Services	0.3	0.1%	123	2%
Financial and Insurance Services	0.0	0%	16	0%
Information Media and Telecommunications	0.0	0%	29	1%
Professional, Scientific and Technical Services	2.2	0%	163	3%
Public Administration and Safety	2.3	1%	17	0%
Rental, Hiring and Real Estate Services	16.7	5%	57	1%
Health and Education				
Education and Training	6.2	2%	61	1%
Health Care and Social Assistance	0.8	0.2%	26	0%
Population Serving				
Accommodation and Food Services	1.5	0.4%	227	4%
Arts and Recreation Services	0.6	0.2%	105	2%
Construction	9.7	3%	1342	24%
Other Services	5.2	2%	373	7%
Retail Trade	23.6	7%	676	12%
Vacant				
Commuter Car Park	0.0	0%	-	-
Under Construction	1.4	0.4%	-	-
Vacant land	55.9	16%	-	-
Vacant land with storage	3.6	1%	-	-
Vacant Space (unoccupied)	3.8	1%	-	-
Others				
Infrastructure	28.7	8%	-	-
Multi-use	79.2	22%	-	-
Other	66.4	19%	-	-
Residential	0.0	0%	-	-
Total	358.8	100%	5662	100%

Top 3 industries

Construction experienced the greatest increase in local jobs since 2009 (761 local jobs), followed by Retail Trade (147), and Transport, Postal and Warehousing (70).

Business

The precinct has 446 businesses and is known for its diverse mix of heavy industry. It is occupied by large Australian-owned businesses, such as JK Williams (earthmoving) and Bega Dairy, as

well as global enterprises, such as Virbac (animal pharmaceuticals) O-I Glass (major international company and subsidiary of Visy) and Meyer Timber (one of the largest timber wholesale companies in Australia). It also includes a significant number of small-scale heavy industry, such as Grant Engineered (metal fabrication) and population-serving businesses, such as gymnasiums, day-care centres, and food outlets. The site is also occupied by boutique food services, such as Rusty Penny Brewing Co and Underground Coffee Roasters.



North Penrith

4. EMU PLAINS

Overview

The Emu Plains industrial precinct is located on the western side of the Penrith LGA and is well-connected by major roads and rail.

The precinct spans over 132 ha of employment-zoned land. Most of the lots are smaller than 0.5ha. The largest site in the precinct is Boral's 40ha Emu Plains Quarry. The precinct has a mixture of older and newer developments, with differing heights.

The precinct is mostly zoned IN1 General Industrial, with a smaller proportion zoned IN2 Light Industrial. The precinct's size and range of lot sizes lends it to having a high diversity of industries, with manufacturing and construction being the main industries.

In 2016, the precinct provided a total of 2,781 jobs. Population-serving businesses within the precinct's boundaries provide services for workers as well as serving the local population. For example, the precinct's western side offers a variety of cafes and fast-food restaurants, as well as two yoga studios, a performing arts school, an aquatic centre, and roller-skating rink. These businesses increase activity and the vitality of the precinct.

The precinct's eastern side is home to Penola Catholic College (formerly known as McCarthy Catholic College) and the McCarthy Campus of CathWest Innovation College. CathWest Innovation College is a trade training centre

that provides vocational pathways for secondary school students. Neighbouring this education precinct is a caravan park that also offers some long-term residential accommodation.

The precinct is bounded by the Nepean River to the north and east, but there are a lot of residential uses adjoining its western and southern boundaries. Residential development to the south is generally separated by the main western rail line. Although the precinct is located on the floodplain of the Nepean River, the overall low-level of site constraints make the area suitable for a wide range of employment uses.



132 HA
Zoned and serviced industrial land



22 HA
Vacant, zoned and serviced industrial land



195
Businesses



2781 Jobs (2016)

Job distribution



46% Industrial

40% Population serving

6% Knowledge intensive
7% Health and education



923 (33%)
Jobs in manufacturing



687 (25%)
Jobs in construction



Location within Penrith LGA

The precinct is located 2km from Penrith’s City Centre, on the western side of the Nepean-Dyarubbin River. It is at the foot of the Blue Mountains on land that was once orchards and dairy farms. The precinct hugs Russell Street and Old Bathurst Road and is proximate to major thoroughfares, such as the Great Western Highway (1.5 km), the M4 Motorway (1.5 km), Castlereagh and Mulgoa Roads (2 km), and Emu Plains train station (located within the precinct’s eastern boundary).

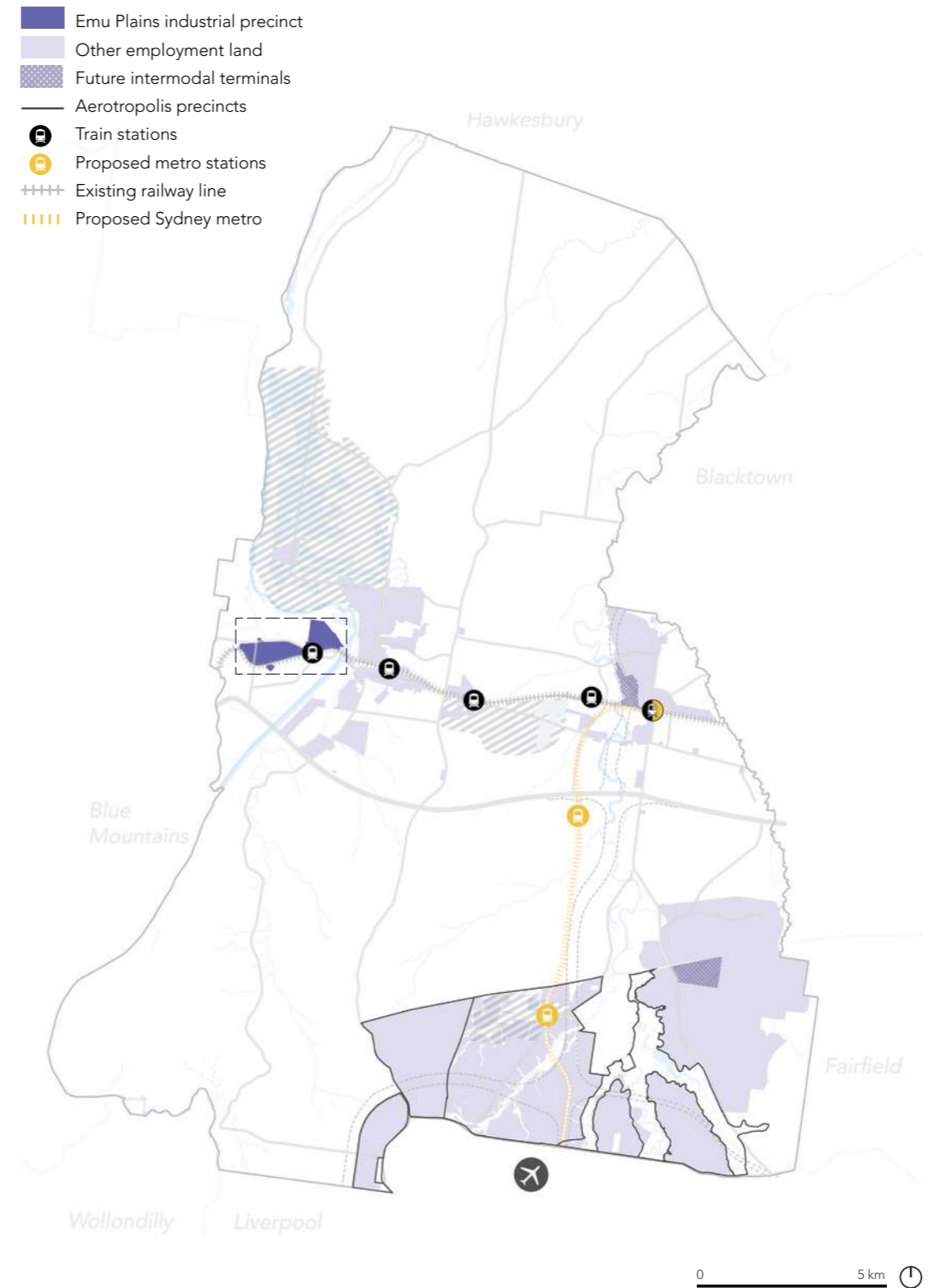


Planning context

The precinct is zoned by the Penrith Local Environmental Plan 2010. The Penrith Development Control Plan 2014 also sets out several land-use controls for the precinct in Part D4 Industrial Precincts. The precinct is referred to as Precinct 7 (Emu Plains – north of Old Bathurst Road) and Precinct 8 (Emu Plains – south of Old Bathurst Road) in this document

MAP 6: Emu Plains Industrial Precinct

Location of Emu Plains industrial precinct in the LGA.



LAND-USE ZONING

The precinct is mostly zoned IN1 General Industrial (99.3% or 148.9ha) and supports traditional and non-traditional uses, including manufacturing, education and training, electricity, gas and water services, mining, construction, transport, postal and warehousing, retail trade and wholesale trade. The rest of the precinct is zoned IN2 Light Industrial (0.7% or 1.1ha), which is totally comprised of vacant land.

Area percentage by zoning

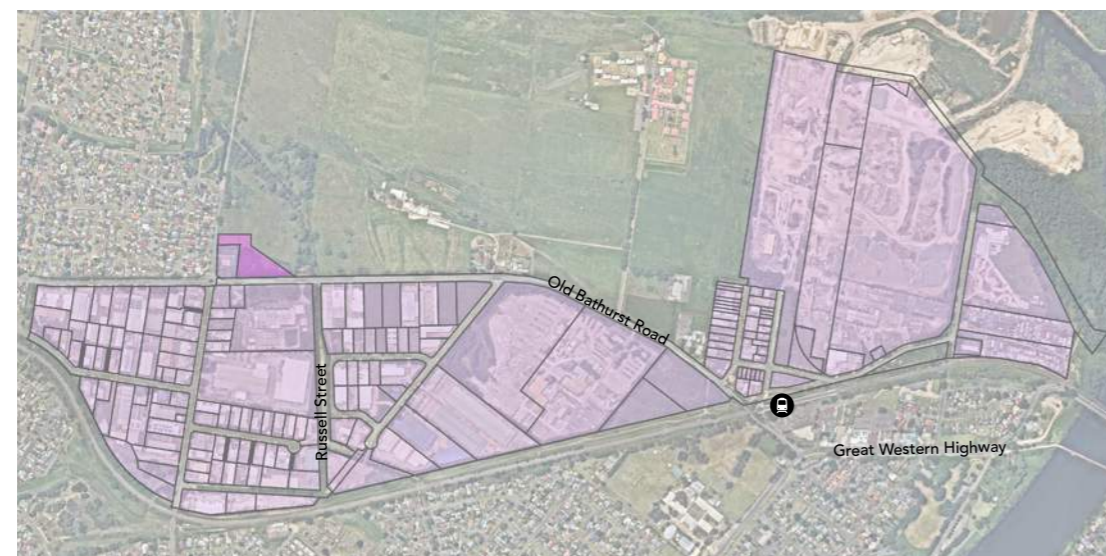


Table 1: Area by land-use zoning of Emu Plains industrial precinct

Land zone	Area (ha)	Percentage
Area zoned IN1	148.9	99%
Area zoned IN2	1.1	1%
Total Area*	150	100%

*Includes roads

Figure 1: Land-use zoning in Emu Plains industrial precinct



Legend

Industrial Light Industrial

LOT SIZE

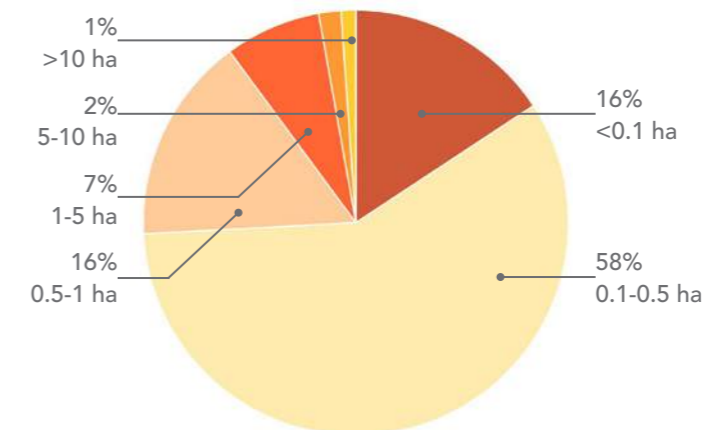
Emu Plains is mostly sub-divided into small-scale lots with 90% of all lots being 1 ha or less in size. Of the 178 lots in the precinct, the largest proportion (58%) of lots are 0.1 to 0.5 ha. The second largest group (15.8%) are lots smaller than 0.1 ha. Lots between 0.5 and 1 ha make up

15%. Only 10% of lots are larger than 1 ha. The predominance of smaller lots in the precinct makes it suitable for a variety of small-scale industries.

Table 2: Lot sizes in Emu Plains industrial precinct

Lot size	Number	Percentage
<0.1 ha	28	16%
0.1-0.5 ha	104	58%
0.5-1 ha	28	16%
1-5 ha	13	7%
5-10 ha	3	2%
>10 ha	2	1%
Total	178	100%

Figure 2: Proportion of lots by lot size of Emu Plains industrial precinct



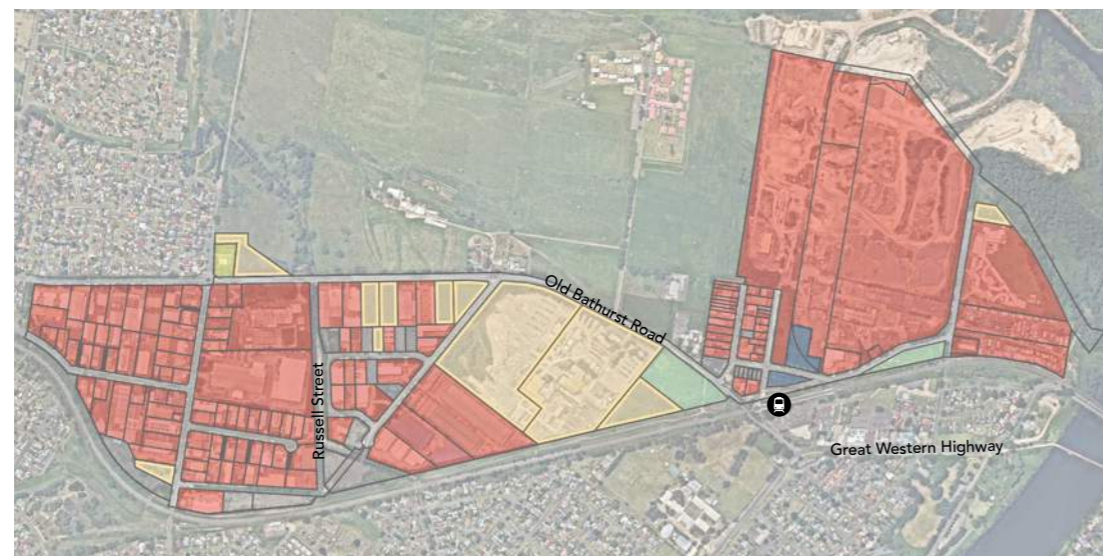
DEVELOPMENT STATUS

Around three quarters (75.6% or 99.7 ha) of the precinct developable land area is developed and 17% (or 22.4 ha) remains vacant. Some vacant land (5.9 ha) is currently being used for storage. The "Other" category only applies to a very small portion of the precinct (2.1% or 2.7ha) and refers to land that is not developable in the immediate future and is likely to be used for non-employment purposes.

Most developed lots are small and are between 0.1 to 0.5 ha in size (or 88 lots of 140). 19 of 140

developed lots are smaller than 1000 sqm and only 2 of them are larger than 10 ha. Of the 11 vacant lots, 7 are 1 ha or less. Only two lots are 5 ha or larger. Most vacant lands with storage are smaller than 0.5 ha, while only (3 of 22) vacant lands with storage are larger than 0.5 ha. Therefore, the vacant lands available for future development largely reflect the lots already developed, meaning that future development of these sites is likely to deliver a similar type of building and business.

Figure 3: Development status of Emu Plains industrial precinct



Legend

Developed

Developed

Vacant

Vacant land with Storage

Vacant Land

Other Uses

Commuter Car Park

Infrastructure

Other

Table 3: Development status by area of Emu Plains industrial precinct

Development Status	Area (ha)	Percentage
Developed	99.7	76%
Under Construction	0	0%
Commuter Car Park	1.1	1%
Other	2.7	2.1%
Vacant Land	22.4	17%
Vacant Land with Storage	5.9	5%
Total	131.9	100%

Figure 4: Development status by area of Emu Plains industrial precinct

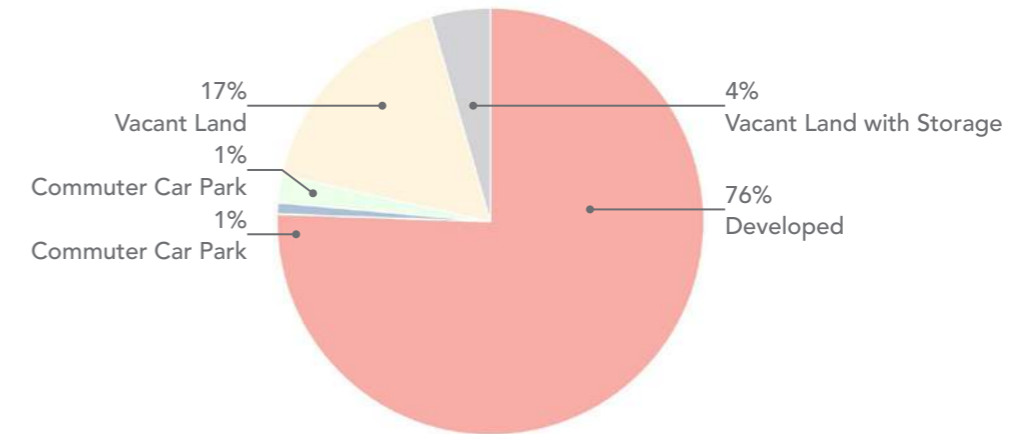
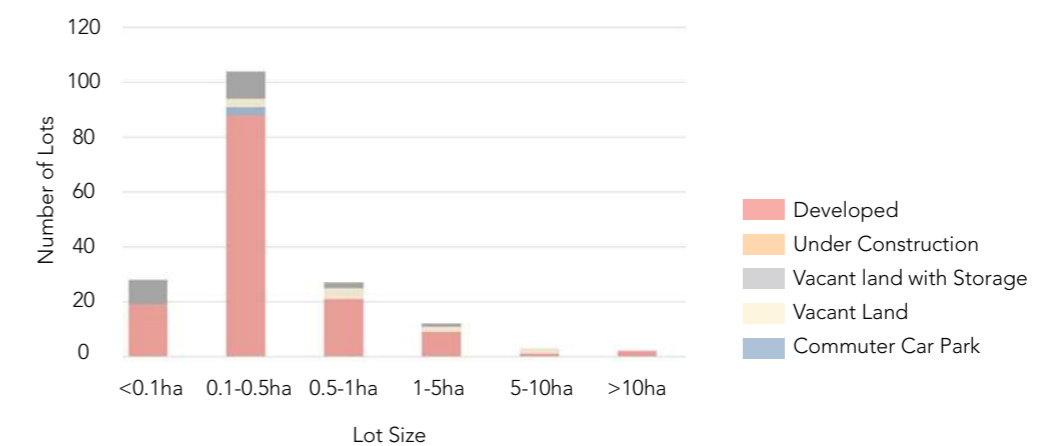


Table 4: Development status by lot size of Emu Plains industrial precinct

Lot Size	<0.1 ha	0.1-0.5 ha	0.5-1 ha	1-5 ha	5-10 ha	>10 ha	Total
Developed	19	88	21	9	1	2	140
Under Construction	0	0	0	0	0	0	0
Commuter Car Park	0	3	0	0	0	0	3
Other	0	0	1	1	0	0	2
Vacant Land	0	3	4	2	2	0	11
Vacant Land with Storage	9	10	2	1	0	0	22
Total	28	104	28	13	3	2	178

Figure 5: Development status by lot size of Emu Plains industrial precinct



OCCUPANCY

More than two-thirds (68%) of the fully developed lots have a single occupancy, while just under a third (28%) have multiple occupants.

Single occupancy lots lend themselves to future redevelopment than multiple occupancy.

Table 5: Occupancy Status of Emu Plains industrial precinct

Occupancy	Number of lots	Percentage	Area (ha)	% of total area
Single Occupancy	95	68%	82.8	83%
Multiple Occupants	39	28%	15.8	16%
Vacant Space - Unoccupied	5	4%	0.6	0.6%
Total	139	100%	99.2	100%

Figure 6: Occupancy Status of Emu Plains industrial land



Legend

Occupied

- Multiple Occupancy
- Single Occupancy
- Other

Vacant

- Vacant land with Storage
- Vacant Land

Other Uses

- Commuter Car Park
- Infrastructure

EMPLOYMENT

Total employment in Emu Plains industrial precinct was 2,781 jobs in 2016. The vast majority of jobs are in the industrial and population serving sectors.

Employment in the precinct has grown from 2,553 jobs in 2009, and is estimated to have been 3,083 jobs in 2019.

Table 6: Land use and jobs by GSC employment code of Emu Plains industrial precinct

Employment Code	Land Area (ha)	% of total	Jobs	% of total
Industrial	75.5	77%	1292	46%
Population Serving	15.0	15%	1119	40%
Health/Education	5.1	5%	195	7%
Knowledge Intensive	2.9	3%	175	6%
Total	98.5	100%	2781	100%

Figure 7: Land use and jobs by GSC employment code of Emu Plains industrial precinct



Legend

Industrial Sectors

- Industrial
- Population Serving
- Knowledge Intensive
- Health and Education

Other Uses

- Commuter Car Park
- Infrastructure
- Residential

Developed

- Under Construction
- Other

Vacant

- Vacant land with Storage
- Vacant Land
- Vacant Space - Unoccupied

INDUSTRIES

Manufacturing is the largest industry and provides 923 local jobs, representing 33% of all jobs in the precinct. This industry covers 18% of the total area of the precinct (23.7 ha).

Construction is the second largest industry and provides 687 local jobs, representing almost a quarter of all jobs in the precinct. However, it only accounts for 1.9% of the total area of the precinct (2.5 ha). This high number of jobs in Construction may be partly explained by workers

being employed by companies in the precinct but working elsewhere.

The major concrete supply company Rocla announced the closure of its Emu Plains site in April 2020, which will likely lead to a reduction of 94 construction jobs in the precinct.

Accommodation and Food Services is the third largest industry in the precinct, employing 208 workers, representing 7.5% of all jobs in the

precinct. This industry comprises 3.3% of the total precinct area (4.3 ha). Retail and other services make up 1 in 5 of the population serving jobs in the precinct.

Figure 8: Land use by ANZSIC code of Emu Plains industrial precinct

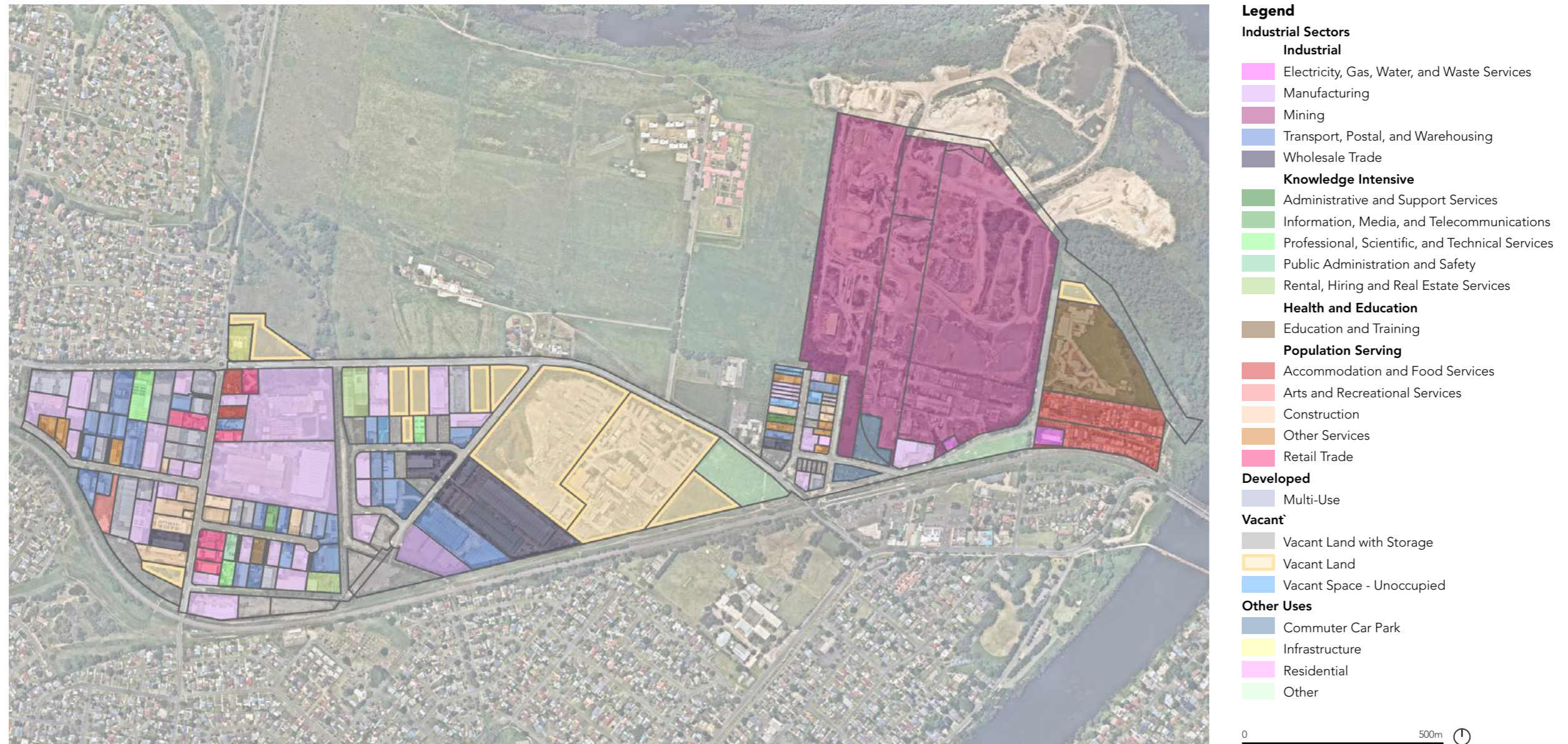


Table 7: Land use by ANZSIC code of Emu Plains industrial precinct

ANZSIC Code	Total Land Area (ha)	% of total	Jobs	% of total
Industrial				
Agriculture, Forestry and Fishing	0	0%	17	1%
Electricity, Gas, Water and Waste Services	0.4	0%	45	2%
Manufacturing	23	18%	923	33%
Mining	39.7	30%	12	0%
Transport, Postal and Warehousing	8.9	7%	143	5%
Wholesale Trade	1.3	1%	152	6%
Knowledge Intensive				
Administrative and Support Services	0.1	0%	50	2%
Financial and Insurance Services	0.0	0%	0	0%
Information Media and Telecommunications	0.2	0%	3	0%
Professional, Scientific and Technical Services	1.1	1%	100	4%
Public Administration and Safety	0.2	0%	0	0%
Rental, Hiring and Real Estate Services	1.3	1%	21	1%
Health and Education				
Education and Training	5.1	4%	144	5%
Health Care and Social Assistance	0.0	0%	50	2%
Population Serving				
Accommodation and Food Services	4.4	3%	208	8%
Arts and Recreation Services	0.5	0%	11	0%
Construction	2.6	2%	687	25%
Other Services	1.2	1%	102	4%
Retail Trade	1.6	1%	111	4%
Vacant				
Commuter Car Park	1.1	1%	-	-
Under Construction	0.0	0%	-	-
Vacant land	22.4	17%	-	-
Vacant land with storage	6.0	5%	-	-
Vacant Space (unoccupied)	0.6	2%	-	-
Others				
Infrastructure	0.5	0%	-	-
Multi-use	6.2	5%	-	-
Other	2.7	2%	-	-
Residential	0.1	0%	-	-
Total	132.0	100%	2,781	100%

Top 3 industries by Growth between 2009 and 2019

Construction experienced the greatest increase in local jobs since 2009 (346 local jobs), followed by Transport, Postal and Warehousing (46), and Accommodation and Food Services (28).

Business

The precinct is occupied by 195 businesses and is known for its diverse mix of manufacturing, construction, and food services. Businesses with head offices in

Emu Plains range from larger construction serving and civil engineering companies, such as ACO drainage equipment and Marley Flow cooling towers, to mid-size companies, like Avida RV (caravans and campervans) and Plustec (windows and doors). The precinct is also occupied by boutique manufacturers, like Zokoko (artisan chocolate), Gingerbread Folk (artisan biscuits), and Native Oils Australia, as well as recreational facilities like Nepean Aquatic Centre and Penrith Skatel (roller skating). The largest site in the precinct is occupied by Boral Quarries.



5. JAMISONTOWN

Overview

The Jamisontown industrial precinct is centrally located in the Penrith LGA and is well-connected to major roads near the intersection of Mulgoa Road and the M4 motorway.

The precinct is primarily zoned B5-Business Development with a smaller component of 14.9ha zoned IN1-General Industrial. The precinct is mostly used for wholesale and retail trade, and urban services, particularly home improvements and automotive sales and servicing.

The precinct has traditionally been popular amongst 'bulky' goods or large retail format

destination stores serving the Penrith, Hawkesbury and Blue Mountains LGAs. These businesses are generally well-positioned along Mulgoa Road – which affords high visibility and accessibility. Residential uses adjoining the precinct are limited. There are some conflicts arising from the precinct zonings of B5 and IN1. This is exemplified on Abel Street, where a children's playcentre, Kidz Klub, is positioned directly across from 'heavier' industrial manufacturers.

Topography is relatively flat with low levels of site constraints making the area strongly suitable for

industrial and retail uses.

Adjacent to the Homemaker Centre and further along Mulgoa Road and York Road are several food services and small retailers for workers. The precinct is connected to Penrith CBD along Mulgoa Road which offers a shared cycling and pedestrian path. Beyond the Homemaker Centre, amenity is more limited. Pedestrian access is more restricted in the IN1 zoned section of the precinct. The precinct has very few remaining lots for future development, with just over 1.5 ha currently vacant.



88 HA
Zoned and serviced industrial land



1.4 HA
Vacant, zoned and serviced industrial land



425
Businesses



2898 Jobs (2016)

Job distribution



16% Industrial

70% Population serving

10% Knowledge intensive
5% Health and education



1,029 (36%)
Jobs in retail trade



463 (16%)
Jobs in construction

Location within Penrith LGA

The precinct is located less than 1km from Penrith's CBD, between the Nepean-Dyarubbin River and Jamison Park, and suburban Jamisontown and South Penrith. The precinct is split by Mulgoa Road and is bordered at its most south-western end by the Western Motorway.

Planning context

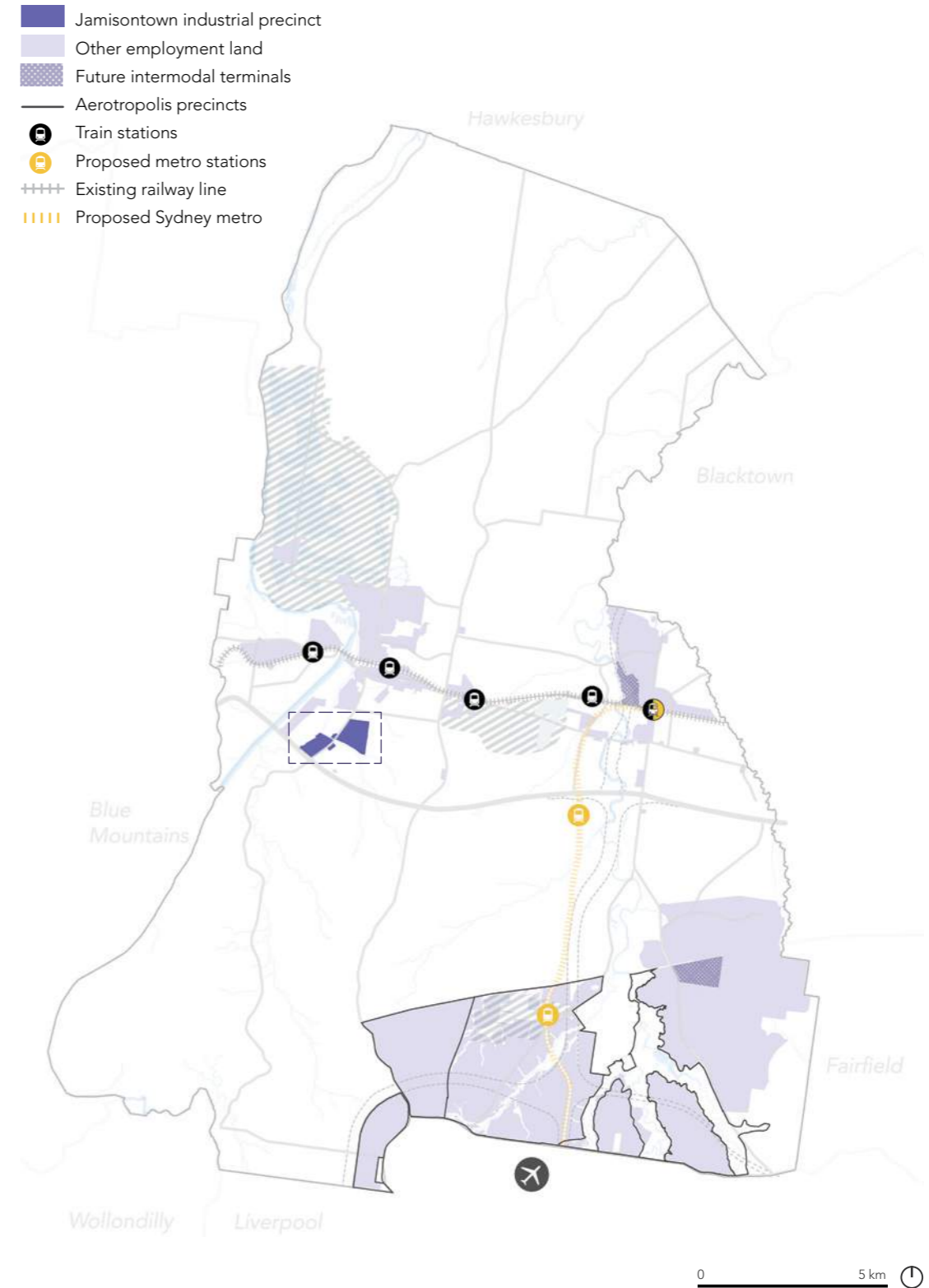
The precinct is zoned by the Penrith Local Environmental Plan 2010. Unlike the major

industrial precincts in the LGA, Jamisontown is not managed as a single employment precinct in the Penrith Development Control Plan 2014 (DCP). Rather, it sets out land-use controls for the industrial part of the precinct, referred to as Precinct 6 South Penrith (east of Mulgoa Road) in Part D4 Industrial Precincts. There are also some relevant controls for bulky goods retailing in Part D3 Commercial and Retail Development of the DCP.



MAP 7: Jamisontown Industrial Precinct

Location of Jamisontown industrial precinct in the LGA.



Jamisontown

LAND-USE ZONING

The precinct is mostly zoned B5-Business Development (78.1 ha or 84%). Lands zoned IN1-General Industrial make up the remaining 14.9 ha of the precinct.

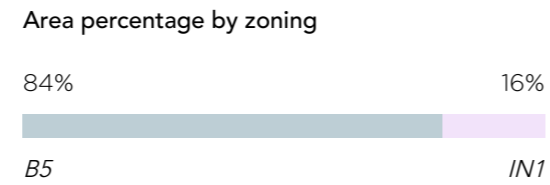


Table 1: Area by land-use zoning of Jamisontown industrial precinct

Land zone	Area (ha)	Percentage
Area zoned B5	78.1	84
Area zoned IN1	14.9	16
Total Area*	93	100%

*Includes roads

Figure 1: Land-use zoning in Jamisontown industrial precinct



Legend



LOT SIZE

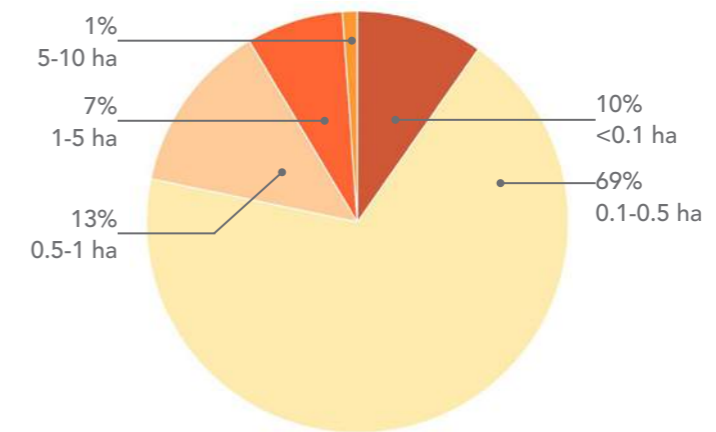
Like the Emu Plains industrial precinct, Jamisontown is mostly sub-divided into small-scale lots. Jamisontown contains the highest proportion of small scale lots among Penrith's primary industrial precincts. Of the 175 lots in Jamisontown, 137 lots (78%) are under 0.5ha. Most of the other lots in the precinct are

between 0.5 to 5 ha at 20.6% (36 lots). There are only 2 lots larger than 5 ha and no lots larger than 10 ha. The two largest lots contain the Penrith Homemaker Centre which has 40 retail stores. The predominance of smaller lots in the precinct makes it suitable for a variety of small-scale industries.

Table 2: Lot sizes in Jamisontown industrial precinct

Lot size	Number	Percentage
<0.1 ha	17	10%
0.1-0.5 ha	120	69%
0.5-1 ha	23	13%
1-5 ha	13	7%
5-10 ha	2	1%
>10 ha	0	0%
Total	175	100%

Figure 2: Proportion of lots by lot size of Jamisontown industrial precinct



DEVELOPMENT STATUS

Jamisontown is also the most developed precinct within the Penrith LGA, with nearly 87 ha or 98% of developable land containing established developments. Just 2% (1.5 ha) of developable land is vacant or vacant land with storage.

There are few vacant lots remaining with all vacant land or vacant land with storage lots (11 in total) being less than 0.5 ha in size. Five of the

10 vacant lots are small strips of land fronting Mulgoa Road adjacent to the Homemaker Centre and are unlikely to be able to be developed for future employment for individual use. The largest vacant lot is a narrow-frontage 0.42 ha site near the corner of Abel Street and York Road and is the most north-eastern IN1 zoned lot in the precinct.

Figure 3: Development status of Jamisontown industrial precinct



Legend

Developed

Developed

Vacant

Vacant land with Storage

Vacant Land

Table 3: Development status by area of Jamisontown industrial precinct

Development Status	Area (ha)	Percentage
Developed	86.8	98%
Under Construction	0.0	0%
Commuter Car Park	0.0	0%
Other	0.0	0%
Vacant Land	1.4	2%
Vacant Land with Storage	0.1	0.1%
Total	88.4	100%

Figure 4: Development status by area of Jamisontown industrial precinct

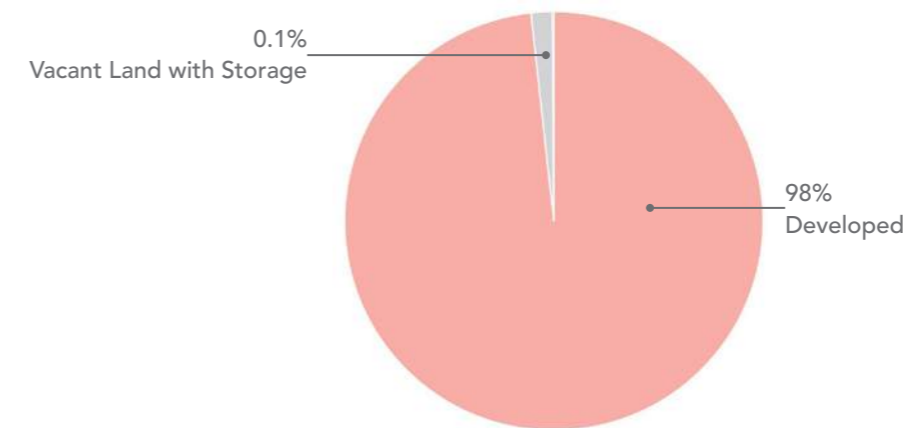
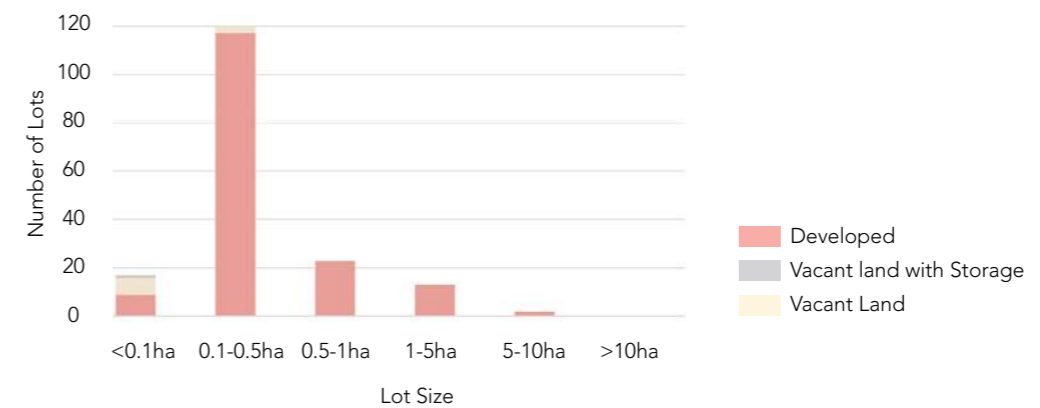


Table 4: Development status by lot size of Jamisontown industrial precinct

Lot Size	<0.1 ha	0.1-0.5 ha	0.5-1 ha	1-5 ha	5-10 ha	>10 ha	Total
Developed	9	117	23	13	2	0	164
Under Construction	0	0	0	0	0	0	0
Commuter Car Park	0	0	0	0	0	0	0
Other	0	0	0	0	0	0	0
Vacant Land	7	3	0	0	0	0	10
Vacant Land with Storage	1	0	0	0	0	0	1
Total	17	120	23	13	2	0	175

Figure 5: Development status by lot size of Jamisontown industrial precinct



OCCUPANCY

The fully developed lots are split relatively evenly between single occupancy (42%) and multiple occupancy (54%).

Table 5: Occupancy Status of Jamisontown industrial precinct

Occupancy	Number of lots	Percentage	Area (ha)	% of total area
Single Occupancy	69	42%	29.3	34%
Multiple Occupants	89	54%	55.6	64%
Vacant Space - Unoccupied	6	4%	1.9	2%
Total	164	100%	86.8	100%

Figure 6: Occupancy Status of Jamisontown industrial land



Legend

Occupied

- Multiple Occupancy
- Single Occupancy

Vacant

- Vacant land with Storage
- Vacant Land
- Vacant Space - Unoccupied

0 500m

EMPLOYMENT

Employment in the precinct in 2016 was 2,898 jobs. The vast majority of jobs (70%) were in the population serving sector, with 16% of jobs in the industrial sector.

Employment in the precinct has grown 2,767 jobs in 2009, to an estimated 3,248 jobs in 2019.

Table 6: Land use and jobs by GSC employment code of Jamisontown industrial precinct

Employment Code	Land Area (ha)	% of total	Jobs	% of total
Industrial	17.3	20%	473	16%
Population Serving	62.7	74%	2018	70%
Health/Education	3.8	4%	131	5%
Knowledge Intensive	1.0	1%	276	10%
Total	84.7	100%	2898	100%

Figure 7: Land use and jobs by GSC employment code of Jamisontown industrial precinct



Legend

Industrial Sectors

- Industrial
- Population Serving
- Knowledge Intensive
- Health and Education

Vacant

- Vacant land with Storage
- Vacant Land
- Vacant Space - Unoccupied

0 500m

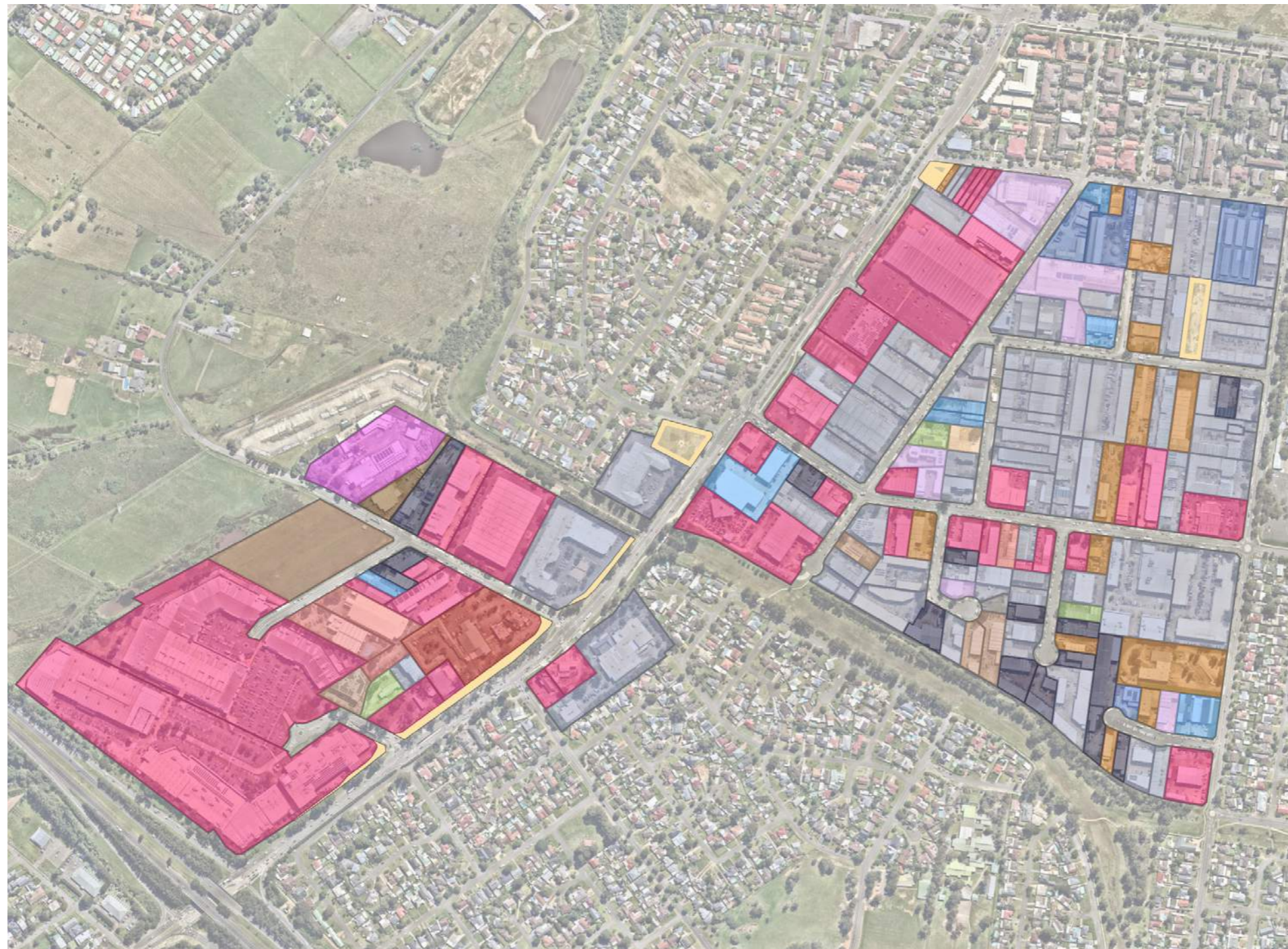
INDUSTRIES

Retail Trade is the largest industry and provides 1,029 local jobs, representing 36% of all jobs in the precinct. It accounts for at least 34% of the total area of the precinct (30.3 ha). Construction

is the second largest industry and provides 463 local jobs, representing 16% of all jobs in the precinct. It accounts for at least 0.23% of the total area of the precinct (0.2 ha).

Manufacturing is the third largest industry and provides 314 local jobs, representing 11% of all jobs in the precinct. It accounts for 3% of the total area of the precinct (2.9 ha).

Figure 8: Land use by ANZSIC code of Jamisontown industrial precinct



- Legend**
- Industrial Sectors**
- Industrial**
 - Electricity, Gas, Water, and Waste Services
 - Manufacturing
 - Transport, Postal, and Warehousing
 - Wholesale Trade
 - Knowledge Intensive**
 - Rental, Hiring and Real Estate Services
 - Health and Education**
 - Education and Training
 - Health Care and Social Assistance
 - Population Serving**
 - Accommodation and Food Services
 - Arts and Recreational Services
 - Construction
 - Other Services
 - Retail Trade
 - Developed**
 - Multi-Use
 - Vacant**
 - Vacant Land with Storage
 - Vacant Land
 - Vacant Space - Unoccupied

0 500m

Table 7: Land use by ANZSIC code of Jamisontown industrial precinct

ANZSIC Code	Total Land Area (ha)	% of total	Jobs	% of total
Industrial				
Agriculture, Forestry and Fishing	0	0%	9	0%
Electricity, Gas, Water and Waste Services	4.9	6%	0	0%
Manufacturing	2.9	3%	314	11%
Mining	0.0	0%	0	0%
Transport, Postal and Warehousing	2.1	2%	26	1%
Wholesale Trade	3.6	4%	124	4%
Knowledge Intensive				
Administrative and Support Services	0.0	0%	29	1%
Financial and Insurance Services	0.0	0%	10	0%
Information Media and Telecommunications	0.0	0%	55	2%
Professional, Scientific and Technical Services	0.0	0%	79	3%
Public Administration and Safety	0.0	0%	68	2%
Rental, Hiring and Real Estate Services	0.6	1%	35	1%
Health and Education				
Education and Training	0.4	1%	41	1%
Health Care and Social Assistance	3.3	4%	91	3%
Population Serving				
Accommodation and Food Services	1.8	2%	234	8%
Arts and Recreation Services	1.6	2%	86	3%
Construction	0.2	0.2%	463	16%
Other Services	4.1	5%	205	7%
Retail Trade	30.3	34%	1029	36%
Vacant				
Commuter Car Park	0.0	0%	-	-
Under Construction	0.0	0%	-	-
Vacant land	1.4	2%	-	-
Vacant land with storage	0.1	0.1%	-	-
Vacant Space (unoccupied)	2.1	2%	-	-
Others				
Infrastructure	0.0	0%	-	-
Multi-use	28.8	33%	-	-
Other	0.0	0%	-	-
Residential	0.0	0%	-	-
Total	88.4	100%	2898	100%

Top 3 industries

Construction experienced the greatest increase in local jobs since 2009 (229 local jobs), followed by Retail Trade (197), and Accommodation and Food Services (37).

Business

The precinct has 425 businesses and is known for its retail and recreational trade. The Penrith Homemaker Centre is the key anchor for the

precinct and is occupied by 40 national bulky goods retailers. Other major occupiers in the precinct include Dunn & Farrugia (fencing and gate manufacturer that provides almost a third of all manufacturing jobs in the precinct), ACTROL (large national refrigeration wholesaler), and Nepean Hospitality. A range of entertainment, recreational, and other non-industrial businesses also occupy the precinct, including restaurants, fitness centres, dance and performing arts schools, and ten-pin bowling.



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