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1 EXECUTIVE SUMMARY

1.1 Vision / Land Use Recommendations

1.1.1 Aligning the 'Vision' & Reality

As the Section entitled 'Reason for Study' below highlights – there are a number of local, subregional and regional opportunities and challenges facing industrial and business growth in the North Blayney Area and across the Shire. The immediately pressing issue is a submission seeking to rezone part of the industrial land (the 'Trade Centre' and south) for residential purposes.

As this report highlights – there is no simple answer to the challenges that face Council and the community relating to the North Blayney Employment Lands ('Study Area'). The key issue or guiding factor should be the Council and Community 'Vision' for the industrial area north of Blayney.

It is appropriate that regular ideas or proposals are put forward that challenge this 'Vision' and test it to ensure that the 'Vision' is still the desired land use strategy. However, we suggest that any departure from the historic long-held employment vision for North Blayney should only occur as part of a strong and detailed strategy, renewed 'Vision', with key stakeholder and community support, and over a time period that takes into account economic cycles and is not 'reactionary' to 4-5 year downturns.

Based on the outcomes of the stakeholder engagement there were good arguments put forward for both sides of the residential v's industrial 'visions' for key sites.

The submission by the owners of the Trade Centre provided an important insight into the difficulties faced in attracting local and non-local business to new industrial/business parks and we do not dispute their findings that the Trade Centre land has not been sufficiently attractive in the last 5-7 years.

However, there was no majority opinion supported by the key stakeholders for a change from the current VISION for the area as an industrial centre to a NEW VISION that would prioritise residential growth. In fact there were strong opinions presented to protect existing and potential industry not just in the Trade Centre but throughout the Study Area and these land owners must also be respected.

The planning system should not be inflexible if it is to keep up with changing employment and development demands. However, if the long-term strategic planning is sound then planning controls that support that strategic VISION should only be changed where there is a strong case for long term benefits through a revision of this Study.

1.1.2 Potential Land Use Conflicts

The danger with modifying the zoning of the Study Area and permitting an increase in residential land uses is that it would not only compromise existing industrial uses but it would compromise future potential for industrial and employment growth. Blayney can ill afford to impact on the potential existing operations and future growth of its existing businesses – yet alone create additional disincentives for new industrial investors looking for sites that are not constrained by residential uses and buffers.

It is recognised that the existing interface between industrial uses and existing residential areas is already an issue though to-date the industrial operators have maintained reasonable relations with residential owners in the area and heavier industrial types have generally located towards the north of the Study Area with potential growth into future investigations areas along Marshalls Lane and north of Church Hill.

1.1.3 Timing & Supply of Zoned/Serviced Land

It is important to note that the rezoning and provision of new serviced industrial lands can take 4-5 years and often by this time the key opportunities have passed or found equally suitable land elsewhere. One key to success is having suitably zoned, appropriate land with services available when the demand arises and with sufficient flexibility to adapt to changing market demands.

The core advantage that Blayney has is that the Orange Airport lands may take 5-10 years to be rezoned, serviced and made available whilst Blayney is available now. (We note that there are other industrial lands in and around Orange and Bathurst that are also available now and compete directly with Blayney). However, Blayney cannot afford to wait around for McPhillamys or other major projects and needs to attract new investment now to get ahead.

1.1.4 Sustainable Development & the Long Term View

The recommendations of this report are based around the principle of 'sustainable development' which includes economic, environmental and social balance. Diversity or a robust economy is an essential ingredient to sustainability and the ability to manage change. The provision of a sufficient supply of suitable and adequately serviced employment lands with flexibility in zoning and appropriate mitigation of land use conflicts is essential. To

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compete with other areas the industrial sites need to be able to operate 24 hours a day / 7 days a week unaffected by sensitive land uses and with mitigation measures already in place to manage environmental impacts.

It all comes down to whether Council and the community have a clear vision for the desired outcomes and the will and resources to implement or facilitate those outcomes aligned with positive economic and social conditions.

If stakeholders believe they have done everything within their power to activate the Study Area and attract new investment and it is not expected to change then perhaps a change in direction is warranted. But residential rezoning of industrial lands should be a 'last course of action' because it is irreversible and may necessitate a great deal of expense for Council/community/land owners to identify/investigate/rezone/develop new industrial lands.

Submissions by the owners of the Trade Centre have highlighted that their previous investments in industrial estates (e.g. Bathurst) have taken 10 years to gain any momentum and after 15-20 years they are nearly fully developed. Now that the Trade Centre is only 6-7 years old – we suggest it is too early to determine that it will not succeed and should be rezoned as a result.

Key Recommendation

On this basis our key recommendation is that the 'Vision' for the Study Area remains as a priority for employment and supporting local industry (in preference to residential growth) for the next 5-7 years (see the VISION Statements in the next Section).

Council should continue to seek ways for the area to grow into a subregional industrial centre and attract new business. As a result, we do not propose any changes in key planning controls at this time.

However, this recommendation comes with some key provisos:

1. Should there continue to be low take-up of land in the Trade Centre area and further south for industrial purposes in the next 5-7 years (2021-2023) then this Study should be revisited and potentially a staged approach to conversion to residential adopted in line with the Residential Option in this Study.
2. Council should continue to investigate amendments to planning controls that could facilitate or attract more growth in industrial and business uses (either through the Local Environmental Plan, Development Control Plan, or other Council policies and incentive schemes).
3. Council should continue to investigate future growth areas for industrial uses that are further removed from existing urban and residential areas to the north of Church Hill and understand the relative benefits of this land over existing land and potential costs to make this land available.
4. Council should continue to investigate alternative residential growth areas in and around the Town of Blayney to address the current shortage in available urban and large lot residential land to see if there are more favourable sites than rezoning existing industrial land (part of a separate study).

The best method to achieve these outcomes may be the update of the Subregional Rural & Industrial Land Use Strategy that is now 8-10 years old. This would provide the mechanism to address these issues at a sub-regional level whilst testing local opportunities and constraints.

1.2 Key Site Recommendations

See the KEY SITE CONCEPTS (Indicative Only) for additional recommendations.

1.2.1 Trade Centre (Zone B5)

We do not dispute the research of the Trade Centre owners that they have tried to attract industrial and business operators without success for several years. However, we do query whether the economic situation since 2008 and the Global Financial Crisis has had a significant impact on economic growth and investor confidence and should not necessarily be taken as determinative of the potential of this area for industrial/business growth. This does not mean that we don't understand the risk and economic challenge to the land owner.

Some of the people who have purchased land in the Trade Centre for business expansion have not proceeded because of the current economic climate. Also, the business owners themselves state in their 2nd submission that it took 10 years to get the Bathurst Trade Centre started and another 20 years to make it a vibrant commercial centre.

Therefore, our recommendation does NOT state that Council should NEVER consider rezoning of the site for residential purposes. Instead, it suggests a testing period of another 5-7 years to see what macro and micro economic changes may occur and re-evaluate if the VISION for the North Blayney Area has changed.

In addition, as the Residential Concept Section below states, we have suggested a staged approach to rezoning of industrial land to residential starting with land to the south of the Trade Centre and this could potentially test the market before the Trade Centre land is rezoned.

1.2.2 Hill Street (Zone B6)

No change is currently recommended to Zone B6. There is a low probability that the existing uses will move out of the area in the short to medium term (5-10 years). The existing uses are entitled to remain in Zone B6 with 'existing use rights'. Whilst some land owners suggested that the area should be rezoned for residential uses – many of the existing owners appeared tolerant of the surrounding industrial area as long as their existing amenity was retained. This may become more of an issue as land owners change and new owners move into the area.

Please refer to Option 2 above the Residential Strategy Section below for more information on how future consideration of residential zoning could be staged – potentially extending from Hill Street north. We suggest there is a regular review to see if any changes to Zone B5 in the future make it so similar to Zone B6 that it is not worth retaining the two separate zones.

1.2.3 Second Shopping Centre Site – Hill St (Zone B6)

We have approached the proposed developer and, at this time, they have decided not to proceed with the development of a second supermarket site in Blayney. Until a firmer proposal is put on the table then we cannot recommend the rezoning of land north of the rail line for retail uses / 'shops' considering the preliminary opposition from the community and the potential impacts it could have on the main shopping street (Zone B2).

However, on the KEY SITE DIAGRAM we have indicated what this could potentially look like for further investigation. Assuming that preferred site(s) at the southern end of the town centre along Adelaide Street (Zone B2) could not be made available and that a second shopping centre is viable in Blayney then from a land use conflict point of view there is no major issue from having a shopping centre in an industrial area and providing some competition in the town.

A second shopping centre may also have the potential to act as a catalyst for further development in the Study Area including potential ancillary businesses such as a Service Station or Hardware/building supplies centre (as these are often owned by the shopping centre majors). Further study is required of the economic viability of all of these options.

1.2.4 Linfox/FCL Site (Zone IN2)

No change is currently recommended to Zone IN2 for the FCL/Linfox site. This is a vital strategic infrastructure site with significant potential subject to market conditions. This site should be protected for at least 5-10 years in case either FCL/Linfox or another future operator can create a viable operational intermodal facility. In the interim its ongoing use as a truck logistics area and standby Cadia dewatering plant is a good utilisation of this flood prone site. Further consultation should occur with any operators to understand how to facilitate growth whilst managing the interface with the urban area and residential amenity. .

1.2.5 Former Abattoir (Zone IN2 / RU2)

No change is currently recommended to the two zones across the former Abattoir site and other rural lands held by Langway Pty Ltd. Whilst there have been previous submissions from the owners for both an industrial zoning and residential zoning there are a number of constraints that may make this difficult or more expensive to develop.

The Future Investigation Area Section below suggests it could potentially be considered as a longer term industrial expansion area particularly if it is developed in combination with any possible expansion of the existing intermodal terminal site with a longer rail siding (low likelihood in the short to medium term). However, there are other sites that are likely to be more suitable in the shorter term IF additional land is required. A residential option would not generally be considered until its impacts on future industrial expansion to the north and the contamination and remediation costs were further assessed.

Council should continue to work with the landowner to get a better understanding of the site potential and considering the above comments may wish to consider it for either future industrial or residential use.

2 STUDY SCOPE

2.1 Reasons for Study

There are several recent key triggers for this Review that this Study seeks to address or at least create an opportunity for discussion as follows:

- a) Orange Airport Proposed Rezoning for Industrial / Business Park – Orange City Council has submitted a Planning Proposal to the Department of Planning & Environment (DPE) to rezone up to 210 hectares of land around the airport for business and industrial uses (see Other Challenges Section for more details);
- b) Approach by owners of Trade Centre to rezone all of the Zone B5 land (and land to the south in Zone IN2) for residential uses on the basis that they have only been able to sell 4-5 lots in the last 5 years (see Key Sites Section for more details);
- c) Possible demand for alternative sites for a second shopping centre (see Key Sites Section for more details);
- d) Reduced operations of FCL/Linfox intermodal terminal (see Key Sites Section for more details);
- e) Recent opposition to an application for a Goat Abattoir at the Sealink Site but future potential livestock processing opportunities in the Shire;
- f) Reduced growth and development associated with Nestle Purina;
- g) Proposed new Cadia Dewatering Plant potentially replacing old plant in 2016;
- h) 'Fit for the Future' and potential amalgamations with Orange City Council;
- i) Preparation of the Regional (Growth) Plans and ramifications for Blayney;
- j) The GHD (2008) Subregional Rural & Industrial Land Use Strategy' is outdated and needs review – particularly in terms of supply and demand sub-regionally of different industrial and business lands;
- k) The *Blayney Local Environmental Plan 2012* and the need for a regular review of planning controls with potential to inform the new development control plan.

This highlights the pace of change and the need for the Study Area and its key stakeholders to evolve to address the challenges whilst maintaining long term visions to avoid reactive decision making.

2.2 Scope of Works

The project has been broken down into several stages as follows:

- a) **Stage One** summarised the known issues and opportunities that could affect economic growth and development of the North Blayney Industrial Area. The deliverable was a short report / workshop with key staff / and hand marked up mapping to identify further areas for research.
- b) **Stage Two** prepared some preliminary mapping of constraints and opportunities and recommendations for key sites in the North Blayney Industrial Area.
- c) **Stage Three** involved the preparation of an Indicative Structure (Concept) Plan Options for the North Blayney Industrial Area and further testing of key sites including a presentation to the Councillors and key staff.
- d) **Stage Four** involved a stakeholder workshop and consultation with key industrial stakeholders to test the key options and support for changes to planning controls. This has allowed us to finalise this report to be adopted by Council and guide future decision making.

This project is a 'visioning' exercise and challenges key assumptions/policies. However, it recognises the limitations to the methodology and may need further validation and consultation with key stakeholders and the community.

Further testing may include a number of other specialisations including economics (macro and micro), transport engineering, industrial sector expertise, and marketing to deliver strategies for attracting new industries.

This Scoping Study will highlight where these inputs may be beneficial but we are not experts in these areas and have not been asked to include these specialists in this study.

Note that previous versions of this report have been produced at each stage and may differ from this final report.

2.3 Consultation

This Study included a range of consultation with key stakeholders and government agencies. The outcomes of some of that consultation are detailed in the Appendices.

2.4 Indicative Concept Plan

A key purpose of this report and the associated indicative concept plan(s) is that it can act as a 'tool' to engage with key stakeholders. Often people will not respond until there are 'options' on the table that are open to discussion. A Concept Plan provides a 'visual' explanation of some of these options that people can easily understand.

It is important to note that the Concept Plans attached to this Study are indicative only and were used to test ideas about certain outcomes for key sites and get an overall picture of what North Blayney could achieve in development terms if fully developed. It was not part of the scope to provide a detailed master plan that would control development or environmental outcomes in those areas without significant further testing and design.

Council has led the way in starting the conversation by identifying the 'vision' for the Study Area, identifying study parameters and available information and gaps in that information, and asking the right questions about what the community and existing and future business owners want to achieve with this land.

Further detailed Master Planning and key site plans are a good way to continue engaging with stakeholders as this study is reviewed and demonstrate that information gained through the consultation process has been considered and integrated into the preferred outcome with testing of alternatives. Any detailed master planning can then be stripped back to its core parameters to inform any development control plan or amendments to the Local Environmental Plan. The public exhibition of these plans is another opportunity to engage, test and tweak the final outcomes.

2.5 Additional Specialist Studies

This report highlights the fact that this is a strategic planning (land-use) study only and identifies several areas where additional specialist consultant input is recommended. This may include, but is not limited to:

- a) **Transport & Infrastructure** studies to determine the viability of key transport and infrastructure projects that may underpin economic and industrial growth such as the rail and intermodal facility, trucking and transport logistics, flood management and drainage responses, barriers to supply chain augmentation, and local road safety and operations;
- b) **Economic** studies to determine the value of different options of development, the economic costs of key options and projects, supply chain challenges, the sectors of the market with best return on investment to guide Council involvement, and economic flow on effects throughout the local and regional economy;
- c) **Environmental** studies to determine appropriate outcomes including, but not limited to, flooding and drainage, riparian corridors and ecology, acoustic and odour buffers and amelioration for key industrial types, landscape buffers and corridors and risk strategies for managing contamination and hazards associated with industrial chemicals and processes.

It is also important to note that if Council wants to facilitate certain land use outcomes and attract industrial operators it is recommended that many of the preliminary studies and their recommendations are prepared for the entire Study Area. The aim is to minimise the amount of money and time applicants need to spend to reach an agreed outcome and avoid onerous assessment processes. Therefore it is recommended further studies are prepared:

- a) prior to any major development applications;
- b) as part of a co-ordinated / integrated set of outcomes;
- c) to determine appropriate land uses and mitigating factors that Council and the community will accept;
- d) feed directly into any guiding Master Plan and development controls.

3 VISION(S) FOR THE STUDY AREA

3.1 Summary of Key Options

The key recommendations can be distilled down into two (2) distinct 'Visions' for the area. Whilst there will always be moderate or intermediate options – the potential for and impact of land use conflicts between industrial/business uses and residential/community uses suggests that one option needs to have priority over the other in any chosen vision.

The way that the Study Area is arranged/located – it is very difficult to talk about isolating parts of the area for residential use and parts for industrial use as the industrial functions are spread across the entire area (as are many existing sensitive uses). The Trade Centre owner has submitted that there are many examples of residential uses being located alongside industrial uses and these interfaces can be appropriately managed – but most of these examples occur where the supply of land for both uses is extremely limited so the market is willing to allow poorer amenity for residential uses and/or greater restrictions on industrial uses as there are few other alternatives.

Note: The following is a list of two opposite ends of the spectrum in terms of a VISION for the Study Area. Not all assumptions would necessarily need to occur in order to achieve each VISION. However, it provides the opportunity to TEST those assumptions. Some are based on current Council policy but may not be supported by the market or the capabilities of the land.

Whilst adopting a 'black and white' position is open to challenge as being inflexible and non-responsive to changing market demand – in this case it could be argued that by adopting too flexible an approach that the vision is being 'watered-down' to the point where neither option will ever fully succeed and Blayney's sustainability is in question.

This report accepts that some of these assumptions are longer term aspirations for which there is yet to be developed a business case or viable economic model. It also assumes that if Blayney acts quickly it will be able to compete evenly with other similar industrial sites in the region subject to similar macro-economic factors.

3.2 Option One (1): Maintain Employment Priority

This Option would:

- 1) **Vision:** Be based on a vision of Blayney being a key SUB-REGIONAL industrial and employment centre that supports its LGA/villages as well as Regional Centres (particularly Orange/Bathurst). It would:
 - a) Seek to facilitate major regional mining, renewable energy, and agricultural/food manufacturing industries and be competitive in these fields;
 - b) Aim to strengthen its transport infrastructure and become a key regional intermodal and/or logistics facility servicing the eastern of the Central West and maximising efficient logistics and export functions.
 - c) Seek to build upon the key industrial strengths of the Study Area including key infrastructure and utilities and existing food / beverage / agriculture / construction industries.
- 2) **Key Assumptions** (not all of these need to occur to support this Vision) Assume:
 - a) Regis – McPhillamys Mine will be viable and commence construction within short term (5 years);
 - b) A freight road-rail intermodal facility will be viable in this location in the medium term (5-10 years) and could build on the existing FCL/Linfox facility along with associated road transport logistics and manufacturing so this key strategic asset needs to be protected for long term potential;
 - c) The site location and capability is sufficient to attract new businesses and compete with other regional industrial sites such as Orange Airport in the medium to longer term (10-15 years);
 - d) The Blayney-Demondrille Rail Line will be reopened within the medium to long term (10-15 years or more);
 - e) Growth will support some additional site costs such as extension of services/utilities, additional earthworks and retaining/drainage to manage steeper sloping sites.
- 3) **Land Uses & Growth (Existing):** Seek to protect the investment of the existing industries and businesses and facilitate their future growth and expansion by reducing constraints and land use conflicts. It acknowledges that the existing industrial uses in the Study Area would significantly reduce the attraction and viability of any new residential offer in the area.
- 4) **Land Uses & Growth (Industrial):** Seek to maintain an over-supply of appropriately zoned and serviced industrial and business land to meet potential and projected growth from a number of regionally significant 'pipeline' projects including mining, transport and logistics, and food and agricultural value-adding (in preference to identifying future investigation areas that will need to be rezoned and serviced).

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- 5) **Land Uses & Growth (Heavier):** Facilitate some heavier industrial uses with appropriate mitigation measures for the environment whilst accepting some compromises in residential amenity to enable adaptive re-use and opportunities, particularly at the Linfox/FCL and former abattoir sites close to the urban interface.
- 6) **Land Uses & Growth (Sensitive Uses):** Seek to avoid, or minimise/mitigate any land use conflicts by minimising any further growth in residential or other sensitive commercial uses in the area, except where appropriate setback and buffers from industries and key transport routes can be maintained. Seek to facilitate the transition of existing sensitive residential and community land uses out of the industrial area in the longer term to further reduce existing conflicts OR accept the impacts of industrial growth on those uses (within reason).
- 7) **Land Uses & Growth (Residential):** Consider small pockets or areas where residential uses could be increased with less impact on industrial and employment growth. This is predominantly on the higher slope lands that are less suitable to industrial use where contamination could be addressed. However, the purchasers of these dwellings would need to accept that 24 hour industrial activity was likely in surrounding streets. Alternatively, only dwellings associated with industries (such as caretaker dwellings) may be permissible. Both of these options significantly reduce the demand for and return on any residential investment.
- 8) **Opportunities:** Identify and build on new opportunities including agricultural value-adding / food and beverages / construction and potentially aim to become a centre for renewable energy (wind, solar, biomass, possibly hydro etc.) with greater collaboration between education, research, Council, key industry leaders, and agriculture.
- 9) **Leadership:** Require considerable resources and tools available to Council (predominantly planning & engagement) to facilitate industrial and employment growth in the area. However, business growth is likely to be led by business leaders and a 'grass roots' approach – particularly with local government in a state of change.
- 10) **Planning Controls:** Consider minor modifications in zoning, permissible land uses, and development controls to create more flexibility in industrial and commercial controls – though there is potential to conflict with Zone B2 – Local Centre (Blayney's Town Centre). It would prioritise industrial flexibility over residential amenity.
- 11) **Future Investigation:** Favour utilisation of existing zoned and serviced industrial lands before any investigation of future expansion areas (though eventually future investigation areas in line with the recommendations of this report may be required).

3.3 Option Two (2): Staged Approach to Residential Rezoning & Investigation of Additional Industrial Areas

This Option would:

- 1) **Vision:** Accept that the existing North Blayney Industrial Area is unlikely to ever achieve its full potential as a freight and logistics / intermodal hub so it is better suited to maintaining existing industries and promoting a moderate amount of local industry growth as infill development mostly to the north of the Study Area along Marshalls Lane.
- 2) **Competition:** Accept that there are other industrial sites in the region that may have less physical constraints, similar or improved utilities and infrastructure, and greater likelihood of achieving critical mass and growth for regionally significant industry and logistics.
- 3) **Competition:** Accept that there is limited opportunity for growth in more traditional industries such as heavy industry / manufacturing and Blayney may not be able to compete with other regional centres to attract high-technology industries and value-adding food manufacturing etc.
- 4) **Land Uses & Growth (Northern Area):** Aim to support local industry and business and some limited business/industrial growth but accept it is unlikely to attract regionally significant or heavier industries.
- 5) **Land Uses & Growth (Linfox/Reeks):** Assume that the isolated nature of the intermodal terminal and site constraints and competition will mean road transport dominates logistics and this area is better suited to businesses and light industries (mostly outside the flood zone). Assume 24 hour operations not required.
- 6) **Land Uses & Growth (Hill St):** Recognise the low probability of existing residential and commercial uses from transitioning from the Hill Street area. Accept some residential development around Hill Street and potentially consider additional permitted business uses to reinforce this neighbourhood centre.
- 7) **Land Uses & Growth (Residential):** Seek to address the current lack of residential lots in Blayney by focussing on more residential and mixed-use developments in the area and converting a significant percentage of the Southern parts of the Study Area to this use (preferably on land with greater slope that has not historically been

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used for industry and is unlikely to be contaminated in the earlier stages). It would zone existing or former industrial uses for light industry to limit the impact of future businesses in these areas to low impact industries and place the onus on these businesses to manage their impacts.

- 8) **Land Uses & Growth (Transport):** Accept a degree of land use conflict and find ways to manage those conflicts – particularly heavy vehicle traffic along Osman/Gerty Streets & Marshalls Lane and existing heavier industrial uses. However, it is likely to limit existing and proposed industrial operations from achieving 24hr operations or heavy industrial / higher impact uses.
- 9) **Controls:** Rezone part or all Zone B5 / Zone B6 / and part of Zone IN2 for residential uses – thereby supporting the proposed rezoning by the Trade Centre owners and maintaining the existing residential/community area along Hill Street.
- 10) **Future Investigation:** It MAY need to identify new industrial land opportunities that can be rezoned once demand increases. It recognises there is potential to lose new business opportunities to Orange/Bathurst/ elsewhere if suitable land is not rezoned with access and utilities at the time demand arises. There is also a substantial Council resource required to further this investigation and conduct necessary studies if this is not led by the relevant land owners.

The difficulty arises from the fact that many of Option 2's assumptions have either already occurred or have a higher likelihood of occurring (in the short term) than those of Option 1. It is easier to accept that the Study Area is already compromised by physical constraints and residential rezoning provides a short-term solution to the development pressures and current submissions.

Option 2 is an easy answer that avoids the need for any substantial effort by Council and the community to consider factors, many of which may be outside local control. But it is also a resignation that Blayney will never achieve its full potential (as a sub-regional economic hub) and has significant ramifications for existing industrial/business operators who are likely to oppose any restrictions on their operations and flexibility.

Note: Further opportunities/challenges/assumptions regarding these TWO Options are discussed in relation to the Trade Centre land in Section 6.1 below.

4 KEY SITES

4.1 Trade Centre (Zone B5 Business Development)

4.1.1 Background

It is important to note the history of this land (see Appendices – Consultation Notes – Ray Hornery) and the fact that there have been previous attempts (1980/90s?) to rezone this land for residential use and this was challenged and was purchased by Council to prevent that from occurring.

The objective for Zone B5 is to enable a mix of business and warehouse uses and bulky goods premises that require a large floor area, in locations that are close to, and that support the viability of, centres (see Appendices for detailed Land Use Table from LEP).

The desired future character of this area (at the time of preparing the LEP) was for bulky goods premises, hardware / building / rural / landscape supplies, light industries, vehicle sales or hire premises, warehouse or distribution centres, industrial retail, and supporting businesses. This zone has already been given a wider variety of permissible land uses than the industrial zones (excluding heavy industrial types) but it does not currently permit dwellings.

It is important to note that the Trade Centre probably arose as a response to future development opportunities associated with the development of the McPhillamy's mine and growth of Nestle Purina and Sealink. It was likely envisaged that these facilities would have significant flow on effects for associated industrial retail / business. It is true that some of these opportunities have not yet eventuated, or have eventuated without the flow-on requirements for supporting industries, or these supporting industries have gone elsewhere (Orange/Bathurst).

In 2009 there was an approved subdivision of the land for a 'Trade Centre' and since that time most of the roads have been formed and most lots placed on the market. The Trade Centre (Zone B5) has an area of approximately 8.75 hectares and there is an existing approval for 18 lots of which 1 is a large remnant lot (split zoned across into Zone IN2) with a remnant dwelling (with potential for another 4-6 lots). Based on the proposed rezoning plan provided by the owners there is potential for up to 29 lots (if further subdivision).

Only 2 lots have been developed by October 2015 and only six (6) lots have different ownership to the original developers of the Trade Centre including:

- a) 9 Radburn St (Lot 106) – Baptist Churches of NSW Property Trust – 3114m² - The church was originally looking to build a church on this land and the LEP was specifically amended (before finalisation) to permit this but an alternative site in the urban area was subsequently found (reasons for change not known at this time);
- b) 16 Radburn St (Lot 105) – GJ & CA Mitchell – 2,509m² (vacant);
- c) 20 Radburn St (Lot 103) – IB & RM Reeks - 2650 m² (vacant);
- d) 22 Radburn St (Lot 102) – O'Brien Wash & Go Pty Ltd - 2393m² – This is constructed and operational;
- e) 41 Marshalls Ln (Lot 19) – Blayney Shire Council – 3152m² (vacant);
- f) 43 Marshalls Ln (Lot 20) – JE Collins – 2818m² (shed – purpose unknown).

From feedback by speaking to some of these owners and at the Stakeholder Workshop the following was discussed:

- a) The car wash owner does not support a residential rezoning as it would impact on the 24 hour operations of the car wash (the Trade Centre owners claim they would purchase this property to avoid this impact but there was no indication from the car wash owner that this was a likely outcome);
- b) One owner plans to build a shed for manufacturing or possibly storage in the future on their site and do not support a residential rezoning;
- c) One owner had an intention to relocate a car repair facility to the lot but the economy has since slowed down and they would like to sell the lot for the best value they can get (residential or industrial).

There is a single dwelling located on Lot 221 (3.69ha) owned by Trinity Height Pty Ltd (it is the Senior Planner's advice that this company has the same owner as Blayney Developments Pty Ltd. Gordon St has been built through this lot and provides access for further subdivision which is indicated on the proposed subdivision plan for Planning Proposal (see Appendices) – leaving a dwelling on a 7130m² lot. For the purposes of land use conflict it is assumed this dwelling does not pose a constraint to further industrial development.

The remaining 13 lots are held by Blayney Developments Pty Ltd and are vacant. Therefore, of the 9ha of land in Zone B5 (including Radburn St and part Gordon St) – only ~1.2ha is developed and only 1.66ha sold or owned by others than the original developer, leaving up to 7.34ha in the hands of the original developers and 7.58ha vacant land (excluding roads).

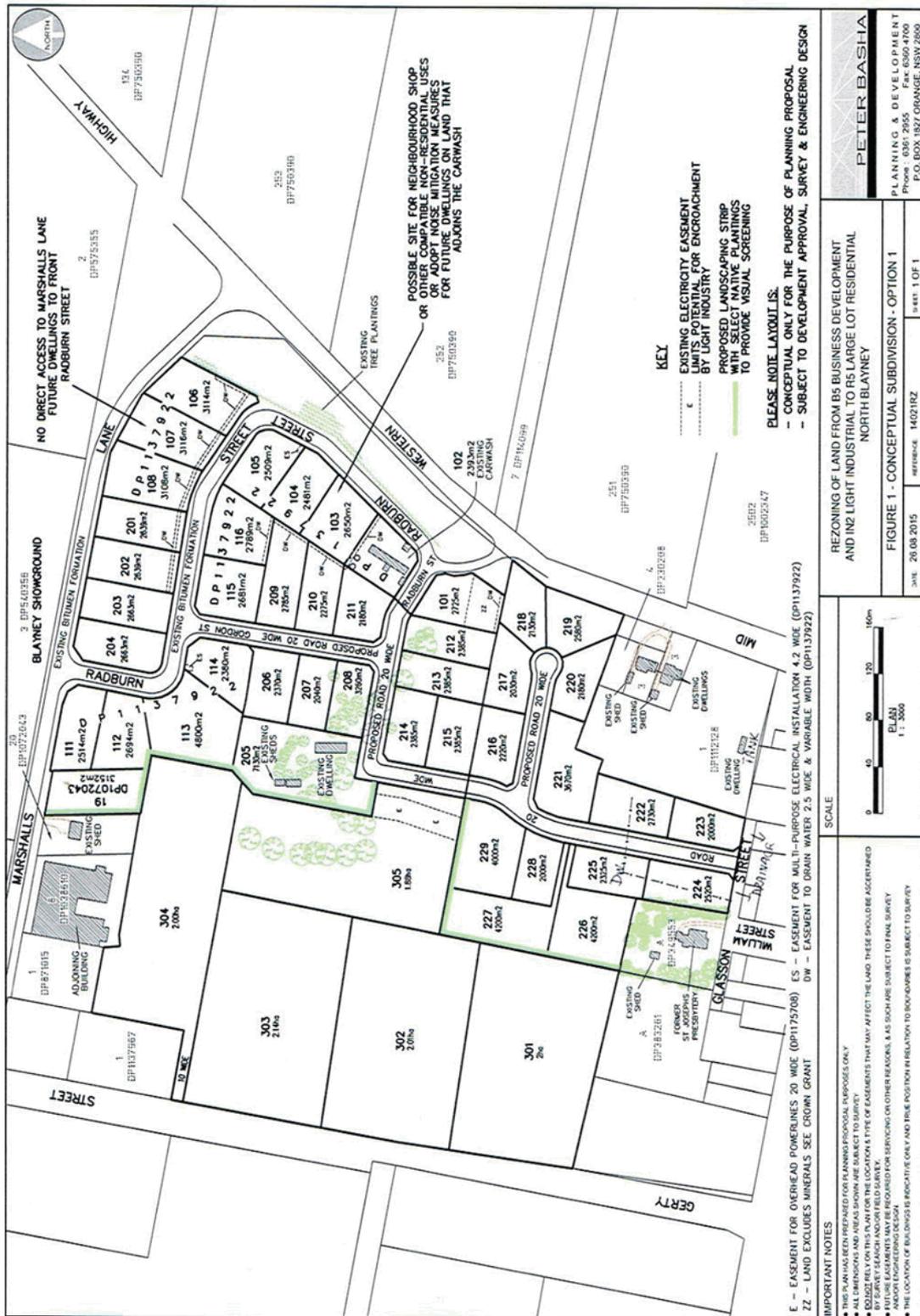


Figure 2: Trade Centre & Surrounds –Residential Proposal – Draft Subdivision Plan (2015)

4.1.2 Challenges

The Trade Centre area is a particularly pressing issue because over 7.58ha (88.9%) of the 8.53ha developable land is vacant, 14 lots are held by the original developer and have not sold, and the owners of that land have been approaching Council for some time now to rezone the land for residential use (see the Subdivision Plan in Appendices that formed part of a Rezoning Submission made to Council recently).

This suggests that the original intended purpose and design of that subdivision has not been successful to-date (i.e. the desired future character of this area may not align with the economic reality at this time). However, it is important to appreciate that the economic demand for land of this zoning may change over time. This is an excellent example to illustrate that Council is at a cross-roads for the future of the Study Area.

4.1.3 Rezoning Submission(s)

Council has received a Rezoning Submission (August 2014) on behalf of Blayney Development Pty Ltd and Mr J McCann. This submission seeks to rezone all of the land associated with the Trade Centre as well as adjoining lands to the south as far as Hill Street to Zone R5 Large Lot Residential with some further subdivision of some of the larger lots with the majority in the range of 2,000m² to 3,100m² with larger lots to the western edge to act as a ‘buffer’ to adjoining Zone IN2 Light Industrial land.

The core argument is that the poor take-up of lots indicates that interest in the site as a business area is ‘virtually non-existent’ and that a change of land use is required for economic and social benefits including provision of housing choice at Blayney on larger lots that are not catered for in Blayney with improved visual amenity at the key highway approach. The fully serviced nature of these lots requires no major changes other than minor subdivision.

The additional argument put forward is that the adjacent Zone IN2 land to the south is ‘too undulating and steep in places to accommodate the larger building footprint and vehicle areas associated with industrial development’. As a result, it should also be considered for large lot residential.

In order to address the potential land use conflict with Zone IN2 lands to the west it is suggested that the definition of ‘light industry’ is one that would not interfere with the amenity of the neighbourhood. However, this directly raises the question whether future industry would be limited by the presence of the proposed residential uses.

It also argues that there is sufficient supply of industrial land so loss of some will not affect employment or industrial demand. However, it seems to be missing pages addressing ministerial directions that employment lands not be reduced.

The submission did not address impacts from truck movements along the Regional Road of Marshalls Lane that borders some of the northern sites. It does not look sufficiently at impacts from nearby existing or future potential industrial activities.

The Applicant acknowledges that the proposed rezoning does NOT fit with any existing land use strategies. It attempts to distinguish itself from the *Blayney Settlement Strategy (2012)* by calling itself ‘large lot residential’ when it is in fact urban residential (fully serviced) on larger lots.

4.1.4 Option 1 - Employment/Industrial Lands

We take on board the Applicant’s submission that they have tried to attract the full range of possibilities noted below or there is good reason why those land uses would not be suitable for the site. Therefore, they have not supported any proposal to extend the permissible business/industrial uses of the land. Also, the community is generally not supportive of retail ‘shop’ uses outside Zone B2 on Adelaide Street. Therefore, the suggestions below (other than ‘Working within Existing Permissible Land Uses’) are background information only and not recommended by this report at this time and would require more detailed review and justification.

Working within Existing Permissible Land Uses - There may be some opportunities that the current owner may not have fully investigated that align with the existing zoning and land uses permitted with consent including:

- a) Try and attract existing businesses in Blayney in the fields of vehicle sales or hire premises / vehicle body repair workshops / vehicle repair stations such as Blayney Motors Service & Repairs (38 Water St); Blayney Smash Repair Centre (37 Ogilvy St); Michael Baker Automotive / Repco Service Centre (131 Adelaide St); and Tyrepower (Adelaide St) to free up valuable business zoned land. It is recognised that attracting existing businesses is difficult without reasons to leave existing premises or incentives to cover relocation costs unless these existing businesses are looking to expand and can’t achieve it on their existing sites (It would appear that some local businesses have considered or bought land BUT current economics does not support expansion on the Site);
- b) Try to attract new rural supplies / hardware, building and landscape supplies businesses (such as Bunnings / Mite10 / ANL) to this area (see potential relationship to a major shopping centre in Zone B6 below) or relocate

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- existing Quality Building Supplies (45 Carcoar St) (hardware and building supplies / timber yards) or The Farm Shop (27 Ogilvy Street) (rural supplies) to free up valuable residential land for medium density housing;
- c) Try to attract bulky goods and industrial retailing (working with Council to provide flexibility within these definitions to allow some ancillary retail) (though it is realised that these types of businesses are already provided in Orange/Bathurst and Blayney may not have the attraction for these businesses). The Trade Centre has worked with the CTFD Group to market it for bulky good without success;
 - d) Work with mining companies and support industries to identify a range of support industries that are likely to result from the commencement of McPhillamys Mine or Kempfield and likelihood of being based in Blayney (though it is recognised that these mines may be several years away from commencing, if at all);
 - e) Try to attract light industry and high technology industry and warehouse /distribution centres (working with Council to provide flexibility on impacts) that may include smaller scale metal workers, packaging, food and agricultural products, etc. (this is subject to the opportunities presented earlier in this report);
 - f) Try to attract animal related businesses such as veterinary hospitals that could be associated with the horse racing and other animals at the Showgrounds;
 - g) Try to attract new storage facilities and depots;
 - h) Try to attract emergency service facilities to relocate such as Fire Brigade (23 Church St) to remove noisy vehicles from CBD – Possibly greater control of government authorities but low probability of budget unless already in strategic plan.

It is clear that many of these opportunities are difficult / face several challenges and the Trade Centre owner states that have already considered these uses. In effect, these uses are more likely to occur once major projects such as mining and transport/logistics projects go ahead and there is no timeframe in which this is likely.

Possible Expansion of Permissible Land Uses on the KEY CORNER SITES ONLY (Possibly Lots 106-108) - There may be potential to consider amendments to BLEP2012 Land Use Table for Zone B5 to permit the following (some of which may need to be mapped as Additional Permitted Uses on key sites):

- a) Hotel or Motel Accommodation – Gateway & high visibility (tourist accommodation is not as sensitive as dwelling uses) – especially for budget motels but will compete with existing motels in town and may not be supported by the current population and passing tourist densities – again the owners state they have tried this;
- b) Highway Service Centre / Service Station – Most likely will want a site fronting the highway with good access (but may compete with proposal to replace Nixon Transport with Highway Service Centre or Service Station on Church land). The owners claim they have tried to attract 7/11 and Metro Petroleum but these did not proceed;
- c) Group Homes (permanent) or Seniors Housing / Residential care facilities – This is an essential community service, however, any residential type use is likely to have some impacts on industry.

This may be appropriate (subject to detailed studies) but is only a stop-gap solution in that it does not address the majority of sites/land in the Trade Centre but could allow some development until a major project triggers further business/industrial growth. Low to moderate probability of success in short term.

Possible Expansion of Permissible Land Uses ACROSS THE ENTIRE ZONE - There may be potential to consider amendments to BLEP2012 Land Use Table for Zone B5 **OR Convert to Zone IN2** to permit the following across the entire zone (subject to economic viability and testing):

- a) Animal boarding or training establishments – adjacent to Showground & trotting facilities and to work in with permissible future Veterinary Hospital;
- b) Agricultural Produce Industries – This could align with increases in agricultural value adding and food manufacturing but most of the existing lots are likely to be too small for major industries;
- c) General Industries – Currently only light and high technology industries are permitted with consent. This may expand into higher impact industries (but not heavy industries). We agree with the owners that heavy industries are better placed further from the highway / entrance to town;
- d) Liquid fuel depots – Risks with these facilities can be managed and could be associated with Service Stations;
- e) Freight transport facilities / Truck Depots / Transport Depots – Need larger sites for heavy vehicle movements and could facilitate earthmoving and trucking companies;
- f) Business premises / Office premises – This would directly compete with Zone B2 and B6 but there may not be sufficiently large sites for larger format buildings;

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- g) Function centres / Entertainment facilities / registered clubs – Whilst the original intent was not to move entertainment facilities out of the town centre – new large format buildings and facilities are usually dependant on private vehicles and there are few available sites in the town centre.

Discussions with a developer of shopping centres suggested that the Trade Centre land is too far from the core of Town to support a stand-alone supermarket so this was not considered further.

It is important to note that allowing some of these things to occur in Zone B5 would then make Zone B5 very similar to Zone B6 (zone becomes surplus) or Zone IN2 and it may also mean Zone B5 competes with Zone B6 for the business uses which may not assist in the transition of Zone B6 away from sensitive uses.

A conversion to Zone IN2 Light Industrial would mean that the flattest land is available for industrial development but there is already a surplus of IN2 land (much of which is less desirable for industrial purposes). However, the existing lot sizes are relatively small to attract larger industrial buildings that require large vehicle turning areas so lots may need to be amalgamated. Also, the visual amenity of the simpler form and service areas of industrial buildings is less desirable when viewed from the highway.

Council Leadership on Key Sites - Whilst Council should not be in a habit of 'bailing out' developers – one temporary solution may be for Council to invest in 2-3 of the lots to alleviate the financial pressures on the developer and allow them to put off any further approaches to rezone land for residential uses. Potentially, Council could then undergo the addition of permissible uses (amendment to BLEP2012) at no cost to the developer to allow for potentially tourist accommodation or a highway service centre and then on-sell the land. However, there are real risks associated with Council rezoning its own land to add value and risk that the land would not sell or meet current market demand. It would be preferable for private land owners to undergo this process (but possibly not economic). A transparent and accountable process would be required regardless.

4.1.5 Option 2 - Converting to Residential Lands

It has been requested by the land owner/developer, that some or all of the Trade Centre be converted to residential use and further subdivided to achieve ~30 total lots – ranging in size from 2180 to 7130m² (the majority at the smaller size)(see Plan in Appendices).

The benefit of this to the developer is that the substantial up-front cost of the development including roads, utilities, development approvals, and any contributions paid could begin to be paid back by potential take-up with a land use that does have some demand and poor supply locally – assuming that people would seek to buy in or adjacent to industrial uses and the price per lot was in accordance with market demand.

However, it is important to recognise the following impacts or issues if the land were rezoned for residential uses:

- a) It would consume ~8.5ha of industrial / employment lands;
- b) It would consume some of the flattest lands in the industrial area;
- c) The recommended buffer of 400m to heavy industry (particularly Environmental Treatment Solutions) is not achieved – so it may impact operations of existing industries if there are complaints;
- d) The recommended buffer of 100m to light industry will impact on ~14ha of industrial land in the adjacent zone (potentially limiting activities and hours of operation);
- e) A limited buffer to the recreation ground and trotting track to the north may impact some activities such as shows, major events, night sports and trotting training and racing;
- f) The location on Marshalls Lane means that heavy vehicle transport servicing the entire industrial area may impact on residential uses and safety (whilst the Trade Centre owner claims that people would be aware of this risk and don't complain in areas such as Bathurst – the issue arises when there are Development Applications for expansion or new industrial operations with additional traffic generation);
- g) The lots range from 0.2 to 0.6ha so they will need to be serviced with reticulated water and sewer (lot size is unlikely to be sufficient for on-site services);
- h) Some subdivision of larger lots is likely (particularly those with dual road frontage) as suggested by draft Subdivision Plan (see Appendices);
- i) The Gateway to Blayney from north will be residential (though this is expected to have a lower visual impact compared to industrial or bulky good buildings);
- j) It would effectively undermine any attempt or reason for Council to attempt to transition (and partly fund) the relocation of dwellings and community facilities from Zone B6 (Hill Street) out of the industrial area and, thereby not only retain but worsen the existing constraints on industrial and business operations in North Blayney.

It is also a significant assumption that the local market would provide demand for residential lots adjacent to both light and heavy industrial uses and adjacent to a highway. Whilst there is demand for large lot residential lots with

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good views and amenity – these lots would not likely fit that market niche unless there was a significant change and move away from North Blayney for industrial purposes and more towards residential.

Whilst there is demand for urban residential lots there is insufficient evidence to demonstrate that this land would be preferred to other less constrained sites in the existing urban area. If the land were to be rezoned and the market were to either avoid or devalue these lots then it is a lose-lose situation for all involved and rezoning back to industrial is unlikely with the few new houses remaining causing ongoing issues for industrial expansion.

However, it is important to also recognise that conversion of this land to dwellings may have the following community benefits:

- a) Avoid the need to rezone and extend utilities/transport infrastructure to new lands to meet the current demand for residential growth;
- b) Provide a low visual impact at the Gateway to town with dwellings in a landscaped setting;
- c) The lot arrangement is already setback from the highway with its own service road so it is a reasonable solution for residential amenity;
- d) Larger lots to the west of the area could provide some transition to industrial lands along Osman / Gerty Street;
- e) The proposed subdivision could potentially extend (as shown on the Plan in the Appendices) down to the existing residential area in Zone B6 – consolidating these residential lands and recognising they have a low probability of changing in the short to medium term.

However, in summary, whilst the benefits may be considerable to the developer – it substantially compromises the intent of the North Blayney Industrial Area and may limit future employment growth – potentially further exacerbating the move of employment away from Blayney to other centres. This compromise should ideally ONLY occur if the desired future character of the Study Area were to be changed to promote residential uses over employment lands.

Recommendation:

We do not dispute the research of the Trade Centre owners that they have tried to attract industrial and business operators without success for several years. However, we do query whether the economic situation since 2008 and the Global Financial Crisis has had a significant impact on economic growth and investor confidence and should not necessarily be taken as determinative of the potential of this area for industrial/business growth. This does not mean that we don't understand the risk and economic challenge to the land owner.

Some of the people who have purchased land in the Trade Centre for business expansion have not proceeded because of the current economic climate. Also, the business owners themselves state in their 2nd submission that it took 10 years to get the Bathurst Trade Centre started and another 20 years to make it a vibrant commercial centre.

Therefore, our recommendation does NOT state that Council should NEVER consider rezoning of the site for residential purposes. Instead, it suggests a testing period of another 5-7 years to see what macro and micro economic changes may occur and re-evaluate if the VISION for the North Blayney Area has changed.

In addition, as the Residential Concept Section below states, we have suggested a staged approach to rezoning of industrial land to residential starting with land to the south of the Trade Centre and this could potentially test the market before the Trade Centre land is rezoned.

4.2 Hill Street Community & Residential Area (Zone B6 Enterprise Corridor)

4.2.1 Background

The objectives for Zone B6 are to promote employment and businesses along main roads and maintain the economic strength of centres by limiting retailing activity. It allows for some quasi residential types but not stand-alone residential (see Appendices for detailed Land Use Table from LEP).

The desired future character of this area (at the time of preparing the LEP) was to promote transition of dwellings and sensitive community uses out of the area over time by allowing a broader range of business uses compared to the surrounding industrial zones.

The majority of Zone B6 is taken up by community uses including St Joseph Catholic (Primary) School (1 large lot split across into Zone IN2) / St Joseph's Catholic Church (former)(1 lot) / Church Hall (1 large lot) and by dwellings (22 lots for 11-12 dwelling). There is only one (1) active business in this zone (Nixons Transport on the highway).

4.2.2 Challenges

The community facilities and dwelling area (mostly enclosed in Zone B6 Enterprise Corridor) poses a significant challenge to Council and the Community in strengthening the industrial area and providing flexibility for a wide range of industrial uses to grow and expand whilst protecting sensitive land uses and their amenity / safety. Primary

schools (and associated school zones) and dwellings pose a particular risk due to industrial activity and heavy vehicle movements impacting on residential amenity and the safety of school children on roads carrying heavy vehicles.

Whilst it could be argued that the residents and community facilities have been in an industrial area for some time and must accept some of these impacts – there are some impacts that are unacceptable to the community. One extreme example would be where the Environmental Treatment Solutions facility (400-500m from Zone B6) has had a number of industrial accidents (Fire August 2013 / Chemical accident Mar 2014) that has resulted in evacuation of a large area with fears of chemical impacts. There is also a suggestion below (Section on FCL/Linfox site) that wood fumigation would require a development application (planning hurdle) at the FCL site due to proximity with schools and dwellings.

The Sensitive Use Buffer Map (Appendices – A3 Plans) demonstrates that a 100m buffer around the B6 zone would potentially impact on /sterilise up to 24 hectares of adjacent Zone IN2 land. However, schools and heritage properties may lend themselves to a 200m (or greater) buffer which would effectively sterilise up to 30-35 hectares of industrial zoned land including land adjacent to the railway.

This significantly impacts on the ability of existing businesses to grow and the ability to attract future businesses that may have higher impacts. It effectively means that heavy industrial uses need to be located north of Marshalls Lane.

4.2.3 Opportunities

Hill Street - Existing Community Facilities and Dwellings

The first option is to develop a transition plan for sensitive land uses to transition away from this area, for example:

- 1) Work with St Joseph's School to relocate to a new school site in next 5-12 years with possible sites including:
 - a) To east of and adjacent to the Blayney Showground (north of Marshalls Lane) (subject to flood studies) – 600-700m minimum to Zone IN1; or
 - b) Blayney West Urban Release Area adjacent to Orange-Millthorpe Road and opposite Nestle Purina (assuming that noise and impacts are manageable and don't impact on industrial use);
- 2) Work with dwelling owners (except heritage sites) to package up viable consolidated sites for light industrial and enterprise businesses including take-away food premises;
- 3) Incentives for relocation including free DA fees / removalist fees / no Section 94 contributions etc.

This was the original purpose of providing Zone B6 with a wider range of permissible uses. To-date this approach has not been successful and there is a low likelihood of transitioning of sensitive uses out of this area. The cost of relocation combined with lost property value currently does not make sense in this economic climate and is unlikely to change in the short to medium term. Further consultation with these land owners is required to ascertain their response to this issue but the general tenor of feedback at the Stakeholder Workshop was that the dwelling owners are likely to stay as long as reasonable residential amenity is retained.

Recommendation:

No change is currently recommended to Zone B6. There is a low probability that the existing uses will move out of the area in the short to medium term (5-10 years). The existing uses are entitled to remain in Zone B6 with 'existing use rights'. Whilst some land owners suggested that the area should be rezoned for residential uses – many of the existing owners appeared tolerant of the surrounding industrial area as long as their existing amenity was retained. This may become more of an issue as land owners change and new owners move into the area.

Please refer to Option 2 above the Residential Strategy Section below for more information on how future consideration of residential zoning could be staged – potentially extending from Hill Street north. We suggest there is a regular review to see if any changes to Zone B5 in the future make it so similar to Zone B6 that it is not worth retaining the two separate zones. See the KEY SITE CONCEPT for additional recommendations.

Second Shopping Centre (Church) Site

A second option arose during this Study process where a developer approached Council with the intention to erect a second shopping centre and perhaps a service station in the Study Area and had an option over the Church owned land adjacent to the highway. This would have required an amendment to BLEP2012 Land Use Table for Zone B5 to permit the land use term 'shops' in Zone B6 or as an Additional Permitted Use on that site as only 'neighbourhood shops' are permissible in this zone and are limited by floor area (amongst other things).

Discussions with that developer in March 2016 indicate that the developer is not currently pursuing this option – anecdotally because he has been unable to attract a shopping centre tenant to Blayney but also because he has been looking at other sites.

This raises several interesting questions including:

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- 1) The viability of a second major shopping centre in Blayney to compete with Bernardi's – particularly now that Bernardi's has invested in a major upgrade of its shopping centre;
- 2) The issue with expanding a major retail use that is currently only permissible in Zone B2 Local Centre along Blayney's Adelaide Street south of the railway line. There is potential to weaken the main shopping street by attracting vehicles away from the centre of town so ancillary shops are less supported. It was clear from the feedback at the Stakeholder Workshop and from the surveys that this was a key concern and not generally supported;
- 3) Whether or not the current Zone B2 area (or a slight expansion of this to the south) could support a second shopping centre. An alternate site has regularly been suggested adjacent to the Tattersalls Hotel vacant land with potential to purchase some of the adjacent dwellings. However, the ability to consolidate this land has been found to be difficult and the site area raises its own issues of access from the highway and on-site parking;
- 4) The suitability of the Church land given that it is within a flood zone, has limited access from the highway (particularly for heavy vehicles), and would be immediately adjacent to St Joseph's School and may affect pedestrian safety on Adelaide Street and Hill Street and parking issues.

Recommendation:

We have approached the proposed developer and, at this time, they have decided not to proceed with the development of a second supermarket site in Blayney. Until a firmer proposal is put on the table then we cannot recommend the rezoning of land north of the rail line for retail uses / 'shops' considering the preliminary opposition from the community and the potential impacts it could have on the main shopping street (Zone B2).

However, on the KEY SITE DIAGRAM we have indicated what this could potentially look like for further investigation. Assuming that preferred site(s) at the southern end of the town centre along Adelaide Street (Zone B2) could not be made available and that a second shopping centre is viable in Blayney then from a land use conflict point of view there is no major issue from having a shopping centre in an industrial area and providing some competition in the town.

A second shopping centre may also have the potential to act as a catalyst for further development in the Study Area including potential ancillary businesses such as a Service Station or Hardware/building supplies centre (as these are often owned by the shopping centre majors). Further study is required of the economic viability of all of these options.

Nixon Transport Site

Another key site in this Zone B6 is the Nixon Transport site. This site is currently utilised for a truck transport business but also appears to be used for parking of truck trailers from a variety of users. The issue with the site is that it is mostly unsealed / gravel and truck movements cause some dust concerns that are only likely to be resolved / conditioned as part of any new development application. It also has excellent frontage to the highway (with reasonable sight-lines subject to RMS approval for access) and dual frontage to Hill Street, yet the majority of the site remains vacant or under-utilised. The site is sufficiently large to support heavy vehicle circulation and swept paths and could potentially consolidate with adjacent dwelling sites.

For these reasons, when the LEP was prepared – it was discussed that this would be an ideal site to consider a Highway Service Centre / Service Station with the potential to refuel large B-Double (and possibly future larger Heavy Vehicles when permissible) and have ancillary facilities such as small service station shop, take-away food premises and truck servicing areas. As a result, service stations, highway service centres, neighbourhood shops, take away food and drink premises, and vehicle repair stations were added to the list of permissible uses with consent.

This may align well with the proposal for a second major shopping centre / grocery store on the Church Hall site as the fuel / service station site could be located opposite on the Nixon Transport Site. Alternatively, hardware and building supplies, landscaping material supplies, plant nurseries, and rural supplies are another arm of these major shopping centres and would be permissible with consent.

There have been no discussions between the author of this Study and the owners of the Nixon Transport site though they have been invited to the Stakeholder Workshop. The response from the Trade Centre owners appears to suggest that a Highway Service Centre is not viable in Blayney at this time but that requires more detailed analysis.

4.3 Linfox / FCL Container Terminal (Zone IN2 Light Industrial)

4.3.1 Background

This site is currently within Zone IN2 Light Industrial that aims to provide a wide range of light industrial, warehouse and related land uses and to minimise adverse effect of industry on other land uses. It also enables other land uses that provide facilities or services to meet the day to day needs of workers in the area such as 'neighbourhood shops' (see detail in Land Use Table in Appendices).

4.3.2 Challenges

FCL and then Linfox have operated this site for 20 years and it has specialised in rail transport but also has a substantial road fleet branching out in to Central West NSW. It currently has a several rail sidings listed above in the Physical & Infrastructure Chapter. There is some anecdotal evidence that FCL was first attracted to the site as a result of significant government rebates and incentives but subsequently they have opened other operations in Bathurst and Parkes.

The first issue is that the length of the current sidings (500-700m) are unlikely to suit modern freight train arrangements that are in excess of 1.5-2.5km in length (Sealink siding is ~1.6-1.7km) and this may require trains to be split into two lengths reducing efficiency and increasing costs.

There are connections for the rail siding to the Main Western Line at both ends, however, one siding extends across the Mid Western Highway at the existing crossing so when shunting and loading trains the trains can cross the highway/rail crossing and cause significant delays to a major State highway. If there is a train fault or an accident it could block this crossing for substantial periods.

There are also issues with proximity of this site to existing urban areas south of the railway line due predominantly to the noise associated with lifting and placing containers on trains and around the site. I am unsure if FCL has limitations as to days / times of operation for loading trains but assume that these activities are prohibited after 10pm and before 6am during the night (to be confirmed with Council).

The proximity to residential and community uses (both to the north and south of the site) may also create additional planning hurdles when there are proposal to expand into higher impact activities. For example, FCL/Linfox made a proposal in 2013 to Council to utilise containers for wood treatment and fumigation towards the east of the Site. When Council flagged that this would require a Development Application to address potential impacts on sensitive uses this was not followed up by the land owners/operators. Unfortunately the Blayney Chronicle (21 June 2013) incorrectly reported this as Council knocking back their request for these activities when it had never been applied for or assessed.

The site is also partly constrained by the presence of a drainage channel to the north of the primary site that has also historically flooded during heavy rainfalls and is identified on the Flood Planning Maps in BLEP2012. For this reason the land along this corridor has never been fully developed.

It would appear that since mid 2013 there has been a drastic scaling back of activity at the site with anecdotal evidence of only intermittent loading of trains and container transport (actual activity has not been confirmed). This raises a significant query about the sustainability of intermodal facilities and the issues facing this site in particular. Without speaking directly to FCL/Linfox it is not possible to ascertain all of the reasons why this business model has not succeeded and further consultation is recommended.

There is a potential issue if the Linfox facility is formally closed and there is no intermodal activity for a period exceeding 1 year. An intermodal facility could potentially be deemed to be of a higher impact than the light industrial zoning permits as the noise emanating from container loading could be deemed 'offensive' (subject to more detailed review and definition of activity). If this was the case, after 1 year of closure the facility could potentially lose any 'existing use rights' or the community could raise issues with any new facility on the basis of noise impacts on dwellings. For this reason, it is recommended Council work with Linfox to ensure the site continues to operate in some capacity associated with its original approval to maintain any existing use rights OR it would need to look at rezoning the area into Zone IN1 General Industry to permit a wider range of industrial types (subject to operation of other policies such as *SEPP (Infrastructure) 2007*).

4.3.3 Opportunities

- a) Install detention systems and piped drainage channels to address the flooding and drainage issues along the drainage corridor and open up this land for industrial development to improve synergies with the FCL Terminal;
- b) Look at ways to commence the rail sidings earlier at the former abattoir site so that larger trains (600m to 1000m) can be placed in the siding and shunting does not interfere with the highway crossing;

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- c) Look at ways to provide spaced rail sidings so multiple trains can be loaded/unloaded at the same time (possibly utilising the drainage corridor once it is piped);
- d) Look at reopening Adelaide Street extension above the rail line for left in / left out heavy vehicles to provide improved access to any intermodal facility;
- e) As stated above, work with St Joseph's Primary School to prepare a Transition Plan so it can relocate to an alternative site – allowing the intermodal terminal to operate with less restrictions and improved access;
- f) Possibly find ways to create a built form buffer along the northern edge of the Blayney Railway Station to deflect noise and allow for 24 hour operations at any future intermodal terminal.

Recommendation:

No change is currently recommended to Zone IN2 for the FCL/Linfox site. This is a vital strategic infrastructure site with significant potential subject to market conditions. This site should be protected for at least 5-10 years in case either FCL/Linfox or another future operator can create a viable operational intermodal facility. In the interim its ongoing use as a truck logistics area and standby Cadia dewatering plant is a good utilisation of this flood prone site. Further consultation should occur with any operators to understand how to facilitate growth whilst managing the interface with the urban area and residential amenity. See the KEY SITE CONCEPT for additional recommendations.

4.4 Former Abattoir (Zone IN1 General Industrial)**4.4.1 Background**

The former Abattoir site at the western end of Hill Street is both a significant opportunity and significant challenge to creation of new employment opportunities. There are two parts to this 'site':

- a) The area within Zone IN1 that includes the former abattoir buildings and entrance (5 Lots – Area~7.71ha); and
- b) The adjacent area within Zone RU2 that includes previous treatment ponds (5 Lots – Area~46.91ha but some of this to the north east is constrained by slope.

Both parts of the site are believed to be owned by Langway Pty Ltd.

The intent of including the existing abattoir buildings in Zone IN1 was to recognise that the only way to achieve an adaptive re-use of this site (including potential remediation) would be to provide as much flexibility in the zoning for industrial purposes as possible. Zone IN1 allows for a wide range of industrial and warehouse land uses that seek to 'minimise' any adverse effect on other land uses accepting that hazardous and offensive ('heavy') industries are permitted in this zone. No particular 'vision' for the site has been agreed and we have not conducted any site visit to determine what building stock is present, the extent of any remediation or upgrade works that would be required to adaptively re-use the site,

4.4.2 Challenges

There are a number of challenges to development of this site including, but not limited to:

- a) Very limited land that is flat enough to support cost-effective large format buildings;
- b) Limited access from Hill Street with significant limitations to ever extending Marshalls Lane without reducing grades of the gravel road;
- c) Proximity to new residential development along Johnston Crescent and Ewin Street/Doust St and managing noise, odour and other impacts;
- d) Significant drainage corridor and riparian issues and the need for on-site detention to assist with managing downstream flooding issues;
- e) Demand for new industrial land when existing Zone IN1 and IN2 land is currently over-supplied;
- f) Likelihood of substantial contamination and associated remediation and demolition costs (including buildings and storage ponds) to make it useable for new industries and to avoid contaminated material spreading down watercourses;
- g) The Zone RU2 Rural Landscape area was created on the basis of the *Subregional Rural & Industrial Land Use Strategy (2008)* recommendations. To vary this zoning may require an amendment to this subregional strategy and would require significant resources to consult with all three Councils and the community and update supply/demand equations.

4.4.3 Opportunities

Some of the key opportunities include:

- a) Relatively flat lands associated with the former abattoir buildings;
- b) Some flatter lands along the sides of the key drainage channels to the north and west of the site that could be significant if the minor drainage corridors pipe the 1:10 year flow with a 1:100 year flow down a central road;

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- c) Existing abattoir buildings that may be capable of re-use (subject to state of repair and contamination) that may provide a noise buffer to the urban residential lands to the south;
- d) The railway corridor does provide a partial setback/buffer to residential development to the south and the existing buildings extend this buffer and face away from the residential area to ameliorate noise;
- e) There is potential to use the western section of the east-west drainage corridor as a 'green buffer' and/or larger continuous building forms along the rail corridor to deflect noise and face away from the residential areas;
- f) Reduced visibility of lands behind Church Hill when viewed from key entrances to the town makes it more suited to larger format / less articulated buildings;
- g) Adjacency to the Main Western Rail Line could provide potential for a new or extended rail siding (around the north of the existing buildings) to extend and improve efficiency for the FCL/Linfox terminal.
- h) In BLEP2012 an industrial zoning was given to the areas with existing buildings to make it easier for a new business to be prepared and facilitate the remediation and reactivation of this site – but nothing has occurred to date that I am aware of;
- i) The *Subregional Rural & Industrial Land Use Strategy* (2008) is already out-of-date and needs review anyway. Orange and Cabonne Councils both need to revisit industrial land use supply (see Orange Airport Project). This may be an opportunity for Blayney to arrange/prepare the necessary studies to make LEP amendments;
- j) There is potential to consider new rail crossings over the Main Western Rail Line to connect this area back to the Orange-Millthorpe Road and/or a bypass around the western part of town as part of a larger project (see Village Enhancement Plans).

Langway Pty Ltd have previously approached Council in 2010/2011 and possibly more recently to rezone the Zone RU2 land for industrial uses and put forward an industrial master plan (see Figure below). Council's response was that supply/demand, access arrangements, and environmental constraints needed further investigation to demonstrate it was a viable proposal. However, the willingness of the owners to engage with Council is a positive as long as an acceptable outcome can be agreed.

Discussions with Langway Pty Ltd as part of this Study suggested that there have also been separate approaches for the land to be considered for large lot residential purposes. In some ways this is an attractive option because it is adjacent to the existing urban area and would avoid any industrial intensification. It also has better potential than some industrial uses to utilise some of the more sloping lands. The residential development may also generate enough return to enable a more comprehensive remediation of the site with improved environmental principles and upstream improvements in drainage and flood management.

However, there would be a number of obvious matters that would need to be addressed first including the need to remediate the site to a higher level for residential uses compared to some industrial uses and the economic cost may make the residential development less feasible. There are also limitations to access and servicing of the site.

Most importantly, IF the Future Investigation Areas to the north of this Site are to be protected for future General Industrial growth then increasing residential in this area would potentially create future land use conflicts (depending on where the residential was located).

Recommendation:

No change is currently recommended to the two zones across the former Abattoir site and other rural lands held by Langway Pty Ltd. Whilst there have been previous submissions from the owners for both an industrial zoning and residential zoning there are a number of constraints that may make this difficult or more expensive to develop.

The Future Investigation Area Section below suggests it could potentially be considered as a longer term industrial expansion area particularly if it is developed in combination with any possible expansion of the existing intermodal terminal site with a longer rail siding (low likelihood in the short to medium term). However, there are other sites that are likely to be more suitable in the shorter term IF additional land is required. A residential option would not generally be considered until its impacts on future industrial expansion to the north and the contamination and remediation costs were further assessed.

Council should continue to work with the landowner to get a better understanding of the site potential and considering the above comments may wish to consider it for either future industrial or residential use. See the KEY SITE CONCEPT for additional recommendations.



Figure 3: Former Abattoir Site—Concept Plan (2010)

5 PREFERRED INDUSTRIAL OPTION

5.1 Recommendation

It is the recommendation of this report based on stakeholder feedback that for the next five (5) to seven (7) years that the preferred vision is an industrial priority for the Study Area.

It then follows that residential growth should be restricted subject to the considerations in the next Section on the Residential Option. If at the end of that 5-7 year period there has been no substantial uptake of industrial land then the Residential Option could be reconsidered.

5.2 Potential Planning Amendments

In the preliminary study we investigated the potential to modify existing business and industrial zoning to increase flexibility for additional uses. This was not met with support from the Trade Centre owners as they did not believe these additional uses would improve the potential to attract new businesses.

Likewise any attempt to provide more flexibility to industrial uses to potentially attract heavier industrial types was not generally supported by the existing residential population and the status quo was mostly accepted.

For this reason we have not specifically identified any additional uses that may be suitable to attract new businesses though during the preparation of any development control plan some flexibility in the controls may be considered.

We did consider the potential to merge the B6 & B6 zones into one to reduce complexity if there are any future amendments to permissible uses in those zones so they become very similar in function and purpose but this should not occur at the current time when the areas have quite distinct characters and development requirements.

There could be some future potential to allow 'caretaker dwellings' that are associated with an industrial or business use and incapable of subdivision and separate sale to prevent any further land use conflicts but this was not further explored and is currently not permissible unless they could be demonstrated to be 'ancillary' to the permitted use.

5.3 Non-Planning Opportunities

Therefore, most of the opportunities to attract new businesses are likely to stem from a combination of grass-root local initiatives with support from Council. This could include:

- a) Forward plan extension of sewer services up Osman / Gerty St to maximise potential for expanded uses in Zone IN2;
- b) Provide some incentives for road linkages through the middle of the Southern Area to open up land including but not limited to:
 - i) A link road between the Trade Centre and Hill Street that provides access to lots fronting the highway;
 - ii) An east-west link road from the Trade Centre to Gerty St;
- c) Investigate ways to reduce flooding and drainage issues through the southern part of the site with improved detention/ retention, piped 1:10 year flows and overland flows along road reserves to maximise industrial land and reduce barriers to future development applications (though this may be dependent on the former Abattoir site and the current intermodal being adaptively re-used / expanded to make this viable);
- d) Work with existing businesses/industries to determine their future growth potential and land/service requirements and ask them to work together to facilitate improved potential and new opportunities;
- e) Prepare industry prospectuses to target key industries to the area with a potential incentives program;
- f) Investigate some additional Zone IN1 land to the west of Marshalls Lane (see Future Industrial Investigation Plan) in the short to medium term;
- g) Investigate the bypass option as an alternate highway connection through to the Orange Millthorpe Road in the long term.

5.4 Subregional (Land Use) Strategy

The existing approved industrial strategy for Blayney is the *Sub-Regional Rural & Industrial Land Use Strategy* (2008) ('Subregional Strategy') that has several key strategies for industrial lands. These principles are still relevant to the North Blayney Industrial Area and should be considered when considering any changes to planning controls or industrial areas. These principles inform the recommendations and outcomes of this Study.

Figure 4: Excerpt from GHD (2008) Subregional Rural and Industrial Land Use Strategy – Section 10.3 Strategies & Actions.

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| Strategy | Policy actions |
|---|--|
| 1. Provide for the ongoing economic viability of the Sub-Region, by providing adequate opportunities for employment-generating activities. | <p>1.1 Ensure employment-generating activities are given priority in planning and decision making.</p> <p>1.2 Provide adequate strategic industrial land and zoned serviced business land to cater for industrial growth (job growth), as required in the most appropriate locations to ensure protection of competing land uses and physical constraints to development.</p> <p>1.3 Encourage a wide variety of industrial activities within the industrial zones, compatible with existing development.</p> <p>1.4 Ensure that at any time there are sufficient amounts of available land (zoned and serviced) for industrial purposes, and land identified for urban expansion for longer term industrial requirements.</p> <p>1.5 Encourage clustering of related industries to maximise infrastructure efficiencies.</p> <p>1.6 Implement strategies to identify opportunities to increase diversification of industrial activities.</p> <p>1.7 Permit home industries and home occupations (possibly without consent) in residential and rural areas, subject to appropriate controls in relation to size and scale.</p> |
| 2. Identify land that is appropriate for industrial development. | <p>2.1 Provide land zoned for industrial purposes as shown in Figure 6.1, using the General Industrial land use designation.</p> <p>2.2 Prohibit inappropriate land uses from locating on land zoned for industrial purposes.</p> <p>2.3 Provide a range of allotment sizes for industrial uses.</p> <p>2.4 Rehabilitate and make available underutilised industrial land for new development.</p> |
| 3. Ensure planning policy facilitates and supports business development. | <p>3.1 Ensure planning policy facilitates the establishment of new businesses based on the competitive advantages of the region, including providing access to major road and rail access routes, land, and separation distances from adjoining land uses.</p> <p>3.2 Develop a partnership approach between Council and business interests for the development of industrial land.</p> <p>3.3 Allow for a mix of related and complementary land uses in employment areas to provide services to local employees, while not undermining the key role and function of the area or zone.</p> <p>3.4 Develop policies and actions to attract and retain youth.</p> |
| 4. Ensure rail, road and air transport options supports the local economy, integrates land use planning options and is a sustainable network. | <p>4.1 Incorporate projected local and regional urban growth and economic activity into analysis of the need for future transport infrastructure.</p> <p>4.2 Ensure that the location and design of developments protect and maintain the function of State Government-maintained roads, freight, rail and shipping routes.</p> <p>4.3 Ensure transport planning and infrastructure decisions promote development in appropriate locations.</p> |
| 5. Ensure industrial land has adequate infrastructure. | <p>5.1 Industrial land should be capable of being serviced by all required infrastructure and utilities.</p> <p>5.2 Promote sustainable water and energy use in industrial development.</p> |
| 6. Prevent and manage land use conflicts. | <p>6.1 Prepare specific controls for industrial land uses and regulate them through the LEP or DCPs.</p> <p>6.2 Prevent potentially conflicting land uses from locating adjacent to industrial activities. Where this is not possible, manage the conflicts through implementation of development controls.</p> <p>6.3 Provide land use buffers to prevent land use conflict between industrial development and competing uses. Refer to the recommended buffer zones in Appendix E.</p> <p>6.4 Allow for expansion of industry when defining separation distances from other uses.</p> <p>6.5 Notify neighbours of significant industrial development proposals on adjoining properties.</p> |
| 7. Prepare and implement new environmental planning instruments for the LGAs | <p>7.1 Prepare a new comprehensive LEP in accordance with the Standard Instrument encompassing the relevant strategies and actions identified above (see also Chapter 15).</p> |
| 8. Prepare management guidelines for land uses in industrial zones | <p>8.1 Prepare a development control plan to support the LEP and provide additional detailed guidelines for development.</p> |

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In order to implement these principles it is necessary to protect any industrial or employment vision for key industrial lands unless there is strong evidence that the desired outcomes are not working over a significant time period through the economic cycles.

5.5 Buffers to Industry

In order to protect industry one common tool is the provision of recommended 'buffers' or setback between existing or potential industrial development and sensitive land uses (and vice versa). The Appendix to this Study includes the buffers adopted in the Subregional Strategy and these are general guidelines used in NSW (with some variation). They apply to broad industrial 'types' and may need to be increased or decreased for specific applications on their merits.

At the Stakeholder Workshop we specifically asked stakeholders the question of what buffers they thought were suitable – both from the perspective of existing residences and existing industries. It was common for people to ask for a larger buffer (generally in the order of 400-500m) between industrial and residential uses regardless of the use as this may align with their perceived need to protect their investments.

The Maps in the Appendix to this Study include a number of examples where we have tested the effect of creating buffers around existing residences and the amount of industrial land that is consumed if these buffers were to be properly implemented. In effect even limited residential development of Zone B5 or parts of Zone IN2 would effectively sterilise most of the southern industrial area from any significant growth of industry.

5.6 Ministerial Directions

The following Section 117 Direction makes it clear that changes to industrial planning controls or areas needs to be supported by a strategy that is approved by the Department of Planning.

1.1 Business and Industrial Zones

Objectives

- (1) The objectives of this direction are to:
 - (a) encourage employment growth in suitable locations,
 - (b) protect employment land in business and industrial zones, and
 - (c) support the viability of identified strategic centres.

What a council must do if this direction applies

- (4) A draft LEP shall:
 - (a) give effect to the objectives of this direction,
 - (b) retain the areas and locations of existing business and industrial zones,
 - (c) not reduce the total potential floor space area for employment uses and related public services in business zones,
 - (d) not reduce the total potential floor space area for industrial uses in industrial zones, and
 - (e) ensure that proposed new employment areas are in accordance with a strategy that is approved by the Director-General of the Department of Planning.

Consistency

- (5) A draft LEP may be inconsistent with the terms of this direction only if council can satisfy the Director-General of the Department of Planning (or an officer of the Department nominated by the Director-General) that the provisions of the draft LEP that are inconsistent are:
 - (a) justified by a strategy which:
 - (i) gives consideration to the objective of this direction, and
 - (ii) identifies the land which is the subject of the draft LEP (if the draft LEP relates to a particular site or sites), and
 - (iii) is approved by the Director-General of the Department of Planning, or
 - (b) justified by an environmental study (prepared in accordance with section 57 of the *Environmental Planning and Assessment Act 1979*) which gives consideration to the objective of this direction, or
 - (c) in accordance with the relevant Regional Strategy or Sub-Regional Strategy prepared by the Department of Planning which gives consideration to the objective of this direction, or
 - (d) of minor significance.

Figure 5: Section 117 Ministerial Directions.

6 RESIDENTIAL REZONING OPTION

6.1 Alternative Approach

If either Council still wishes to consider a residential rezoning option for part of the existing Study Area OR there is no substantial take-up and development of existing industrial land in five (5) to seven (7) years then we have put forward a Residential Rezoning Option and Staging Strategy.

We suggest the staged release of four (4) key areas in order to minimise impacts on existing and potential future industry until key sites (including the FCL/Linfox area and nearby existing industrial uses) have determined their future. See Southern Area Residential Option Two (2) Plan to this Report. The rezoning of these areas would depend on testing of the principles below and staging of the residential release as set out below.

6.2 Timing for Rezoning Investigation

As discussed in relation to the Trade Centre area (Areas 2 & 4) we have suggested that Council waits at least another 5 years and possibly up to 7 years before considering a rezoning application for those lands. This does not mean that a number of preliminary investigations cannot occur in the meantime. However, sufficient time would need to pass to make an informed decision that some of the precursors to the Industrial VISION (particularly in the southern area) are unlikely to occur in the medium to long term.

In relation to Areas 1 & 3 the delay until residential rezoning could be considered may be less than five (5) years because this land is unlikely to ever be utilised for large format industrial buildings and Area 1 forms a natural extension to the Hill Street residential area. However, this would need careful design of buffers and setbacks (within the residential zoned lands) to surrounding Zone IN2 areas and existing industries. For Area 3 one preliminary investigation would be the issue of contamination near the former Sale Yards and other uses and whether the costs of remediating any contamination would be prohibitive.

Please note that if the Residential Option is chosen then Council should immediately consider investigating alternative areas for industrial growth in accordance with the next Section and this process could take 3-5 years (or more) to achieve.

6.3 Key Principles for Rezoning

Key principles that would need to be considered prior to any consideration of residential rezoning would include, but not be limited to:

- a) All existing industrial users to be consulted on any residential rezoning proposals and any objections to carry significant weight (regardless of whether their existing consents allow 24 hour operations or would be classified as 'general' or 'heavy' industry – Attempts to be made to maintain 100-200m minimum buffer zones to these industries;
- b) Acknowledgement that Zone IN2 Light Industry permits 'light industry' and 'general industry' – so it is not limited to 'light industry' that does not impact on neighbourhood amenity – the onus is on any future residential uses to accept a degree of impact from industrial operations;
- c) Minimum 200m (and preferred 400m) setback to Environmental Treatment Solutions (due to the treatment of chemicals and potential for human safety issues);
- d) 100m setback to Marshalls Lane to protect this Regional Road and allow 24 hour heavy vehicle traffic to all industrial zoned land.
- e) 100m (preferred 200m) setback to Osman / Gerty Street to allow both 24 hour heavy vehicle traffic to all southern industrial land (FCL/Linfox site and existing industrial uses) and to allow industrial expansion along both sides of Osman / Gerty St and future adaptive re-use of former Abattoir site;
- f) 50-100m setback to Mid Western Highway frontage to allow for business opportunities that require high public visibility / passing traffic and to minimise traffic impacts on new residential uses in accordance with the *Development near Rail Corridors and Busy Roads - Interim Guideline*.
- g) No residential growth south of Hill Street both because of the existing flood zone and to protect the existing intermodal terminal and rail line to allow for any future growth (not just development but also frequency / intensity of use of the rail corridor);
- h) Consideration of use of steeper lands for residential expansion as these are less likely to be suitable for larger footprint industrial buildings. However, this will add to costs to develop this land and may make it less

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attractive than alternative sites. An indicative cost estimate for developing this land should be considered prior to any rezoning to maximise the potential the land would be marketable once rezoned;

- i) All contamination and remediation requirements are to be thoroughly investigated prior to any rezoning proceeding to Gateway Determination to determine viability of remediation for residential compared to industrial or business use;
- j) Assumption that Hill Street existing sensitive uses will not transition away from area in short to medium term so Hill Street will remain closed to heavy vehicle traffic;
- k) Council would need to identify, investigate, rezone and service potential new industrial lands in accordance with the Future Industrial Investigation Plan in this report and potentially provide additional Zone IN1 General Industrial Lands to replace the lands lost to residential rezoning (subject to a supply/demand equation that would provide a minimum of 20 years supply);
- l) Generally residential release is to be staged where it will take up the least suitable industrial lands and be setback the greatest distance from existing and likely future industrial areas.

6.4 Staged Approach to Residential Rezoning

As a result, the following order of rezoning is suggested in line with the above principles:

- a) **Area 1** – Slopes of hill to north of Hill St. Existing recently constructed dwelling. Extends Hill St residential area. Utilises slopes that are less suitable for industrial uses. Well setback (>100m) from Osman / Gerty Street and Highway. Needs to determine appropriate access point and servicing pattern;
- b) **Area 2** – Part of Trade Centre land and adjacent light industrial land. Well setback from Marshalls Lane; Osman / Gerty Street, and Highway. Around existing dwelling. Not a likely major thoroughfare for heavy vehicles on local roads. Needs to determine appropriate access point and servicing pattern;
- c) **Area 3** – Slopes of Church Hill that are less suitable for industrial buildings. Incorporates existing dwelling. Setback from Hill and Gerty Streets to minimise impacts on heavy vehicle traffic. Subject to remediation of former Sale Yards;
- d) **Area 4** – Additional Trade Centre lands assuming that in 5-10 years there has been no further take-up of these lands for light industrial or business uses. Setback from Marshalls Lane by 100m. Still buffered to highway by existing landscaped area. Removal of Car Wash may be a requirement.

7 FUTURE INVESTIGATION AREAS (INDUSTRIAL GROWTH)

7.1 Need for Future Investigation Areas

The previous Subregional (land use) Strategy did not identify any significant future investigation areas for industrial growth in and around the Town of Blayney. This may have been because at the time it was not warranted due to an over-supply or it may have been an over-sight.

There are several options when Council and the Community may need to consider the investigation of additional land for industrial zonings that may include:

- a) The Residential Option is chosen so Council should consider replacing any land lost to residential uses – ideally in areas that are buffered to existing/proposed residential uses;
- b) The existing vacant industrial lands are demonstrated to be incapable of supporting any significant industrial capacity due to site constraints combined with market forces that limit their likely development potential;
- c) There is significant take-up of existing industrial land and an insufficient supply of suitably zoned and capable land for a 20 year period.

We have set out indicative areas for Future Investigation for Industrial Expansion on this map (see Appendices) and also on the Title page.

Please note that it was not within the Scope of this Study to conduct anything more than a basic desktop analysis of 'Future Investigation Areas'. There has been no site visits or detailed site analysis and no consultation with land owners to test ideas or verify an interest in these areas being used for future industrial expansion.

7.2 Identification / Principles for Investigation

It is important to note that the identification of future investigation areas does NOT mean that these areas will be rezoned for industrial uses. All potential areas should be considered on their merits, even those where there is not currently a land owner willing to participate in its redevelopment.

This study sets out a number of key principles for identifying appropriate industrial land and protecting that land and also commences with a reference to principles set out in the *Subregional Rural & Industrial Land Use Strategy* (see Section above). Central to these is the principle of avoiding (or if not possible to avoid - minimising or mitigating) land use conflicts. In summary the Future Investigation Areas were identified for some or all of the following reasons:

- a) They are located on some of the flatter lands in and around the Town of Blayney;
- b) They are located adjacent to or in close proximity to the existing industrial area;
- c) They are located away from existing urban areas (though interfaces with existing rural dwellings still requires further investigation) and may have the potential to accommodate the desired buffers around the industrial area;
- d) They have proximity to an existing or future road network capable of handling heavy vehicles;
- e) They have the potential for connection to or expansion of existing utilities;
- f) The location of the land may either reduce their visibility from key roads/gateways to town or place them with high visibility (depending on the type and form of the industry/business);
- g) There are no major site constraints such as flooding, significant vegetation, or bushfire that may prevent the development of the land.

Note that these are generally site planning principles and does NOT take into account the economic and market feasibility of developing certain lands for a wide range of industrial uses. These investigation areas require detailed site planning and economic feasibility testing before they could be considered for rezoning.

We reiterate again that the rezoning of new lands for industrial use is a long and expensive process and will involve a significant commitment from the land owners, Council, Community and key stakeholders to achieve. It is expensive and requires significant investigation and study and expensive infrastructure. It can also take up to 2 years to achieve a rezoning (assuming it can be supported) and 5-10 years to development and service that land.

Therefore, rezoning should not be seen as a simple solution if existing zoned land is to be consumed for residential or other purposes.

8 BACKGROUND ANALYSIS (OPPORTUNITIES & CONSTRAINTS)

8.1 Study Area & Planning Controls

8.1.1 Study Area Boundary

The Study Area is approximately **~133 hectares** (including roads) and includes all of the lands located in an existing business or industrial zone north of the Main Western Railway in the Town of Blayney. It is commonly known as the 'North Blayney Industrial Area'. See the map on the Title Page and in the Appendix (A3 plans) – Study Area / Existing Zoning BLEP2012.

| Zone | Area (with Roads) | Number of Lots (2015) |
|----------------------------------|-------------------|------------------------------|
| IN1 – General Industrial | ~75ha | (excl. Church Hill) ~42 Lots |
| IN2 – Light Industrial | ~40ha | ~40 Lots |
| B5 – Business Development | ~9ha | ~20 Lots |
| B6 – Enterprise Corridor | ~9ha | ~32 Lots |
| Total Business/Industrial | ~133ha | 134 Lots |

Key boundaries are formed by:

- The Main Western Railway to the South;
- The Mid Western Highway to the East (except for a small extension down Maria Street);
- Low Street / Marshalls Lane to the West (except the former abattoir site and the former Australian Tanned Products site).

It is important to note that this Study will also briefly investigate the potential of lands adjacent to the Study area as Future Investigation Areas for industrial/business expansion. Most of these lands are in Zone RU2 Rural Landscape.

The Study Area does not include other key industrial sites including:

- The East Blayney Industrial Area including Sealink and the new Cadia Dewatering Plant; and
- The West Blayney Industrial Area for Nestle Purina.

It also does not include the recreation areas associated with Blayney Showground. However, there may be some discussion of how these areas and their uses relate to or are impacted on by the North Blayney Industrial Area.

Cadastre (lot) boundaries may have shifted since BLEP2012 created so map layers may not match lot boundaries in some locations. One recommendation is that, as part of any future LEP amendments, there is potential to update the LEP mapping to align cadastre and zoning boundaries and address any split zoning.

8.1.2 Zoning & Key Sub-Areas

The Study Area has several key zones (see Figure.2) and minimum lot sizes (see Figure.3) that were implemented as part of BLEP2012 to define the different character and desired development outcomes across the area including (see the Zone Land Use Tables and Land Use Matrix in the Appendices for more details):

Zone IN1 – General Industrial

- Purpose & Permissible Uses:** Designed to provide the greatest flexibility of industrial and warehouse uses including potentially higher impact activities (such as heavy industries, heavy industrial storage establishments, some sewerage system and waste facilities);
- Lot Size:** It has the highest minimum lot size for subdivision of 6,000m² to preserve larger sites for larger footprint buildings or building complexes (though some existing lots are smaller than this);
- Location & Slope:** This zone was generally set back from the Mid-Western Highway to reduce visual and other impacts at the gateway to the town and incorporates:
 - all of the land north of Marshalls Lane (~RL875-RL900);
 - lands west of Osman / Gerty Street and north of Hill St (~RL870-890) (Note that the zone was limited to RL890 in the south-east corner of Church Hill to limit visibility); and
 - the former abattoir site (~RL870-880);
- Visual Impact:** Zoning boundaries are set partly by visual impact and separation from the highway. This has pushed some Zone IN1 land towards the slopes of Church Hill which may be less viable for larger footprint buildings. The 'northern area' along Lawson Street is reasonably well sited to minimise visual impacts.

Zone IN2 – Light Industrial

- Purpose & Permissible Uses:** Designed to facilitate industries and businesses with lower impacts on medium lot sizes). It does not permit heavy industries but unlike Zone IN1 does permit bee keeping (bee export industry), rural supplies, highway service centres, restricted premises, service stations, wholesale supplies, and places of public worship;
- Lot Size:** It has an intermediate minimum lot size of 4,000m² to preserve some larger sites for larger footprint buildings and room for larger vehicle movements and storage (though some existing lot sizes are smaller than this). Lots are expected to be fully serviced;
- Location & Slope:** This zone is located south of Marshall Lane and east of Osman Street and the former Abattoir (excluding the Trade Centre and Enterprise Corridor (Community facilities/dwellings) land. It has limited frontage to the highway. It is generally located on the lower slopes that are flatter lands from ~RL870-890 (except for hill just north of Hill St).

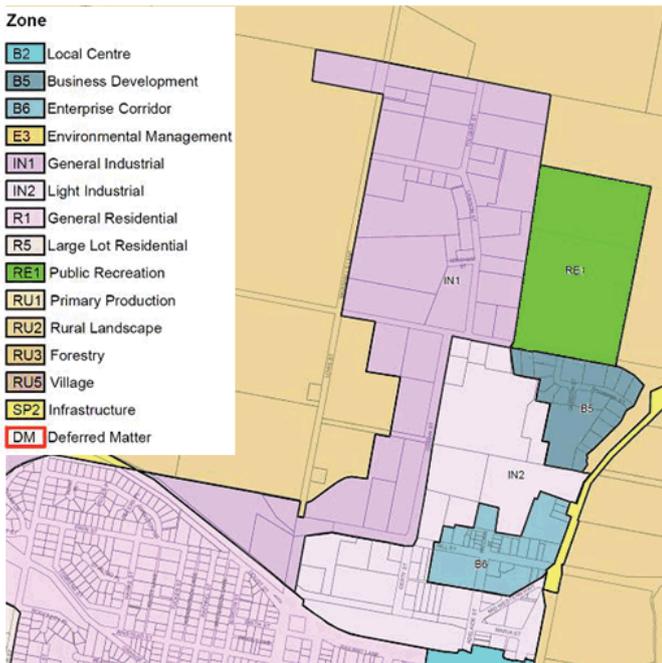
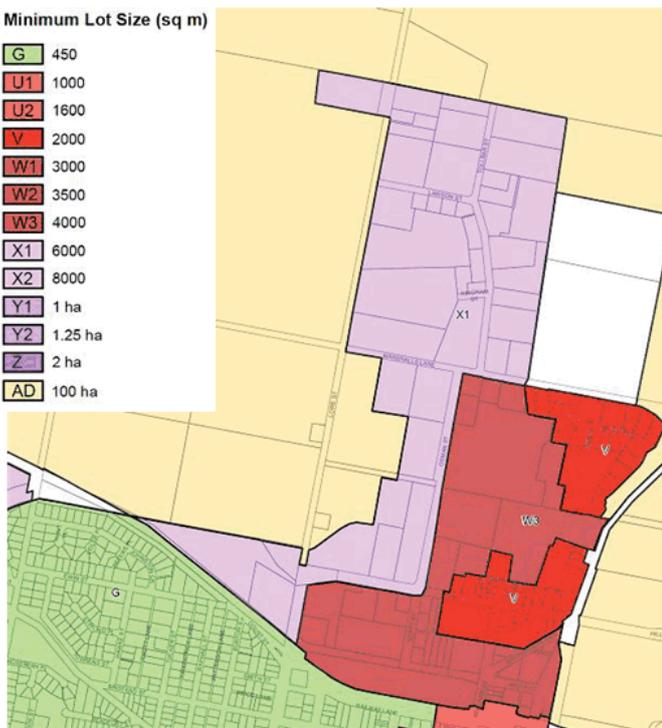


Figure 6: Land Zoning Map for North Blayney (BLEP2012 – LZN-004B).

Zone B5 – Business Development

- Purpose & Location:** Designed to facilitate the approved 'Trade Centre' that permits a mix of business and warehouse uses and bulky goods premises that require a larger floor area (compared to retail in the CBD) in a location that is close to and supports the viability of the CBD (without competing with the central business district).
- Permissible Uses:** This zone is different from Zone IN1 in that it permits less 'industrial' types such as funeral homes, bulky good premises, rural supplies and wholesale supplies (some permissible in IN2), child care centres, respite day care centres, health service facilities and educational establishments;
- Lot Size:** It has the smallest industrial lots size for subdivision of 2000m² that will permit small business lots that are more affordable where they are serviced by smaller vehicles or have alternative access arrangements. This suits the nature of the Trade Centre. Lots are expected to be fully serviced.



*Figure 7: Lot Size Map for North Blayney (BLEP2012 – LSZ-004B).***Zone B6 – Enterprise Corridor**

- 1) **Purpose:** Designed to recognise the existing community facilities and dwellings along Hill Street but provide some added incentive for this area to transition to a mix of businesses and industry. Permissible land uses are not supposed to compete directly with the Blayney Town Centre (Zone B2);
- 2) **Permissible Uses:** Unlike Zone IN1 and IN2 it provides for a range of employment uses (including business, office, retail (limited) and light industrial uses). It accepts that there are existing residential uses but seeks to provide a wider range of business uses for these properties to transition over time away from more sensitive land uses. In this way it can form a small service centre for the industrial area. It also permits group homes, seniors housing, residential care facilities, home businesses/occupations, home occupation (sex services), backpacker accommodation, bed and breakfast accommodation, highway service centres, service stations, transport/truck depots, child care centres, community facilities, health service facilities and educational establishments;
- 3) **Lot Size:** It has the smallest lot size for subdivision of 2000m² that will permit small business lots that are more affordable and recognises the existing smaller lot pattern associated with dwellings. Larger vehicle servicing on site is not expected to be required. Lots are expected to be fully serviced.

Why Not Expand the Industrial Zones?

Whilst a broader industrial zoning could have been applied throughout this area – visual impact and land use conflicts with existing dwellings and urban areas were key issues resulting in the use of Business ('B') Zones to act as buffers to these areas and the highway. In general there have been no requests to rezone the B Zones for industrial uses as most stakeholders recognise the sensitivity of the highway frontage and the flexibility in the existing zones for their intended uses. The light industrial zone was intended to create a buffer to Hill Street and the urban area south of the railway line. However, the more flexible Zone IN2 was used for the former abattoir to promote its adaptive re-use – though any future use would still need to address its limited buffer to urban land.

Why Not Combine the Business Zones?

There are some valid concerns that there is not a great deal of distinction between Zones B5 and B6. These are the only areas of Blayney Shire that utilise these zones and it is generally advisable to simplify zone categories and make them as flexible as possible. However, the zones were intended to recognise the quite different history and desired land uses (in 2011 when the LEP was created) in each area. The reasoning for these zones has not been questioned by any of the key stakeholders (except to seek conversion to residential uses). Instead, there is a discussion in the Key Sites Section about potentially increasing the number of land uses permitted with consent in these zones. In particular, consideration of expanding retail uses such as 'shops' in this area has been investigated but generally this has not been supported by the community as it conflicts with the main business area along Adelaide Street.

Why Not Reduce the Minimum Lot Sizes or Remove them Altogether?

An alternate approach to increasing flexibility could be to reduce the minimum lot sizes (MLS) for the industrial areas or remove minimum lot sizes altogether and allow the market to decide what lot sizes are suitable. There has been no feedback that the higher minimum lot sizes in Zone IN1 and IN2 have been restricting development. It must be recognised that there are existing lot sizes in both areas that are below the MLS and these create some flexibility if someone is looking for a smaller lot.

One solution has been used by existing land owners such as the O'Brien lot in Lawson Street where they have created a multi-purpose site with multiple users leasing smaller sheds - allowing for smaller users without fragmenting the sites if they need to be adapted in the future.

On the other hand there are suggestions that the lot sizes in the Trade Centre may be too small to attract larger operations and this may have played some role in reducing the market viability of these lots.

On this basis it is not recommended that the MLS is changed for these areas but Council should continue to review this issue. Further information is required on the lot sizes demanded by the market for land uses that would find the Study Area desirable.

8.2 Physical Features & Infrastructure

8.2.1 Location & Transport Infrastructure

The Study Area is located at the intersection of several key pieces of infrastructure and transport routes including:

- a) Mid-Western Highway – connecting Cowra to Bathurst and servicing a broad region of south-western NSW including key agricultural areas such as West Wyalong, Young, Grenfell, and Temora;
- b) Orange-Millthorpe Road is a Regional Road that connects the Mid Western Highway at Blayney back to the Mitchell Highway near Orange via Millthorpe;
- c) Main Western Rail Line – as the primary western rail line servicing western NSW with connections through to Parkes and Dubbo through Orange and Bathurst;
- d) Blayney-Demondrille Rail Line – an existing line that is no longer utilised that could provide an alternative route for freight to bypass the congested Blue Mountains travelling via Port Kembla;
- e) Marshalls Lane (primary access road to industrial precinct) is a Regional Road extending from the highway and down to the Intermodal Terminal via Gerty / Osman Street. It is the responsibility of the Roads & Maritime Services (RMS) and can potentially be maintained to a higher level;

The opportunities and challenges faced by these transport infrastructure types are considered in more detail below.

The location of the study area on key transport infrastructure creates potential for regionally significant and local industries and businesses, particularly those associated with transport and logistics as part of critical supply chains for agricultural, construction, and food manufacturing.

8.2.2 Topography, Views & Visual Impact

There are both opportunities and constraints relating to topography of the Study Area. Limited slope / flatter topography is critical to industrial and large format businesses due to the large building footprints and the need to avoid significant cut/fill and retaining walls or stepped building forms.

On one hand, Blayney's location along the Belubula river plain means that land close to the river is generally flatter land that requires minimal cut/fill/retaining. However, the centre of the area is dominated by Church Hill and its slopes where not only would there be substantial costs associated with creating flat development sites but the visibility and potential visual impact of these sites is greater. This explains why most existing industrial development is located along the railway corridor, highway frontage, or to the north of Marshalls Lane.

Church Hill has an elevation of approximately RL936. From a visual impact point of view approximate RL880-890 has been nominated as a limit to industrial development to allow 10-15m high buildings that would not exceed RL910 (water tank) level. However, there is still higher visibility up slopes of Church Hill and along the highway frontages that need to be managed. The slopes of Church Hill above RL910 can exceed 20-30% and are not likely to support any significant development.

There is also a secondary hill (unnamed) located between Church Hill and the highway (just north of Hill Street) that rises up to RL884 and has slopes in the order of 10-15% where industrial and large format buildings would also be less desirable / more expensive to construct.

The topography is a mixed blessing. On one hand flatter lands need to be prioritised for industrial use. It is important to note that the Trade Centre Site is some of the only remaining flat land with minimal constraints that is serviced so use of this land for residential purposes needs to be carefully considered against the difficulty of sourcing additional flat lands with good infrastructure and access. However, sloping lands around Hill Street and Osman Street may be better suited to residential use.

8.2.3 Watercourses, Flooding & Drainage

The Study Area has a number of drainage channels and watercourses that intersect with and cross the area, potentially affecting the viability of industrial activity and increasing the chance of water contamination from industrial activities spreading to the Belubula River system (see the attached Environmental Mapping).

The Study Area is particularly constrained by the presence of a drainage channel to the north of the FCL/Linfox site and south of Hill Street / St Joseph School that has also historically flooded during heavy rainfalls and is identified on the Flood Planning Maps in BLEP2012.

There has been a more recent flood study in 2015 that has provided more accurate mapping of flooding risks along this corridor and indicates that much of the low lying land along the watercourse near the railway line is affected by

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the 1% Annual Exceedance Probability (AEP) flood (commonly known as the 1 in 100 flood planning area) with depths of inundation from 1-2m. This is likely to be a key reason why the land along this corridor has never been fully developed. It has recently been raised as a matter that needs to be addressed for any redevelopment of the Church Hall site (see Key Sites Section). Raising levels through this area above the 1:100 flood level plus suitable freeboard is one solution but could exacerbate flooding downstream if not carefully managed and makes efficient access more difficult to achieve. Utilising flood prone lands for rail sidings may not be totally inconsistent if flooding is rare but it is an investment risk.

Any future development of land to the west and north of the former Abattoir would potentially require some significant on-site detention and piping of 1:10 year flows with 1:100 year overland flow paths to permit any substantial development of this area and reduce flooding towards the FCL/Linfox site. However, these works would be expensive and consume significant land and may have limited impact on flooding issues if the flooding is partly generated by the Belubula River and its tributaries backing up into this valley.

Potential methods to manage flooding can be further explored once the 2015 Flood Study is developed into a Floodplain Management Plan (when funding is available).

To a lesser degree there are also challenges and opportunities from managing stormwater and drainage across the rest of the Study Area. For example in the northern part of the Study Area drainage across the vacant Council land (70 & 126 Marshalls Lane) and across 6-8 Tollbar Street may warrant some on-site detention to minimise downstream stormwater issues.

There would need to be further flora and fauna studies to determine if piping of the 1:10 flows and removal or filling of drainage corridors is an appropriate environmental response to maximise development potential but on first glance the environmental qualities of these areas would appear to be low. However, there is some potential to create a green riparian buffer on the former Abattoir site south of the existing watercourse to the rail corridor to increase separation to residential development along Johnston Crescent and Ewin Street.

8.2.4 Road Access

- a) **Highway:** Direct frontage to the Mid-Western Highway is a significant opportunity for the Study Area as it avoids the need for heavy vehicles to pass through residential areas or local roads to get to the industrial precinct. However, access to/from the highway will always be closely controlled by the RMS and new access points restricted where sight-lines are poor and/or vehicle speeds too high. For this and other reasons, a number of access constraints are in place.
- b) **Marshalls Lane:** The primary heavy vehicle access to the highway is along Marshalls Lane. As stated above, part of this is a Regional Road (down to the Intermodal Terminal) that is the responsibility of the RMS and maintained to a higher standard. At this time the lane does not have direct frontage to any dwellings so 24 hour heavy vehicle traffic is less likely to have any significant impacts. It is also located to have good sight lines along the highway for entry/exit.
- c) **Hill Street:** Secondary access is along Hill Street. This path has a number of key constraints including more limited sight lines at the intersection with the highway; noise constraints due to dwellings and sensitive community uses along its frontages; and a school zone around St Josephs. It is not a preferred heavy vehicle route for these reasons.
- d) **Adelaide Street:** Adelaide Street diverges from the Mid Western Highway just north of the railway. However, owing to the intersection angles, poor sight-lines along the highway, and the same constraints as Hill Street to which it connects – it is limited to exit only and is not suited to heavy vehicles.
- e) **Radburn Street:** The more recent construction of the Trade Centre has provided a new access point to the highway along Radburn Street. This access is limited to left in with no exit so it is significantly constrained in terms of vehicle access. This intersection may need further review and discussion with RMS depending on the Trade Centre final uses.
- f) **Rail Crossing:** Another access constraint to the Study Area is the railway crossing and existing rail sidings and intermodal terminal. Due to limited rail siding lengths at the FCL/Linfox facility there are occasions when longer freight rail trains are shunted over the crossing before being returned to the intermodal facility. This blocks the highway and there are currently no reasonably direct alternative routes from the south. Also, if there were to be accidents at this rail crossing then access would be severed.
- g) **Alternative Routes:** Council has long considered the provision of a new alternative route connecting Marshalls Lane to the Orange-Millthorpe Road to provide an alternative access in the event of barriers at the existing highway/rail crossing. There is an existing dirt road that extends from Marshalls Lane to the Quarry entrance from Millthorpe Road but grade changes do not support heavy vehicles. Alternative 'bypass' routes have been

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tabled on flatter lands to the north of Church Hill but costs would be significant and would require State/Federal funding (long term likelihood only). The latest 'Northern Bypass' route is shown on key plans in this Study.

- h) **Defined Freight Networks:** As raised in the WRI 2015 Study, Council and the RMS / Transport for NSW should work towards an improved understanding of road transport issues in the LGA including barriers to high mass vehicles (HMV). Currently there are significant limitations to HMVs east of the Newell Highway. This may result in many larger vehicles de-coupling at key centres like Dubbo and continuing onwards but Blayney is unlikely to be a major truck distribution point. Whilst regional networks are critical – it is often the cost of getting products from major production points onto that regional network that significantly adds to transport costs and reduces economic viability. This is why the Study Area – with direct access to the highway and rail is well positioned. However, to improve agricultural supply chains it would require a regional study.

Direct access to the highway – particularly along Marshalls Lane – suggests that the area is well suited to industrial uses and heavy vehicle access. Any discussions about changes in land use need to recognise that compromising Marshalls Lane with sensitive land uses may severely restrict 24 hour operations and increase heavy vehicle impacts.

8.2.5 Rail Access & Intermodal Facilities

Blayney may have a unique opportunity to build upon its location at the intersection of the Main Western Rail Line the potential re-opening of the Demondrille Rail Line (subject to viability) and the Mid Western Highway (subject to a number of provisos).

There are existing facilities at Bathurst that could provide some competition with Blayney but no existing rail loading facility at Orange. Parkes is the nearest large scale public intermodal facility and is noted as a national logistics facility. In addition, the Orange Airport industrial proposal would most likely be in direct competition if this proposal included a future rail siding.

The intermodal facilities in Blayney are reasonably unique across the region. There are two existing facilities:

- the open (public) facility run by Linfox/FCL (within the Study Area) that is also used by Cadia for its existing dewatering plant and gold distribution; and
- the closed (private) facility recently opened on the Sealink site (outside the Study Area) that is expected to become operational once the new Cadia dewatering plant comes on-line.

At this stage there has only been a desktop study of rail access and sidings so there have been no discussions or accurate analysis of the use of these existing rail sidings, siding lengths, and constraints and opportunities for these sidings to be expanded with either FCL/Linfox or Cadia or Sealink.

There would appear to be 2 rail sidings in the FCL/Linfox facility. From aerial photos only it would appear that the primary siding diverges from the Main Western Rail Line just east of the former abattoir buildings and has an indicative length of ~650m to the highway crossing with an additional 80-90m over the highway crossing. The secondary siding diverges from the primary siding just west of the Cadia dewatering plant and runs close to Maria Street with a length of ~490-500m.

It is important to note that the Sealink Rail Siding completed in 2012 is approximately 1680-1700m long with access points at both ends to the Main Western Rail Line and a combined length of multiple sidings of 4 kilometres – one of the longest privately owned rail sidings in NSW (Western Advocate -24 May 2012). Therefore, the FCL/Linfox rail sidings are restricted to much shorter train lengths or trains must be broken into two sections totalling no more than 1100m. However, Linfox/FCL claims this does not affect the viability as freight trains over the Blue Mountains are limited by siding lengths over the mountains that are generally less than 500m. However, it could affect future freight along the Demondrille Railway Line

It is also important to note that the FCL/Linfox facility is located adjacent to existing business and residential zoned lands south of the railway line so there are potential land use conflicts that may restrict 24 hour operations. It is unknown if noise complaints have ever been made about the facility but it would be expected that expansion of hours or increases in activity / impacts would potentially be challenged by adjacent land owners or result in increased planning hurdles or conditions of consent.

It is important to ensure that proposals for growth of inter-modal and rail transport are considered in a regional setting and the economic viability is analysed (not part of this Study). However, recent reductions in operations of the FCL/Linfox facility raise queries about the viability of this facility. Increases in the rail siding lengths through the former abattoir site may create opportunities to increase viability but managing conflicts with adjacent residential uses to the south of the rail line may impact on 24 hour operations and higher impact activities. It may be difficult for the FCL/Linfox facility to compete with existing intermodal facilities including Sealink / Kelso / Parkes / future Orange Airport.

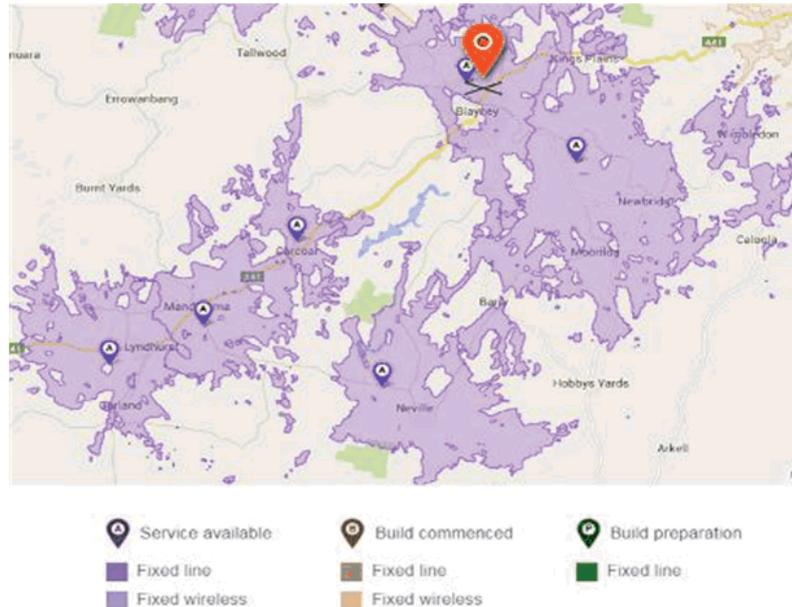
8.2.6 Utilities

The Study Area also has access to a number of significant utilities that are necessary to support more intensive forms of industry (particularly high energy consumers) including:

- a) **Natural gas** – branch from the Moomba to Sydney gas pipeline extends to Blayney Industrial Area but not all properties have access to the reticulated gas lines;
- b) **Electricity** – 11kV lines run throughout the industrial area and there is a large substation at the corner of Marshalls Lane and Osman Street (Essential Energy). However, the Study Area is not connected to the TransGrid 132kV high voltage electricity network – so it is limited to the 11kV low voltage supply. This may not affect most local industries but larger energy consumers may not have sufficient capacity. For example, Sealink and Blayney Frozen Foods appear to only be on 11kV lines. Carcoar Wind Farm only appears to feed into 11kV network. There may be capacity issues in the existing network. For example, Sealink has connected to the original lines to the former abattoir site and this may reduce future capacity on the former abattoir site.
- c) **Sewer** – Blayney Sewage Treatment Plant has some limited capacity for additional waste though industrial trade waste may require pre-treatment. There is a reticulated network through the majority of the Study Area though not all lots have direct access. However, there are also potential constraints on sewer as the Blayney Sewage Treatment Plan is designed primarily to service growth in residential demand. No in-depth analysis has been conducted of the demand and potential to service industrial sites but it would be expected to be limited. This can potentially be overcome by localised treatment facilities and is unlikely to affect smaller operations.
- d) **Water** – Potential for discussion about capacity of CTW system. All of the lands are located below RL900 and existing tank systems and there is a reticulated network through the Study Area. Whilst the CTW system has some additional capacity – this is also designed to accommodate urban residential growth rather than large industrial consumption so intensive water consuming industries may face challenges to secure water supply. However, recent initiatives to connect Bathurst and Orange water supplies are likely to address these issues for at least the next 20 years;
- e) **Telecommunications:** Compared to other parts of the Shire, Blayney has good access to mobile and fixed line communications. In addition, as of September 2015 – the NBN website (see Figure.4) indicates that all areas north of the railway line in the Study Area are capable of accessing fixed wireless high speed broadband for telephony and internet communications. Whilst there are other areas in the LGA with this access – they may not have the same level or combination of other infrastructure and resources as the Study Area.

However, it is important to note that this level of access to utilities is unlikely to differentiate the Study Area from other key competitors that are likely to have this level or higher of access to utilities (e.g. Orange Airport has similar or improved access with high voltage power lines and potential expansion of the STP/water supply).

Figure 8: NBN Fixed Wireless Coverage across the Region as at September 2015
www.nbnco.com.au.



8.2.7 Buffers to Sensitive Land Uses

One of the greatest constraints to the success of the Study Area in attracting, retaining, and growing industrial and employment activities is potential land use conflicts with sensitive land uses such as dwellings and community land uses such as schools.

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There are no prescriptive guidelines on appropriate buffers between different industrial uses and sensitive land uses. However, general 'Rules of Thumb' applied to higher impact industries are set out in the Appendix E to the adopted *Subregional Rural and Industrial Land Use Strategy – Final Strategy* (2008). This includes:

- a) 1000-1500m – High impact facilities such as Pharmaceutical and Biocide Production; Manufacture of Paints and Inks; Cement Production >150,000 tonnes per year; Wood fibre or Wood chip production; Production of artificial fibres and textiles; Industrial chemical production; Fabricated Metal Products > 1,000,000 tonnes per year; Rendering and casings works etc.;
- b) 500m – Moderate impact facilities such as Abattoirs; Sawmills; Structural or sheet metal production; Bitumen batching plant; Glass wool/Rock wool manufacturing; and Cement production 5,000-150,000 tonnes per year etc.;
- c) 300m – Leather and artificial leather production/tanning; Concrete batching plants; Cement production up to 5,000 tonnes a year; Chemical production; Dyeing or finishing of cotton/linen/textiles; Carpet backing with latex; Production of vegetable oils and fats; Flour mills; Manufacturing of milk products etc.;
- d) 200m – Wool scouring; Clay bricks/tiles/pipe refractories > 10,000 tonnes per year etc.;
- e) 100m – Smallgoods production; Bakery; Milk depot; Wood preservation plant; Joinery; Concrete or stone article production; Boiler makers, etc..

This Study has not conducted a review of existing industrial facilities and their buffer zones. However, the above uses would match many of the existing businesses suggesting that at a minimum a **100-200m buffer** would be needed to protect these industries from encroachment. For industries like Environmental Treatment Solutions a **400-500m buffer** would be preferable due to the higher risk from airborne chemical transfer if there are industrial accidents.

It is important to note that the quarry to the north-west of the Study Area would most like require a 500m-1000m buffer depending if there is blasting.

Recreation Facilities do not have a prescribed buffer zone and can potentially be compatible with industrial uses. However, they could potentially conflict with residential uses where they involve large crowds (Blayney Show and Trotting Races) or night time activities with light spill from high wattage lights (sporting activities and horse racing) then a 100-200m buffer would be preferable (or at least outside light spill and general noise radii).

Where there are existing Community Facilities & Dwellings there needs to be at least 50-100m buffers and minimisation of heavy vehicle movements, particularly during school zone times and at night time. The potential transition of these activities out of the Study Area is considered in more detail in the Key Sites chapter.

Similarly, the proximity of dwellings and sensitive urban uses to the south of the railway line is an issue for the growth and investment in the North Blayney Industrial Area – particularly sites within 200-400m of this interface (which includes any existing or future facilities using the Linfox/FCL intermodal terminal and the former abattoir site – dealt with in more detail below). This may also impact on future uses of the former Abattoir site as it is adjacent new residential development along Johnston Crescent.

Attempts have been made on the associated mapping to demonstrate the impacts of some potential buffers on industrial activity and growth.

Feedback on Buffers

There were also a number of discussions / feedback at the Stakeholders Workshop and in the Survey that indicated that both industrial operators and residential land owners generally favour larger buffers to minimise land use conflict. All of the Survey responses that addressed the question on setbacks/buffers (Q8) asked for buffers in excess of 500m between industrial and residential uses (regardless whether they were residential or industrial land owners). However, many existing dwellings/industries appear to be able to coexist with a 100-200m buffer.

8.2.8 Contamination

Contamination has not been assessed as part of this Study, however, it would be expected that several of the sites – particularly former sale yards and abattoir lands, would be contaminated. Industrial uses will generally have a higher threshold for acceptable contamination compared to residential uses – so contamination may not be a significant constraint. However, it would be good practice to have sites cleaned up to an appropriate level prior to sale and re-use for industrial purpose.

The historic use of the Trade Centre land (and large lots of Zone IN2 land to the south) is likely to have been rural / lifestyle but further studies would be required before it could be potentially converted to residential zoned land. Whilst the sloping lands around Church Hill may be more suited to residential uses than large format industrial buildings – contamination on these sites would likely be cost prohibitive to residential development

8.3 Other Opportunities

8.3.1 Economy Overview

In 2011, the Gross Regional Product (GRP) of Blayney was the 7th highest in the Central West, which considering its size in comparison to others is significant. In 2013/14 GRP was estimated at \$369 million (WRI 2015 Study p.13) with key sectors including:

- a) Mining – 26% value added / 21% FTE employment (significant growth 2006-2011);
- b) Agriculture – 10% of value added / 25% of FTE employment (some reduction 2006-2011);
- c) Food & Beverage Manufacturing – 9% of value added / 10% of FTE employment (some reduction 2006-2011);
- d) Utilities and Finance & Insurance Services the next largest sectors by GRP (Utilities in Study Area);
- e) Education and Construction the next largest sectors by employment (Construction in Study Area);
- f) Heavy and civil engineering construction and Administrative services have had significant growth 2006-2011.

The WRI 2015 Study identified a number of sectors as ‘key sectors’ in the local economy (some of which are directly relevant and other indirectly relevant to the Study Area) including:

- a) Tourism – Hospitality and Arts & Recreation (see section on tourism and recreation below);
- b) Food & beverage manufacturing cluster – F&B manufacturing; transport & storage; wholesale (see below);
- c) Agriculture (see below)
- d) Manufacturing – including non-metallic mineral manufacturing and fabricated metal manufacturing (see below).

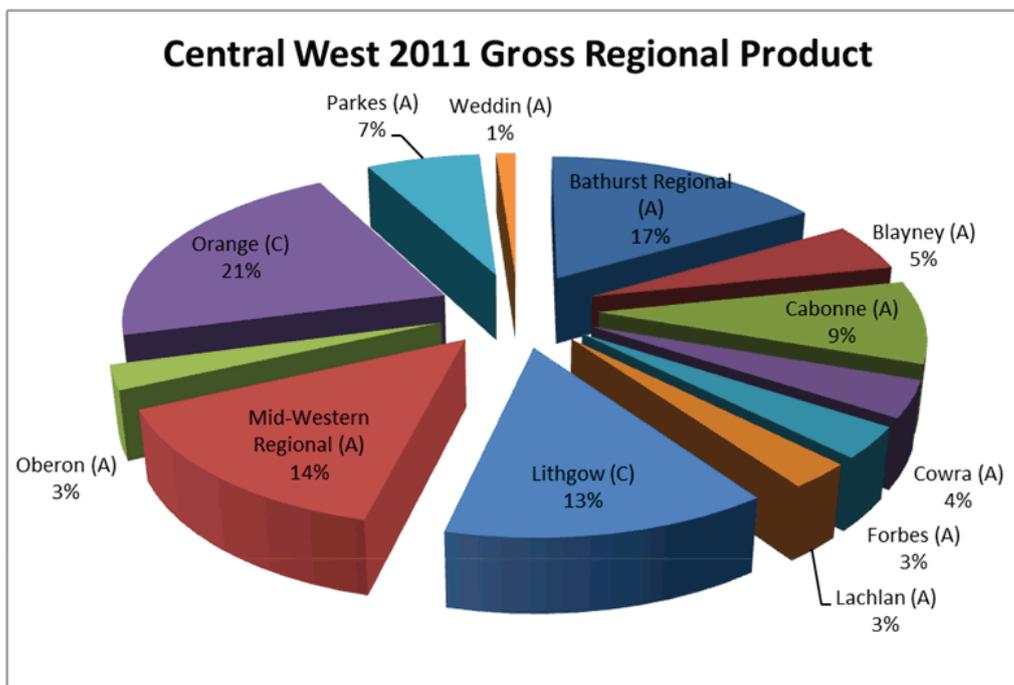


Figure 9: Gross Regional Product by LGA in Central West (2011 Census).

8.3.2 Investment Opportunity Overview

RDA and A.P Sheere Consulting prepared an Investment Opportunity Assessment in 2013 for each LGA in the Central West including Blayney Shire. Many of the findings (summarised in the excerpt below) are still relevant today to this Study. It is important to note that manufacturing, wholesale trade and construction made up \$72.8 million of contribution to GRP in 2010-2011 for the Shire (3 of the top 5 contributors) and together was nearly double the contribution of agriculture (\$34.9 million).



potential growth sectors and initiatives

- Mining – locally based mining support services such as logistics firms, equipment and personnel hire and general business support services.
- Alternative Energy – including wind farms, solar energy, geothermal, biofuels and bioenergy that harness waste from the traditional energy sector, are potential areas of opportunity.
- Advanced Manufacturing – e.g products with high levels of design, technologically complex and/or innovative products. The Manufacturing sector imported the most in terms of goods and services from outside the region indicating potential for growth in this sector and businesses servicing it locally. Light industrial and specialist manufacturers are also areas identified as providing growth opportunities.
- Wholesale trade – further development of support services.
- Health Care and Social Assistance – medical and other health care services; medical specialists; dental services; residential care services; child care services. The popularity of retirement villages is expected to continue as the population ages and living costs escalate in particular in metropolitan areas, making the need for an affordable place to retire more critical.
- Organic Agriculture - and alternative fruit crops such as hazelnuts, figs and feijoas. Cold climate presents opportunities for developing a niche wine sector.
- Retail trade – identify gaps in provision locally.
- Tourism – including the use of premises for provision of onsite entertainment, recreation (indoor and outdoor), function facilities, information, interpretation and cultural activities for visitors and the general public (National Tourism Planning Guide, TTF, June 2011). Examples include: tours, museums, wineries, golf courses and nature-based attractions, food and wine trails, development of conventions and events; sports tourism. Develop specific target marketing (e.g. Asia is the fastest growing tourism market in the world) and short term accommodation.
- Knowledge based industries – for example, Information media and Telecommunications, Communications, Finance, insurance, real estate and business services; Community, social and personal services.
- Small, Micro and Home Based Business – e.g. develop a range of programs which target sectors including trades, cultural and creative industries and school leavers. Initiatives include identifying industry champions, networking events, assisting with funding applications, development of cluster groups, 'Setting-up your own small business' programs, organising 'Career Development Days' with schools, producing a business newsletter, encouraging participation in business awards programs, assistance establishing online presence using social media (e.g. Facebook), ebay, etc.
- Niche industries: cold food storage hub, livestock yards and associated services all provide growth opportunities within the region.
- Facilities and services geared towards families including recreational activities.
- Facilities and services geared towards an aging population including aged care and residential facilities.
- The development of suitably targeted industry specific prospectuses should be considered plus the development of import replacement initiatives.
- Target workers who come to Blayney (predominantly from Bathurst, Cabonne and Orange) for employment encouraging them to become local residents as well as local workers.

Figure 10: Excerpt from RDA/ A.P.Sheere (2013) Investment Opportunity Assessment (Central West).

Table 8.0 Top 5 Industry Contributions to GRP, 2010 - 2011

| Industry | 2009 – 2010 % | 2010-2011 % | Contribution to GRP 2011 | % change |
|-----------------------------------|---------------|-------------|--------------------------|----------|
| Agriculture, forestry and fishing | 15.8% | 14.7% | \$34.9m | -1.1 |
| Manufacturing | 15.6% | 11.8% | \$28.1m | -3.8 |
| Wholesale trade | 7.6% | 10.6% | \$25.1m | +3.0 |
| Construction | 8.8% | 8.2% | \$19.6m | -0.6 |
| Transport, postal and warehousing | 7.5% | 7.0% | \$16.5m | -0.5 |

Note: Based on GRP at current prices. Source: ACOGroup (2012), A.P. SHEPHERD CONSULTING 2013

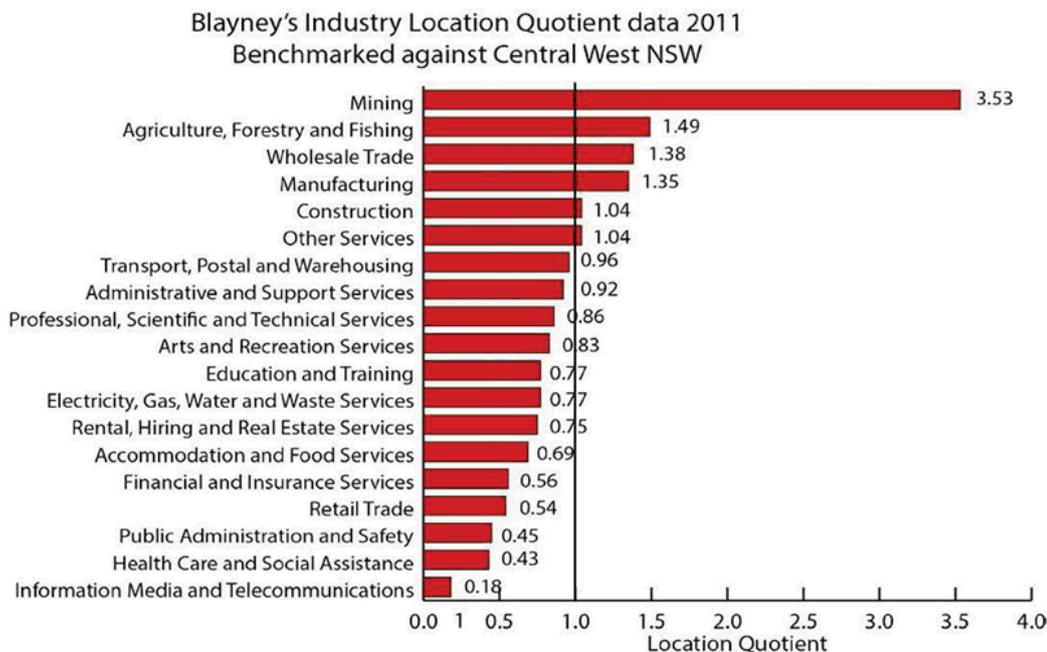
Table 8.1 Industry Sectors with increased \$value contributions between 2009-2011

| Industry | 2009 -2010 | 2010-2011 | Contribution to GRP 2011 | % increase |
|---|------------|-----------|--------------------------|------------|
| Wholesale trade | 7.60% | 10.60% | \$25.1m | 3.00% |
| Financial and insurance services | 1.80% | 4.70% | \$11.3m | 2.90% |
| Mining | 3.50% | 4.90% | \$11.6m | 1.40% |
| Administrative and support services | 1.40% | 2.50% | \$6.0m | 1.10% |
| Information media and telecommunications | 0.30% | 1.00% | \$2.4m | 0.70% |
| Professional, scientific and technical services | 2.30% | 2.90% | \$67.4m | 0.60% |
| Accommodation and food services | 2.60% | 3.00% | \$7.1m | 0.40% |
| Rental, hiring and real estate services | 7.60% | 10.60% | \$5.7m | 3.00% |

Note: Based on GRP at current prices. Source: Central West Regional Economic Profile, 2012, A.P. SHEPHERD CONSULTING 2013

Figure 11: Key Industry Contributions for Blayney LGA in 2011 - Excerpt from RDA (2013) Investment Opportunity Assessment.

The Industry Location Quotient graph below seeks to demonstrate that all industries above a quotient of 1 are sustainable (including Mining, Agriculture, Wholesale Trade, Manufacturing, and Construction) but those below may have a declining concentration (e.g. warehousing, utilities, and others) suggesting a longer term weakness and significant impact on Blayney’s economy if not managed.



Source: Central West Regional Economic Profile, 2011, 2012, A.P. SHEPHERD CONSULTING

Figure 12: Location Quotient Data showing industries with key strengths (>1) and weaknesses (<1) - Excerpt from RDA (2013) Investment Opportunity Assessment.

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In addition the RDA (2014) Central West Region Export Import Contribution Study corroborated many of these findings including recommendations to actively pursue and support the expansion of local business/industry in achieving import substitution opportunities where there is adequate demand to support growth locally (including professional and technical services; mining services; finance and insurance services; and logistics (warehousing; transport).

8.3.3 Agriculture, Rural Industry & Value-Adding

The value of agriculture at the 2011 Census in Blayney LGA was \$37.9 million (\$82.4 million with economic multiplier) – 9th highest out of 12 LGAs in Central West Region. However, Blayney Shire is adjacent to Cabonne (2nd highest at \$178.9 million); Cowra (6th highest at \$86.3 million); and Bathurst Regional (7th highest at \$56.1 million). This could provide opportunities for additional value-adding including rural industries and food processing – possibly centred around livestock processing, wool trading and cropping.

| 2011 Census | \$ Total Value of Agriculture in LGA | Economy Multiplier |
|---------------------------------------|--------------------------------------|------------------------|
| Lachlan | 260,950,970 | 568,559,974 |
| Cabonne | 178,937,867 | 389,869,824 |
| Parkes | 172,960,534 | 376,846,411 |
| Forbes | 172,794,147 | 376,483,887 |
| Weddin | 134,613,885 | 293,296,733 |
| Cowra | 86,350,471 | 188,140,405 |
| Bathurst Regional | 56,098,833 | 122,228,137 |
| Mid-Western Regional | 48,110,977 | 104,824,197 |
| Blayney | 37,830,379 | 82,424,830 |
| Oberon | 30,812,593 | 67,134,477 |
| Lithgow | 18,809,119 | 40,981,308 |
| Orange | 15,784,778 | 34,391,875 |
| Total Value of Ag Central West | \$1,214,054,553 | \$2,645,182,058 |

Figure 13: NSW Trade & Investment – Value of Agriculture (Source: 2010-11 Agriculture Census).

As Figure.10 shows below, livestock production is by far the greatest agricultural producer for Blayney LGA followed by wool and cropping but it would also be important to look at agricultural production in the catchment area of Blayney and this is likely to be more diverse.

| Type of Agriculture (2010-2011 Dept. Primary Industries) | \$ million |
|--|-------------|
| Livestock (total value) | 24.1 |
| Wool | 6.4 |
| Crops (total value) | 5.1 |
| Whole Milk | 2.1 |
| Horticulture – Fruit (Grapes) & Nuts | 0.9 |
| Horticulture - Cut flowers & Nurseries & turf | 0.4 |
| Eggs | 0.2 |
| Total | 39.2 |

Figure 14: NSW Trade & Investment – Value of Agriculture by Type in Blayney LGA (Source: 2010-11 Agriculture Census).

The development of the Central Tablelands Livestock Exchange (CTLX) is an example of the Blayney Region being well placed and centrally located for livestock production, sales and distribution. Whilst, CTLX is only currently serviced by road and there is potential to add a rail spur for improved distribution to export markets and potentially reduced freight costs.

The WRI 2015 Study has identified favourable opportunities in the agriculture sector in the beef market; increased farm productivity; Asian beef exports; marketing local beef; and utilisation of technology to create a vertically integrated beef cattle supply chain to Asia (and particularly China) with significant employment opportunities. However, in order to compete there would need to be large-scale partnerships that could deliver consistent high quality products and in reliable volumes and this is likely to extend well beyond the boundaries of Blayney LGA and goes to a number of factors affecting local farm productivity.

It is interesting to note that in 2015 there was a proposal for a new small stock abattoir at the Sealink facility that would demonstrate there is a demand in the area. However, this is unlikely to proceed due to, amongst other things, concerns about goat viruses). Anecdotal discussions with key players suggest that an abattoir (without goats) is still being considered for the future.

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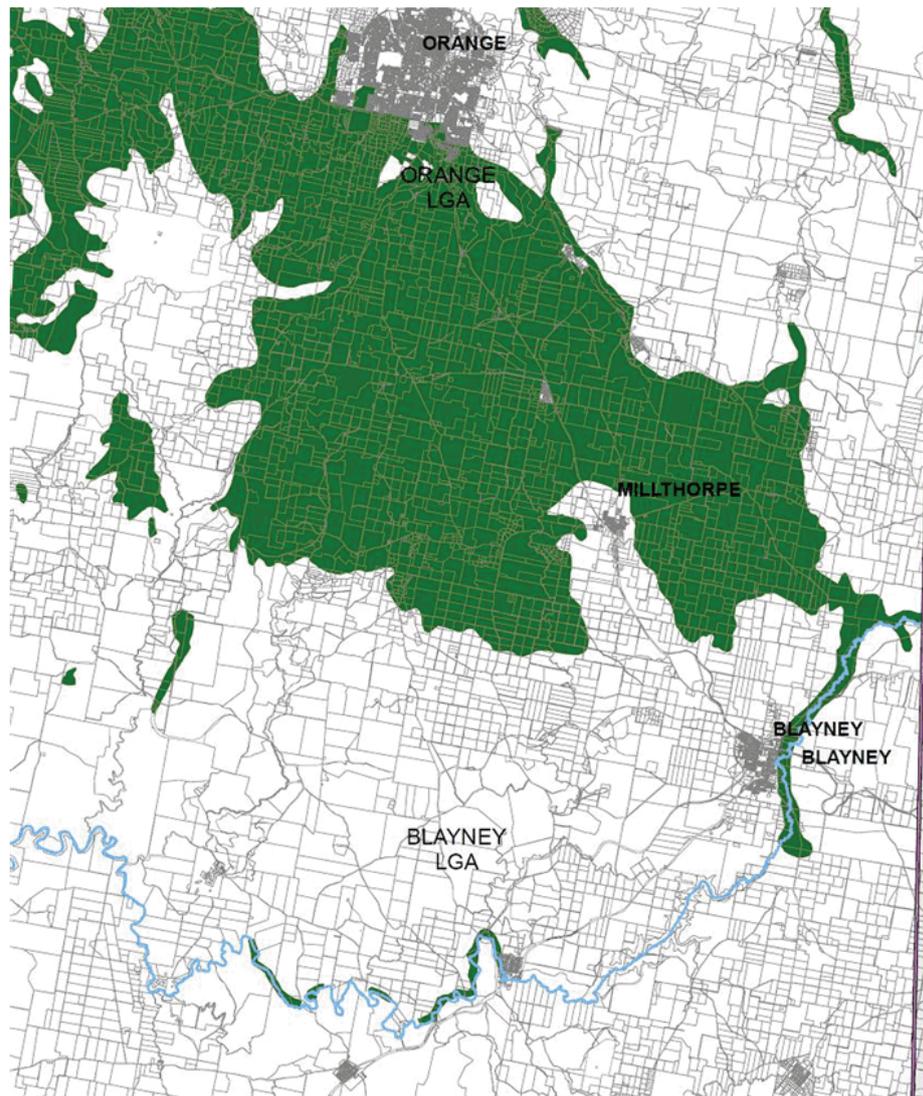


Figure 15 Excerpt from BSAL Mapping showing BSAL areas in Blayney Shire.

There are also a number of niche industries such as the Queen Bee Export business on Marshalls Lane. However, there are limited examples of collaboration or attraction of new businesses that would expand value adding in the agricultural sector. The Stakeholder Workshop feedback tended to suggest that most of the innovation is likely to be led by local industries rather than large new players.

The following is a summary of key points from WRI 2015 Study p.27-28 relating to agricultural opportunities and challenges including:

- a) Strong demand for quality meat products (particularly from Asia);
- b) Potential for Blayney to increase meat production (subject to increasing farm productivity);
- c) There are difficulties gaining entry to export markets and maintaining relationships and quality, and meeting the larger scale contracts with a small scale local market/collaboration between farmers.

Increasing agricultural productivity is outside the scope of this study – but leveraging off the CTLX facility and possibly any future meat processing works and frozen food facilities to prepare meat for export markets aligned with strong supply chains and transport infrastructure is likely to be a key component and requires further investigation.

NSW Agriculture, Department of Planning & Environment, CENTROC and RDA are currently investigating a number of ways to identify, protect, and enhance agricultural lands and associated industries. The Biophysical Strategic Agricultural Land (BSAL) Mapping (see map above) identifies the best quality soil, land capability, and water resource

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areas including land in the Shire (though these maps are currently primarily used in managing land use conflicts with mining and coal seam gas industries so they have not been further investigated in Blayney Shire as this conflict does not exist at this time).

It is interesting to note that most of the core BSAL lands in Blayney Shire are to the north, west and east of Millthorpe and include the Orange Airport / Spring Hill area (though BSAL mapping is unlikely to be a critical mapping to prevent the Orange Airport industrial area proceeding in the current planning process). Further discussion with NSW Agriculture is required to see if it may expand to other parts of the Shire with additional information/ variables.

The key stakeholders are looking to expand the BSAL mapping to identify Critical Industry Clusters that identify associated major rural industries and their catchments that require protection. CICs are concentrations of highly productive industries within a region that are related to each other, contribute to the identity of that region and provide significant employment opportunities. It is our understanding these have only been prepared for Hunter (again to provide protection from mining & gas industries). However, there could be potential to expand this out to the Central West (subject to resourcing and political issues with this sort of research) though there may not be any 'critical' industries in Blayney Shire that are under threat.

Engagement with NSW Agriculture, DPE, RDA, RMS/Transport for NSW, and CENTROC is highly recommended as they all working on the issue of increasing agricultural productivity and improving supply chains to get agricultural products to export and domestic markets. The Central West has the potential to continue being a 'Pilot' Study Area for these new studies and Blayney Council can leverage off this information and expertise.

8.3.4 Mining

General

Blayney Shire has a number of known and identified potential resource areas predominantly around metallic mineral resources such as gold and copper.

The opportunity and challenge is to be able to leverage economic opportunities in the form of direct investment by the mining company, growth in supporting industries such as metal working and mining equipment supplies, take-up of employees living in the Shire, increases in residential construction and employment, and economic multipliers for retail and other businesses etc.

However, Blayney needs to be practical about how much of this investment / value capture it can attract when it is competing with larger centres such as Orange and Bathurst that already have significant investment in mining related industries and the ability to provide larger well-trained staff as other mines move out of construction phases. A 'rule of thumb' is that up to 70% of workers are likely to prefer living in major centres within 45-60 minutes' drive of mines compared to 20-30% in smaller closer centres or rural residential areas closer to the mine (this estimate requires further research).

It is interesting to note that a number of mining support companies that service not only the region but also mining interests across Australia are increasingly setting up in the Central West / Orana as distribution networks improve and the costs of land are competitive. Blayney could position itself to attract some of these industries/businesses but it may also be an entrepreneurial opportunity for existing local businesses.

Cadia

Mining is already a significant part of the regional and local economies with significant infrastructure in the Town of Blayney in the form of the existing and proposed new Cadia Dewatering Plant and associated rail siding to transport gold concentrate to Port Kembla. Approximately 24 million tonnes per annum of ore is mined at the Cadia Valley Operations and it is pumped approximately 30km to Blayney where it is dewatered and loaded onto trains.

There is a current Major Projects approval and construction has commenced on a new dewatering facility at the Sealink site which has commenced construction and the existing plant to the west of the FCL/Linfox site is likely to be retained for standby processing capacity (though this will mean the Linfox/FCL intermodal is less likely to be used for gold concentrate loading). Cadia also appear to own land extending up to the gateway to the former abattoir but this does not appear to be currently used.

The dewatering facility operates 24 hours per day over two 12 hour shifts – 7 days per week. Container filling and train loading is undertaken between 7am and 7pm up to 7 days per week (*Environmental Assessment 2010 – Modification No.2*). Consent has been granted to increase throughput capacity to 300,000 tonnes per annum with a corresponding increase in train movements to five (5) per week. Approximately 6 staff are employed at the dewatering facility. This facility will only be decommissioned when considered redundant. Both facilities will need to retain suitable buffers to allow 24 hour operations.

Kings Plans / McPhillamys

There is also a proposal to develop the McPhillamys Gold Resource near Kings Plains only 8-9 kilometres north-east of Blayney and 29-30km south-west of Bathurst. This operation is now owned by Regis Resources (publicly listed company based in WA) that purchased the operation from Newmont / Alkane in 2012.

The McPhillamys project has a quoted gold resource of 73.2 tonnes. Regis Resource's website states that as at July 2014 the fall in gold price combined with some infrastructure issues (partly believed to be secure water supply) has meant the company does not anticipate progressing to a feasibility study in the 'near term' but will continue exploration to commence development 'at some time in the future' (www.regisresources.com.au).

Whilst it is not possible to determine when the economic and infrastructure challenges will change / be solved – it is believed to still be a viable project. From the date of gaining a bankable feasibility study it is an assumption that the mine could commence construction in 2-3 years. That would appear to suggest a minimum 5 year delay assuming no change in gold price in the next 2 years or this time period to find a sustainable water supply.

It is important to note the recent NSW Dept. of Premier and Cabinet & REMPLAN (Nov 2014) Infrastructure Services Impact Model: Blayney Shire Council (relating to Regis / McPhillamys Mine). This provided a brief analysis of the potential employment benefits / infrastructure impacts flowing from the potential mine including but not limited to:

- 190 construction workers / 150 operational workers
- 9 additional service workers during construction / 7 during operations
- \$112,507 direct and indirect impacts on infrastructure per year for the life of the project.

This highlights the opportunities of economic modelling to predict benefits and impacts from development scenarios. However, this in only simple input-output modelling and improved modelling is likely to be more accurate.

Kempfield Silver Mine (Trunkey)

There is also a current exploration project at Kempfield Silver Mine near Trunkey Creek owned by Argent Minerals. It is currently expected to yield 21.8 million tonnes / 52 million ounces of silver equivalent (www.argentminerals.com.au) but may also be dependent on increases in mineral prices. It could be expected that Blayney / Bathurst would be a key service point for this mine. There are no estimates in time when this mine may become operational.

8.3.5 Blayney-Demondrille Rail Reopening

The reopening of the Blayney-Demondrille Railway Line would be a transformational project in terms of movement of freight from western and Central NSW to the Sydney and Port Kembla ports and domestic markets and Blayney would be well positioned to take advantage of this opportunity. The barriers to freight movement over the Blue Mountains are considerable and this alternate route provides significant opportunities.

A number of key NSW Government documents (see Studies Chapter) place significant weight on opening up access to ports, increasing export potential, and shifting freight from road to rail. However, it is generally only regional studies that have identified the Demondrille Rail Line potential and as yet the process for reopening has stalled. Whilst an Expression of Interest was put out by Government to reopen the line the tenders were lodged and considered but all were rejected or the process has stalled. Anecdotal evidence suggests that the reopening would not be viable without significant investment from Federal/State Government.

It is not possible to put an accurate likelihood or timeframe on the upgrade and reopening of the Demondrille Rail Line at this current time. However, knowing the size of the project and the recent difficulties with the tender process – it may be reasonable to assume that at a minimum it may take more than 10 years (and possibly at many as 15-20 years) to achieve (assuming that it is economically viable and/or has significant Federal and State funding). Its viability could be substantially improved once the Inland Melbourne to Brisbane Rail Project is constructed but again this is a long term project.

These longer timeframes will make it more difficult for Council to justify maintenance of the larger industrial lands if there is no industrial growth in the intervening times. However, this project could rapidly change direction if the NSW Government quantifies the cost of significant congestion over the Blue Mountains and the reliance on road transport and identifies funding opportunities and as the Inland Melbourne to Brisbane Rail Project commences.

Further review of the physical and economic constraints and opportunities is required (See Studies). The RDA (2014) *Central West Region – Export Import Contributions Study* recommends that the region focusses on key infrastructure priorities and requirements for business and industry investments and actively participates in and promotes a co-ordinated approach to planning the region's export infrastructure.

It is very difficult to make decisions based on Council's current policy stand to seek to reopen this rail line when there are several significant hurdles to achieving this and possibly a 10-20 year timeframe. As this would be a transformational project it is certainly worth Council pursuing it – but Blayney could only really benefit from it if there is an expansion of intermodal freight and protection and enhancement of the existing industrial area.

8.3.6 Freight, Transport & Logistics

There is potential for increased freight, transport and logistics related businesses to build on the Study Area location in proximity to the Mid Western and Mitchell Highways, the Main Western and Demondrille Railway Lines, and its agricultural commodity catchment and mining related business. The development of the FCL/Linfox and Sealink/Cadia railway sidings and Nixon's Transport can potentially improve the efficiency and viability of freight transport to key ports and export/domestic markets.

The NSW Freight & Ports Strategy has a number of key goals that may influence the Study Area including, but not limited to:

- a) Doubling of freight over next 20 years in NSW to 800 million tonnes by 2031;
- b) Need to identify freight movements and network demand;
- c) Shift more movements to rail and improve productivity of the rail network;
- d) Foster intermodal terminal network development;
- e) Coordinate regional infrastructure and service provision;
- f) Manufacturing, minerals, meat and livestock, building and construction, and grain make up the 3rd to 7th highest volumes in 2011 (after coal and miscellaneous metropolitan freight) (Freight & Ports Strategy p.19);
- g) The Central West delivers over 7 million tonnes per annum to Port Kembla (another reason the Demondrille railway line would be a significant game-changer). The Central West has one of the largest volumes of freight in regional NSW (after Hunter and Illawarra) p.35;
- h) Containerised cargo from regional NSW for export is a 'natural' market for rail provided the network and logistic service providers perform efficiently and are cost effective;
- i) There needs to be improvements in access to Port Botany, especially for container movements.

This is further supported by the Central West Transport Plan, Price Waterhouse Cooper 2015 *Containerised Cargo Demand Assessment* and regional RDA Studies. However, there are a number of barriers to increased freight, transport and logistics (see Challenges below).

It is important to note the following outcomes of the PWC 2015 Study:

- a) The existing modal split in the region is weighted towards containerised road freight – IN 2015 64% of TEU travel by road and 36% by rail;
- b) Containerised freight by rail is dominated by grains; forestry products; general freight and mining outbound (all except mining outbound are not core Blayney strengths);
- c) There are currently 10 operational intermodal terminals in the Central West but only two are accessible to third party shippers along with one inactive intermodal and one proposed intermodal;
- d) Road freight tends to suit domestic markets better as the markets are too dispersed for a rail-based supply chain model to be cost competitive. Road freight allows consolidation of loads for multiple deliveries in one truck and routes can be adapted to minimise costs;
- e) Rail is considered a cost effective option at distances greater than 300km from port (Blayney would be within the 300km of Sydney Port); where it is transporting large volumes to centralised locations;
- f) Location of secondary processing of materials can determine the mode choice;
- g) Forecast of approximately 44,000 additional contestable TEUs in Central West by 2031 – however, the vast majority of these are grains and forest products (not currently core business for Blayney);
- h) There is scope for additional terminals in the region in the future but the core recommendations are at Dubbo and Lithgow (there are queries around the suitability of Lithgow);
- i) Triggers for new infrastructure investment will most likely be growth in containerised grain exports or mining inbound volumes (there are queries around the viability of mining inbound volumes);
- j) Thorough business case assessment is required for the success of intermodal terminals as long as attractive catchment areas;
- k) The Blayney Intermodal was supported by a group of three co-located manufacturers including Nestle / Electrolux creating high production volumes and freight flows but this supply chain model has dissolved as

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Nestle shifted to domestic markets and Electrolux closed (this needs to be rechecked with Nestle as their new wet factory may have a number of international inputs and outputs);

- l) This model demonstrates that groups of medium sized shippers can co-ordinate volumes to support a terminal – especially if food manufacturers in the region re-orient towards export markets;

These findings are supported by discussions with the Regional Manager of FCL/Linfox who stated that:

- a) Local volumes through the Blayney Intermodal were of insufficient size and irregular in volume that it was difficult to align with the requirement to purchase a defined space on a regular train;
- b) Local consumer goods which make up a significant regional volume of TEUs have moved to road transport or are no longer required e.g. Email/Electrolux & Myer;
- c) They looked into timber products to supplement volumes but proximity to Blayney’s urban area may complicate any on-site timber treatment (this has not yet been tested).

In late 2015 and early 2016 a Regional Intermodal Terminal Taskforce was set up by Transport for NSW headed by Mr Ken Gillespie. There were regional meetings of the taskforce (including Parkes) and some questions raised at this meeting were around the PWC 2015 Study. Anecdotal evidence is that some of the findings of the PWC Study are under review and may not accurately reflect the reality of regional intermodal viability (see some comments above). However, from general principles the key recommendations do align with feedback from Linfox/FCL. The findings of the taskforce are due out later in 2016.

All of the factors appear to suggest that a large scale intermodal terminal at Blayney FCL/Linfox site may not be economically viable in the short to medium term based on containerised demand up to 2031 (15 years)(subject to detailed study). Factors weighing against Blayney include:

- it is less than 300km from Sydney;
- most of the local and regional products are not traditionally containerised by rail;
- Cadia already has an alternate siding for its gold products & Sealink/Blayney Frozen Foods – a major potential distributor also has potential to use the new siding (but is not currently doing so in 2016);
- Blayney’s local industry is mostly for local or domestic markets;
- there is too much variability in quantity and timing to support train transport;
- there are additional barriers to rail movement compared to road;
- there is too much regional competition;
- the site is significantly constrained.

Reopening of the Demondrille Rail Line may not significantly affect this outcome. It would take a significant increase in the local processing of base materials or significant inbound mining product to provide additional local TEUs or Blayney would need to position itself for regional distribution of products/materials.

However, situations and economics can change and the existing intermodal is a significant piece of regional infrastructure. It would be worth protecting the lands that make up the FCL/Linfox site (and road transport connections to/from the site) from residential development for at least the next 15-20 years to see if their viability can improve. In the meantime a focus on road related transport and logistics may be more viable but would need to compete with major regional operators such as Finemores.

8.3.7 Construction & Mining Related Manufacturing

There is already a strong presence of construction and mining-related manufacturing businesses including steel and concrete fabrication, timber and sawmilling, and building / construction related companies that have sites in the Study Area. This includes larger operations such as Mid West Concrete, I.C.R. Engineering and Atlantic Civil.

Some like ICR and Midwest Concrete have developed from small scale local businesses whereas Atlantic Civil is a national company that needs a presence in the Central West for construction and distribution. As the WRI (2015) Study suggests – there is significant growth potential for some of these businesses but they are often held back by skill shortages and access to larger export/domestic markets.

However, the WRI 2015 Study identifies opportunities for industrial manufacturing to increase automation of metal product fabrication and manufacturing processes and expanding the range of products and the market they are sold to. This could include an automated pallet storage system. However, the WRI 2015 Study cautions that the manufacturing sector is reliant on external markets and less dependent on local factors with less capacity to assist these businesses at the local level.

There could be opportunities to target mining-specific fabricators and machinery providers if McPhillamys and/or Kempfield proceed but these mines could be several years away; Orange already dominates the market in terms of

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mining suppliers associated with Cadia, and the industry is very cyclical which can have major effects on a small town like Blayney. On the positive side, mining industries in the Central West can service the entire Central West / Orana and mining is expected to increase over the next 10 years (subject to macro-economic factors). Blayney's strength is likely to lie in local manufacturers targeting regional construction in niche industries such as concrete and steel products. There are also a number of local builders who utilise sites for storage and depots for machinery. There is a need to foster smaller businesses that have smaller site requirements. Sites like 40 Lawson St (O'Briens) are necessary because multiple tenants can lease smaller sheds with no land holding costs and greater efficiencies of land use. Conversion of a few of the larger sites with multiple tenancies/sheds and available services could foster smaller local and start-up businesses if available (market not determined). There are several newer sheds currently vacant that will suit this potential.

8.3.8 Food & Beverage Manufacturing

The Study Area and other industrial areas in Blayney already support a number of food processing, warehousing and distribution facilities including Blayney Foods; Sealink Frozen Foods; and Nestle Purina Pet Foods. This broadly indicates that food processing is a viable economic enterprise in this location.

The WRI 2015 Study recommends that Blayney may have potential to create a Food & Beverage Manufacturing Cluster with high level food manufacture value adding. This is one of the most likely areas to generate a stronger economy and significant growth in employment.

The WRI 2015 Study p.25 makes a number of relevant findings including:

- a) Potential value adding in food manufacturing could include cooking, flavouring, packaging and branding of basic food products (e.g. Nestle Purina pet food products) and could include par-cooking, prepared meals and long-life packaging;
- b) Low level value adding is common so high level value adding may be needed given the strategic location of Blayney to inputs, markets, transportation and infrastructure and synergies with supply chain operators;
- c) Export markets are the key opportunity and would need experienced people to facilitate new trade agreements and open up new markets and provide improved supply chain control and consistent volumes;
- d) Given the difficulty of establishing large operations, niche manufacturers were more likely to develop in the region (this suggests that larger volumes for rail transport are unlikely to be achieved);
- e) Growth in the transport industry will be heavily tied to growth in the food industry so targeted assistance to niche food manufacturers may have significant economic flow on effects.

Again, the food & beverage market is highly competitive (particularly in the Central West where there are major operators in Bathurst, Lithgow, Cowra, Forbes, Manildra and Parkes. Blayney's strengths may be associated with livestock products and high-value meat products. However, these are usually associated with abattoirs and this is a difficult industry and one where the recent application for a goat abattoir has demonstrated there is not universal acceptance.

8.3.9 Recreation & Tourism

The WRI 2015 Study highlighted a number of potential growth areas for the Town of Blayney associated with tourism and recreation. It doesn't go into detail, but it cannot be forgotten that the Study Area is adjacent to the Blayney Showground – a significant piece of recreation and potential tourism infrastructure that hosts the Blayney Show, trotting training and races, and other horse events as well as arrange of sports training and events.

Whilst the best use of the majority of Study Area industrial lands is unlikely to be tourism or recreation functions – there may be potential for some limited key sites to provide additional tourism infrastructure or support industries. For example, the Trade Centre lots that are closest to the highway are an important 'gateway' site and sufficiently removed from Zone IN1 General Industry to perhaps warrant a tourist accommodation opportunity such as a hotel or motel. This would in turn provide the opportunity to host larger recreation or sporting events at the adjacent showground resulting in improved facilities and potential to cater for a greater diversity of events. *Note that the economic viability of tourist accommodation in this location is not tested in this report. The current zoning does not permit tourist accommodation in Zone B5 – but an amendment is considered in Key Sites Section below.*

Again, competition for regional sporting infrastructure will be difficult with Orange and Bathurst having a broader range of higher grade facilities. However, costs at these facilities may make it more attractive to hold low infrastructure sports such as cricket at some of these facilities. This requires further review.

8.3.10 Colocation / Collaboration / Synergies

One of the key opportunities for Blayney industrial operators is to improve collaboration and synergies between different industries in the area to strengthen economic ties and communication, potential colocation for supply chain and transport efficiencies and potential by-product usage, and to create a critical mass of industry that in turn attracts new investors and industrial operators.

There are obviously already existing relationships between Cadia and FCL/Linfox and Cadia and Sealink that have created synergies for access to rail sidings for Cadia’s gold products. There may also be relationships between concrete and metal producers and fabricators for the creation of Mid West Concrete products but this is unknown.

However, anecdotally I am unaware of any formal forums, workshops, or regular engagements (other than potentially the Rotary Group) where businesses come together to raise opportunities and address issues. Successful entrepreneurs seem to operate fairly independently of each other and there are limited examples where synergies are developed, displayed and marketed.

Council should not be solely responsible for resolving the issues faced by the North Blayney Industrial Area. With its limited resources it should be seeking to facilitate the private sector in developing these synergies and letting the private sector and markets determine the best fits and opportunities. It is clear that a number of the existing business owners are innovators that have the ability to create opportunities and have a positive outlook. Their only limitation seems to be finding like-minded people to partner with so they are not solely responsible for delivering change.

Therefore, this Scoping Study suggests that Council could consider some key workshops and forums (possibly through a Business Chamber entity) and arrange some key speakers (possibly big industrial operators in Orange and Sydney) that up-skill the local operators and get them working together.

8.3.11 Sustainability & Renewable Energy Production

Wind Farms & Solar Energy are a significant resource for Blayney Shire and the Central West/Orana is the gateway for a number of major wind and energy projects. As the economy moves towards more take-up of renewable energy Blayney may have a number of opportunities.

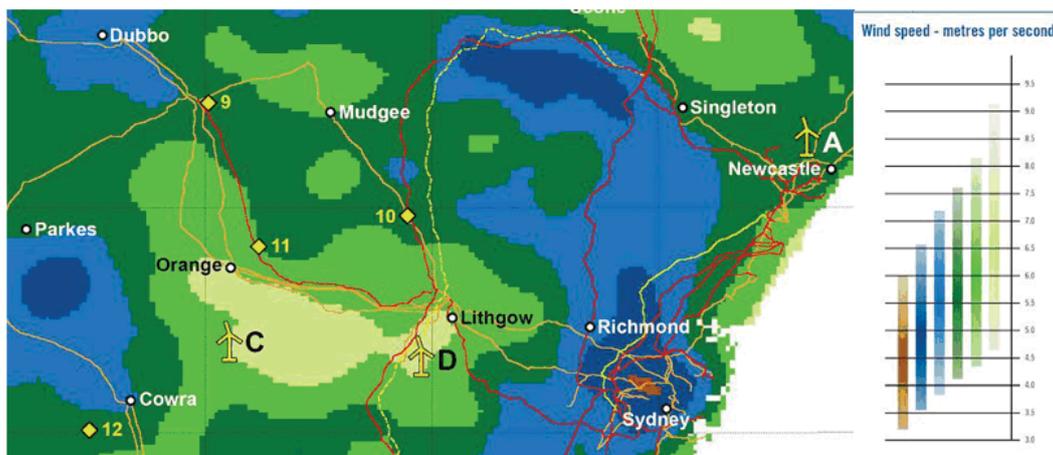


Figure 16: Excerpt from NSW Wind Atlas Map showing high wind speeds across Blayney LGA (Dept. Planning & Environment).

Firstly, the renewable industry provides the opportunity to generate electricity that can be purchased by industry (or they can run their own renewable energy farms) to increase their sustainability and balance their triple bottom line. This could be of particular interest to large energy users such as Cadia and Sealink / Blayney Frozen Foods and other energy intensive industries.

Very few of Blayney’s large industrial sheds currently have photovoltaic panels for electricity generation even though there are massive surface areas – many with north sloping roofs. Anecdotally George Tanos has been talking about adding solar to the Blayney Frozen Foods shed in Tollbar / Lawson St and with decreasing PV prices this should be encouraged by Council. Where there are large vacant parcels with sloping land (such as the Timber site) then this could also be considered for ground arrays.

If Blayney’s industries were to offset most of their carbon production with clean energy initiatives then this could create a significant market point of difference (though the added expense needs to be considered to ensure viability

and determine there is a market for the eco-industrial products). As time evolves more industries will need to evolve towards reduced energy and water consumption and improved 'green' credentials that are appropriately benchmarked.

Secondly, whilst the current scale of production is limited there may be some opportunities for local industry to collaborate with key component producers to construct, service and maintain wind and solar infrastructure locally with an appropriately skilled workforce. These skillsets could then be outsourced to large industrial players such as Infigen and First Solar for regional and national projects. The Central West could foster relationships with key research institutions (such as UNSW Sustainable Energy Research Faculty (Tyree Building)/ Australian Energy Research Institute) and local universities / colleges.

Thirdly, one of the potential by-products of agricultural production is bio-fuels which in turn can produce bio-energy. The Cowra Community (Clean Cowra Inc.) is currently looking at ways to create a bio-fuel scheme that turns Council sewage and agricultural crop by-products into energy. Cowra Council has invested in this project. Blayney has similar opportunities and could potentially collaborate with Cowra to expand the supply chains and utilise its own waste streams to supplement this project. It could eventually consider having significant off-grid facilities or communities run by these schemes. Waste products from a future abattoir could potentially be a biofuel opportunity.

Fourthly, there may be current and future opportunities for waste and by-product streams from different industries to become inputs for other industries and co-location of compatible industries and businesses that can benefit from these products. It would be interesting to see if significant energy consumers like Cadia and Sealink have actually looked at opportunities like co and tri-generation of power to produce electricity, cooling for refrigeration (e.g. Blayney Frozen Foods / Sealink), and potentially heating for offices and homes in Blayney.

Whilst this is just a number of ideas or 'thought-bubbles' – there are specialists in renewable energy production that could be introduced to the industrial community to foster new ideas and methods of production to build on existing renewable energy production in the area.

However, we take on-board that 'Technology Parks' are not a new idea and there are other attempts to provide these elsewhere. For example, Bathurst has the Technology Park adjacent to the University but has been unable to secure an anchor tenant (according to the Trade Centre owners). However, their model was more around manufacturing of computer parts and technology rather than servicing renewable energy.

8.3.12 Infrastructure Management

It is important to recognise that three of the key users of North Blayney Industrial Area are Blayney Council; Central Tablelands Water, and Essential Energy – all with depots, and some with offices and major infrastructure like sub-stations in this area. They are probably some of the largest current local employers and have significant trained staff. Unfortunately, Blayney is not located on TransGrid high voltage lines but these local services are important.

These authorities currently (and more likely in the future will) undergo changes in their workforce and roles particularly with increased privatisation of functions and amalgamations (see Amalgamation Section below). The challenge will be to avoid losing the employees and their skill bases from the region.

There may be opportunities as part of any downsizing/amalgamation to take advantage of location and infrastructure to develop infrastructure crews and machinery at Blayney that can be outsourced for regional projects. For example, outsourcing of road building machinery and road crews may be a way to maintain those sites. Electricity authorities may be interested in outsourcing line crews or water supply repairs.

Whilst it is difficult to envisage how these traditional agency models could adapt without government / community funding – the concept of shared services and business models espoused by the WBC Alliance may offer some alternatives for entrepreneurs.

8.3.13 North Blayney Development Control Plan No.1 (1996)

Council is aware that the North Blayney Development Control Plan ('old DCP') is considerably out-of-date (20 years old) and does not integrate with the current Local Environmental Plan (2012) in its terminology and its sub-zoning. In this way there is an opportunity to use this report as a basis to prepare a new DCP for the future intended uses of this area and provide clear guidance and planning processes to facilitate additional take-up.

It is unlikely that the old DCP is causing any significant barrier to industrial land take-up as Council has a very flexible approach to its application and there are not many strict / numerical controls in the old DCP. However, the old DCP does not align with or support the vision for this area. In particular, the creation of 'sub-zones' in the DCP – particularly those associated with residential and community uses could be perceived as compromising the industrial

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area and its growth as it suggests new dwelling can be constructed and only home industries will be permitted and in the industrial sub-zone heavy uses must be 100m from the residential sub-zone.

It is advisable that where there is a clear direction for some of the 'key sites' in this report – that site-specific DCP chapters potentially provide a 'concept' plan for those sites to guide future development. This does not necessarily need to restrict use – but can indicate existing environmental characteristics to be retained/enhanced/addressed, preferred vehicle access/egress point(s), built form and massing considerations, and manage land use conflicts/interfaces with neighbouring sites etc.



Figure 17: Excerpt from North Blayney DCP showing 'sub-zones'.

8.4 Other Challenges

8.4.1 Competition & Transport Infrastructure

A weaker local economy, competition and lack of supporting infrastructure are the key threats / weaknesses for the North Blayney Industrial Area. Competition from other sites that may have improved infrastructure and economic viability is addressed in several of the following sections but includes:

- a) Bathurst & Orange Industrial Areas;
- b) Orange Airport Project;
- c) Existing Regional Rail Intermodal Terminals.

As the graph below demonstrates, the Blayney LGA is not one of the stronger agricultural producers (9th highest out of 12 LGAs in Central West in 2011) and has one of the smaller economies of the Central West Region (but on a per person basis it is likely to be relatively efficient).

Due to a perceived lack of diversity in the local economy (compared to some of the regional cities) the Shire is also vulnerable to a wide range of macro and micro economic factors (for example, in mining and agricultural production fluctuations) but it is better placed than many regional centres including some larger settlements.

8.4.2 Bathurst & Orange Industrial Areas

Due to its location, Blayney will always have to compete with the industrial opportunities associated with the two largest Regional Cities in the region – Orange and Bathurst. With improvements in transport – there has been increased centralisation of services and employment in major regional cities and smaller centres within 20-30 minutes' drive often become commuter centres. Orange and Bathurst are located on the same or similar road and rail connections. These cities also have sufficient size of population and economy:

- a) To attract the larger industrial operations;
- b) To provide / attract / educate more highly skilled employees;
- c) To provide scale, critical mass and synergies between industries for increased efficiencies;
- d) To create large industrial estates where land use conflicts can be managed;
- e) To have similar or improved access to utilities including high voltage electricity, gas, water and sewer.

Therefore, in order to compete, Blayney may need to offer a point of difference potentially including, but not limited to: reduced land and development costs (where possible); less restrictions from planning controls (where appropriate); synergies with existing businesses; access to a rail siding for cheaper transport (particularly to export markets); and proximity to agricultural supply chains.

Whilst the GHD (2008) Subregional Rural and Industrial Land Use Strategy reviewed some of these issues at a sub-regional level – it was based on 2006 evidence that is now 10 years old. It is due for a review and this offers the potential to review Bathurst's (outside area) and Orange's existing industrial areas and identify potential target industries that may be looking to relocate to an alternative site. However, if Orange amalgamates with Blayney then a different approach to this strategy is likely.

This report does not look at the supply and demand for industrial land in other centres. However, anecdotal evidence during presentations on the Orange Airport Project (see below) suggest that Orange is quickly running out of suitable industrial land that can provide 24 hour operations with minimal land use conflicts including Narrambla, Leewood and Clergate. In 2016 there have been rezoning proposals to convert some industrial land associated with the former abattoir north of Orange (Clergate / Charles Sturt University) to residential – further exacerbating this issue.

8.4.3 Orange Airport Project

In 2015 Orange City Council proposed to rezone lands surrounding the Orange Regional Airport for industrial and business uses. The Planning Proposal was approved by Council and forwarded to the Department of Planning & Environment. A Gateway Determination was provided but a number of conditions needed to be satisfied before it can be publicly exhibited including consultation with Blayney and Cabonne Councils.

The proposal seeks to capitalise on air-related business/industries immediately adjacent to the Orange Airport and on recent significant upgrades to the runways and their extensions for larger planes as well as the passenger terminal. The proposal seeks up to 200-220ha of industrial and business park area around the airport and to the north adjacent to the Main Western Rail Line. Proximity to the rail line opens up the possibility that future development could include a rail siding and/or intermodal facility.

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This project poses particular threats to the Study Area as follows:

- a) Proximity of the Proposal to the Study Area means it is likely to directly compete with the Study Area for similar industrial and business park activity;
- b) Proximity of the Proposal to Orange may improve the attraction of the Proposal to new industries and it has closer proximity for workers to a Regional City which attracts more highly skilled workers;
- c) The potential for a rail siding and inter-modal terminal is in direct competition with the existing terminals at Blayney and would duplicate this resource and increase competition – one of Blayney’s key points of difference to industrial land in and around Orange;
- d) The lands around the airport are generally flatter and may reduce costs for new large format buildings and are also perhaps more suited to a longer rail siding / inter-modal terminal;
- e) The Airport has the added potential of synergies with air transport and related support industries as key tenants;
- f) Orange is running out of suitable industrial land that allows 24 hour operations with minimal residential constraints so the Airport project is highly likely to proceed;
- g) The co-location of industry around airports has the added benefit of reducing encroachment by sensitive land uses and enhancing air safety, reducing noise impacts, and potentially improving security.

However, the presence of another freight intermodal terminal in the region focussed on the Main Western Rail Line may add additional weight to the argument to reopen the Demondrille Rail Line.

The key issues facing this development would appear to be community concerns about development in the water catchment for Suma Park and sensitive groundwater areas, impacts on and growth of Spring Hill (community opposition), impacts on neighbouring land owners, water and sewer security, and appropriate heavy vehicle access back to the Mitchell Highway and Orange with minimised traffic impacts on sensitive uses. These all appear to be surmountable with engineered solutions. In addition, the development will take-up land identified on BSAL Agricultural land mapping but this is likely to be outweighed by the fragmented land ownership in this area and the economic benefits of the industrial operations over agriculture (see Section 5.4 above).

The proposed rezoning has recently been reduced from ~300 ha to ~200 ha. However, this is still substantially larger than the existing zoned industrial and business land in the Blayney North Industrial Area (~138ha).

If the rezoning were to proceed in the next few years then it would be expected that the first stage would be the industrial area to the south of the airport terminal with a focus on air related industries. Orange City Council believe they can attract operators like Toll who would provide a helicopter retrieval service for NSW Ambulance that would service the region. It may also include new fuel facilities for rental cars.

A critical aspect of competition is the potential for a new rail siding alongside the Main Western Rail Line that would create opportunities for a new intermodal freight facility. There is no information on whether an intermodal facility in this location would be viable. The rail line here is relatively straight with potential for a 2-3km siding with flat land adjacent and few environmental constraints. This may be a longer term project (10-20 years?) but would compete with Blayney if the Demondrille Railway Line ever reopened.

My preliminary opinion is that the Orange Airport Project is highly likely to proceed, it has fewer constraints compared to North Blayney Industrial Area (except for lack of a highway frontage), it has the potential for a greater rate of growth and critical mass, and it may directly compete with the Study Area for food manufacturing, agricultural industries, and transport and logistics. The key advantage that Blayney has is existing zoned and serviced land available now and for the next 5-10 years it takes to establish the Orange Airport industrial area. If Blayney cannot grow and strengthen its employment in this time then the competition may be too great.

8.4.4 Skills Shortages

The WRI 2015 Study highlights that there are skills shortages across the Region that make it difficult for businesses to expand. Having said that – the level of education in Blayney LGA is comparable or better than the averages in the Central West (but it may be less than in Regional Cities) (see WRI 2015 Study p. 17). In fact the Socio-Economic Indices for Areas (SEIFA) Index is quite high for Blayney (ranked No.92 in NSW out of 152 LGA) – comparable to Orange and just lower than Bathurst.

Consultation as part of the WRI 205 Study found that there were shortages of engineers, food technologists, and butchers in the food and beverage manufacturing sector and there were shortages of metal workers including fabricators, welders and sheet metal workers in the metal manufacturing industries.

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| Area | SEIFA rank | Postgraduate Degree | Bachelor Degree | Diploma (Advanced/ Graduate) | Certificate level | Total qualified | No qualifications |
|---------|------------|---------------------|-----------------|------------------------------|-------------------|-----------------|-------------------|
| Blayney | 6 | 1.5% | 10.2% | 10.1% | 28.2% | 50.0% | 50.0% |
| Orange | 6 | 2.6% | 12.8% | 10.5% | 26.2% | 52.1% | 47.9% |
| Cowra | 2 | 0.9% | 8.4% | 9.1% | 27.5% | 45.9% | 54.1% |

Figure 18: Tertiary Education Qualification by LGA (Source: Census 2011 / RDA 2013 Investment Opportunity Assessment).

As businesses have been unable to employ sufficient skilled workers to keep up with demand and, as a result, have had to move towards increased mechanisation and automation to provide consistent quality and supply. This is a missed opportunity for employment initiatives but may be inevitable considering quality control and efficiency of automated systems. More broadly there appears to be skills shortages across the full range of trades and difficulty attracting people to take up apprenticeships.

The WRI 2015 Study recommends working with businesses to identify skill shortages that could assist businesses to close these gaps. However, the solution perhaps requires a broader state and federal involvement as it is reliant on funding and alignment of TAFE and college education programs. Blayney is unlikely to attract higher education facilities but could partner with these facilities in Regional Cities to foster apprenticeships etc.

Whilst Agriculture, Mining, Manufacturing, and Construction were among the highest employers in Blayney LGA in 2011, these can be fairly cyclical industries with large increases and decreases in employment over time. Therefore, it is important that employees are able to expand their skills and retain quickly to adapt to changes in the economy.

Another opportunity may be the provision of more affordable housing choices in and around Blayney to attract more trades and skilled labourers who would then prefer to have local jobs (but these local jobs need to be created first). However, skills shortages are generally more complex issues and may be outside of the control of local government.

8.4.5 Banks & Lending

One of the biggest constraints to increased industrial/commercial development is bank lending practices including, but not limited to:

- a) Perceived higher risk lending on land in Blayney compared to Orange or Bathurst;
- b) Reduced competition between banks/lenders for this sort of lending;
- c) Increased costs and higher lending rates for commercial ventures;
- d) Difficulty getting commercial loans in smaller regional centres;
- e) Lower value of land to support larger mortgages;
- f) Less experienced operators may find it difficult to negotiate competitive products.

These economic factors are not considered in further detail in this report but would warrant further examination by an economic specialist. The risk is that without any pattern of growth and demand for industrial land around Blayney that banks will make it even harder to get loans, therefore exacerbating the problem.

8.4.6 Other Costs of Development

There is a range of other planning/development associated costs that are relevant to the viability of attracting and developing industry including, but not limited to:

- a) DA Fees (can be waived)
- b) Section 94 Fees (can be waived)
- c) Sewer headworks charges
- d) Water headworks charges
- e) Electricity upgrade charges
- f) Trade Waste Agreements

The WRI 2015 Study suggests for example that *'noting the difficulties in developing greenfield industrial sites, potential Food & Beverage Manufacturing businesses may be attracted to the region by assistance measures, including tax or rate rebates, service fee reductions and/or development assistance'* (p.8).

This report does not provide a review of these costs or their impacts on the bottom line of businesses. However, as many of these charges are set at the local level it is an area where Council may have the greatest potential to provide a clear strategy that provides attraction for new businesses without unduly shifting the burden to local

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taxpayers. However, Council may have little ability to affect CTW charges or other utility authorities and Council also needs to be careful not to shift the burden of attracting business to their rate-payers.

Reducing up-front costs of development and providing serviced land at the cheapest possible cost is a key opportunity for Blayney Council. Whilst land costs may be lower in and around Blayney, costs for utilities and infrastructure are generally similar or greater where there are not economies of scale. However, the fact that Blayney's industrial lands are generally all serviced should compete well with green-field development areas where these costs need to be passed on (e.g. Orange Airport Project). Council could consider different methods and timing to capture costs to make land packages more attractive.

8.4.7 Marketing & Communicating Blayney's Advantages

Another potential weakness is that Blayney has less Council and other resources to market and communicate the potential opportunities and advantages of its industrial lands. Other larger Councils may have:

- a) Economic Development Officers that regularly sell their industrial opportunities at regional and state level forums and have a budget to produce marketing strategies, brochures, and incentives for development;
- b) Resources to create detailed Economic Development Strategies that determine their key opportunities and advantages and provide dollar values for return on investment to add to their marketing arguments;
- c) Forums for their industrial and business leaders to promote communication of ideas and strategies, education and mentoring, and possible synergies between industrial players.

However, on the positive side Blayney has the advantage of a small but dedicated team who are closer to everyday issues, who understand their community well, and who have less barriers between individual departments so that holistic solutions can be identified. However, the above opportunities need to be added to existing significant workloads.

Some key opportunities include:

- a) Preparation of a Marketing Brochure for North Blayney Industrial Lands and opportunities;
- b) Preparation of Prospectuses for key growth industries including agricultural value-adding; food and beverage manufacturing and frozen foods; transport and logistics, and construction manufacturing;
- c) Continue to develop business cases and economic development strategies for transformational projects such as the Demondrille Rail Line; Expanded Intermodal Terminal; and niche industries;
- d) Develop industry partnerships between key industry players, education and training institutes, research and development institutes, and plan for changing patterns of employment.

8.4.8 Amalgamation

Amalgamation of council areas including the Blayney LGA is both an opportunity and a challenge to the advancement of the Study Area for employment growth. The likelihood of amalgamations affecting Blayney LGA is not considered in detail in this report but is a real risk for smaller councils such as Blayney.

As highlighted by the recent approaches by Orange City Council regarding the development of the Orange Airport Industrial and Business Park – it is clear that amalgamation could have several benefits for the Study Area:

- a) It may partly remove the 'blinkered' approach to economic growth by Council's only considering what is best for their LGA without adopting a 'regional' approach that looks to build upon existing assets to promote regional viability;
- b) As a result, Orange may consider the assets at North Blayney as a more viable proposition for investment for industrial and business growth for certain kinds of industries and it may save considerable money not having to build or attract another intermodal facility;
- c) Projects in Blayney may have potential access to a larger rate base for funding to deliver infrastructure and attract investment.

However, amalgamations could also be negative for the following reasons:

- a) Public administration and Council employment is a significant employer in the area and one of the key tenants of the Study Area. Loss of local employment would have a significant impact on the local economy and flow-on effects for other industries;
- b) Amalgamation may not change the business perception of the economic viability of operations in the Study Area compared to existing and proposed industrial sites closer to Regional Centres. Projects such as the Orange Airport industrial area are still likely to proceed to meet 'local' perceived demand;

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- c) There may always be a Council perception of ‘boundary’ between the LGAs based on their lack of experience with Blayney’s assets and opportunities entrenched through history and possible ambivalence of locals to the amalgamation and take-over by a larger Council;
- d) There may be higher development costs and contribution fees (and a greater resistance to flexibility) under alternative regimes that further reduce viability in the Study Area.

Whilst there may be some clearer direction by mid 2016 on this issue from NSW Government, it is important that Blayney Council plans for the future of the North Blayney Industrial Area and engages with its community as it is likely to be driven by the local community regardless of the responsible authority.

9 APPENDICES

9.1 MAJOR EXISTING & FORMER BUSINESSES

The following is a brief summary of some of the major existing or former businesses to understand how those industrial or business activities fit within the existing zone and whether there are any particular land use conflicts. It may not be a comprehensive list of ALL businesses that exist as it is a desktop review only and there has been no consultation with business owners and smaller businesses may not be included. This information may change quickly but many businesses have been present for some time.

9.1.1 Zone IN1 – General Industrial

| | |
|-----------------|--|
| Business | Mid West Concrete Pty Ltd, 84 Marshalls Ln (No.100 SIX) - (02) 6368 2444 (Max Osbourne) |
| Area | Lot 201 DP1196179 – Area ~4ha |
| Activity | Concrete supplies including stock troughs, and plumbing products (e.g. septic tanks, headwalls, drains etc.) and engineering products (e.g. tilt panels). See www.midwestconcrete.com.au |
| Business | Western White Linen, 190 Marshalls Ln (website says No.150) – (02) 6388 3133 |
| Area | Lot 21 DP806163 – Area ~1ha |
| Activity | Commercial laundry and linen provider servicing businesses across the Central West. Likely to be a 'light industry' or 'industrial retail' plus ancillary 'office' (permitted with consent). |
| Business | Blayney Wholesale Foods Pty Ltd, Cnr Lawson Street / Marshalls Ln – (02) 6368 9400 See further details in Appendices – Consultation with Ray Hornery & George Tanos |
| Area | Lot 4 DP249490 – Area ~2ha |
| Activity | Storage and supply of frozen foods including Nestle, McCains, Simplot, Inghams, Edgell, I&J, Leggos, De Costi Seafood, Colonial Farm, Captain's Catch, and Culinary Select. www.blayneywholesalefoods.com |
| Business | Atlantic Civil Products, 166 Marshalls Ln |
| Area | Lot 3 DP249490 – Area ~ 2ha (but only half of site appears to be used as other half has shed from closed Australian Tanned Products |
| Activity | Concrete and steel building and infrastructure products including structural plate, wall systems, pipe systems, and modular bridges (www.atlanticcivil.com.au). |
| Business | Blayney Auto Dismantlers, 176 Marshalls Ln |
| Area | Lot 2 DP1072760 – Area ~ 0.49ha |
| Activity | Likely to be defined as 'vehicle repair station' or 'vehicle body repair station' (permitted with consent) |
| Business | Environmental Treatment Solutions Pty Ltd, 79 Marshall Ln – (02) 6368 4990 |
| Area | Lot 1 DP881855 – Area ~ 1.68ha |
| Activity | Storage and processing of hazardous, restricted, solid, liquid, clinical, asbestos and classified waste streams generated by commercial and industrial clients. It is licenced for non-thermal treatment of hazardous and other waste and waste recovery. They own and operate each aspect of the waste disposal cycle (identification, transport, and disposal). See www.envirotreat.com.au). ETS has an Environmental Protection Licence (EPL 13230) which covers all activities on the premises. |
| Business | 40 Lawson St – Multi Shed / Multi Business Site including: a) O'Brien Construction (Builder), |
| Area | Part of larger multi-use lot – Lot 3 DP1126321 - Area~0.8ha |
| Activity | Likely to be defined as 'warehouse' or 'depot' (permitted with consent) as it is not primary business premise and is used for storing builder's materials. |
| Business | Ted Wilson & Sons (Electrician / Irrigation), 30 Lawson St |
| Area | Lot 2 DP1126321 – Area~1.2ha |
| Activity | Likely to be defined as 'warehouse' or 'depot' (permitted with consent) as it is not primary business premise and is used for storing builder's materials. |
| Business | Blayney Concrete / Blayney Hire, 28 Lawson St |
| Area | Lot 1 DP1126321 – Area~1.3ha |
| Activity | Likely to be defined as 'light industry' and 'vehicle sales or hire premises' or 'hardware and building supplies' (permitted with consent) |
| Business | Blayney Council Works Depot, 12 Lawson Street |

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| | |
|-----------------|---|
| Area | 2 Lots (Lots 8 & 9 DP249490) – Area ~2.12ha |
| Activity | Likely to be defined as ‘depot’ with ancillary ‘offices’ (permitted with consent). Council and its outdoor workers is a significant employer for Shire. |
| Business | Essential Energy (former Country Energy) Depot, 4 Lawson St (+ 6 Kingham St) |
| Area | Lot 10 DP249490 – Area ~0.7ha + Lot 19 DP258329 – Area ~0.35ha |
| Activity | Likely to be defined as ‘depot’ with ancillary ‘offices’ and ‘liquid fuel depot’ (permitted with consent). However, may be affected by recent job losses. |
| Business | Blayney Treated Pine Pty Ltd, Marshalls Ln – (02) 6368 2660 (CLOSED?) |
| Area | Lots 14-17 & Lots 21- 22 DP852722 - Area ~ 6.6ha |
| Activity | Timber mill only operating at low capacity. Large site suitable for redevelopment. Likely to be defined as ‘sawmill or log processing industry’ and ‘timber yard’ (permissible with consent). |
| Business | Former Blayney Abattoir (now closed) – Owner: Langway Pty Ltd |
| Area | ~7.9ha over 5 lots |
| Activity | Former abattoir (closed) |
| Business | Former Blayney Sale Yards (now closed) – Owner: Council |
| Area | ~5.9ha over 1 full + 2 partial lots |
| Activity | Sale yards no longer likely due to CTLX and now prohibited in zone. Council pound is located on small part of site. Site available for redevelopment. |
| Business | Vehicle Sales & Repairs (Trucks) – Owner: RG Jeffries |
| Area | ~1.48ha |
| Activity | Likely to be defined as ‘vehicle sales and hire’ and ‘vehicle repair station’ (permitted with consent). Recent approval for this activity. |
| Business | Templar Resources (Lease) from Owner: Stuart/Mead – 183 Marshalls Ln |
| Area | ~1.94ha |
| Activity | Shed currently being leased by exploration company to store and process exploration samples. Site not fully utilised but constrained partially by dam / water storage at rear. |
| Business | Central Tablelands Water Depot – 6 Kingham St |
| Area | ~0.3442 ha |
| Activity | Likely to be defined as ‘liquid fuel storage’ and ‘depot’ (permitted with consent) |
| Business | AGL Gas Networks Ltd – 4 Kingham St |
| Area | 0.1667ha |
| Activity | Unsure if just depot or office (permitted with consent) |
| Business | Water Bores Drilling Service (Cook) / Machinery Sales – 13-15 Lawson St |
| Area | ~0.81ha |
| Activity | Likely to be defined as ‘vehicle sales and hire’ or ‘vehicle repair station’ |
| Business | Shed (not business activity known) – 52 Marshalls Ln |
| Area | ~0.71ha |
| Activity | Shed (anecdotal evidence it is being used as a dwelling but not confirmed). |

9.1.2 Zone IN2 – Light Industrial

In Zone IN2 there is a handful of businesses with the largest consumer of land the FCL/Linfox Freight Terminal but there are also a number of vacant lots, many of which taken up by the drainage corridor / flood prone land. This Zone also includes 3-4 dwellings (1 on partial lot adjacent to Trade Centre and 2-3 on Adelaide Street near Maria St.

| | |
|-----------------|--|
| Business | Essential Energy (former Country Energy) Substation – 3 Marshalls Lane |
| Area | Lot 1 DP513052 – Area~0.37ha |
| Activity | Substation likely to be defined as ‘electricity generating works’ (permitted with consent) |

| | |
|-----------------|---|
| Business | Australian Queen Bee Exporters, 58 Marshalls Ln – (02) 6368 3788 (Warren & Rose Taylor) |
|-----------------|---|

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| | |
|-----------------|---|
| Area | Lot 1 DP871015 – Area~0.4ha |
| Activity | Export of Queen Bees, honey and honeycomb likely to be defined as either ‘agricultural produce industry’ (permitted with consent) or ‘light industry’ (permitted with consent) |
| Business | Vacant Shed - 51 Marshalls Lane |
| Area | Lot 8 DP1038610 – Area~0.62ha |
| Activity | Former warehouse and office (Shed 1 – 59m * 24.8m / Shed 2 – 58m * 24.8m) with loading dock and B-Double access with 32.5m * 18m covered breezeway. Listed with JMA Property Services at \$900,000 including GST in September 2015 (~\$145/sqm) |
| Business | Fenton’s Bus Service – 31 Gerty St (Osman St) |
| Area | Lot 1 DP1137967 – Area~0.56ha |
| Activity | Shed and parking area for buses – likely to be defined as ‘transport depot’ (permitted with consent) |
| Business | Shed – 53 Gerty (Osman) St – Ian Reeks |
| Area | Lot 2 DP1103517 – Area~1.14ha |
| Activity | Large dual shed appears to be for logistics and warehousing (permitted with consent) for ICR Engineering / Linfox? – May be partly or fully vacant now Linfox has reduced operations? |
| Business | Motor Vehicle Inspection / Repair – 18 Hill St |
| Area | Lot 14 DP664033 – Area~0.1ha |
| Activity | Likely to be defined as ‘vehicle repair station’ (permitted with consent) |
| Business | I.C.R Engineering, 16A Hill St (No.14 on SIX) – Ian Reeks |
| Area | Lots 11-13 Sect 16 DP758121 – Area ~0.55ha |
| Activity | Steel fabrication and supplies (www.icrengineering.com.au) likely to be defined as ‘light industry’ (permitted with consent). |
| Business | Terry Blair Builder – 12 Hill St |
| Area | Lot 1 DP91204 – Area~0.24ha |
| Activity | No visible activity but likely to be used as storage for building business (if still active) – ‘depot’. |
| Business | Linfox / FCL Intermodal Terminal (Cadia likely to lease dewatering plant area) |
| Area | Lot 1 DP1006860 _ Lot 299 DP1004555 (Terminal/Siding) ~4.6ha Lot 1 DP91204 / Lot 10 DP1021746 / Lot 3 DP848674 ~3 ha |
| Activity | Rail siding and intermodal freight terminal with storage of shipping containers. Also includes original Cadia dewatering plant likely to be defined as ‘freight transport facilities’ (permitted with consent) |
| Business | Newman’s Bus Service, 3773 Mid Western Highway / 3 Maria Street |
| Area | Lot 4 DP1204384 – Area ~0.78ha |
| Activity | ‘Transport depot’ (permitted with consent) |

9.1.3 Zone B5 – Business Development

| | |
|-----------------|--|
| Business | O’Brien Wash and Go, 22 Radburn Street |
| Area | Lot 102 DP1137922 – Area ~0.24ha |
| Activity | Car and truck wash (2 car wash bays, 2 larger vehicle/truck wash bays, a semi bay, and a dog wash including fragrance and vacuum/shampooing bays, food and car care vending machines, coffee, and ATM and shower/toilet amenities and dedicated rest area. Open 24hrs/7 days (Blayney Chronicle – 13 July 2012). |

There is one other shed on 43 Marshalls Lane but it is not known what this shed is used for (and anecdotal evidence suggest it may be used for habitable purposes).

9.1.4 Zone B6 – Enterprise Corridor

| | |
|-----------------|---|
| Business | Nixon’s Refrigerated Transport, 3728 Mid Western Highway – (02) 6368 2201 |
| Area | 2 lots – Lot 247 DP661272 + Lot 1 DP1112128 – Area ~1.8ha |
| Activity | Freight transport facility |

9.1.5 Active Business Land – Majority Developed

Based on a desktop review and brief site visit the supply of land in October 2015 can be broken down as follows:

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| Zone | Business | Area |
|--|--|-----------------|
| IN1 – General Industrial | Templar Resources (Stuart & Mead) – 183 Marshalls Ln | ~1.94ha |
| | Western White Linen – 190 Marshalls Ln | ~1.00ha |
| | Toshack Building – 182 Marshalls Ln | ~0.24ha |
| | Blayney Auto Dismantlers – 176 Marshalls Ln | ~0.49ha |
| | Blayney Wholesale Foods Pty Ltd – 60 Lawson St | ~2.00ha |
| | Multi-Business (O'Brien) - 40 Lawson St | ~0.81ha |
| | Ted Wilson & Sons – 30 Lawson St | ~1.20ha |
| | Blayney Concrete / Blayney Hire – 28 Lawson St | ~1.31ha |
| | Blayney Council Works Depot (2 Lots) – 14 Lawson St | ~2.11ha |
| | Essential Energy Depot – 4 Lawson St | ~0.69ha |
| | Williams Shed – 52 Marshalls Ln | ~0.71ha |
| | Mid West Concrete Pty Ltd – 100 Marshalls Ln | ~4.00ha |
| | Environmental Treatment Solutions Pty Ltd – 79 Marshalls Ln | ~1.68ha |
| | Central Tablelands Water Depot – 6 Kingham St | ~0.34ha |
| | AGL Gas Networks – 4 Kingham St | ~0.17ha |
| | Water Bores Drilling Service (Cook) – 13 Lawson St | ~0.41ha |
| | Vehicle & Agricultural Machinery Sales (Cook) – 15 Lawson St | ~0.41ha |
| | Atlantic Civil Products – 166 Marshalls Ln | 50% ~1.00ha |
| | Blayney Treated Pine Pty Ltd – 134 Marshalls Ln (6 lots) | 40% ~2.71ha |
| | RG Jeffriess – Vehicle Sales/Repairs – 17 Tollbar St | 50% ~0.74ha |
| DF Parker (Cottesbrook Honey?) – 27 Tollbar St | 30% ~0.20ha | |
| Total | | ~30.36ha |
| IN2 – Light Industrial | Essential Energy Substation – 3 Marshalls Ln | ~0.37ha |
| | Australian Queen Bee Exporters – 59 Marshalls Ln | ~0.40ha |
| | Fenton's Bus Service – 31 Gerty (Osman) St | ~0.56ha |
| | I.C.R Engineering / Linfox – 53 Gerty (Osman) St | ~1.14ha |
| | Motor Vehicle Inspection/Repair – 18 Hill St | ~0.10ha |
| | I.C.R. Engineering – 14 Hill St | ~0.55ha |
| | Terry Blair Builder – 12 Hill St | ~0.24ha |
| | Linfox / FCL (Terminal / Siding only) | ~4.60ha |
| | Infrastructure (Pump Station) – Adelaide St / MW Highway (2 Lots) | ~0.24ha |
| | Newman's Bus Service (Garfox P/L) + Shell Service Station – 3 Maria St | ~0.78ha |
| | Hanson's Concrete – Maria St | ~0.38ha |
| Total | | ~9.36ha |
| B5 – Business Dev. | O'Brien's Wash & Go | ~0.24ha |

9.1.6 Active Business Land with Development Potential

Based on a desktop review and brief site visit the supply of active business land that has additional vacant area / development potential in October 2015 can be broken down as follows:

| Zone | Business | Total Area | Dev. Area | Pot. Area |
|--------------------------|---|-----------------|----------------|----------------|
| IN1 – General Industrial | Atlantic Civil Products | ~2.00ha | 50% ~1.00ha | ~1.00ha |
| | Blayney Treated Pine Pty Ltd | ~6.77ha | 40% ~2.71ha | 60%~4.07ha |
| | RG Jeffriess – Vehicle Sales/Repairs – 17 Tollbar St | ~1.48ha | 50% ~0.74ha | 50% ~0.74ha |
| | DF Parker (Cottesbrook Honey?) – 27 Tollbar St | ~0.60ha | 30% ~0.20ha | 70% ~0.40ha |
| | | ~10.86ha | ~4.65ha | ~6.21ha |
| B6 – Enterprise Corridor | Nixon's Refrigerated Transport – 3728 MW Hwy (2 Lots) | ~1.81ha | 30%~0.54ha | 50%~1.27ha |

9.1.7 Closed Business Land/Vacant

Based on a desktop review and brief site visit the key sites that are likely to be closed business land (i.e. existing buildings but no existing tenants) in October 2015 can be broken down as follows:

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| Zone | Closed Businesses | Area |
|--------------------------|--|----------------|
| IN1 – General Industrial | Former Blayney Abattoir | ~7.90ha |
| | Elbow Skins P/L (B&B Wool & Skins) – 2 Tollbar St (Lot 336) | ~0.41ha |
| | Elbow Skins P/L (B&B Wool & Skins) – 2 Tollbar St (Lot 1) | ~0.61ha |
| Total IN1 | | ~8.92ha |
| IN2 – Light Industrial | 51 Marshalls Lane (For Sale) | ~0.62ha |
| | 53 Gerty St (Assuming ICR / Linfox don't currently use building) | ~1.14ha |
| | 2 Hill St - Cadia (Lot 2) | ~1.60ha |
| Total IN2 | | ~3.36ha |

9.1.8 Vacant Land

Based on a desktop review and brief site visit the supply of land in October 2015 can be broken down as follows:

| Zone | Vacant Lots | Area |
|------------------------------------|---|--------------------------|
| IN1 – General Industrial | Former Blayney Sale Yards – 31 Gerty St (3.73ha/2.04ha/3.82ha) | ~9.59ha |
| | 126 Marshalls Ln – Council | ~3.38ha |
| | 70 Marshalls Ln – Aleimatt Pty Ltd | ~2.13ha |
| | 8 Tollbar St – Council | ~2.11ha |
| | 6 Tollbar St – GM Tanos | ~2.23ha |
| | 180 Marshalls Ln – Council | ~0.32ha |
| | 40 Lawson St (rear lot) – O'Brien | ~2.17ha |
| | Total IN1 | |
| IN2 – Light Industrial | 31 Gerty St (Lot 222) – BSC | ~7.31ha |
| | 33 Gerty St (Lot 3) – BSC (opposite former Sale Yards) | ~2.71ha |
| | 25 Hill St (Lot A) – Southwell | ~0.84ha |
| | 10 Hill St (Lot 10) – Linfox (Currently for Sale) | ~0.77ha |
| | 91 Gerty St? (Lot 1 DP848674) – Linfox | ~0.90ha |
| | 2 Hill St – Cadia (Lot 1 Sect 30) | ~0.63ha |
| | 91 Gerty St? (Lot 3) – Linfox | ~2.03ha |
| | 79 Gerty (Osman) St – Roman Catholic Church (Drainage Lands) | ~1.12ha |
| | 20 Hill St – Roman Catholic Church (St Joseph Vacant Drainage) | ~0.86ha |
| | 1 Maria St – BSC (4 lots) | ~0.43ha |
| Maria St Mixed Lots & road reserve | ~1.00ha | |
| Total IN2 | | ~18.6ha |
| B5 – Business Development | There are currently 17 vacant lots (13 held by the original developer) and 1 large remnant lot with a dwelling capable of further subdivision in to up to 8 residential lots (see Appendices) or probably 5 industrial medium sized lots. | ~7.58ha (excl. roads) |
| B6 – Enterprise Corridor | Vacant land associated with or next two dwellings & community uses counted in table below. | -- |

9.1.9 Dwellings & Community Uses

Based on a desktop review and brief site visit the supply of land in October 2015 can be broken down as follows:

| Zone | Community Use or Dwelling | Area |
|---------------------------|---|------------------------------|
| IN1 – General Industrial | 9 Hill St (Langway P/L) Single dwelling on large lot | ~1.21ha |
| IN2 – Light Industrial | 3700 Mid Western Highway – Single dwelling split across Zone B5 | ~1.30ha |
| | 3 Glasson St (Lot 2) – McCann/Lawson – Recent dwelling | ~4.74ha |
| | 150 Adelaide St / MW Hwy | ~0.06ha |
| | <u>148 Adelaide St / MW Hwy</u> | <u>~0.06ha</u> |
| 4 Dwellings Total | | ~7.43ha |
| B5 – Business Development | 1 dwelling (but it is believed to be owned by the same people responsible for the Trade Centre subdivision so it is not counted as a constraint to further industrial development). | ~0.71ha (from PP diagram) |

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| | | |
|--------------------------|--|----------------|
| B6 – Enterprise Corridor | 20-22 Hill St (Lot 1) – St Josephs School (Zone B6 only – split zoned) | ~1.62ha |
| | Church (former) | ~0.20ha |
| | Church Hall | ~0.94ha |
| | 6 Dwellings (10 lots) east of William St | ~0.94ha |
| | 2 Dwellings (3 lots) north of Nixons Transport | ~0.35ha |
| | 3 Dwellings (10 lots) west of William St | ~0.76ha |
| | 1 Dwelling (1 Glasson St) – Former Presbytery House | ~0.52ha |
| | 1 Dwelling – 40 Hill St | ~0.12ha |
| | <u>1 Dwelling - 48 Hill St</u> | <u>~0.14ha</u> |
| | 14 Dwellings Total + 1 School | ~5.59ha |

9.1.10 Summary

| Zone | Active Business | Business with Develop. Potential | Closed Business | Vacant | Dwelling & Community | Road | TOTAL (excl. roads) |
|--------------|-----------------|----------------------------------|-----------------|----------------|----------------------|----------------|---------------------|
| IN1 | 30.36ha | 6.10ha | 8.92ha | 21.93ha | 1.21ha | 6.12ha | 74.64ha |
| IN2 | 9.36ha | -- | 3.36ha | 18.60ha | 7.43ha | 1.73ha | 40.48ha |
| B5 | 0.24ha | -- | -- | 7.58ha | 0.71ha | 0.76ha | 9.29ha |
| B6 | -- | 1.81ha | -- | -- | 5.59ha | 1.64ha | 9.04ha |
| TOTAL | 39.96ha | 7.91ha | 12.28ha | 48.11ha | 14.94ha | 10.25ha | 133.45ha |

9.2 CONSULTATION & ENGAGEMENT

9.2.1 Consultation Strategy

One of the key recommendations of this Study is that whilst this study has made reasonable efforts to get key stakeholder input – there are always potential gaps in information and consultation that can be progressed after this Study is adopted. Key stakeholders are likely to include:

- a) Existing land owners and industrial / business operators in the Study Area (see Section below) and in other industrial areas around the LGA (e.g. Sealink);
- b) Local and regional real estate agents that specialise in industrial and business land sales and leasing;
- c) Councillors and key business owners and business groups in the Shire;
- d) The broader Blayney and Shire community;
- e) Key development agencies such as Regional Development Australia (RDA); CENTROC; NSW Agriculture; NSW Resources & Energy; Department of Planning & Environment etc.;
- f) Upcoming key mining projects such as Regis/McPhillamys and Kempfield etc.;
- g) Key transport infrastructure providers including RMS (Roads); Transport for NSW / John Holland (Rail); Orange Council for Orange Airport;
- h) Key utility including; CTW (Water); Essential Energy (Electricity); Jemena (Gas) etc.;
- i) Surrounding Councils and their economic development officers;
- j) Potential industrial operators that may be looking to move from other areas including part of Orange and Bathurst's industrial areas where dwelling encroach or areas in Sydney that are undergoing significant transition away from industrial uses.

I would suggest that there are a variety of resources with key development agencies that are working on similar issues at a regional level that would feed into this discussion and they would be the best starting point after existing land owners, Councillors and the community who know the local issues. The best way to follow up from this report would be a significant update to the Subregional Rural & Industrial Strategy.

9.2.2 Consultation that Informed this Report

The initial scope of this Study was to prepare a preliminary analysis of opportunities and challenges – so no comprehensive consultation or engagement has yet occurred. However, during the course of preparation the following consultation has taken place (some of the notes from these consultations are in the Appendices):

- a) Review of consultation that occurred during the Western Research Institute (2015) Economic Study with key land owners in the North Blayney Industrial area;
- b) Attendance at Presentation by Orange City Council on Revised Orange Airport Planning (Rezoning) Proposal on Thursday, 20 August 2015;
- c) Meeting with General Manager on Thursday, 8 October – briefing for Councillor Workshop that evening and discussion about further consultation opportunities;
- d) Discussion with Senior Planner on Thursday, 8 October – regarding recent approaches from owners / investors for the Trade Centre and Church land on Hill Street;
- e) Senior Planner and General Manager briefed the Councillors on Thursday, 8 October – regarding the project as well as approaches from investors/land owners – and the way forward to resolving these issue (AN not present);
- f) Brief discussion with Director of Technical Services on Thursday, 8 October – regarding Council interests in vacant land parcels and any know engineering constraints;
- g) Telephone discussion with Kirk May (Developer) on Friday, 16 October regarding the Church Land at Hill Street and rezoning / permissible land use potential for a large retail shop and possible hardware related activities on Nixon Transport site;
- h) Workshop & Update Session with General Manager, Director of Environmental Services, Director Technical Services and Senior Planner on 10 November 2015;
- i) Telephone discussion with Jim Murray – Regional Manager (Parkes) – FCL / Linfox on Tuesday, 17 November 2015 regarding the Blayney Intermodal Terminal;
- j) Meeting with Peter McMillan – Regional Development Australia on Wednesday, 18 November 2015;
- k) Telephone discussion with Peter Basha – Planning Consultant for Trade Centre Rezoning on Thursday, 19 November 2015 & Email dated Thursday, 26 November 2015;

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- l) Telephone discussion with Peter Rogers – Developer for the Trade Centre about his rezoning submissions on Thursday, 26 November 2015;
- m) Telephone discussion with Ian Reeks (ICR Engineering) about his vision for the area and concerns regarding residential impacts on industrial growth on Thursday, 26 November 2015;
- n) Telephone discussion with Andrew Wannan (Environmental Manager Newcrest) about the future for the existing Cadia Dewatering Plant and concerns regarding residential impacts on operations;
- o) Telephone discussion with George Tanos (Blayney Frozen Foods) ;
- p) Telephone discussion with Gerrard Davies (Principal, St Josephs School);
- q) Meetings with Peter Rogers (Trade Centre Developer); and Kirk May (Proponent for new development Church Site) on Monday, 30 November 2015;
- r) Stakeholder workshop at Blayney Community Centre on Thursday, 2 March 2016 from 6pm to 8pm - facilitated by iPLAN PROJECTS. Key outcomes are mentioned throughout this document. Invitations were sent to all land owners as well as to the property tenants. Follow up calls were made to many people over several days to promote attendance. Over 30 people attended (not including Council staff and Councillors).
- s) Survey / Questionnaire provided to all attendees of the Stakeholder workshop and also sent to those invitees who couldn't attend who requested input. Key outcomes are mentioned throughout this document. Surveys are attached. Only six (6) surveys were completed and one additional submission from the Trade Centre owners made in another format.
- t) Telephone discussions with Karl Nealon (Nestle Purina); Andrew Wannan (Newcrest); George Tanos (Blayney Frozen Foods); Kirk May (potential developer); Sam Bae (Blayney Treated Pine); Mani Carawana (Langway Pty Ltd) on 30 March 2016 following up survey submissions.

9.2.3 Notes on Key Consultation / Meetings**Linfox / FCL – Jim Murray (Regional Manager) – 17/11/15 - Phone Discussion**

Linfox has ceased rail operations from the intermodal facility and have shifted to trucks. However, there are still 3-5 trains per week servicing Cadia.

Linfox used to service Myers / Electrolux / Nestle. Electrolux closed and shifted to a road model (note Ian Reeks shed still being used by Electrolux). Myer shifted to a road model. Nestle volumes dropped and shifted to road model. Regionally the road model allows deconsolidation at Parkes and direct to Port Botany.

Agricultural exports are up and down and don't provide sufficient or reliable volumes to support Trains.

Timber was a possible option for them but the treatment of timber on site became a potential issue and is done at Bathurst.

Issues with rail include:

- You have to pay for space on trains in advance.
- Cycles of trains and containers difficult to meet.
- Rail has a narrow window to get into ports and doesn't always align with shipping.
- Cotton & grain do their own trains.
- Curfew for loading

However, if Linfox had sufficient volumes they would prefer to put them on trains.

Limited to 600-700m trains over Blue Mountains which suits their smaller Intermodal and trains can be broken up into several lengths for loading/unloading. Size depends on hardstand areas – not just siding lengths. Linfox has two main sidings and a 3rd possible so length is not currently an issue for them.

ICR Engineering – Ian Reeks (Owner) – 26/11/15 – Phone Discussion

Ian has four sites in the study area:

- ICR Engineering – South side of Hill St. He could significantly expand his production due to demand but is only limited by energy and resources. He currently operates from 6am to midnight but ensure no loading during night hours. However, longer operations are often required. Can't recall what original consent required.
- Sheds – North side of Hill St leased to Electrolux (4-5 trucks per day) and Linfox. Their lease up in end 2016 and he thinks that Nestle would take both for warehousing and distribution.

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- Vacant land behind sheds on North side of Hill St – He is lodging a DA for a concrete tilt panel plant and computerised storage shed.
- Sheds – Marshalls Lane. Has recently successfully leased this to a Timber Roof Truss company that will hopefully be starting before Xmas with 12-15 employees.
- Vacant lot in Trade Centre adjacent to Car Wash. He is lodging a DA for a mini-factory and storage facility. Trade Centre owners have approached him about rezoning to residential and he is not interested.

lan reiterated that a key priority is to avoid residential near Marshalls Lane as all trucking needs to operate down this route because Hill St is closed to heavy vehicles. He would be very concerned if Trade Centre rezoned for residential. He also wants Gerty St to be protected for traffic from his Hill St factories. He would like to extend industrial in the future up Gerty St (east side) once he is in a position to do so. He has 4 children in his business that will be continuing to expand operations. He cannot keep up with demand so expansion is highly likely. Any restrictions on industrial 24 hour operations would be a significant concern.

Newcrest – Andrew Wannan (Environmental Manager) – 27/11/15 – Phone Discussion

Brief discussion about the existing Cadia Dewatering Plant located on leased land from FCL/Linnox near the railway.

New Dewatering Plant currently under construction and is capable of processing their 32 million tonne production.

Proposal is to retain the existing plant and use it for the foreseeable future as a standby to the new plant (no defined time for decommissioning of plant or associated effluent ponds or pumps – though they are investigating this). So they will retain potential for train shipments from this plant for foreseeable future.

Existing dewatering operations run 24 hours but loading only occurs during daytime and is subject to noise controls and EPA licensing.

Cadia would be concerned if residential uses were to come closer to the existing facility until such time as it is decommissioned as they would not want any further restrictions on their operations.

Ray Hornery (former Planner & Development Engineer for Council / Consultant Planner for George Tanos) - 27/11/15 – Phone Discussion

In the 1970's Blayney was put forward as the industrial service centre for the Bathurst Orange Development Corporation ('BODC'). Council purchased land around the Town of Blayney (including the current Sealink site to the east but excluding the Trade Centre lands). The intent of Council was to attract a major industrial operator like Devro. The infrastructure required a significant amount of investment by State Government and Council and caused some financial hardship for Council.

Blayney Foods originally was where Nestle is today. George Tanos originally purchased land in Tollbar St for the new Blayney Food facility and he still owns vacant land there for warehousing opportunities. Council sold the Newbridge Road site and this was later sold again to George Tanos who occupies the site today.

A Mrs Bottom owned what is now the Trade Centre site and lived in the house that is still present to the west of this land. Mrs Bottom applied to Council to subdivide the Trade Centre land for rural residential and it had some Council support but was opposed by Council's planner (Ray Hornery) due to the risk it posed to the Timber Mill and appropriate buffers. Council then bought the land from Mrs Bottom. A number of approaches to key warehousing and manufacturing players (e.g. Bushmans Tanks) were made in the early 1900s but were not successful.

George Tanos business at Tollbar Road is for Food Services that services restaurants, hotels, and corner stores from Glenbrook (east) to Dubbo (west) and Mudgee (north) to Young (south). It has several freezer rooms and docks. Mr Tanos also operates the Gateway food services in Orange (opposite Bunnings) where it provides frozen and dried foods and butcher where it can be ordered and delivered.

The Sealink facility at Newbridge Road provides bulk storage for Simplot and smaller customers and includes large freezer rooms for bulk storage. It also has packing operations for customers like Hamper King. It has a state of the art tracking system for 4th party logistics. It focusses on frozen vegetables and fish for Simplot. Products are delivered to Sealink and then delivered to customers.

Simplot still has a strong business model and is closely linked to George Tanos. Whilst there has been some cost cutting in the last few years they have continued operations in Bathurst/Kelso and invested significantly in new fish product facilities. However, there are opportunities for Tanos to pack food products for a variety of other clients.

The proposal for a Goat abattoir at Blayney is unlikely to proceed and there are current investigations for a site in Bourke. However, Mr Tanos still believes there is potential for a small stock abattoir in Blayney (not Goats – to

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address the issue with Q Fever that was raised by EPA and NSW Department of Health. This may occur once the Bourke facility is operational.

Mr Tanos recognises that there are significant opportunities in value-adding to meat products including deboning and packaging of meat for Asia and North American markets. He has significant contacts in China he would like to pursue.

The Rail Siding was always designed to service the new Cadia dewatering plant. However, Mr Tanos has been trying to convince Simplot to move their products by rail. A lot of vegetables come from Tasmania by boat in 26T containers. Rail allows for 26T containers but road can only support 22T containers so they are destuffed at Melbourne.

The Rail Siding is a private siding and cannot currently act as an intermodal. An intermodal (public or private) would require a significant investment with Environmental Impact Statements and regulatory hurdles. Therefore, the current facility does not result in truck to rail modal shifts.

The rail siding does not currently stack up because adding a few containers to trains passing through ('milk run') is not a viable option as it depends what else is on the train as to its destination and efficiencies. Even the proposed Abattoir would have only produce 2-3 containers per day. However, if they were able to consolidate 13-15 containers they could consider train freight operations.

The Sealink facility currently has a dedicated power line that is taken from Hill Street and runs along the rail line to the freezers. This takes the power that was once utilised for the former Abattoir. It has approximately 10kVa capacity but Cadia and Tanos are only likely to currently use 5kVa of this so there is additional capacity for growth. Mr Tanos is currently getting advice from a consultant on adding Photovoltaic Solar Energy panels to his facility in Tollbar St and possibly Newbridge Road.

9.3 BLEP2012 – LAND USE TABLES / MATRIX

Zone B5 Business Development

1 Objectives of zone

- To enable a mix of business and warehouse uses, and bulky goods premises that require a large floor area, in locations that are close to, and that support the viability of, centres.

2 Permitted without consent

Environmental protection works

3 Permitted with consent

Bulky goods premises; Child care centres; Funeral homes; Garden centres; Hardware and building supplies; Kiosks; Landscaping material supplies; Light industries; Neighbourhood shops; Passenger transport facilities; Plant nurseries; Respite day care centres; Roads; Rural supplies; Take away food and drink premises; Timber yards; Vehicle sales or hire premises; Warehouse or distribution centres; Any other development not specified in item 2 or 4

4 Prohibited

Agriculture; Air transport facilities; Airstrips; Amusement centres; Animal boarding or training establishments; Biosolids treatment facilities; Boat building and repair facilities; Boat launching ramps; Boat sheds; Camping grounds; Caravan parks; Cemeteries; Charter and tourism boating facilities; Commercial premises; Correctional centres; Crematoria; Eco-tourist facilities; Electricity generating works; Entertainment facilities; Exhibition homes; Exhibition villages; Farm buildings; Forestry; Freight transport facilities; Function centres; Heavy industrial storage establishments; Highway service centres; Home-based child care; Home businesses; Home industries; Home occupations; Home occupations (sex services); Industries; Jetties; Marinas; Mooring pens; Moorings; Mortuaries; Public administration buildings; Recreation facilities (major); Registered clubs; Residential accommodation; Restricted premises; Rural industries; Service stations; Sewage treatment plants; Sex services premises; Tourist and visitor accommodation; Transport depots; Truck depots; Waste disposal facilities; Water recreation structures; Water recycling facilities; Water treatment facilities; Wharf or boating facilities

Zone B6 Enterprise Corridor

1 Objectives of zone

- To promote businesses along main roads and to encourage a mix of compatible uses.
- To provide a range of employment uses (including business, office, retail and light industrial uses).
- To maintain the economic strength of centres by limiting retailing activity.
- To provide for residential uses, but only as part of a mixed use development.

2 Permitted without consent

Environmental protection works

3 Permitted with consent

Backpackers' accommodation; Bed and breakfast accommodation; Business premises; Community facilities; Garden centres; Group homes; Hardware and building supplies; Hotel or motel accommodation; Kiosks; Landscaping material supplies; Light industries; Neighbourhood shops; Passenger transport facilities; Plant nurseries; Roads; Rural supplies; Seniors housing; Take away food and drink premises; Timber yards; Vehicle sales or hire premises; Warehouse or distribution centres; Any other development not specified in item 2 or 4

4 Prohibited

Agriculture; Air transport facilities; Airstrips; Amusement centres; Animal boarding or training establishments; Biosolids treatment facilities; Boat building and repair facilities; Boat launching ramps; Boat sheds; Camping grounds; Caravan parks; Cemeteries; Charter and tourism boating facilities; Commercial premises; Correctional centres; Crematoria; Eco-tourist facilities; Electricity generating works; Entertainment facilities; Exhibition homes; Exhibition villages; Farm buildings; Forestry; Freight transport facilities; Function centres; Group homes (transitional); Heavy industrial storage establishments; Industries; Jetties; Marinas; Mooring pens; Moorings; Mortuaries; Recreation facilities (major); Registered clubs; Residential accommodation; Restricted premises; Rural industries; Sewage treatment plants; Sex services premises; Tourist and visitor accommodation; Vehicle body repair workshops; Waste disposal facilities; Water recreation structures; Water recycling facilities; Water treatment facilities; Wharf or boating facilities

Zone IN1 General Industrial

1 Objectives of zone

- To provide a wide range of industrial and warehouse land uses.
- To encourage employment opportunities.
- To minimise any adverse effect of industry on other land uses.
- To support and protect industrial land for industrial uses.

2 Permitted without consent

Environmental protection works

3 Permitted with consent

Aquaculture; Depots; Freight transport facilities; Garden centres; General industries; Hardware and building supplies; Heliports; Industrial training facilities; Kiosks; Landscaping material supplies; Light industries; Neighbourhood shops; Plant nurseries; Roads; Take away food and drink premises; Timber yards; Vehicle sales or hire premises; Warehouse or distribution centres; Any other development not specified in item 2 or 4

4 Prohibited

Agriculture; Air transport facilities; Airstrips; Amusement centres; Biosolids treatment facilities; Boat launching ramps; Boat sheds; Camping grounds; Caravan parks; Cemeteries; Charter and tourism boating facilities; Child care centres; Commercial premises; Eco-tourist facilities; Educational establishments; Entertainment facilities; Exhibition homes; Exhibition villages; Farm buildings; Forestry; Function centres; Health services facilities; Highway service centres; Home-based child care; Home businesses; Home occupations; Home occupations (sex services); Jetties; Marinas; Mooring pens; Moorings; Places of public worship; Public administration buildings;

Registered clubs; Residential accommodation; Respite day care centres; Restricted premises; Service stations; Sewage treatment plants; Stock and sale yards; Tourist and visitor accommodation; Water recreation structures; Water recycling facilities; Wharf or boating facilities; Wholesale supplies

Zone IN2 Light Industrial

1 Objectives of zone

- To provide a wide range of light industrial, warehouse and related land uses.
- To encourage employment opportunities and to support the viability of centres.
- To minimise any adverse effect of industry on other land uses.
- To enable other land uses that provide facilities or services to meet the day to day needs of workers in the area.
- To support and protect industrial land for industrial uses.

2 Permitted without consent

Environmental protection works

3 Permitted with consent

Agricultural produce industries; Aquaculture; Bee keeping; Depots; Garden centres; Hardware and building supplies; Heliports; Industrial training facilities; Kiosks; Landscaping material supplies; Light industries; Neighbourhood shops; Plant nurseries; Roads; Rural supplies; Take away food and drink premises; Timber yards; Vehicle sales or hire premises; Warehouse or distribution centres; Water recycling facilities; Any other development not specified in item 2 or 4

4 Prohibited

Agriculture; Air transport facilities; Airstrips; Amusement centres; Biosolids treatment facilities; Boat launching ramps; Boat sheds; Camping grounds; Caravan parks; Cemeteries; Charter and tourism boating facilities; Child care centres; Commercial premises; Correctional centres; Eco-tourist facilities; Educational establishments; Entertainment facilities; Exhibition homes; Exhibition villages; Farm buildings; Forestry; Function centres; Health services facilities; Heavy industrial storage establishments; Heavy industries; Home-based child care; Home businesses; Home occupations; Home occupations (sex services); Jetties; Marinas; Mooring pens; Moorings; Public administration buildings; Registered clubs; Residential accommodation; Respite day care centres; Rural industries; Sewage treatment plants; Tourist and visitor accommodation; Waste disposal facilities; Water recreation structures; Water recycling facilities; Wharf or boating facilities

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| Draft Blayney Local Environmental Plan 2011 (Post Public Exhibition) Land Use Matrix [DoP version 3.0] | Business | | | | | | | Industrial | | | |
|---|---|-----------------|--------------------|--------------|-------------------------|------------------------|------------------|------------------------|----------------------|----------------------|------------------------|
| | B1 Neighbourhood centre | B2 Local centre | B3 Commercial Core | B4 Mixed Use | B5 Business Development | B6 Enterprise corridor | B7 Business Park | IN1 General Industrial | IN2 Light Industrial | IN3 Heavy Industrial | IN4 Working Waterfront |
| Legend | | | | | | | | | | | |
| o permitted without consent [mandated under the SI]. | | | | | | | | | | | |
| o permitted without consent. | | | | | | | | | | | |
| c permitted with consent [mandated under the SI]. | | | | | | | | | | | |
| c permitted with consent. | | | | | | | | | | | |
| x prohibited [mandated under the SI]. | | | | | | | | | | | |
| x prohibited. | | | | | | | | | | | |
| A permitted under SEPP (Affordable Rental Housing) 2009. | | | | | | | | | | | |
| I permitted under SEPP (Infrastructure) 2007. | | | | | | | | | | | |
| Fill colours in green or red mandated under the SI. | | | | | | | | | | | |
| Fill colour in purple public infrastructure permitted under a SEPP. | | | | | | | | | | | |
| Is the zone used? [please select Y/N for each zone] | N | Y | N | N | Y | Y | N | Y | Y | N | N |
| agriculture | agriculture group term | | | | | | | | | | |
| aquaculture | x | | | | x | x | | x | x | | |
| extensive agriculture [eg. grazing of livestock, etc.] | x | | | | x | x | | x | x | | |
| bee keeping | x | | | | x | x | | x | x | | |
| dairy (pasture-based) | x | | | | x | x | | x | x | | |
| intensive livestock agriculture [eg. poultry farms, etc.] | x | | | | x | x | | x | x | | |
| feedlots | x | | | | x | x | | x | x | | |
| dairies (restricted) | x | | | | x | x | | x | x | | |
| intensive plant agriculture [eg. cultivation of irrigated crops] | x | | | | x | x | | x | x | | |
| horticulture | x | | | | x | x | | x | x | | |
| turf farming | x | | | | x | x | | x | x | | |
| viticulture | x | | | | x | x | | x | x | | |
| (LAND USE terms OUTSIDE agriculture group term) | | | | | | | | | | | |
| animal boarding or training establishments | x | | | | x | x | | x | x | | |
| farm buildings | x | | | | x | x | | x | x | | |
| forestry | x | | | | x | x | | x | x | | |
| (LAND USE terms OUTSIDE residential accommodation group term) | | | | | | | | | | | |
| residential accommodation | residential accommodation group term | | | | | | | | | | |
| attached dwellings | c | | | | x | x | | x | x | | |
| boarding houses | c | | | | x | x | | x | x | | |
| dual occupancies | c | | | | x | x | | x | x | | |
| dual occupancies (attached) | c | | | | x | x | | x | x | | |
| dual occupancies (detached) | c | | | | x | x | | x | x | | |
| dwelling houses | c | | | | x | x | | x | x | | |
| group homes | c | | | | x | x | | x | x | | |
| group homes (permanent) | c | | | | x | x | | x | x | | |
| group homes (transitional) | c | | | | x | x | | x | x | | |
| hostels | c | | | | x | x | | x | x | | |
| multi dwelling housing | c | | | | x | x | | x | x | | |
| residential flat buildings | c | | | | x | x | | x | x | | |
| rural worker's dwellings | x | | | | x | x | | x | x | | |
| secondary dwellings | c | | | | x | x | | x | x | | |
| semi-detached dwellings | c | | | | x | x | | x | x | | |
| seniors housing | c | | | | x | x | | x | x | | |
| residential care facilities | c | | | | x | x | | x | x | | |
| shop top housing | c | | | | x | x | | x | x | | |
| (LAND USE terms OUTSIDE residential accommodation group term) | | | | | | | | | | | |
| home-based child care | c | | | | x | x | | x | x | | |
| home business | c | | | | x | x | | x | x | | |
| home occupations | c | | | | x | x | | x | x | | |
| home occupation (sex services) | c | | | | x | x | | x | x | | |
| (LAND USE terms OUTSIDE tourist and visitor accommodation group term) | | | | | | | | | | | |
| tourist and visitor accommodation | tourist and visitor accommodation group term | | | | | | | | | | |
| backpackers' accommodation | c | | | | x | x | | x | x | | |
| bed & breakfast accommodation | c | | | | x | x | | x | x | | |
| farm stay accommodation | c | | | | x | x | | x | x | | |
| hotel or motel accommodation | c | | | | x | x | | x | x | | |
| serviced apartments | c | | | | x | x | | x | x | | |
| (LAND USE terms OUTSIDE tourist and visitor accommodation group term) | | | | | | | | | | | |
| camping grounds | x | | | | x | x | | x | x | | |
| caravan parks | x | | | | x | x | | x | x | | |
| eco-tourist facilities | x | | | | x | x | | x | x | | |
| (LAND USE terms OUTSIDE commercial premises group term) | | | | | | | | | | | |
| commercial premises | commercial premises group term | | | | | | | | | | |
| business premises [eg. banks, post offices, hairdressers, etc.] | c | c | c | | x | x | | x | x | | |
| funeral homes | c | c | c | | x | x | | x | x | | |
| office premises | c | c | c | | x | x | | x | x | | |
| retail premises | c | c | c | | x | x | | x | x | | |
| bulky goods premises | c | c | c | | x | x | | x | x | | |
| cellar door premises | c | c | c | | x | x | | x | x | | |
| food & drink premises | c | c | c | | x | x | | x | x | | |
| pubs | c | c | c | | x | x | | x | x | | |
| restaurants or cafes | c | c | c | | x | x | | x | x | | |
| take-away food & drink premises | c | c | c | | x | x | | x | x | | |
| garden centres | c | c | c | | x | x | | x | x | | |
| hardware & building supplies | c | c | c | | x | x | | x | x | | |
| kiosks | c | c | c | | x | x | | x | x | | |
| landscaping material supplies | c | c | c | | x | x | | x | x | | |
| markets | c | c | c | | x | x | | x | x | | |
| plant nurseries | c | c | c | | x | x | | x | x | | |
| roadside stalls | c | c | c | | x | x | | x | x | | |
| rural supplies | c | c | c | | x | x | | x | x | | |
| shops | c | c | c | | x | x | | x | x | | |
| neighbourhood shops | c | c | c | | x | x | | x | x | | |
| timber yards | c | c | c | | x | x | | x | x | | |
| vehicle sales or hire premises | c | c | c | | x | x | | x | x | | |
| (LAND USE terms OUTSIDE commercial premises group term) | | | | | | | | | | | |
| amusement centres | c | | | | x | x | | x | x | | |
| entertainment facilities | c | | | | x | x | | x | x | | |
| function centres | c | | | | x | x | | x | x | | |

Employment Lands Scoping Study, North Blayney Industrial Lands, NSW

| Draft Blayney Local Environmental Plan 2011 (Post Public Exhibition) Land Use Matrix [DoP version 3.0] Legend o permitted without consent [mandated under the SL] o permitted without consent. c permitted with consent [mandated under the SL] c permitted with consent. x prohibited [mandated under the SL] x prohibited. A permitted under SEPP (Affordable Rental Housing) 2009. I permitted under SEPP (Infrastructure) 2007. fill colours in green or red mandated under the SL. fill colour in purple public infrastructure permitted under a SEPP. | | Business | | | | | | | Industrial | | | |
|--|--|-------------------------|-----------------|--------------------|--------------|-------------------------|------------------------|------------------|------------------------|----------------------|----------------------|------------------------|
| | | B1 Neighbourhood centre | B2 Local centre | B3 Commercial Core | B4 Mixed Use | B5 Business Development | B6 Enterprise corridor | B7 Business Park | IN1 General Industrial | IN2 Light Industrial | IN3 Heavy Industrial | IN4 Working Waterfront |
| Is the zone used? [please select Y/N for each zone] | | N | Y | N | N | Y | Y | N | Y | Y | N | N |
| highway service centres | | | | | | | | | | | | |
| industrial retail outlets | | | | | | | | | | | | |
| registered clubs | | | | | | | | | | | | |
| restricted premises | | | | | | | | | | | | |
| service stations | | | | | | | | | | | | |
| sex services premises | | | | | | | | | | | | |
| veterinary hospitals | | | | | | | | | | | | |
| wholesale supplies | | | | | | | | | | | | |
| Industry group term) | | | | | | | | | | | | |
| rural industries [eg. use of composting facilities and works] | | | | | | | | | | | | |
| agricultural produce industries | | | | | | | | | | | | |
| livestock processing industries | | | | | | | | | | | | |
| sawmill or log processing industries | | | | | | | | | | | | |
| stock & sale yards | | | | | | | | | | | | |
| Industry group term) | | | | | | | | | | | | |
| industries | | | | | | | | | | | | |
| heavy industries | | | | | | | | | | | | |
| hazardous industry | | | | | | | | | | | | |
| offensive industry | | | | | | | | | | | | |
| light industries | | | | | | | | | | | | |
| high technology industries | | | | | | | | | | | | |
| home industry | | | | | | | | | | | | |
| general industries | | | | | | | | | | | | |
| (LAND USE terms OUTSIDE industry group term) | | | | | | | | | | | | |
| boat building and repair facilities | | | | | | | | | | | | |
| vehicle body repair workshops | | | | | | | | | | | | |
| vehicle repair stations | | | | | | | | | | | | |
| (LAND USE establishment group term) | | | | | | | | | | | | |
| heavy industrial storage establishments | | | | | | | | | | | | |
| hazardous storage establishments | | | | | | | | | | | | |
| liquid fuel depots | | | | | | | | | | | | |
| offensive storage establishments | | | | | | | | | | | | |
| Storage premises group term) | | | | | | | | | | | | |
| storage premises | | | | | | | | | | | | |
| self storage units | | | | | | | | | | | | |
| (LAND USE terms OUTSIDE storage premises group term) | | | | | | | | | | | | |
| depots | | | | | | | | | | | | |
| warehouse or distribution centres | | | | | | | | | | | | |
| sewerage system group term) | | | | | | | | | | | | |
| sewerage systems | | | | | | | | | | | | |
| biosolids treatment facilities | | | | | | | | | | | | |
| sewage reticulation systems | | | | | | | | | | | | |
| sewage treatment plants | | | | | | | | | | | | |
| water recycling facilities | | | | | | | | | | | | |
| (LAND USE management facility group term) | | | | | | | | | | | | |
| waste or resource management facilities | | | | | | | | | | | | |
| resource recovery facilities | | | | | | | | | | | | |
| waste disposal facilities | | | | | | | | | | | | |
| waste or resource transfer stations | | | | | | | | | | | | |
| Water supply system group term) | | | | | | | | | | | | |
| water supply systems | | | | | | | | | | | | |
| water reticulation systems | | | | | | | | | | | | |
| water storage facilities | | | | | | | | | | | | |
| water treatment facilities | | | | | | | | | | | | |
| air transport facility group term) | | | | | | | | | | | | |
| air transport facilities | | | | | | | | | | | | |
| airport | | | | | | | | | | | | |
| heliport | | | | | | | | | | | | |
| (LAND USE terms OUTSIDE air transport facility group term) | | | | | | | | | | | | |
| airstrip | | | | | | | | | | | | |
| helipad | | | | | | | | | | | | |
| (Other LAND USE terms relating to infrastructure) | | | | | | | | | | | | |
| car parks | | | | | | | | | | | | |
| electricity generating works | | | | | | | | | | | | |
| freight transport facilities | | | | | | | | | | | | |
| passenger transport facilities | | | | | | | | | | | | |
| port facilities | | | | | | | | | | | | |
| roads | | | | | | | | | | | | |
| transport depots | | | | | | | | | | | | |
| truck depots | | | | | | | | | | | | |
| wharf or boating facilities | | | | | | | | | | | | |
| (Land use establishment group term) | | | | | | | | | | | | |
| educational establishments [eg. TAFE establishment, etc.] | | | | | | | | | | | | |
| schools | | | | | | | | | | | | |
| (Land use facility group term) | | | | | | | | | | | | |
| health services facilities | | | | | | | | | | | | |
| hospitals | | | | | | | | | | | | |
| medical centres | | | | | | | | | | | | |
| health consulting rooms | | | | | | | | | | | | |

Employment Lands Scoping Study, North Blayney Industrial Lands, NSW

| Draft Blayney Local Environmental Plan 2011 (Post Public Exhibition) Land Use Matrix [DoP version 3.0] | Business | | | | | | | Industrial | | | |
|--|-------------------------|-----------------|--------------------|--------------|-------------------------|------------------------|------------------|------------------------|----------------------|----------------------|------------------------|
| | B1 Neighbourhood centre | B2 Local centre | B3 Commercial Core | B4 Mixed Use | B5 Business Development | B6 Enterprise corridor | B7 Business Park | IN1 General Industrial | IN2 Light Industrial | IN3 Heavy Industrial | IN4 Working Waterfront |
| Legend o permitted without consent [mandated under the SI]. c permitted without consent. c permitted with consent [mandated under the SI]. c permitted with consent. x prohibited [mandated under the SI]. x prohibited. A permitted under SEPP (Affordable Rental Housing) 2009. I permitted under SEPP (Infrastructure) 2007. Fill colours in green or red mandated under the SI. Fill colour in purple public infrastructure permitted under a SEPP. | N | Y | N | N | Y | Y | N | Y | Y | N | N |
| Is the zone used? [please select Y/N for each zone] | N | Y | N | N | Y | Y | N | Y | Y | N | N |
| Other LAND USE terms relating to community infrastructure | | | | | | | | | | | |
| child care centres | c | c | c | c | c | c | c | x | x | x | x |
| community facilities | c | c | c | c | c | c | c | x | x | x | x |
| correctional centres | x | x | x | x | x | x | x | x | x | x | x |
| emergency services facilities | I | I | I | I | I | I | I | I | I | I | I |
| industrial training facilities | x | x | x | x | x | x | x | c | c | c | c |
| information and education facilities | c | c | c | c | c | c | c | c | c | c | c |
| places of public worship | c | c | c | c | c | c | c | x | x | x | x |
| public administration building | c | c | c | c | c | c | c | x | x | x | x |
| research stations | c | c | c | c | c | c | c | c | c | c | c |
| respite day care centres | c | c | c | c | c | c | c | x | x | x | x |
| signage | | | | | | | | | | | |
| advertising structure | c | c | c | c | c | c | c | c | c | c | c |
| building identification sign | c | c | c | c | c | c | c | c | c | c | c |
| business identification sign | c | c | c | c | c | c | c | c | c | c | c |
| LAND USE terms relating to recreation | | | | | | | | | | | |
| boat launching ramps | x | x | x | x | x | x | x | x | x | x | c |
| boat sheds | x | x | x | x | x | x | x | x | x | x | x |
| charter & tourism boating facilities | x | x | x | x | x | x | x | x | x | x | x |
| environmental facilities | c | c | c | c | c | c | c | c | c | c | c |
| jetties | x | x | x | x | x | x | x | x | x | x | c |
| marinas | x | x | x | x | x | x | x | x | x | x | x |
| mooring | x | x | x | x | x | x | x | x | x | x | x |
| mooring pens | x | x | x | x | x | x | x | x | x | x | x |
| recreation areas | c | c | c | c | c | c | c | c | c | c | c |
| recreation facilities (indoor) | c | c | c | c | c | c | c | c | c | c | c |
| recreation facilities (major) | x | x | x | x | x | x | x | x | x | x | x |
| recreation facilities (outdoor) | x | x | x | x | x | x | x | x | x | x | x |
| water recreation structures | x | x | x | x | x | x | x | x | x | x | x |
| Other miscellaneous LAND USE terms | | | | | | | | | | | |
| cemetery | x | x | x | x | x | x | x | x | x | x | x |
| crematorium | x | x | x | x | x | x | x | x | x | x | x |
| environmental protection works | o | o | o | o | o | o | o | o | o | o | o |
| exhibition homes | c | c | c | c | c | c | c | c | c | c | c |
| exhibition villages | x | x | x | x | x | x | x | x | x | x | x |
| extractive industries | x | x | x | x | x | x | x | x | x | x | x |
| flood mitigation works | c | c | c | c | c | c | c | c | c | c | c |
| mortuaries | c | c | c | c | c | c | c | c | c | c | c |
| open cut mining | x | x | x | x | x | x | x | x | x | x | x |
| development which cannot be characterised into any land uses defined in the SI | c | c | c | c | c | c | c | c | c | c | c |

9.4 RECOMMENDED BUFFER ZONES (SUBREGIONAL STRATEGY)

Recommended buffer distance to industry types

| Type of Production, Use or Storage (Purpose) | Threshold Distance (metres) |
|---|-----------------------------|
| <i>Rural industries</i> | |
| Abattoir | 500 |
| Smallgoods production | 100 |
| Manufacturing of milk products | 300 |
| Production of vegetable oils and fats using solvents | 300 |
| Flour mill | 300 |
| Bakery (other than one ancillary to a shop) | 100 |
| Maltworks | 300 |
| Tobacco and cigarette production | 500 |
| Poultry processing works | 100 |
| Freezing and cool storage | 150 |
| Milk depot | 100 |
| <i>Textiles</i> | |
| Dyeing or finishing of cotton, linen and woollen yarns and textiles | 300 |
| Carpet backing with latex | 300 |
| Production of artificial fibres and textiles | 1,000 |
| Rope, cordage and twine production | 100 |
| Wool scouring | 200 |
| <i>Wood, Wood Products and Furniture</i> | |
| Sawmill | 500 |
| Charcoal production | |
| - by the retort process | 500 |
| - other than by the retort process | 1,000 |
| Wood preservation plant | 100 |
| Wood-fibre or wood-chip products | 1,500 |
| Joinery | 100 |
| <i>Paper and Paper Products</i> | |
| Paper or paper pulp production: | |
| - involving combustion of sulphur or sulphur containing materials | 5,000 |
| - from semi-processed materials | 100 |

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| Type of Production, Use or Storage (Purpose) | Threshold Distance (metres) |
|---|------------------------------------|
| - from prepared cellulose and rags | 200 |
| <i>Chemical, Petroleum and Coal Products</i> | |
| Chemical fertiliser production | 1,000 |
| Industrial gases production | 1,000 |
| Polyester resins production | 1,000 |
| Synthetic resins and rubber production other than above | 1,000 |
| Ammunition, explosives and fireworks production | 1,000 |
| Formaldehyde production | 300 |
| <i>Paints and inks</i> | |
| - manufacture | 1,000 |
| - blending and mixing only | 300 |
| Pharmaceutical and veterinary production | 1,000 |
| Biocides production and storage | 1,000 |
| Soap and other detergents production | 300 |
| Cosmetics and toilet preparations production | 100 |
| Inks production | 300 |
| Petroleum refinery | 2,000 |
| Briquette production | 300 |
| Other petroleum or coal production | 500 |
| Organic industrial chemicals production other than above | 1,000 |
| Inorganic industrial chemicals production other than above | 1,000 |
| Chemical products other than above | 300 |
| <i>Non-metallic Mineral Products</i> | |
| Glass and glass production including glass wool | 500 |
| Rock wool manufacture | 500 |
| Clay bricks, tiles and pipe refractories with a design production rate exceeding 10,000 tonnes a year | 200 |
| Cement production in amounts: | |
| - up to 5,000 tonnes a year | 300 |
| - between 5,000 and 150,000 tonnes a year | 500 |
| - exceeding 150,000 tonnes a year | 1,000 |
| Concrete batching plant | 300 |

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| Type of Production, Use or Storage (Purpose) | Threshold Distance (metres) |
|---|------------------------------------|
| Bitumen batching plant | 500 |
| Concrete article or stone article production | 100 |
| Plaster or plaster articles production | 100 |
| <i>Basic Metal Products</i> | |
| Works producing iron or steel products in amounts: | |
| - up to 1,000,000 tonnes a year | 100 |
| - exceeding 1,000,000 tonnes a year | 1,000 |
| Production of non-ferrous metals as: | |
| - aluminium by electrolysis | 2,000 |
| other non-ferrous metals in amounts: | |
| - up to 100 tonnes a year | 100 |
| - between 100 and 2,000 tonnes a year | 300 |
| - exceeding 2,000 tonnes a year | 500 |
| <i>Fabricated Metal Products</i> | |
| Structural or sheet metal production | 500 |
| Works producing iron or steel products in amounts | |
| - up to 1,000,000 tonnes per year | 100 |
| - exceeding 1,000,000 tonnes per year | 1,000 |
| Boiler makers | 100 |
| <i>Miscellaneous Manufacturing</i> | |
| Rendering and casings works | 1,000 |
| Leather tanning and dressing | 300 |
| Leather and artificial leather goods production | 300 |

9.5 RELEVANT STUDIES / BACKGROUND INFORMATION

The following are some of the studies relevant to or considered by this Report.

9.5.1 Council

- Western Research Institute Ltd (2015) *Socio-Economic Profile and Opportunities (Blayney 2020 Masterplan)* ('WRI 2015 Study')
- Blayney Council (2012) *Settlement Strategy* – Adopted by Council ('Settlement Strategy')
- GHD (2008) *Sub Regional Rural & Industrial Land Use Strategy* (for the Councils of Blayney, Cabonne and Orange City) – Adopted by Council ('Subregional Strategy')

9.5.2 Regional

- Bathurst-Orange Development Corporation (N.S.W.) (1976) *Bathurst-Orange Growth Centre*
- Regional Development Australia (RDA Central West) *Regional Plan 2013-2016*
- AEC Group / Invest Central NSW (December 2012) *Central West Regional Economic Profile*
- Regional Development Australia (RDA Central West) (August 2013) *Investment Opportunity Assessment*
- AEC Group / Regional Development Australia (RDA Central West) (October 2014) *NSW Central West Region Export / Import Contribution Study*
- Blayney-Demondrille Railway Line studies and tenders

9.5.3 NSW State Government

- NSW Government NSW 2021 Plan
- NSW Government (December 2012) *NSW Long Term Transport Master Plan*
- NSW Government (November 2013) *NSW Freight and Ports Strategy* ('Freight & Ports Strategy')
- NSW Government (December 2013) *Central West Regional Transport Plan* ('Central West Transport Plan')
- Infrastructure NSW (November 2014) *State Infrastructure Strategy Update 2014 – Recommendations to the NSW Government*
- NSW Government (February 2015) *Economic Profile – Central West and Orana – Prepared for the Economic Development Strategy for Regional NSW*
- NSW Dept. of Premier and Cabinet & REMPLAN (Nov 2014) *Infrastructure Services Impact Model: Blayney Shire Council* (relating to Regis / McPhillamys Mine)
- Transport for NSW / PWC (2015) *Containerised cargo demand assessment: Central Western NSW*

9.6 A3 MAPPING

SEE ATTACHED