

GROWTH MANAGEMENT PROGRAM

LAND SUPPLY REPORT FOR GREATER ADELAIDE

PlanSA



Part 3: Employment Land

Published June 2021



Government of South Australia
Attorney-General's Department

Disclaimer

While every reasonable effort has been made to ensure that this document is correct at the time of publication, the Minister for Planning and Local Government, the State Planning Commission, the State of South Australia, its agencies, instrumentalities, employees and contractors disclaim any and all liability to any person in respect to anything or the consequence of anything done or omitted to be done in reliance upon the whole or any part of this document.

Issued by the Attorney General's Department on 2 June 2021

Version 1: Published on 2 June 2021

© Government of South Australia. All rights reserved.



Government of South Australia
Attorney-General's Department

TABLE OF CONTENTS

1. EMPLOYMENT LAND OVERVIEW	1
1.1 Introduction	1
1.2 What is employment land?	2
1.3 Employment Land Supply and Consumption	3
1.4 Employment trends	7
1.5 Employment projections by industry	8
1.6 Employment by Broad Industry Category (BIC)	9
1.7 Regional comparative advantage	10
1.8 The link between employment by sector and demand for employment land	11
1.9 The approach to managing employment land	12
1.10 Strategic impacts on land use and strategic directions	12
2. EMPLOYMENT LAND SUPPLY – OUTER NORTH	15
2.1 Overview	15
2.2 Employment land supply and consumption	16
2.3 Recent changes to employment land supply	18
2.4 Projected change in employment, 2020 - 2030	19
2.5 Key employment precincts – Outer North	20
2.6 Employment land summary and strategic issues	25
3. EMPLOYMENT LAND SUPPLY – INNER NORTH	27
3.1 Overview	27
3.2 Employment land supply and consumption	28
3.3 Recent changes to employment land supply	30
3.4 Projected change in employment, 2020 - 2030	31
3.5 Key employment precincts – Inner North	32
3.6 Employment land summary and strategic issues	41
4. EMPLOYMENT LAND SUPPLY – ADELAIDE WEST	43
4.1 Overview	43
4.2 Employment land supply and consumption	44
4.3 Recent changes to employment land supply	46
4.4 Projected change in employment, 2020 - 2030	48
4.5 Key employment precincts – Adelaide West	49
4.6 Employment land summary and strategic issues	68
5. EMPLOYMENT LAND SUPPLY – INNER METRO	71
5.1 Overview	71
5.2 Employment land supply and consumption	72
5.3 Recent changes to employment land supply	74
5.4 Projected change in employment, 2020 - 2030	75
5.5 Key employment precincts – Inner Metro	76

5.6	Employment land summary and strategic issues.....	81
6.	EMPLOYMENT LAND SUPPLY – INNER SOUTH.....	83
6.1	Overview.....	83
6.2	Employment land supply and consumption.....	84
6.3	Recent changes to employment land supply	86
6.4	Projected change in employment, 2020 - 2030.....	87
6.5	Key employment precincts – Inner South	88
6.6	Employment land summary and strategic issues.....	94
7.	EMPLOYMENT LAND SUPPLY – OUTER SOUTH.....	97
7.1	Overview.....	97
7.2	Employment land supply and consumption.....	98
7.3	Recent changes to employment land supply	100
7.4	Projected change in employment, 2020 - 2030.....	101
7.5	Key employment precincts – Outer South.....	102
7.6	Employment land summary and strategic issues.....	108

LIST OF FIGURES

Figure 1:	Employment land overview, Greater Adelaide, June 2020.....	1
Figure 2:	Part 3 Employment Land Reporting Structure.....	2
Figure 3:	Occupied and vacant land by region (ha).....	3
Figure 4:	Future employment land by Greater Adelaide region (ha)	4
Figure 5:	Employment land consumption 2008 - 2018, Greater Adelaide region (ha).....	5
Figure 6:	Case Study – General Motors Holden (GMH) Site, Elizabeth South.....	6
Figure 7:	Share of Gross State Product (GSP), manufacturing compared to other key sectors.....	7
Figure 8:	Employment by industry type across Greater Adelaide employment lands, 2020 - 2030	8
Figure 9:	Broad Industry Categories (BIC).....	9
Figure 10:	Projected total jobs by broad industry category (BIC), 2020 and 2030	10
Figure 11:	Outer North employment land overview.....	15
Figure 12:	Total employment land supply by precinct, June 2020.....	16
Figure 13:	Jobs growth on employment land by Broad Industry Category (BIC), 2020 - 2030.....	19
Figure 14:	Greater Edinburgh Parks	21
Figure 15:	Roseworthy	22
Figure 16:	Edinburgh North.....	23
Figure 17:	Elizabeth South.....	24
Figure 18:	Inner North employment land overview.....	27
Figure 19:	Total employment land supply by precinct, June 2020.....	28
Figure 20:	Jobs growth on employment land by Broad Industry Category (BIC), 2020 - 2030.....	31
Figure 21:	Gepps Cross / Cavan / Pooraka	33
Figure 22:	Edinburgh Parks	34
Figure 23:	Salisbury South / Parafield Hills West.....	35
Figure 24:	Burton / Direk.....	36

Figure 25: Kilburn.....	37
Figure 26: Technology Park.....	38
Figure 27: Salisbury Plain.....	39
Figure 28: Windsor Gardens.....	40
Figure 29: Adelaide West employment land overview.....	43
Figure 30: Total employment land supply by precinct, June 2020.....	44
Figure 31: Jobs growth on employment land by Broad Industry Category (BIC), 2020 - 2030.....	48
Figure 32: Adelaide Airport.....	50
Figure 33 Wingfield.....	51
Figure 34: Gillman / Dry Creek.....	52
Figure 35: Le Fevre Peninsula.....	53
Figure 36: North Arm.....	54
Figure 37: Regency Park.....	55
Figure 38: Marleston / Richmond / Mile End South.....	56
Figure 39: Brompton /Thebarton / Hindmarsh.....	57
Figure 40: Beverley.....	58
Figure 41: Woodville North.....	59
Figure 42: North Plympton.....	60
Figure 43: Athol Park.....	61
Figure 44 Royal Park.....	62
Figure 45: Dudley Park.....	63
Figure 46: Torrensville.....	64
Figure 47: Hendon.....	65
Figure 48: Kidman Park.....	66
Figure 49: Port Adelaide.....	67
Figure 50: Inner Metro employment land overview.....	71
Figure 51: Total employment land supply by precinct, June 2020.....	72
Figure 52: Jobs growth on employment land by Broad Industry Category (BIC), 2020 - 2030.....	75
Figure 53: Kent Town / Stepney.....	77
Figure 54: Newton.....	78
Figure 55: Glynde.....	79
Figure 56: Magill.....	80
Figure 57: Inner South employment land overview.....	83
Figure 58: Total employment land supply by precinct, June 2020.....	84
Figure 59: Jobs growth on employment land by Broad Industry Category (BIC), 2020 - 2030.....	87
Figure 60: Somerton Park.....	89
Figure 61: South Road Corridor - Central.....	90
Figure 62: South Road Corridor - North.....	91
Figure 63: South Road Corridor - South.....	92
Figure 64: Tonsley.....	93
Figure 65: Outer South employment land overview.....	97
Figure 66: Total employment land supply by precinct, June 2020.....	98
Figure 67: Jobs growth on employment land by Broad Industry Category (BIC), 2020 - 2030.....	101
Figure 68: Lonsdale.....	103
Figure 69: Port Stanvac.....	104

Figure 70: Seaford	105
Figure 71: Hackham.....	106
Figure 72 Aldinga Beach.....	107

LIST OF TABLES

Table 1: Employment Land Supply by Region in Hectares (ha), June 2020	3
Table 2: Comparative advantage analysis by region, 2030.....	11
Table 3: Strategic directions for Greater Adelaide employment lands.....	13
Table 4: Summary of identified employment precincts, Outer North region, June 2020.....	17
Table 5: Employment land changes, 2008 - 2020	18
Table 6: Comparative advantage analysis for identified precincts	25
Table 7: Summary of identified employment precincts, Inner North region, June 2020	29
Table 8: Employment land changes, 2008 - 2020	30
Table 9: Comparative advantage analysis for identified precincts	41
Table 10: Summary of identified employment precincts, Adelaide West region, June 2020	45
Table 11: Employment land changes, 2008 - 2020	46
Table 12: Comparative advantage analysis for identified precincts.....	68
Table 13: Summary of identified employment precincts, Inner Metro region, June 2020	73
Table 14: Employment land changes, 2008 - 2020	74
Table 15: Comparative advantage analysis for identified precincts.....	81
Table 16: Summary of identified employment precincts, Inner South region, June 2020.....	85
Table 17: Employment land changes, 2008 - 2020	86
Table 18: Comparative advantage analysis for identified precincts.....	94
Table 19: Summary of identified employment precincts, Outer South region, June 2020	99
Table 20: Employment land changes, 2008 - 2020.....	100
Table 21: Comparative advantage analysis for identified precincts.....	108

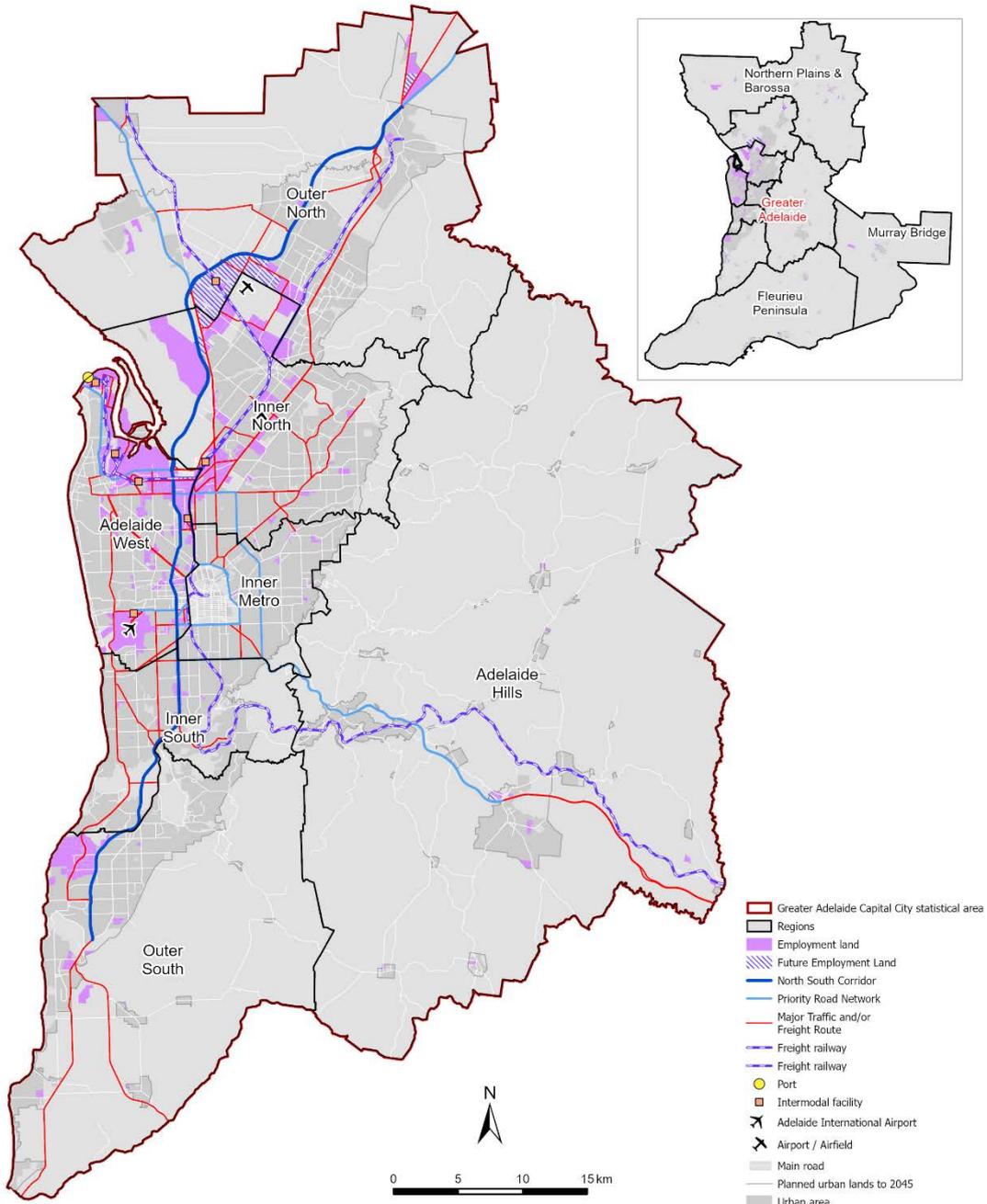
I. EMPLOYMENT LAND OVERVIEW

1.1 Introduction

Part 3 of the Land Supply Report (LSR) provides information and analysis on employment land supply, demand, industry types and projected jobs growth to 2030. This report focuses on the following regions within the Greater Adelaide Planning Region (refer to Figure 1).

- Outer North
- Inner North
- Inner Metro
- Outer South
- Inner South
- Adelaide West

Figure 1: Employment land overview, Greater Adelaide, June 2020



1.2 What is employment land?

Historically, the term ‘industrial land’ was used to describe land providing employment outside of the activity centre network¹, the Central Business District (CBD) and institutional uses (i.e. schools, universities and hospitals). In times where manufacturing made up a significant proportion of total employment in South Australia (and absorbed a substantial quantity of demand for employment lands), use of this terminology was entirely warranted.

In recent years, however, the range of activities taking place within these precincts has evolved from traditional manufacturing. In recognition of this, the term ‘employment land’ has emerged as a more appropriate term to classify these formerly ‘industrial’ precincts. Referring to these precincts as ‘employment lands’ more accurately reflects and characterises their role and function as locations for jobs across a wide range of employment sectors.

This report sets out to provide a ‘snapshot’ of current trends and analysis of projected demand for employment land within Greater Adelaide. Figure 2 outlines how employment land is defined and monitored as part of the LSR.

Figure 2: Part 3 Employment Land Reporting Structure



¹ Activity centers are identified within *The 30-Year Plan for Greater Adelaide – 2017 Update*.

1.3 Employment Land Supply and Consumption

Applying the geography detailed in Section 1.1 and employment land status definitions outlined in Section 1.2, an overview of employment land supply by region is provided in Table 1.

Table 1: Employment Land Supply by Region in Hectares (ha), June 2020

REGION	VACANT	OCCUPIED	OTHER USE*	FUTURE	TOTAL
Outer North	151	893	170	1,732	2,946
Inner North	486	3,105	0	90	3,681
Outer South	331	808	0	0	1,139
Inner South	8	242	0	0	250
Adelaide West	797	3,441	203	0	4,441
Inner Metro	4	112	0	0	116
Adelaide Hills	21	179	0	0	200
Fleurieu	25	362	0	0	324
Northern Plains & Barossa	37	1,333	0	0	1,370
Murray Bridge	73	591	0	0	664
TOTAL	1,933	11,066	373	1,822	15,194

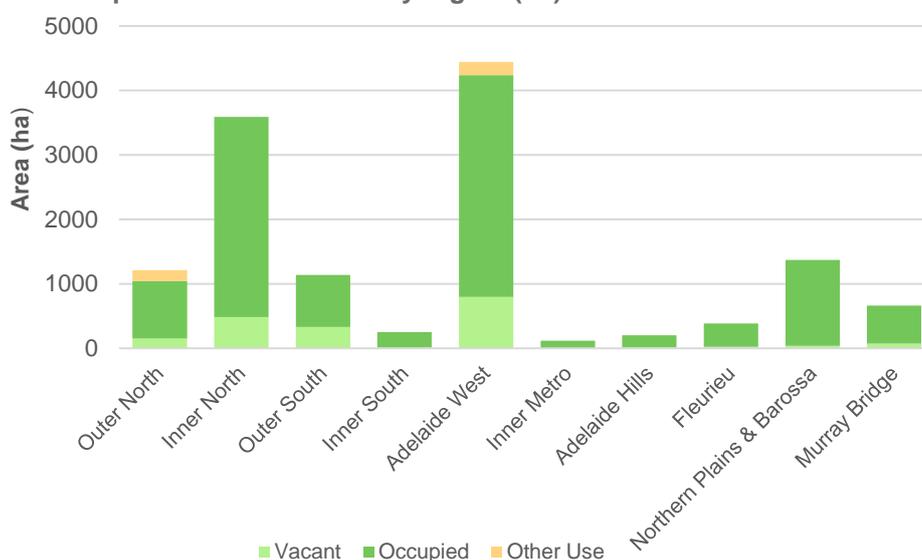
*Other use refers to land which is primarily used for primary production purposes, and is therefore typically vacant of significant structures or buildings but has an ‘other’ use.

As illustrated in Table 1, all regions contain zoned employment land. Over 70% of available supply is contained within the Adelaide West and Inner North regions. Beyond this, the Outer South and Outer North are the only other regions with significant quantities of zoned employment land.

1.3.1 Vacant Land Supply

There is an estimated 1,933 hectares of zoned employment land across Greater Adelaide which remains vacant. This vacant land supply is broken down at a regional level in Figure 3.

Figure 3: Occupied and vacant land by region (ha)



Analysis of the vacant land employment land supply illustrated in Table 1 and Figure 3 shows:

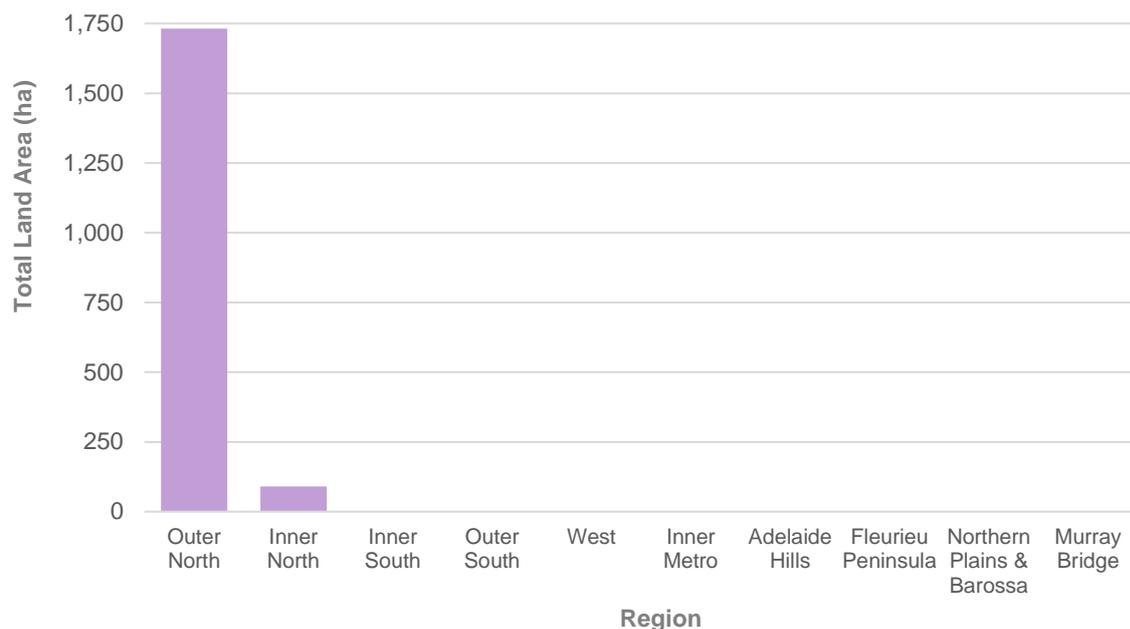
- The Adelaide West comprises the largest single source of vacant land, accounting for over 40% of total supply. It should be noted that some of this land is constrained, and therefore may not be readily available to market.
- The Inner North and Outer South regions comprise a further 817 hectares combined, accounting for another 40% of available vacant land supply.
- Conversely the Inner Metro region, as of June 2020, only contains 4 hectares of zoned vacant land.
- The Outer North and Adelaide West regions comprise land identified as 'other use'. This relates to land used for either primary production or infrastructure purposes.

As identified in Section 1.2, the LSR does not seek to report on underutilised or vacant buildings. However for context, current reporting indicates building vacancy rates within Greater Adelaide's employment lands since 2013 ranges from around 2.5% to 5.0%². These figures align with data collected from visual inspections of selected employment precincts in late 2020³. These inspections indicated low building vacancy rates with the majority of vacant buildings identified as older building stock.

1.3.2 Identified Future Land Supply

Future employment land by region, as documented within *The 30-Year Plan for Greater Adelaide - 2017 Update*, is shown in Figure 4.

Figure 4: Future employment land by Greater Adelaide region (ha)



Analysis of these figures illustrates the following:

- The Outer North region contains the largest source of identified future employment land within Greater Adelaide, accounting for 95% of total supply.
- Greater Edinburgh Parks, which is located adjacent the Edinburgh Royal Australian Airforce Base (RAAF), accounts for the majority of this land.
- Future employment land associated with the Inner North is also associated with the Greater Edinburgh Parks region.

² Colliers International, Industrial Research and Forecast Report - Second Half 2019

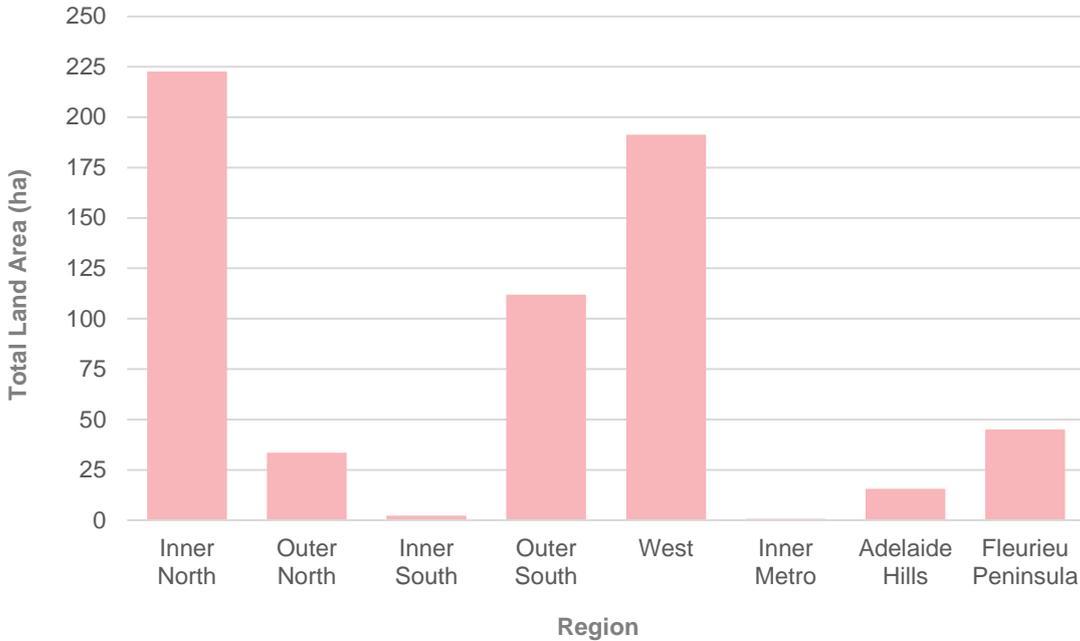
³ Inspections undertaken by AGD staff in December 2020

- There is no defined future employment land within the Outer South region.

1.3.3 *Employment Land Consumption, 2008-2018*

Figure 5 illustrates the amount of zoned employment land consumed from 2008, which was when the 2007 Industrial Land Strategy was published, to 2018 when the last full snapshot of the dataset was undertaken⁴.

Figure 5: Employment land consumption 2008 - 2018, Greater Adelaide region (ha)



Analysis of these figures illustrates the following:

- A total 630 hectares of vacant employment land was consumed;
- The Inner North and Adelaide West regions accounted for 67% of total land consumption.
- Assuming a similar rate of consumption across the next 10 years, it is estimated that current vacant land supply, identified in Section 1.3.1, is sufficient.
- It is important to note however the location, configuration and supporting infrastructure may not provide a ‘development ready’ option for all future employment uses.

1.3.4 *Case Study: Elizabeth South*

Part 3 of the LSR only reports on vacant land, not vacant or underutilised buildings. Analysis of this should form part of any revised Industrial Land Use Strategy to ensure a more complete overview of available supply.

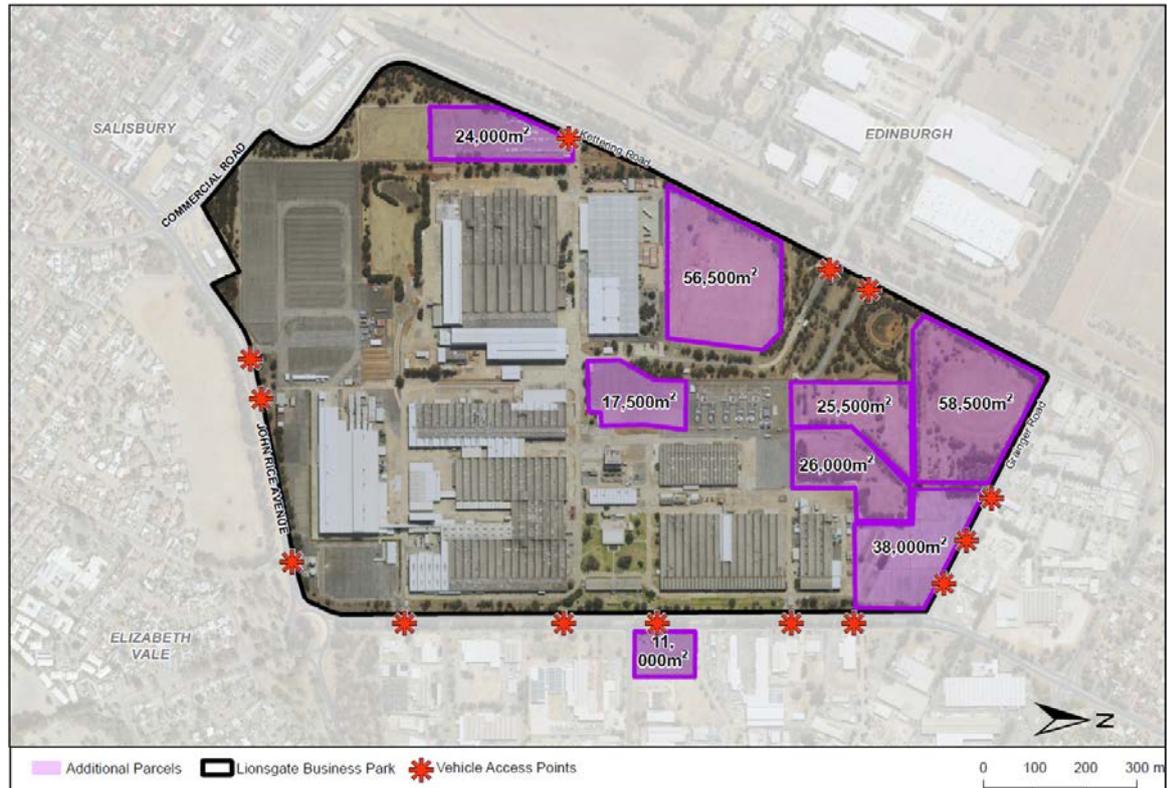
An example of underutilised employment land within Greater Adelaide is the former General Motors Holden (GMH) site in Elizabeth South. When vehicle manufacturing ceased in late 2017 the site was purchased by a private entity who have begun the sites transition to an integrated industrial business park, now known as Lionsgate.

The site has attracted interest from a range of businesses seeking to undertake a variety of activities. Whilst traditional manufacturing is at the core, other land uses such as the co-location and establishment of head offices, have emerged. This represents a shift from a traditional ‘blue collar’ workforce typically associated with employment precincts to a more diverse range of employment activities and worker pools.

⁴ A different method for capturing, recording and analyzing the supply of employment land has been undertaken as part of the LSR, therefore the data does not directly correlate with data captured in 2008.

The adaptive reuse of existing buildings and infrastructure to facilitate and support multiple tenancies has been key. Additional sources of vacant land have also been identified, with over 25ha of land previously assigned as reserve or car storage made available to market for future development⁵, as illustrated in Figure 6.

Figure 6: Case Study – General Motors Holden (GMH) Site, Elizabeth South



1963 – 2017: GMH Factory

- Single operator occupying entire site
- Accommodated vehicle manufacturing, a traditional employment activity
- At its peak in 2003 the plant produced 780 vehicles a day
- Large vacant land parcels were required to store completed vehicles
- Operations ceased in October 2017 resulting in the direct loss of approximately 2,900 jobs since the closure was announced in late 2013.

2017 – Current: Lionsgate Business Park

- Purchased by private operator
- Site converting into an industrial business park ('Lionsgate')
- Adaptive reuse and reconfiguration of existing buildings to accommodate multiple tenancies
- A further 25ha of previously 'vacant' land is being made available for new development
- Development supports a variety of land uses
- New businesses include Sonnen, Genis Steel, Australian Cranes and Levett Engineering.

⁵ www.realcommercial.com.au

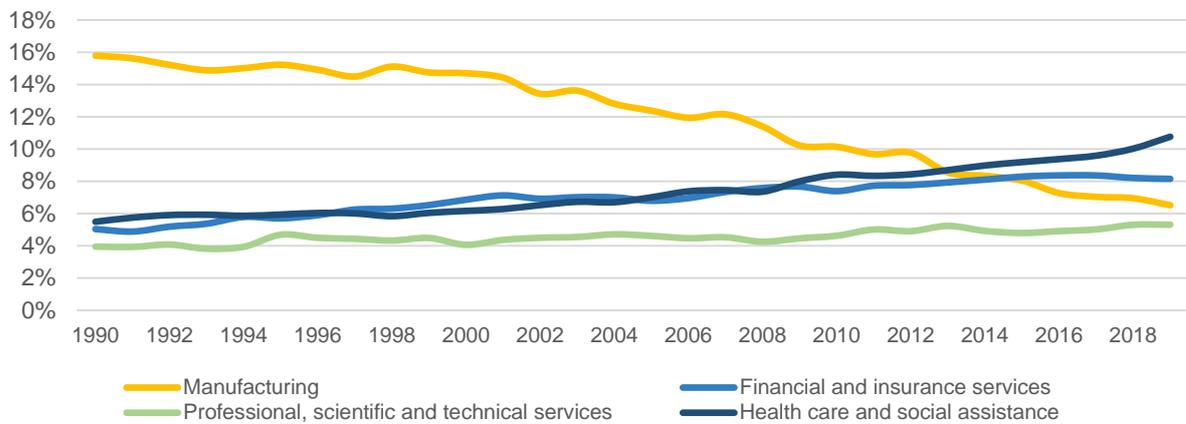
1.4 Employment trends

This section identifies significant employment trends⁶ in South Australia which may influence the type of jobs and future land use requirements. Analysis identified the following key employment trends:

- **Decline of traditional manufacturing**

The share of output attributable to traditional manufacturing in Australia and South Australia has reduced in recent decades. Figure 7 shows the decline in economic importance of traditional manufacturing in South Australia. Since 1990, the share of the State’s GSP attributable to manufacturing has shrunk from 16% to around 6% in 2019. In comparison the health care and social assistance sector has grown from just over 5% to 11% over the same period.

Figure 7: Share of Gross State Product (GSP), manufacturing compared to other key sectors



Source: ABS

- **Growth of advanced manufacturing and other knowledge intensive activities**
South Australia is well-positioned to support growth in knowledge intensive forms of ‘advanced manufacturing’. These activities generally involve the use of innovative and leading edge technologies to streamline the manufacturing process. So, while traditional manufacturing is contracting, advanced manufacturing represents an opportunity for future growth.
- **Diversification of use**
In recent years, the diversity of business types locating within employment precincts has grown. This means precincts are increasingly accommodating activities linked to the provision of services and retail.
- **Increased consumption and global trade**
Rising household income has increased import demand for goods from both national and overseas producers. In addition, there has been increasing demand for Australian-made goods from global markets. These factors have led to an increase in the amount of employment land dedicated to the storage and distribution of goods, particularly in precincts with good access to strategic freight routes, intermodals and trade gateways.
- **The role of new infrastructure in reshaping urban geographies**
Governments are recognising the need to invest in new infrastructure to ensure that urban economies are positioned to prosper in the new economy. These infrastructure investments typically reflect the need to reduce the cost associated with accessing goods from overseas

⁶ Employment trends and employment projections are based on material from an employment lands background paper prepared by SGS Economics and Planning in 2020.

suppliers, and to generate productivity improvements that raise the competitiveness of local producers.

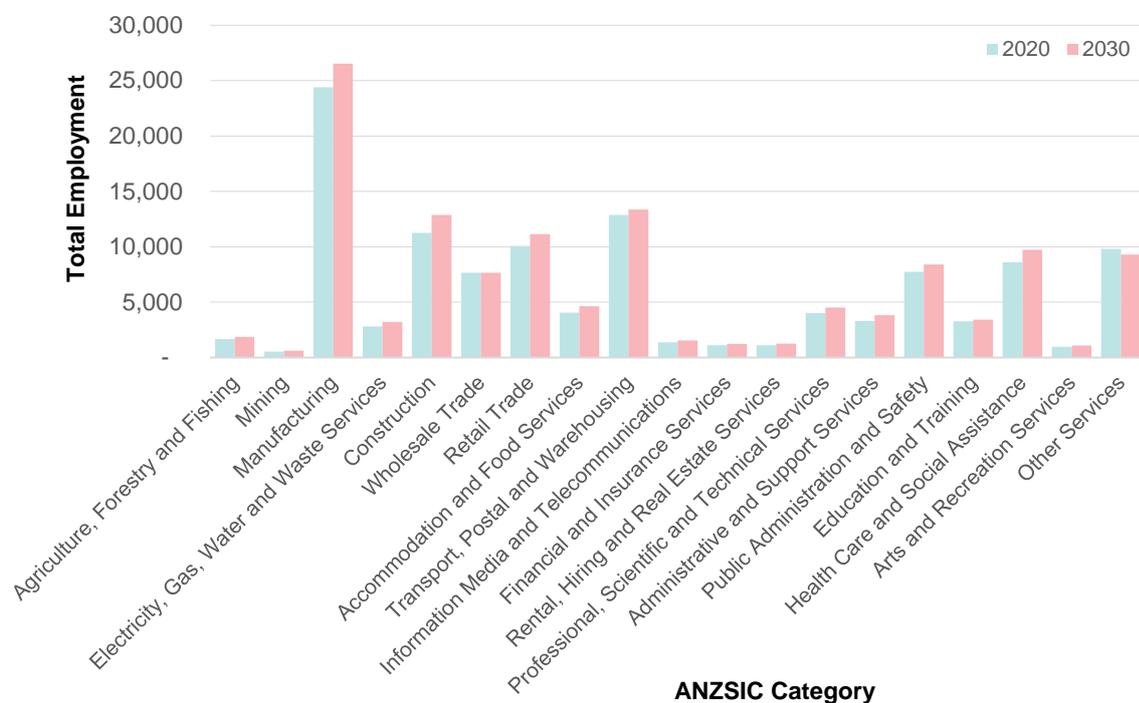
- **Impact of COVID-19 on employment lands**

Preliminary information indicates demand for employment land in the Outer North and Adelaide West regions have experienced strong growth since the beginning of 2020. This trend will need to be closely monitored to ascertain whether or not this increased demand will continue post COVID-19.

1.5 Employment projections by industry

Analysis of employment (jobs) by industry type (ANZSIC⁷ category) provides an overview of the main activities occurring on employment lands. Figure 8 shows the projected⁸ number of jobs, for 2020 and 2030, by industry classification across Greater Adelaide.

Figure 8: Employment by industry type across Greater Adelaide employment lands, 2020 - 2030



Analysis of these projections identifies the following:

- Manufacturing will not only remain the largest employer, but grow its share by 2030. This will be primarily driven by jobs associated with the future frigates and attack class submarine program at Osborne in the LeFevre Peninsula employment precinct.
- The importance of other traditionally 'blue collar' sectors within employment lands, which is demonstrated by the level of employment in construction; transport, postal and warehousing and other services⁹.

⁷ ANZSIC: Australian and New Zealand Standard Industrial Classification allows the grouping of different employment sectors into an organisational structure that can be used for analysis.

⁸ Employment land projections are based on a small area geographies. These generally align with identified precincts however in some instances there is not a perfect alignment of these geographies.

⁹ In reference to jobs on employment lands, 'other services' covers activities like repair and maintenance of automobiles and other pieces of machinery.

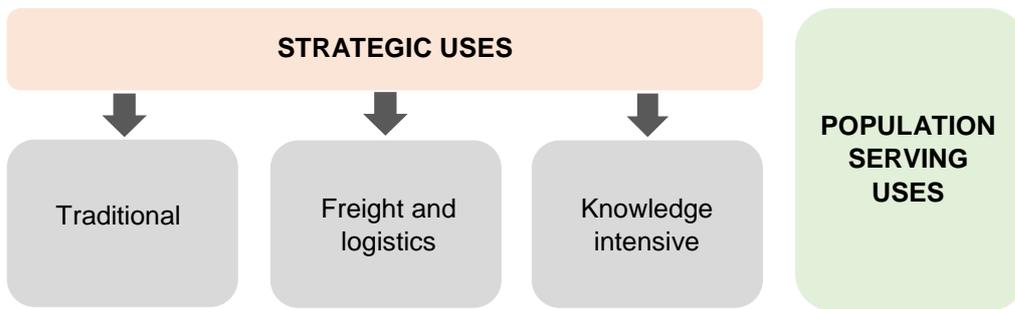
- The range of industry types shown in Figure 9, illustrates the diversity of jobs found within employment land precincts, including jobs related to retail trade; health care and social assistance and public administration.

1.6 Employment by Broad Industry Category (BIC)

To understand the link between employment activities and land use, broad industry categories (BICs) were created by aggregating a range of ANZSIC categories¹⁰ (Figure 8). This approach provides a clearer understanding of a precincts relative strengths and allows a better understanding of the link between economic activity and use of employment land.

In broad terms, employment generating activities within employment land can fit into one of two categories: strategic and population serving. These are shown in Figure 9 and described below.

Figure 9: Broad Industry Categories (BIC)



Strategic uses tend to seek locations whose attributes support their underlying business activities.

Traditional activities - tend to seek locations with good access to skilled blue collar workforces. In addition, they often generate externalities, therefore tending to seek precincts with buffers from sensitive uses.

Freight and logistics activities - employ relatively few people, but are vital for a productive urban economy. Usually associated with heavy vehicle movements, they tend to require large lots, in precincts buffered from sensitive uses close to freight routes.

Knowledge-intensive activities - tend to prefer precincts accessible to relatively educated worker populations, with proximity to knowledge-generating institutions (universities and hospitals), and a range of public and private sector organisations often found in CBDs.

Broad Industry Categories (BICs) and ANZSIC Categories

For the purposes of this analysis, BICs are deemed to comprise the following ANZSIC categories:

Traditional: Agriculture, Forestry and Fishing; Mining; Manufacturing; Electricity, Gas, Water and Waste Services; Construction; Wholesale Trade; Administrative and Support Services

Freight and logistics: Transport, Postal and Warehousing

Knowledge intensive: Information Media and Telecommunications; Financial and Insurance Services; Professional, Scientific and Technical Services; Public Administration and Safety; and Education and Training; Health Care and Social Assistance

Population serving: Construction; Wholesale Trade; Retail Trade; Accommodation and Food Services; Rental, Hiring and Real Estate; Education and Training; Health Care and Social Assistance; Arts and Recreation Services; Other Services

¹⁰ Categories identified in section 1.5

Population serving uses¹¹ are shaped by demand generated from catchment populations. Consequently, demand for these sorts of activities tends to be relatively evenly distributed across metropolitan areas in locations with good accessibility and visibility to population catchments.

The total number of jobs across all BIC's within Greater Adelaide's employment land are projected to grow from 2020 to 2030, as illustrated in Figure 10.

Figure 10: Projected total jobs by broad industry category (BIC), 2020 and 2030



Analysis of these projections identifies the following:

- Traditional employment activities, such as manufacturing will still play a critical role in jobs growth over the next ten years.
- Demand for population serving activities will continue to grow, with new opportunities presenting in regions with higher rates of population and dwelling growth.
- Growth in knowledge intensive industries will continue, particularly within the Inner Metro and Inner South regions.
- Employment in freight and logistic activities will not increase at the same rate, however this does not mean the sector is less important than the others, however more reflective of technological advances and improved efficiencies reducing demand for more labour.

1.7 Regional comparative advantage

Comparative advantage recognises that relative strengths vary across Greater Adelaide's employment lands. Identification of regional comparative advantage (see inset box) is an important step in thinking strategically about ways to support the expansion and evolution of activities taking place across the metropolitan employment land network.

Table 2 summarises the projected comparative advantage for each region in 2030.

Comparative advantage is an economic concept that recognises the fact that (in this case) certain employment land precincts will have attributes that mean they are more suited to the provision of some activities over others.

By calculating the share of jobs by broad industry category (BIC) for each precinct in 2030 and comparing this figure to the share across all metropolitan employment lands, it is possible to understand the relative strengths of individual precincts, or their *comparative advantage*.

¹¹ Population serving activities accommodate industry types located within both knowledge intensive and traditional forms of employment.

Table 2: Comparative advantage analysis by region, 2030

REGION	STRATEGIC ACTIVITIES			POPULATION SERVING
	Traditional	Freight and Logistics	Knowledge Intensive	
Inner Metro			High comparative advantage	Comparative advantage
Inner North	Comparative advantage	Comparative advantage		
Outer North				Comparative advantage
Inner South			Comparative advantage	
Outer South	Comparative advantage			Comparative advantage
West	High comparative advantage	High comparative advantage	Comparative advantage	

High comparative advantage, when compared to other regions
 Comparative advantage
 No comparative advantage

Analysis of the comparative advantage/s for each region identifies the following:

- Adelaide West, with its key trade gateways, freight corridors and large tracts of well protected employment land, is the most significant region for both *traditional* and *freight and logistic* employment activities within Greater Adelaide.
- Regions closest to the CBD (i.e. Inner Metro and Inner South) have comparative advantages when it comes to *knowledge intensive* employment activities.

The comparative advantage concept is used throughout the report to assess the relative strengths of the identified regions and precincts.

1.8 The link between employment by sector and demand for employment land

The quantity of floor space taken up by a single employment land worker varies considerably depending on a range of factors, including the type of employment activity. For example, activity in traditional and freight and logistics categories are typically capital and land intensive, and therefore carry lower employment densities. This means a region dominated by such activities is likely to accommodate workers at low densities, often less than 1 worker per 300 square metres.

On the other hand, commercial office and studio formats (most commonly associated with knowledge intensive forms of employment), tend to accommodate workers at much higher densities. Whilst worker densities tend to be lower in non-CBD spaces, between 25 and 35 square metres of floor space per worker would be a standard provision of space in these formats.

It is therefore important to understand the influence of industry mix within a region when estimating future demand for employment land. The overarching role of the region in delivering either a strategic or population serving function will also impact land use requirements and demand on existing infrastructure.

1.9 The approach to managing employment land

The *Metropolitan Adelaide Industrial Land Strategy 2007*¹² is the current guiding document outlining how to balance the need to protect employment land with a flexible approach to land use planning. It identifies Strategic Industrial Areas, provides criteria for the identification of Prime Industrial Areas (see inset box below) and guidance for when employment land should be considered for rezoning to other uses (i.e. residential) (see inset box over page).

The Strategic Industrial Area's identified in the strategy are:

- Le Fevre Peninsula / Gillman
- Lonsdale
- Edinburgh Parks / Defence Science and Technology Organisation (DSTO)

Because of their economic importance and the significant investment in supporting infrastructure, the strategy recommends these sites be protected from incompatible or competing uses.

Criteria for the identification of Prime Industrial Areas

- a) *the land is contiguous to other industrial activities*
- b) *the land is well located in relation to supply chain and service providers*
- c) *the land offers potential for on-site expansion of existing industrial businesses*
- d) *the land is well located to take advantage of existing or proposed infrastructure or other economic development*
- e) *the land is well located in relation to freight connections and other important road and/or rail networks*
- f) *the land provides, or offers potential for the provision of, small industrial businesses serving the local area*
- g) *the land provides sufficient space for adequate parking and turning space for industrial vehicles*
- h) *the land offer potential for 24 hour operations*
- i) *the land has minimal or no adjoining use constraints*
- j) *the land provides unconstrained vehicle access and exit*
- k) *the land can be commercially developed with infrastructure and site preparation for future industrial activities.*

Criteria for the identification of Industrial land suitable for rezoning

- a) *the land does not form part of one of the Strategic Industrial Areas of the Le Fevre Peninsula/Gillman, Lonsdale and Edinburgh Parks / DSTO or a Prime Industrial Area*
- b) *the site is no longer conducive to continued industrial activities and there will be compelling community or economic benefits through alternative uses*
- c) *the rezoning will not affect (individually or cumulatively) nearby industries by, for example restricting operating hours, delivery times, or the capacity of the local transport network.*

1.10 Strategic impacts on land use and strategic directions

Employment lands within South Australia have undergone major transformations in recent years, driven predominantly by changes in the broader economy, resulting in a shift from more traditional forms of manufacturing towards a broader range of land uses.

- The diversification of the range of employment activities undertaken on employment lands is expected to continue. Strong growth is anticipated in the north, particularly in the vicinity of the recently completed Northern Expressway and Northern Connector, which are critical pieces of freight infrastructure.

¹² DPTI, Metropolitan Adelaide Industrial Land Strategy, 2007

- Analysis shows a decline in the number of people employed in some historically important employment precincts, particularly those with freight and logistics and manufacturing focuses. In many cases, this is likely a result of automation rather than a lack of demand.
- Elsewhere, land in the vicinity of Edinburgh Parks, Outer Harbour, Adelaide Airport, and the South Road corridor will experience increases in employment, highlighting the importance of trade gateways and freight corridors in driving new employment growth.
- The number of jobs across inner suburban employment lands are also expected to grow, driven by knowledge-intensive activities that typically seek areas close to the CBD and access to skilled worker pools. These precincts are often targeted for rezoning to non-industrial land uses, highlighting the need to balance landholders’ interests with broader strategic objectives.
- Lastly, population serving activities will continue to play an important role in providing the products and services which underpin urban productivity and liveability. The important role of population serving precincts needs to be reflected in land use planning to ensure their protection

Table 3 sets out broad strategic directions that should be considered in future strategic planning for employment lands. These directions respond to strategic actions identified and outlined within the regional sections of this report.

Table 3: Strategic directions for Greater Adelaide employment lands

STRATEGIC DIRECTION	TIMEFRAME	STRATEGIC ACTIONS
Review the <i>Metropolitan Industrial Land Use Strategy, 2007</i>	Short Term	<ul style="list-style-type: none"> ▪ Review employment land zones and precincts, to broaden the scope of land captured. ▪ Review and update criteria used to identify the suitability of employment land for rezoning to other uses (i.e. residential).
Monitor and report on employment trends from the 2021 ABS Census	Short Term	<ul style="list-style-type: none"> ▪ The next opportunity to review and analyse employment trends is the 2021 census, which will provide the most contemporary data on employment types, activities, location and mode of transport.
Update the <i>Metropolitan Industrial Land Use Strategy, 2007</i>	Medium Term	<ul style="list-style-type: none"> ▪ Investigate land area requirements for various types of employment activities. This will determine whether current, and future land supply is adequate (i.e. size and location). ▪ Ensure sufficient, appropriately located land supply is available for population servicing activities in growth areas. ▪ Investigate methods of identifying vacant buildings and other land supply ‘opportunities’ within existing precincts, which are not currently being recorded (i.e. vacant land at the former GMH site, now known as Lionsgate Business Park).
Review demand for population serving activities and land	Medium Term	<ul style="list-style-type: none"> ▪ Develop minimum land area requirements for population serving employment activities to support and facilitate population growth. ▪ Where surplus employment land exists for population serving activities, determine the best future use. ▪ Where an identified shortfall exists investigate opportunities to create more.
Monitor and report on land supply and demand	Continual	<ul style="list-style-type: none"> ▪ Monitor and report on land supply, demand and consumption. ▪ Review opportunities to make data more accessible to users online.

* Short term (0-5 years), medium term (5-10 years) and long term (+10 years).



2. EMPLOYMENT LAND SUPPLY – OUTER NORTH

2.1 Overview

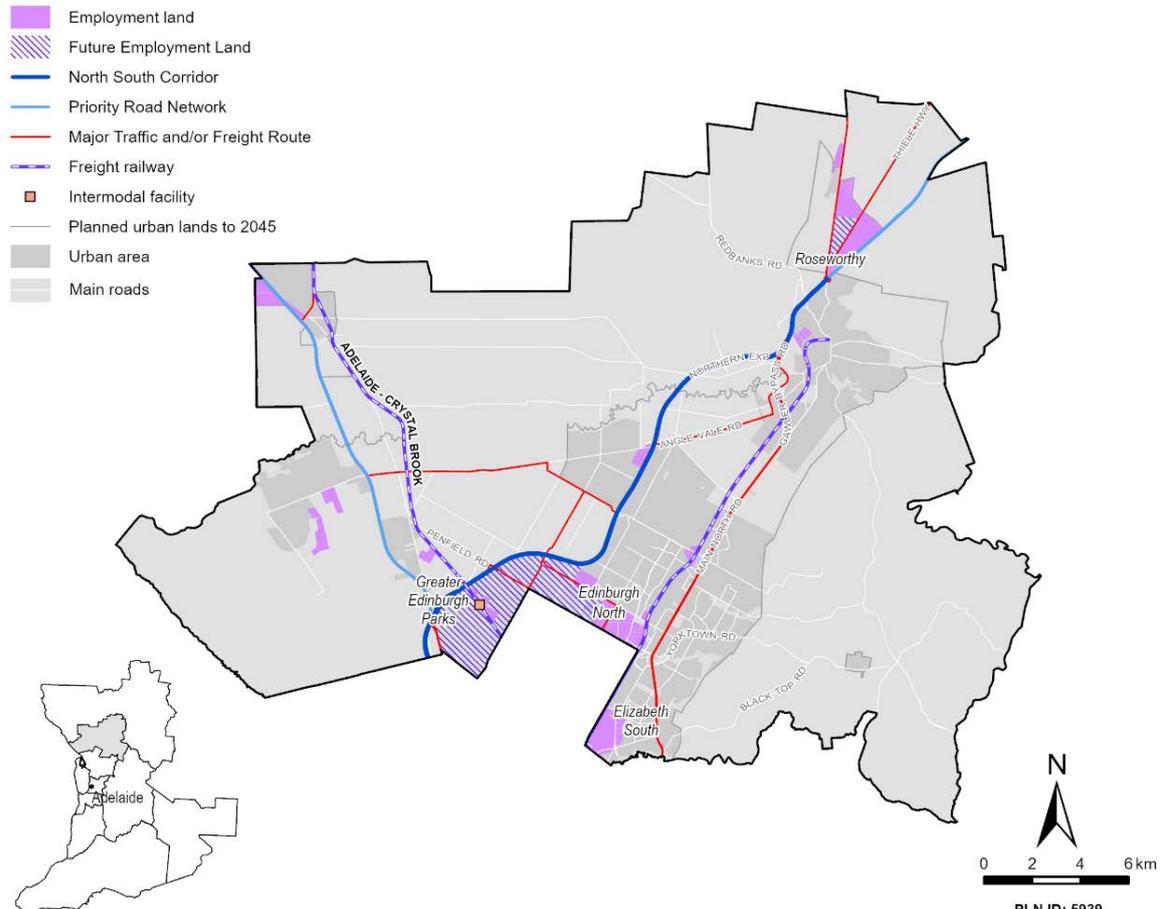


The Outer North region, as illustrated in Figure 11, accommodates an estimated 11% of total zoned employment land within Greater Adelaide and over 95% of all identified future employment land.

In 2020 it was estimated the regions zoned employment lands supported an estimated 5,500 jobs. Over 55% of these jobs were aligned with traditional employment activities, with manufacturing a significant contributor. Its share is projected to grow over the next ten years to 2030 as more land becomes available, and recently completed infrastructure makes land more accessible to key distribution networks and trade gateways.

Projected population growth in Two Wells, Gawler and Roseworthy will provide opportunities to facilitate growth of the regions employment lands driving demand for more population serving activities. This, along with further investigations into the future development of the Greater Edinburgh Parks, present the greatest opportunities for the region to over the next 10 years.

Figure 11: Outer North employment land overview



2.2 Employment land supply and consumption



A stocktake of employment land supply, as of June 2020 and employment land consumption based on the period between 2008 and 2018 highlights the following:

- The region accommodated 1,214 hectares of zoned employment land, of which 70% was occupied, as illustrated in Figure 12 and detailed in Table 4.
- 151 hectares of zoned land remained vacant, accounting for just under 8% of total vacant employment land supply within Greater Adelaide. Of the identified employment precincts Edinburgh North comprised the largest amount, with 50 hectares.
- 170 hectares of zoned land at Roseworthy is currently used for primary production purposes (other use). It is important to differentiate this from vacant land, given future development would require higher levels of investment and preparation prior to becoming ‘market ready’.
- 33.4 hectares of vacant employment land was consumed in the region between 2008 and 2018. Whilst consumption rates are noticeably lower than other regions, it is anticipated demand will increase steadily across the next 10 years.
- Recent evidence suggests land sales within the Edinburgh North precinct have increased over the last couple of years. The recent completion of the Northern Connector, which is directly accessible from the Northern Expressway, is one of the key drivers of demand as it provides more efficient access to key trade gateways and distribution networks.
- 1,732 hectares of identified future employment land is located within the region, accounting for 95% of all identified future employment land across Greater Adelaide. The majority of this land is located within the Greater Edinburgh Parks precinct.
- This land requires rezoning prior to becoming an available source of land. This process requires detailed investigations into the funding, design and provision of supporting infrastructure, most notably stormwater infrastructure, which has been identified as a key issue for the precinct.

Figure 12: Total employment land supply by precinct, June 2020

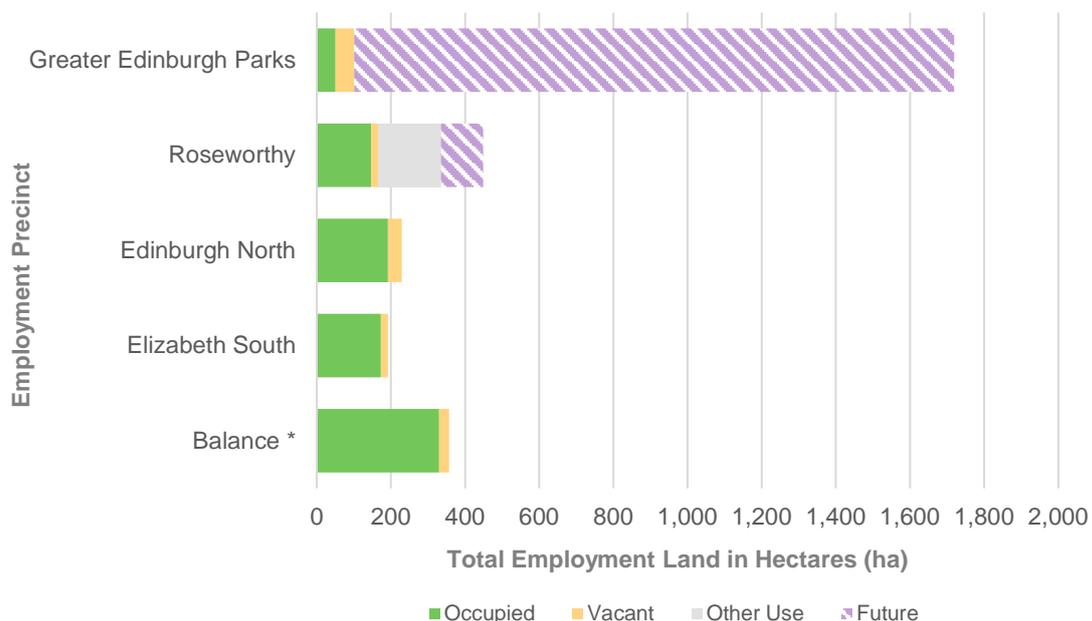


Table 4: Summary of identified employment precincts, Outer North region, June 2020

PRECINCT	Occupied Land (ha)	Vacant Land (ha)	Other Use (ha)	Total Area (ha)	Future Land (ha)
Greater Edinburgh Parks	51	50	-	101	1,618
Roseworthy	147	18	170	335	114
Edinburgh North	192	37	-	229	-
Elizabeth South	173	19	-	192	-
Balance *	330	27	-	357	-
TOTAL	893	151	170	1,214	1,732

* Includes land at Buckland Park, Angle Vale, Virginia, Smithfield and Willaston

2.3 Recent changes to employment land supply



Table 5 highlights changes to zoned employment land between 2008 and 2020. Key changes include:

- 252 hectares of additional land was created through rezoning between 2008 and 2020.
- The Buckland Park Urban Growth DPA provided the single largest source of additional employment land with an additional 115 hectares. This land is currently used for primary production purposes however, and would require significant investment in critical infrastructure prior to becoming a viable land supply option.
- The Penfield Intermodal Freight Facility PAR¹ facilitated the development of a new intermodal facility (rail/road) within the Greater Edinburgh Parks precinct.
- Employment areas were introduced within identified urban growth precincts located at Angle Vale, Playford North and Virginia to support projected population growth.
- Major infrastructure projects such as the Northern Expressway and Northern Connector have resulted in a transfer of heavy vehicle movements from Main North Road, resulting in a shift in the economic geography of the region.
- The closure of the former General Motors Holden (GMH) site in Elizabeth also had significant impacts beyond the cessation of manufacturing activity, with suppliers and other aligned businesses in the region having to cease, downsize, or pivot to new activities.

Table 5: Employment land changes, 2008 - 2020

DPA NAME	GAZETTED	DESCRIPTION
Value Adding (Virginia) DPA	Apr 2020	Rezoned to provide greater scope within the existing Primary Production zone to facilitate expansion of existing facilities.
Greater Edinburgh Parks Employment Lands (Part 2)	Aug 2019	Approximately 39ha of additional employment land was created to facilitate the expansion of the SCT Rail intermodal facility at Penfield.
Playford Urban Growth Areas (Angle Vale, Playford North Extension and Virginia)	Dec 2015	47.7ha land was rezoned to Light Industry on the western side of the Northern Expressway in Angle Vale.
Greater Edinburgh Parks Employment Lands (Part 1)	Mar 2014	Land previously zoned 'enterprise', 'industry', 'light industry' and 'intermodal' converted to the 'urban employment zone'.
Buckland Park Urban Growth	Dec 2010	115ha of employment land was created as part of the Buckland Park Structure Plan. Land is not readily available with significant infrastructure works required prior to land supply becoming available for development.
Penfield Intermodal Rail Freight Facility	Aug 2008	Approximately 50ha of employment land was created to enable the construction of the STC Penfield Intermodal Rail facility. Most of this land is tied up with one land holder, meaning there maybe limitations in terms of availability for other uses.

¹ Planning Amendment Report, this was the precursor to Development Plan Amendments (DPA's)

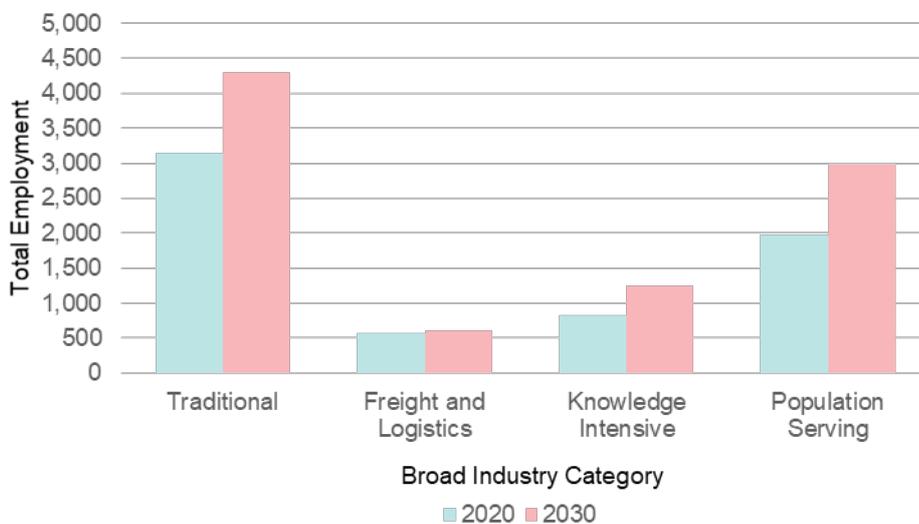
2.4 Projected change in employment, 2020 – 2030

LARGEST INDUSTRY TYPE	LARGEST % GROWTH BY BROAD INDUSTRY CATEGORY	LARGEST GROWTH PRECINCT
<ul style="list-style-type: none"> ▪ Manufacturing - 28% of total employment in 2020 - 25% of total employment in 2030 	<ul style="list-style-type: none"> ▪ Knowledge Intensive (52%) - Health care and social services - Public administration and safety 	<ul style="list-style-type: none"> ▪ Roseworthy - 1,900 jobs in 2020 - An 87% increase is projected by 2030

Projected changes in employment between 2020 and 2030 are summarised as follows:

- The regions employment land supported an estimated 5,500 jobs in 2020, representing 5% of total jobs across Greater Adelaide’s employment lands.
- In 2020, manufacturing, a traditional employment activity, accounted for 28% of total jobs within the region.
- The Outer North region is projected to account for 22% of all new jobs created across Greater Adelaide’s employment lands over the next 10 years. Only the Adelaide West region will accommodate a greater share.
- Growth is projected to be distributed across all broad industry categories (BIC) with traditional employment activities projected to generate the largest number of additional jobs. This supports the regions comparative advantage in traditional employment activities, as demonstrated in Figure 13.
- New jobs created in manufacturing, construction and primary production activities will drive growth in this category.
- Projections indicate knowledge intensive activities will have the highest percentage (not total) increase in jobs across the next 10 years.
- Whilst employment growth in freight and logistics is not projected to be significant, this should not diminish the strategic importance of this sector to the region. Employment numbers in this sector are typically lower than other employment activities as result of automation and technological advances, which drive efficiencies.

Figure 13: Jobs growth on employment land by Broad Industry Category (BIC), 2020 - 2030



2.5 Key employment precincts – Outer North

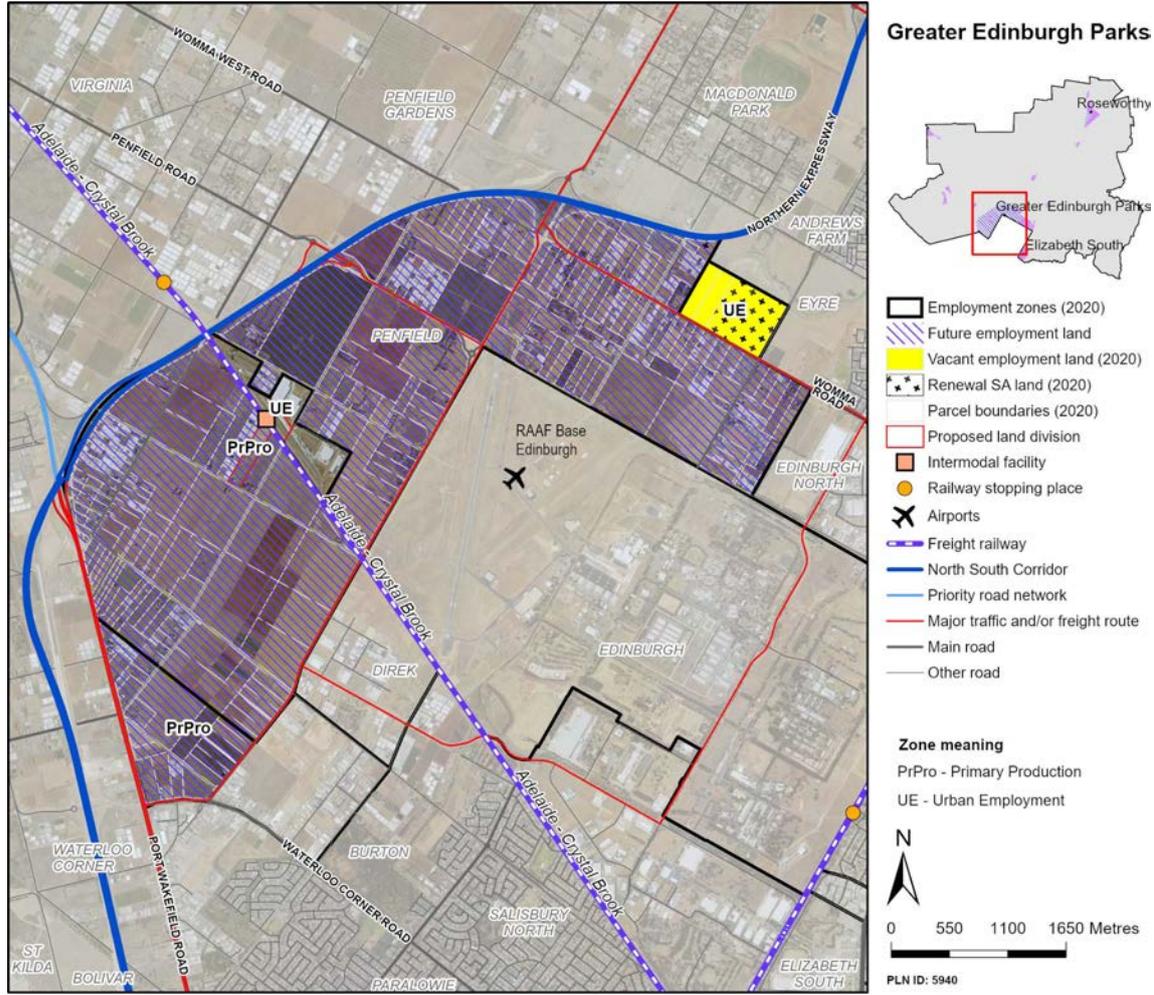
The following section provides analysis on employment land supply and jobs growth for the following precincts:

- Greater Edinburgh Parks
- Roseworthy
- Edinburgh North
- Elizabeth South

Analysis of each precinct includes:

- A map, illustrating the full extent of the precinct, vacant land supply (as of June 2020) and proposed lots (June 2020);
- A table summarising key measures, including total number of jobs in 2020 and total precinct area;
- A graph illustrating the share of total jobs across all four Broad Industry Categories (BIC) in 2030, relative to the share across Greater Adelaide; and
- Overview of the strengths, constraints and opportunities.

Figure 14: Greater Edinburgh Parks

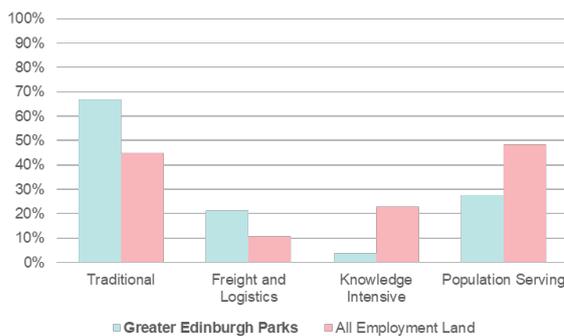


KEY MEASURES

Total Number of Jobs 2020	1,100
Total Precinct Area (ha)	*1,719
Occupied Land (ha)	51
Vacant Land (ha)	50
Future Employment Land (ha)	*1,618

*Includes 120ha of future employment land that falls within the Inner North region.

RELATIVE EMPLOYMENT SHARES (2030)



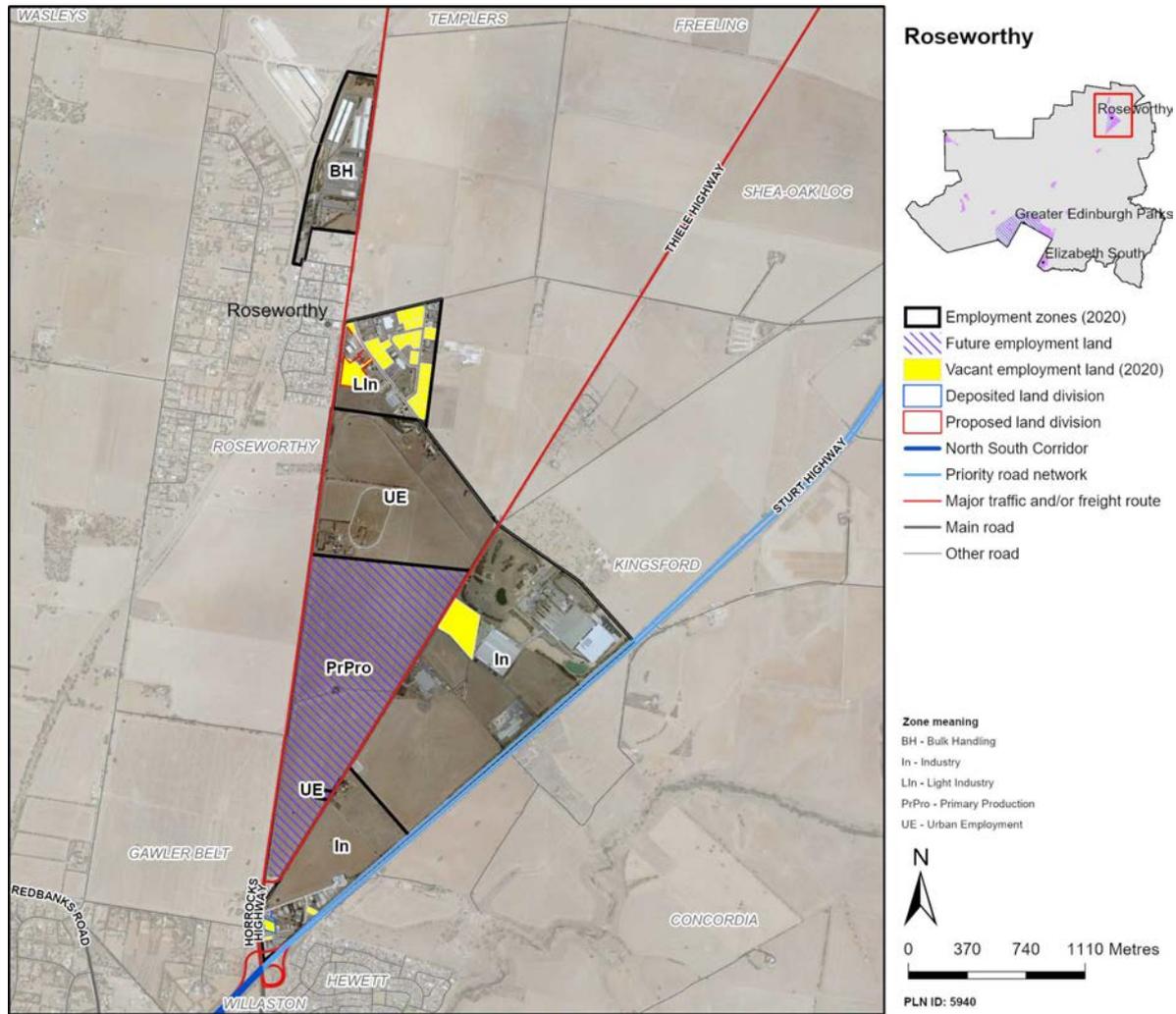
CONTEXT

- Precinct accommodates 95% all identified future employment land within Greater Adelaide.
- Third largest precinct in 2020 for total jobs in the region.
- Land well serviced, with direct access to the Northern Expressway, Northern Connector and Penfield intermodal facility (road and rail).

ANALYSIS

- One of the top 5 precincts in Greater Adelaide for its comparative advantage in traditional and freight / logistic activities.
- The intermodal facility will continue to shape land use, along with its proximity to the Northern Expressway, Northern Connector and Port Wakefield Road.
- Favourable access to key freight networks (road and rail) provides opportunities for export orientated activities.
- Well protected from of sensitive land uses, presenting opportunities for higher intensity activity.
- Significant infrastructure issues, particularly around stormwater management, require further investigation, to determine full extent of required works.

Figure 15: Roseworthy



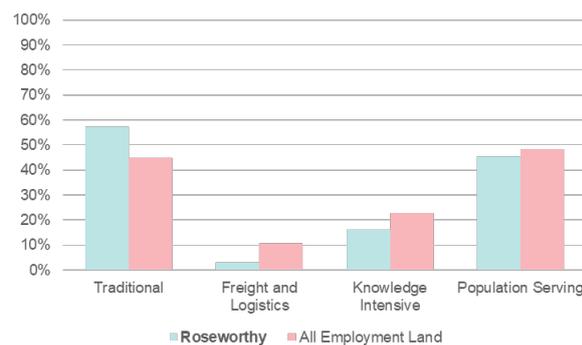
KEY MEASURES

Total Number of Jobs 2020	1,900
Total Precinct Area (ha)	449
Occupied Land (ha)	147
Vacant Land (ha)	18
Agriculture / Other use (ha)	170
Future Employment Land (ha)	114

CONTEXT

- Largest precinct for total zoned land in the region.
- 170 hectares of this land is being utilised for primary production purposes. Prior to this land becoming available infrastructure would need to be identified, funded and constructed.
- Largest precinct in 2020 for total jobs, and projected to be the fastest growing precinct for employment growth over the next ten years.
- Adjacent to a residential growth area to the west, which has recently commenced.

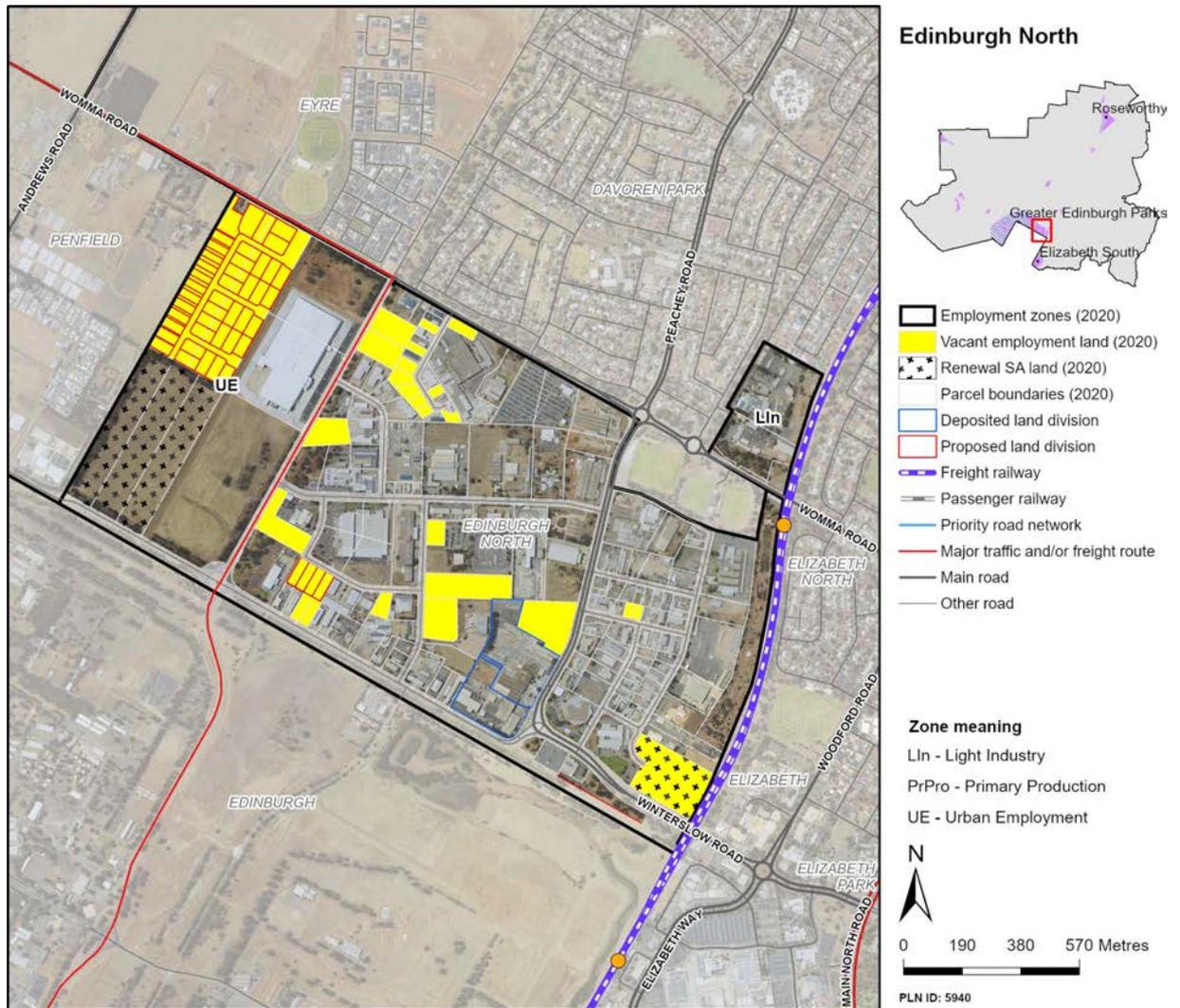
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- Comparative advantage in traditional employment activities, especially manufacturing (glass bottling).
- Close proximity to the Adelaide University campus, which presents opportunities for collaboration between education and private sectors.
- Proximity to high value, export oriented primary production regions to the north presents opportunities for related activities.
- Residential growth in the catchment will drive demand for population-serving industries.
- Potential for conflict between agricultural and employment uses as the area transitions will need to be managed.

Figure 16: Edinburgh North



KEY MEASURES

Total Number of Jobs 2020	1,700
Total Precinct Area (ha)	229
Occupied Land (ha)	192
Vacant Land (ha)	37
Future Employment Land (ha)	0

CONTEXT

- Second largest precinct in the region for total jobs.
- Adjacent the Edinburgh RAAF base and DSTO.
- Western portion of the precinct is predominantly vacant, however a proposed plan of division in the north-west corner indicates potential for activity
- Well serviced by Womma, Hewittson and Bellchambers Roads, which are gazetted B-double routes.

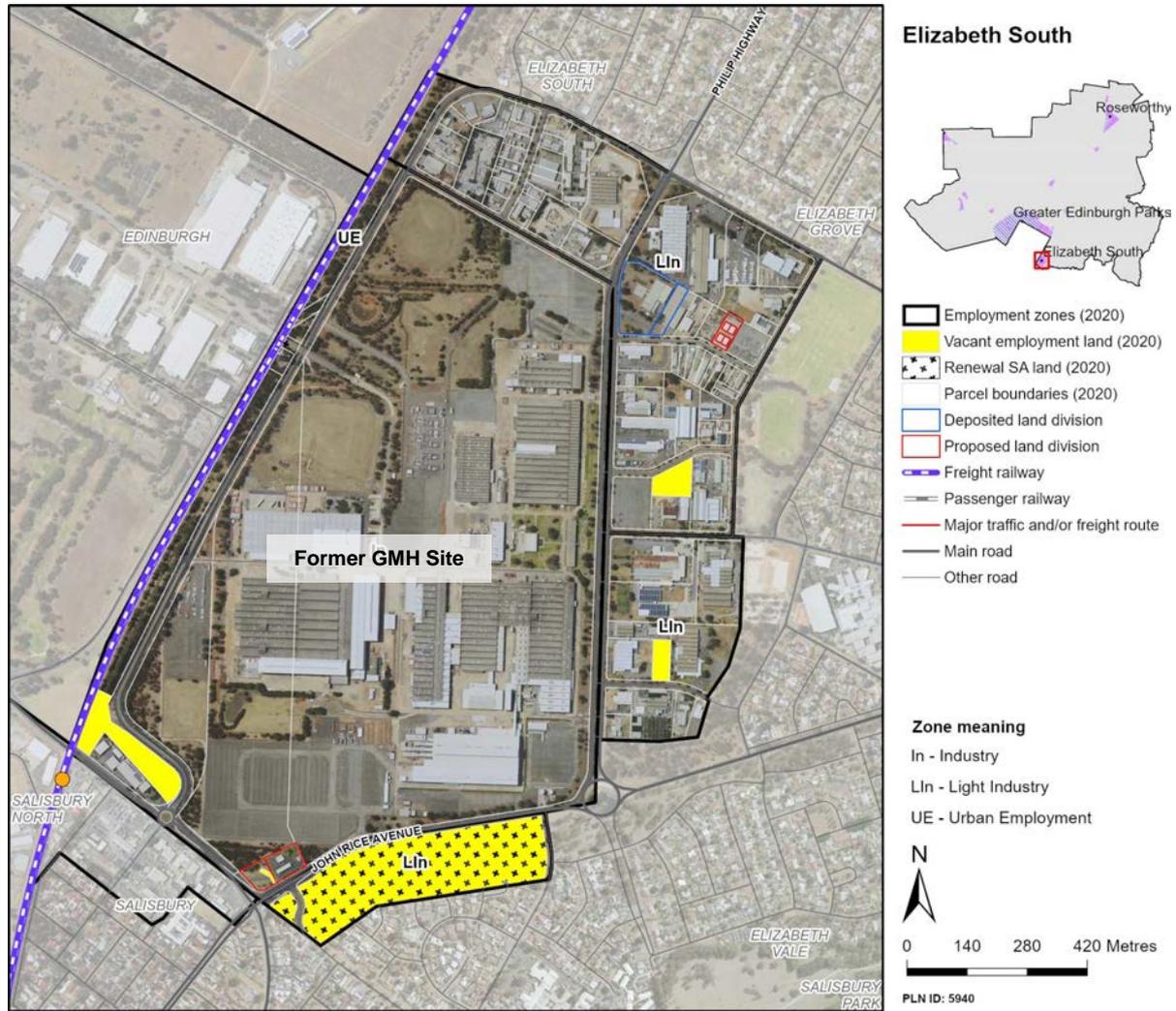
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- The precinct has a comparative advantage in traditional and freight / logistics employment uses. Each benefit from good access to the Northern Expressway and Northern Connector (via Womma Road).
- Manufacturing is the largest employer, accounting for over 30% of total jobs in 2020. Although its share is projected to decline to 25% by 2030.
- Demand for employment in population serving activities will increase over the next ten years as the population grows.
- Vacant land is well protected from encroachment by sensitive uses providing opportunities for more intense employment activity and development.

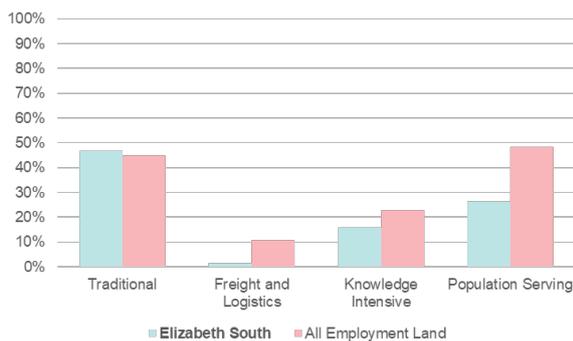
Figure 17: Elizabeth South



KEY MEASURES

Total Number of Jobs 2020	700
Total Precinct Area (ha)	192
Occupied Land (ha)	173
Vacant Land (ha)	19
Future Employment Land (ha)	0

RELATIVE EMPLOYMENT SHARES (2030)



CONTEXT

- Comprises the former GMH site, which ceased vehicle manufacturing in 2017.
- Since then the site has been transitioning into an integrated industrial business park ('Lionsgate'). Accommodating a range of activities, tenancies and opportunities for development of 25ha of underutilised land (former car storage yards and the like).
- Serviced by the Phillip Highway, Kettering Road and Grainger Road, which are gazetted B-double routes.

ANALYSIS

- Comparative advantage in traditional employment activities, most notably manufacturing.
- Employment within the former GMH site will cover a range of industry types, from traditional manufacturing, engineering services and head offices.
- Relatively few issues with residential interfaces providing opportunities for higher intensity development and activity.

2.6 Employment land summary and strategic issues

Employment lands in the Outer North are well positioned in relation to key freight routes (i.e. the Northern Expressway and Northern Connector), providing excellent access to trade gateways.

Access will play a key role in driving future land use and demand in these precincts, which are typically isolated from sensitive land uses and therefore well-placed to accommodate higher intensity employment land use activities in large footprint sites (i.e. freight and logistics, manufacturing).

In the context of South Australia’s increasing freight requirements, and the need for well-located employment land, this land is of significant strategic importance. The Greater Edinburgh Parks precinct is projected to be one of Greater Adelaide’s most important freight and logistics precincts over the coming years.

Comparative advantage is an economic concept that recognises the fact that (in this case) certain employment land precincts will have attributes that mean they are more suited to the provision of some activities over others.

By calculating the share of jobs by broad industry category (BIC) for each precinct in 2030 and comparing this figure to the share across all metropolitan employment lands, it is possible to understand the relative strengths of individual precincts, or their *comparative advantage*.

Table 6: Comparative advantage analysis for identified precincts

PRECINCT	STRATEGIC ACTIVITIES			POPULATION SERVING
	Traditional	Freight and Logistics	Knowledge Intensive	
Greater Edinburgh Parks	Comparative advantage, among top 5 assessed precincts	Comparative advantage, among top 5 assessed precincts	No comparative advantage	POPULATION SERVING
Roseworthy	Comparative advantage	No comparative advantage	No comparative advantage	No comparative advantage
Edinburgh North	Comparative advantage	Comparative advantage, among top 5 assessed precincts	No comparative advantage	No comparative advantage
Elizabeth South	Comparative advantage	No comparative advantage	No comparative advantage	No comparative advantage

Comparative advantage, among top 5 assessed precincts
 Comparative advantage
 No comparative advantage

Based on the comparative advantage analysis the following conclusions can be drawn:

- Employment land in the Outer North has strengths in ‘traditional’ employment activities, driven by relative affordable land, access to key worker pools and separation distances to sensitive land uses.
- The Greater Edinburgh Parks precinct has a significant comparative advantage for freight and logistics activities driven by its proximity to the Northern Connector, Northern Expressway and the Penfield intermodal facility (road and rail).
- Strong projected population growth in the Outer North will drive demand for the establishment of new population serving activities in the region. The importance of these jobs in supporting productivity and liveability highlights the need to ensure the ongoing availability of suitably located employment land, particularly through the Playford growth corridor.



Source: Liebherr-Australia Pty Ltd, Para Hills West, Adelaide

3. EMPLOYMENT LAND SUPPLY – INNER NORTH

3.1 Overview

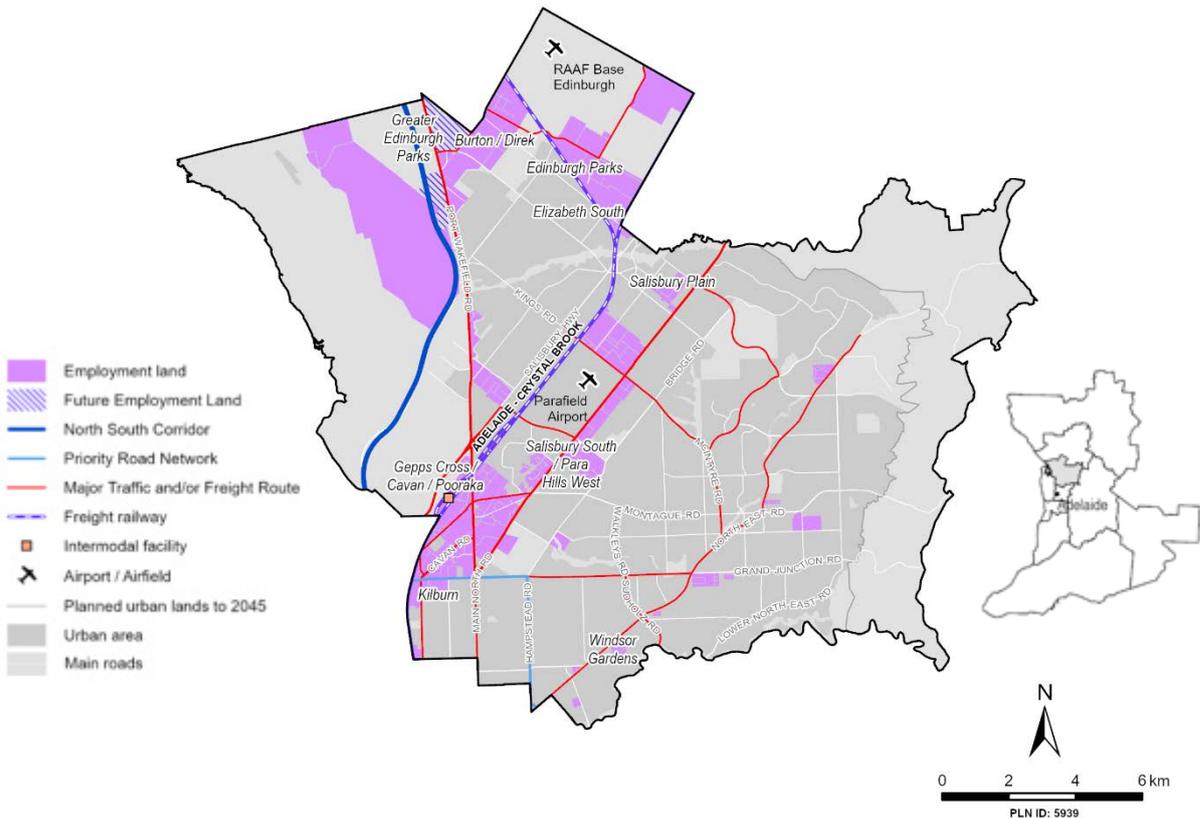
EMPLOYMENT LAND JOBS	ZONED EMPLOYMENT LAND	KEY INDUSTRY TYPES
 <p>30,600 in 2020</p>	 <p>3,591ha</p>	<ol style="list-style-type: none"> 1. Manufacturing 2. Public administration and safety 3. Transport, postal and warehousing

The Inner North region, as illustrated in Figure 18, comprises over 25% of total zoned employment land within Greater Adelaide, making it the second largest region behind Adelaide West. The region is well serviced by a range of distribution and freight networks, including the recently completed Northern Connector, positioning itself as a key region for freight and logistic based activities.

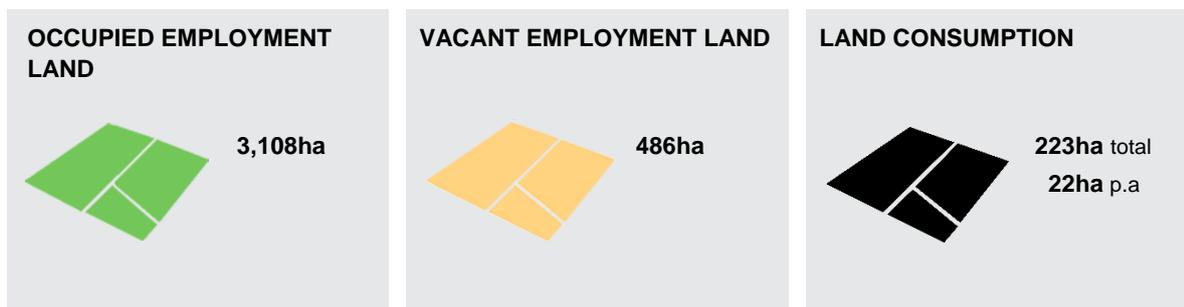
In 2020, it was estimated the regions employment lands supported over 30,600 jobs. Jobs in the region are evenly split between traditional and population serving activities, however manufacturing accounts for over 20% of total jobs. Jobs within the freight and logistics sector will remain constant, which given advances in technology and increased efficiencies, demonstrates the viability of the sector in this region.

Completion of the north-south corridor and improved access to key distribution networks via access to key freight routes will hold the regions employment lands in good position moving forward to 2030 and beyond.

Figure 18: Inner North employment land overview



3.2 Employment land supply and consumption



A stocktake of employment land supply and consumption in 2018 demonstrated:

- The region accommodated 3,591 hectares of zoned employment land, which includes 1,250 hectares occupied by the Bolivar Wastewater Treatment Plant, refer to Figure 19 and Table 7.
- 486 hectares of zoned land remained vacant accounting for 28% of total vacant employment land supply in Greater Adelaide.
- 247 hectares of vacant zoned land was located within the Edinburgh Parks employment precinct, the largest single source of vacant land in the region. Recent figures however indicate the rate of land sales in late 2019 and early 2020 within this precinct have risen markedly. This can be attributed to the completion of the Northern Connector, and may have also been influenced by the COVID-19 pandemic, which appears to have increased demand for localised manufacturing and warehousing.
- 223 hectares of vacant land was consumed between 2008 and 2018, representing over 35% of total employment land consumption across Greater Adelaide.
- The region comprises 90 hectares of identified future employment land. This land is located at Waterloo Corner, and is currently zoned Deferred Urban, Precinct 3 (Deferred Industry).
- A further 120 hectares of future employment land is located within the region, which is associated with Greater Edinburgh Parks (GEP) precinct, however this has been assigned with the larger portion of this precinct which lies within the Outer North region.

Figure 19: Total employment land supply by precinct, June 2020

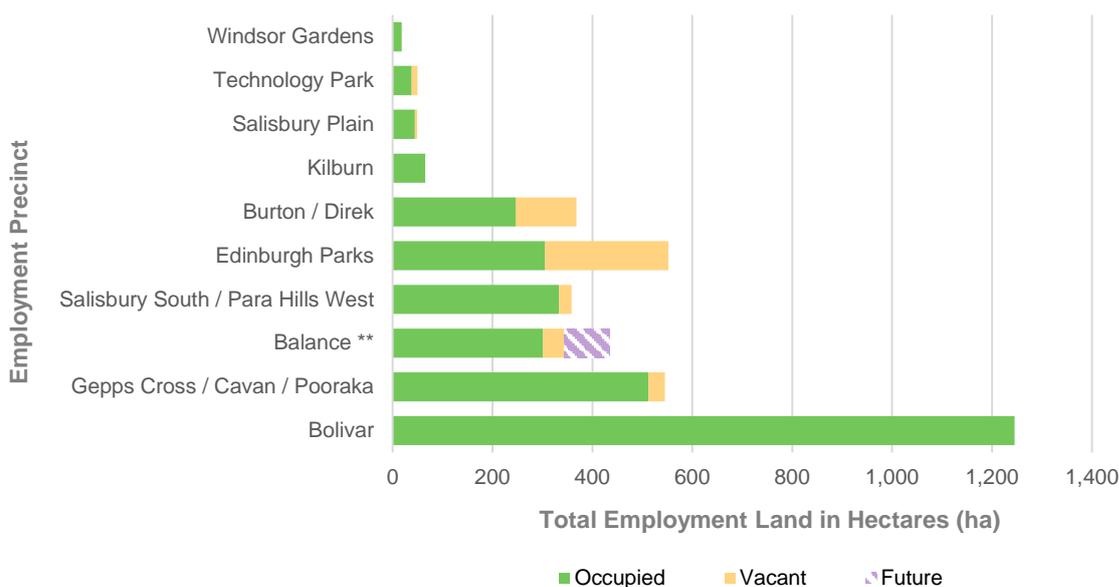


Table 7: Summary of identified employment precincts, Inner North region, June 2020

PRECINCT	Occupied Land (ha)	Vacant Land (ha)	Agricultural (ha)	Total Area (ha)	Future Land (ha)
Gepps Cross / Cavan / Pooraka	512	33	-	545	-
Edinburgh Parks	305	247	-	552	-
Salisbury South / Para Hills West	333	25	-	357	-
Burton / Direk	246	122	-	367	-
Kilburn	65	0	-	65	-
Technology Park	38	12	-	50	-
Salisbury Plain	45	5	-	49	-
Windsor Gardens	18	0	-	18	-
Bolivar	1,245	0	-	1,245	-
Balance *	301	43	-	343	90
TOTAL	3,108	486	0	3,591	90

* Includes land reserved for infrastructure and other smaller precincts.

3.3 Recent changes to employment land supply



Table 8 highlights changes to zoned employment land between 2008 and 2020. Key changes include:

- A net loss of 11 hectares in zoned employment land.
- 82 hectares of land was rezoned to facilitate employment activities, however 93 hectares of employment land was rezoned to facilitate other forms of development, predominantly residential.
- Land rezoned at Direk in 2011 now accommodates the Vicinity Industrial Base (park).
- Employment land at Kilburn and Blair Athol was rezoned to Urban Renewal, introducing the ability to develop land for residential purposes in conjunction with existing employment activities.
- Completion of the Northern Connector has made employment precincts in the region more accessible to key trade gateways and freight corridors.

Table 8: Employment land changes, 2008 - 2020

DPA NAME	GAZETTED	DESCRIPTION
Commercial, Light Industry and Residential (Sites)	Dec 2018	Approximately 3.0ha of land rezoned from Light Industry and Commercial to Residential.
Light Industry Zone, Northfield	Feb 2018	A total 4.5ha of Light Industry land rezoned to Suburban Neighbourhood Zone (residential).
Kilburn and Blair Athol Urban Renewal	Aug 2017	Approximately 97ha of land rezoned from industry to urban renewal (mixed use transition). Zoning does envisage industrial land uses, however introduces ability to develop low to medium density residential.
Main Roads (Salisbury Highway and Main North Road)	Jan 2016	A total loss of 17ha of zoned industry land to bulky goods.
Mawson Lakes	Jul 2016	10ha of light industry zoned land rezoned to urban corridor. 32ha of land along the rail corridor was rezoned to industry. 6.5ha of additional land was created by introducing a commercial zone along Elder Smith Drive, Hudson Road and Salisbury Highway.
Globe Derby Park Surplus Lands	Sept 2015	Approximately 25ha of land was rezoned from Community to Commercial Zone. This zone envisages land uses which included light industry and warehousing.
Mixed Use (Bulky Goods, Entertainment and Leisure)	Dec 2014	22.5ha of zoned industrial land to Mixed Use (Bulky Goods, Entertainment and Leisure) in Salisbury South.
Salisbury Plain Neighbourhood Centre Zone	Apr 2012	Rezoned approximately 4.4ha of zoned Industrial land to create a Neighbourhood Centre Zone.
Rural (Aircraft Noise)/ Direk West Sector: Industry	Oct 2011	Rezoned approximately 18.85ha of land zoned Rural Aircraft Noise to Urban Employment.
Mixed Use (Islington) Zone	Aug 2011	Approximately 21ha of employment land was rezoned to mixed use. The new zone envisages light industry, yet has been developed for retail and bulky goods.
Golden Grove Residential and Light Industry	Dec 2008	Approximately 10.5ha of General Industry land to residential.

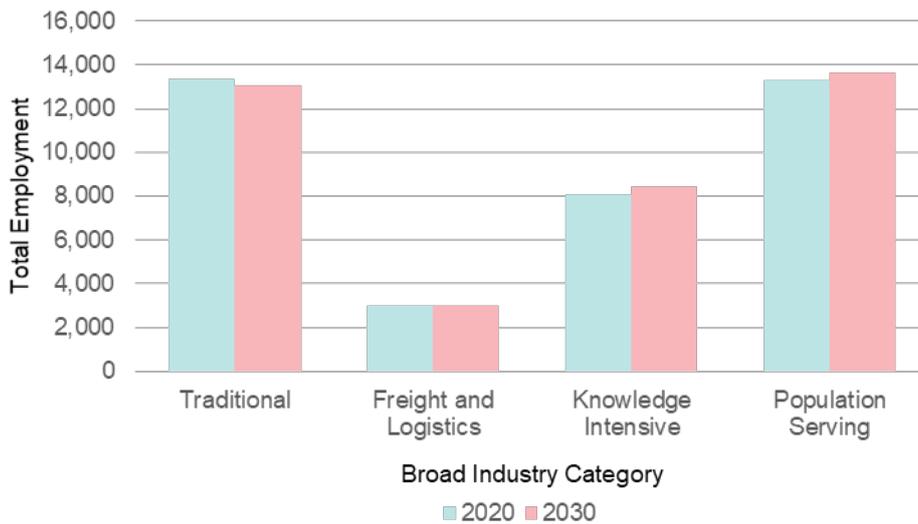
3.4 Projected change in employment, 2020 – 2030

LARGEST INDUSTRY TYPE	LARGEST % GROWTH BY BROAD INDUSTRY CATEGORY	LARGEST GROWTH PRECINCT
<ul style="list-style-type: none"> ▪ Manufacturing - 22% of total employment in 2020 - 21% of total employment in 2030 	<ul style="list-style-type: none"> ▪ Knowledge Intensive (4%) - Public administration and safety - Health care and social services 	<ul style="list-style-type: none"> ▪ Edinburgh Parks - 7,800 jobs in 2020 - An 8% increase projected to 2030

Projected changes in employment between 2020-2030 are summarised as follows:

- The regions employment land supported an estimated 30,600 jobs in 2020, representing over 25% of total jobs across Greater Adelaide’s employment lands.
- In 2020, manufacturing, a traditional employment activity, accounted for 22% of total jobs.
- Total jobs across the regions employment lands are projected to grow by 2% over the next ten years to 2030.
- Population serving activities are projected to accommodate the largest net increase in total jobs by 2030, primarily driven by growth in retail trade.
- Knowledge intensive activities are projected to have the highest percentage rate of jobs growth to 2030.
- The Gepps Cross / Cavan and Pooraka employment precinct will account for approximately a third of total jobs within the regions employment lands by 2030.
- A slight decline in manufacturing employment is forecast, which is symptomatic of the overall decline of the industry type across the State. Technological improvements make existing operations more efficient, and by default, less labour intensive.

Figure 20: Jobs growth on employment land by Broad Industry Category (BIC), 2020 - 2030



3.5 Key employment precincts – Inner North

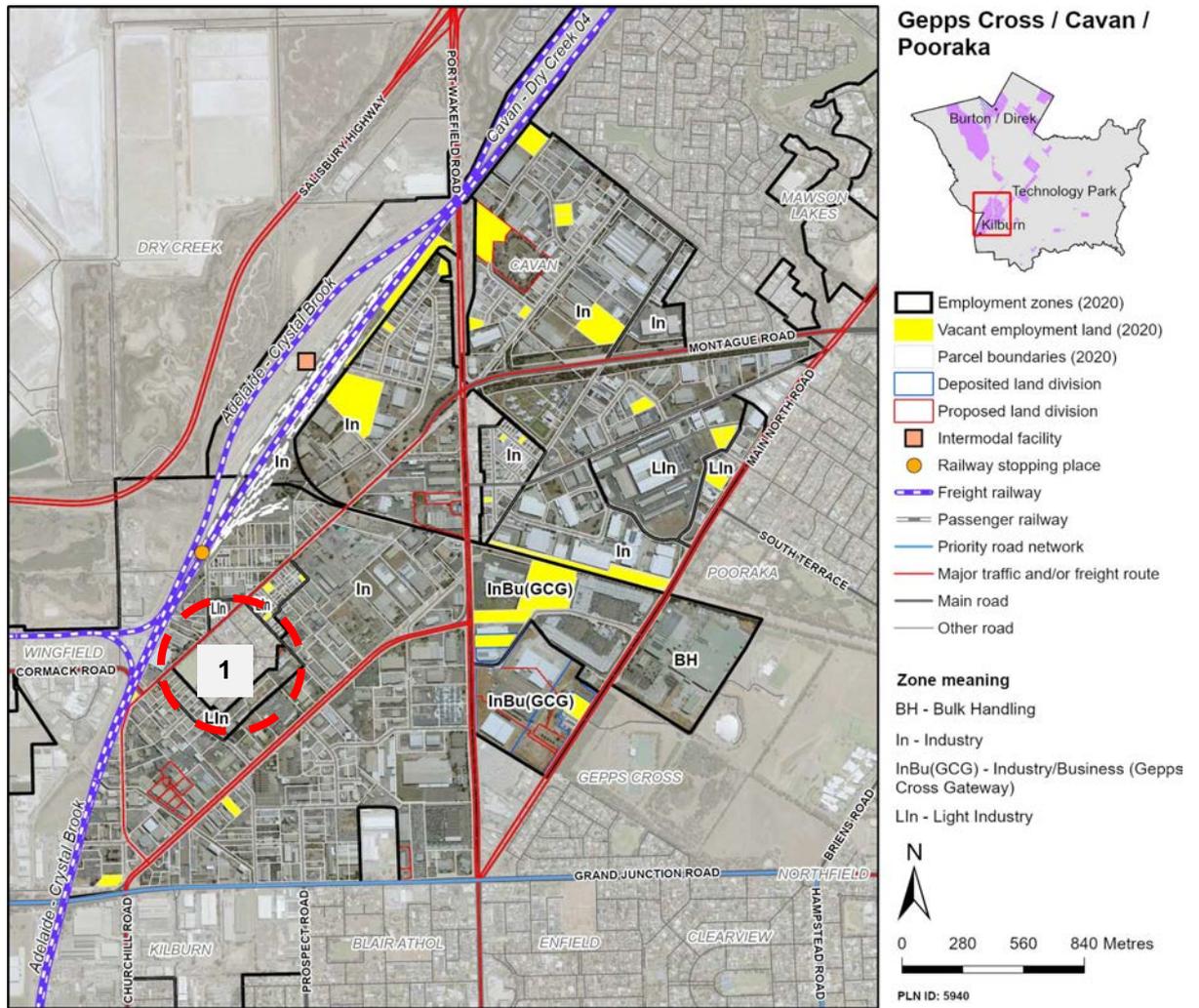
The following section provides analysis on employment land supply and jobs growth for the following precincts:

- Gepps Cross / Cavan / Pooraka
- Edinburgh Parks
- Salisbury South / Para Hills West
- Burton / Direk
- Kilburn
- Technology Park
- Salisbury Plain
- Windsor Gardens

Analysis of precinct includes:

- A map, illustrating the full extent of the precinct, vacant land supply (as of June 2020) and proposed lots (June 2020);
- A table summarising key measures, including total number of jobs in 2020 and total precinct area (ha);
- A graph illustrating the share of total jobs across all four broad industry categories in 2030, relative to the share across Greater Adelaide;
- Overview of the strengths, constraints and opportunities.

Figure 21: Gepps Cross / Cavan / Pooraka



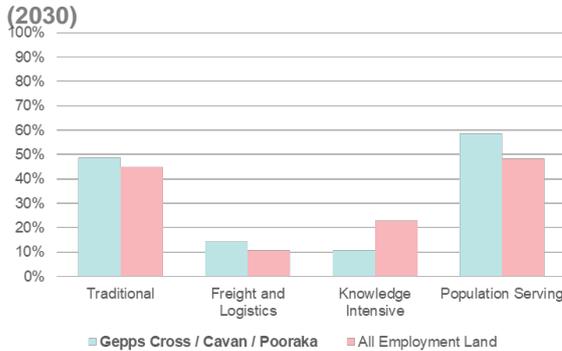
KEY MEASURES

Number of Jobs 2020	11,000
Total Precinct Area (ha)	545
Occupied Land (ha)	512
Vacant Land (ha)	33
Future Employment Land (ha)	0

CONTEXT

- Largest active precinct in the region for total jobs and total precinct area.
- The precinct accommodates the recently completed Woolworths and Metcash distribution centres along with the South Australian producers market.
- Well serviced by multiple gazetted road train routes and key intermodal facilities (road and rail) at Dry Creek and Regency Park.

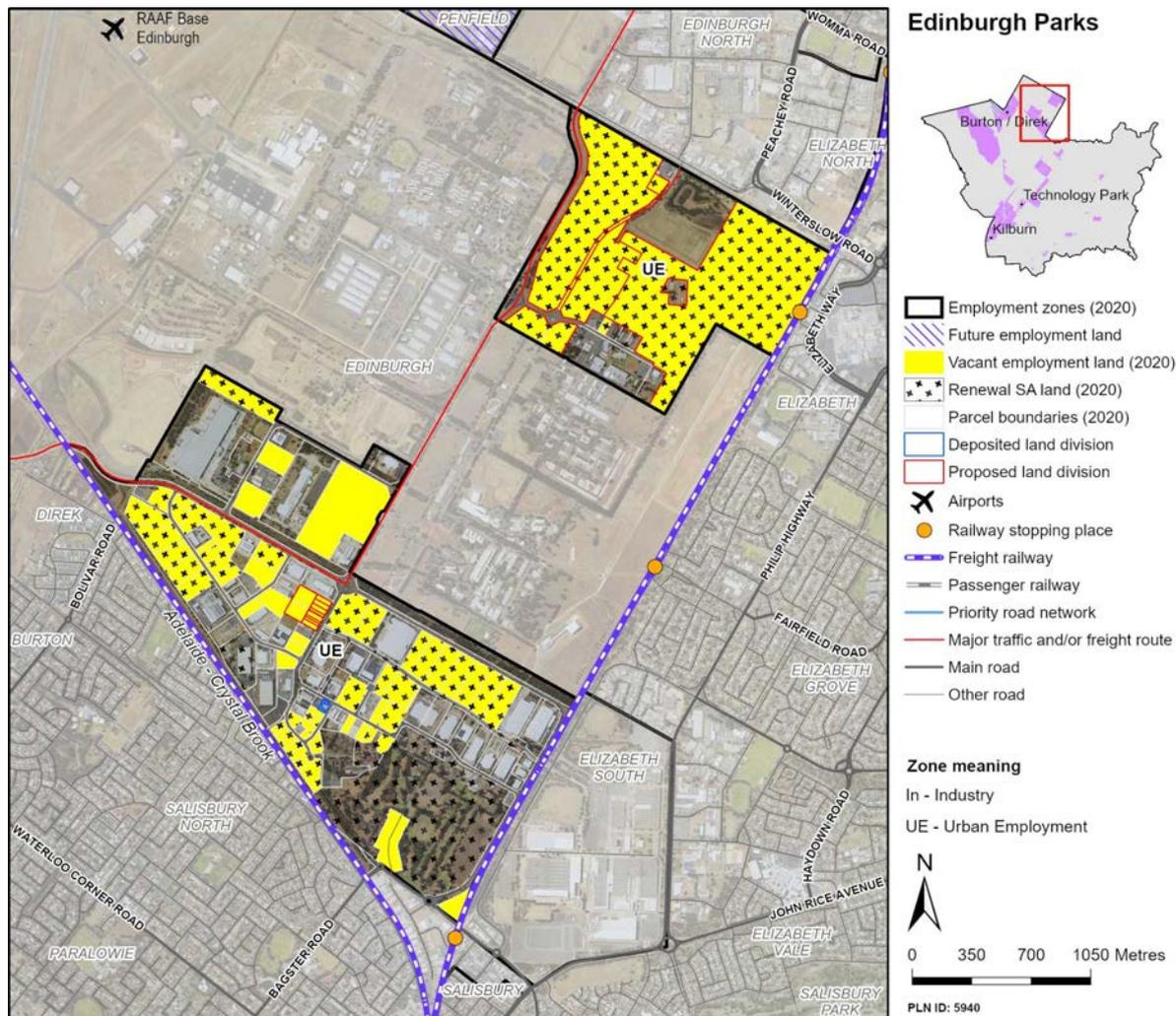
RELATIVE EMPLOYMENT SHARES BY BIC (2030)



ANALYSIS

- The precinct has comparative advantages in freight and logistics, traditional and population serving categories.
- Manufacturing accounts for the greatest share of total employment by industry type.
- Retail trade will accommodate the largest number of new jobs within the precinct.
- Land identified as '1' on the map is zoned residential, with adjacent land consequently zoned light industry, acting as a transition to more traditional employment zoning.
- Remainder of the precinct is well separated from sensitive land uses providing opportunities for more intense development.

Figure 22: Edinburgh Parks



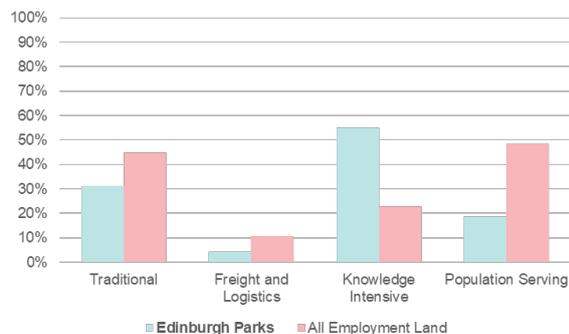
KEY MEASURES

Number of Jobs 2020	7,800
Total Precinct Area (ha)	552
Occupied Land (ha)	305
Vacant Land (ha)	247
Future Employment Land (ha)	0

CONTEXT

- South Australia’s largest master planned industrial estate, being developed by Renewal SA.
- The second largest precinct in the region for total employment in 2020.
- Accounts for 50% of total vacant land in the region.
- Access to multiple gazetted B-double routes.

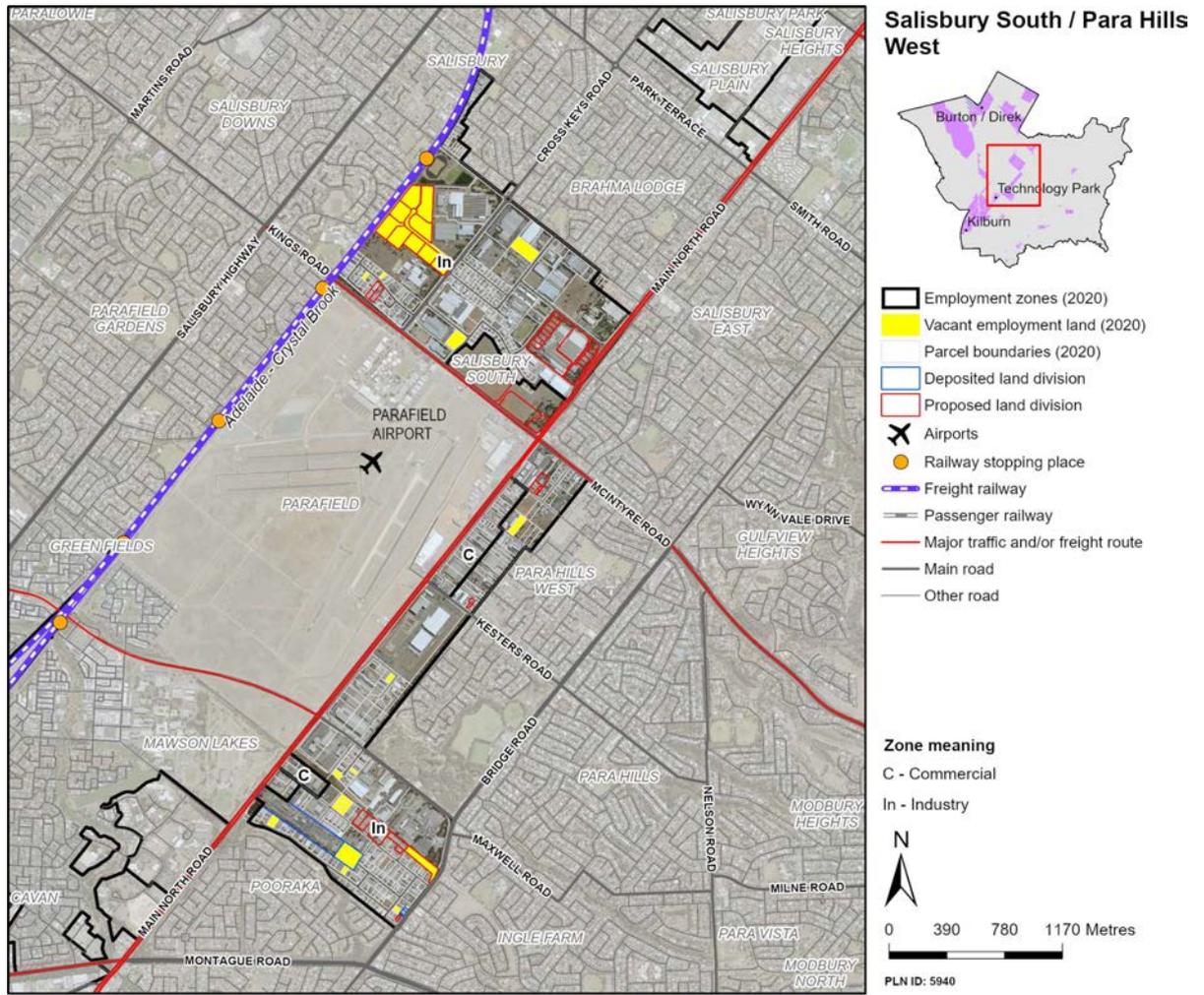
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- Identified as having one of the highest concentrations of knowledge intensive activities in Greater Adelaide.
- Manufacturing accounts for the greatest share of total employment by industry type.
- This is facilitated by access to large worker pools from the growing northern suburbs.
- Located adjacent to aviation and defence activities, providing employment land opportunities for uses linked to these sectors.
- Allotments adjacent the Adelaide-Crystal Brook rail corridor must still be cognisant of residential allotments located on the other site.

Figure 23: Salisbury South / Para Hills West



KEY MEASURES

Number of Jobs 2020	4,300
Total Precinct Area (ha)	357
Occupied Land (ha)	333
Vacant Land (ha)	25
Future Employment Land (ha)	0

CONTEXT

- Precinct relatively well developed.
- The third largest precinct in the region for total employment in 2020 and 2030.
- Direct access to Main North Road, which is a gazetted road train route.

ANALYSIS

- The precinct has a slight comparative advantage in traditional and population serving activities.
- Manufacturing was the largest employment activity in 2020, whilst its share is projected to decline it will still remain the largest employer in 2030.
- As strategic uses seek other locations (traditional and freight / logistics), population serving activities will become increasingly important to ensure the long term prospects of the precinct.
- The Parafield Airports Masterplan (2017) indicates a desire to develop sections for commercial, enterprise and business land uses presenting another potential land supply source for the precinct and region.

RELATIVE EMPLOYMENT SHARES (2030)

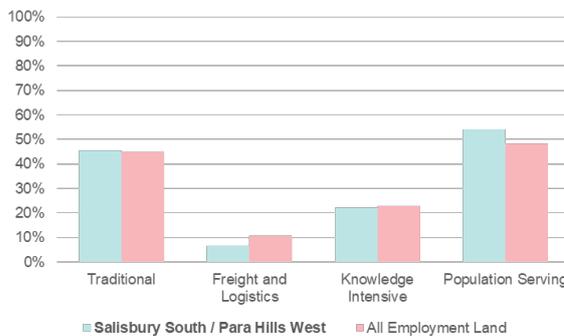
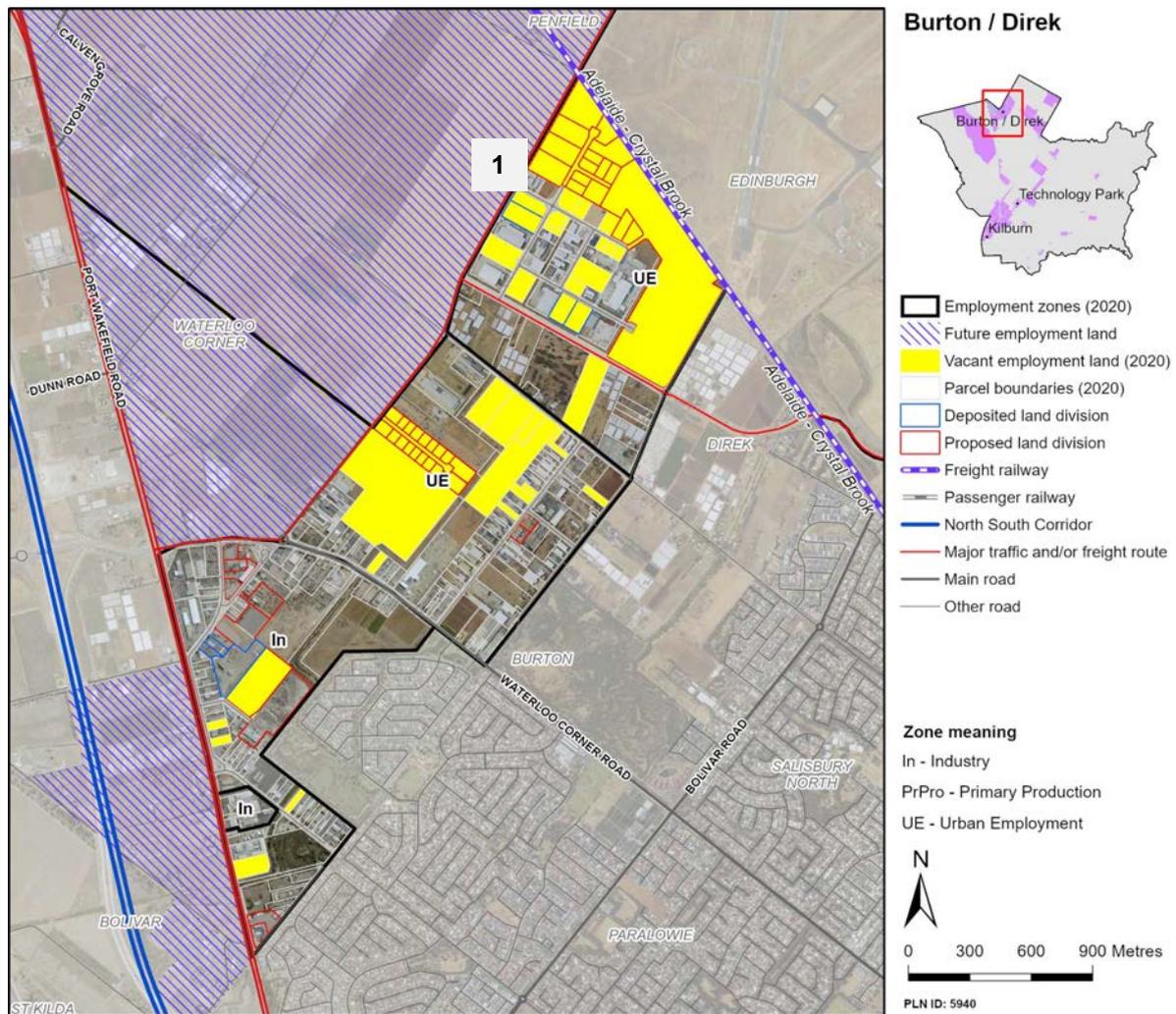


Figure 24: Burton / Direk



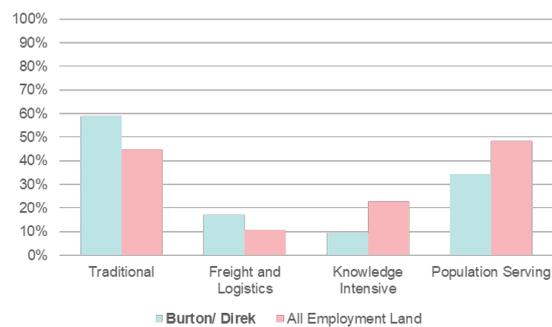
KEY MEASURES

Number of Jobs 2020	3,100
Total Precinct Area (ha)	368
Occupied Land (ha)	122
Vacant Land (ha)	246
Future Employment Land (ha)	0

CONTEXT

- Precinct comprises significant amounts of vacant zoned land.
- Fourth largest precinct in the region for total jobs in 2020.
- The 'Vicinity industrial base' is located in the northern portion of the precinct as identified on the corresponding map as area '1'. Stage 3 of this industrial estate has been brought forward as result of increased demand.

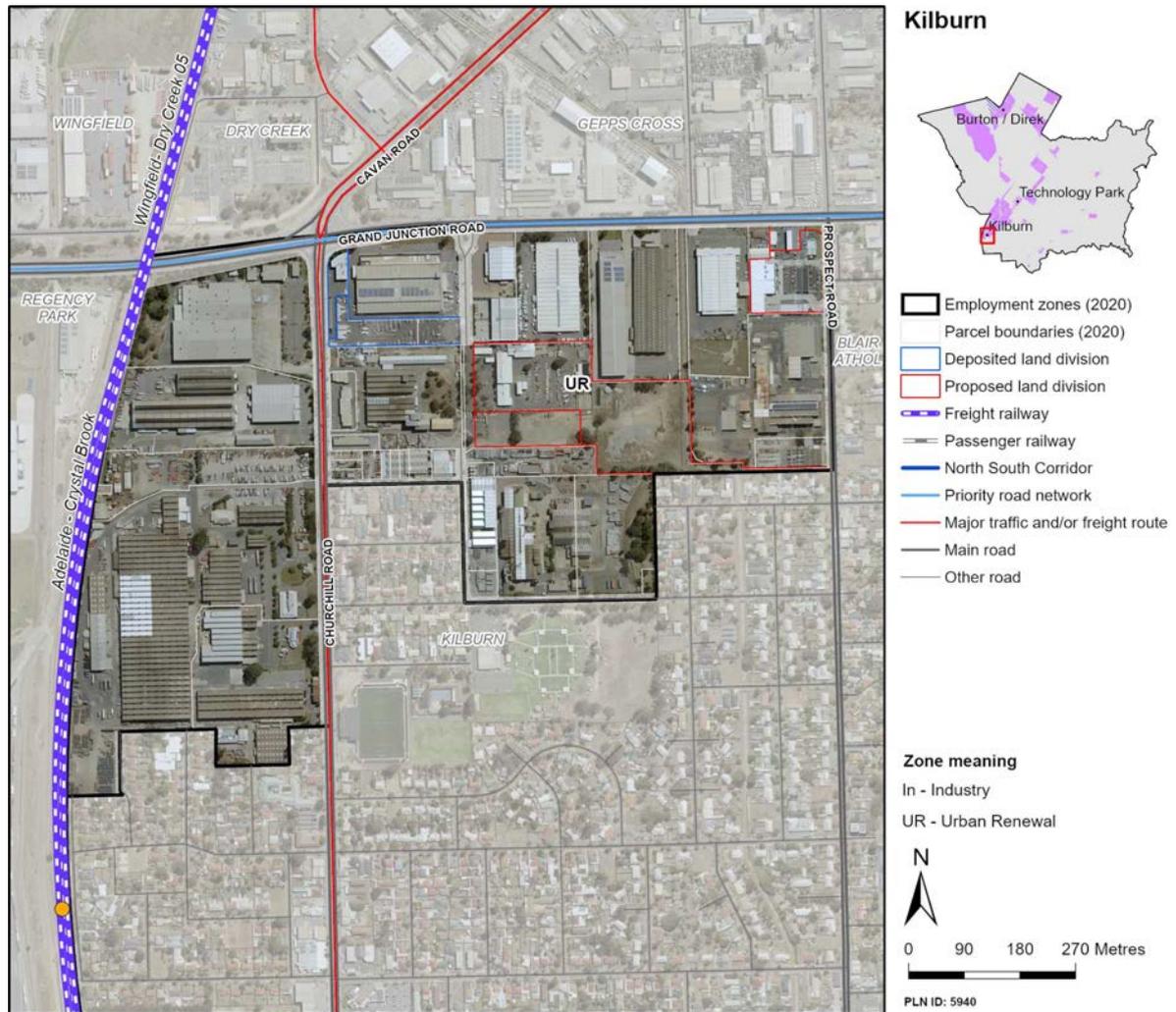
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- Identified as having one of the highest concentrations of jobs in both *traditional* and *freight and logistic* based activities.
- This is driven by access to key freight corridors, producer markets and trade gateways. The recent completion of the Northern Connector solidifies this point even further.
- Dominance of manufacturing and freight and logistic activities translates to low worker densities compared to other precincts.
- Relatively well buffered from sensitive uses creating opportunities for higher intensity development / activity.
- Adjacent to primary production regions likely to promote opportunities for food manufacturing, packaging and distribution.

Figure 25: Kilburn



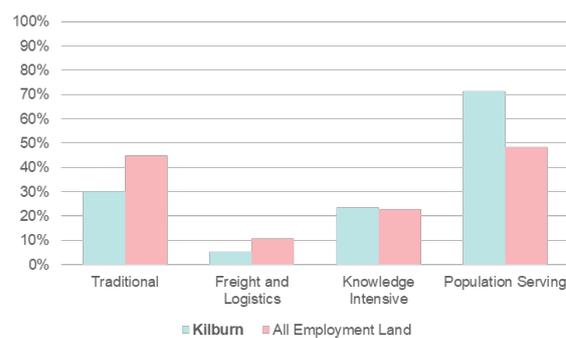
KEY MEASURES

Number of Jobs 2020	1,000
Total Precinct Area (ha)	65
Occupied Land (ha)	65
Vacant Land (ha)	0
Future Employment Land (ha)	0

CONTEXT

- Precinct was rezoned in 2017 from Industry to Urban Renewal, Policy Area 75 (Mixed Use Transition).
- Whilst the new policy area envisages retention and development of employment uses, the overarching intent is to seek a transition towards *low and medium density residential development*.

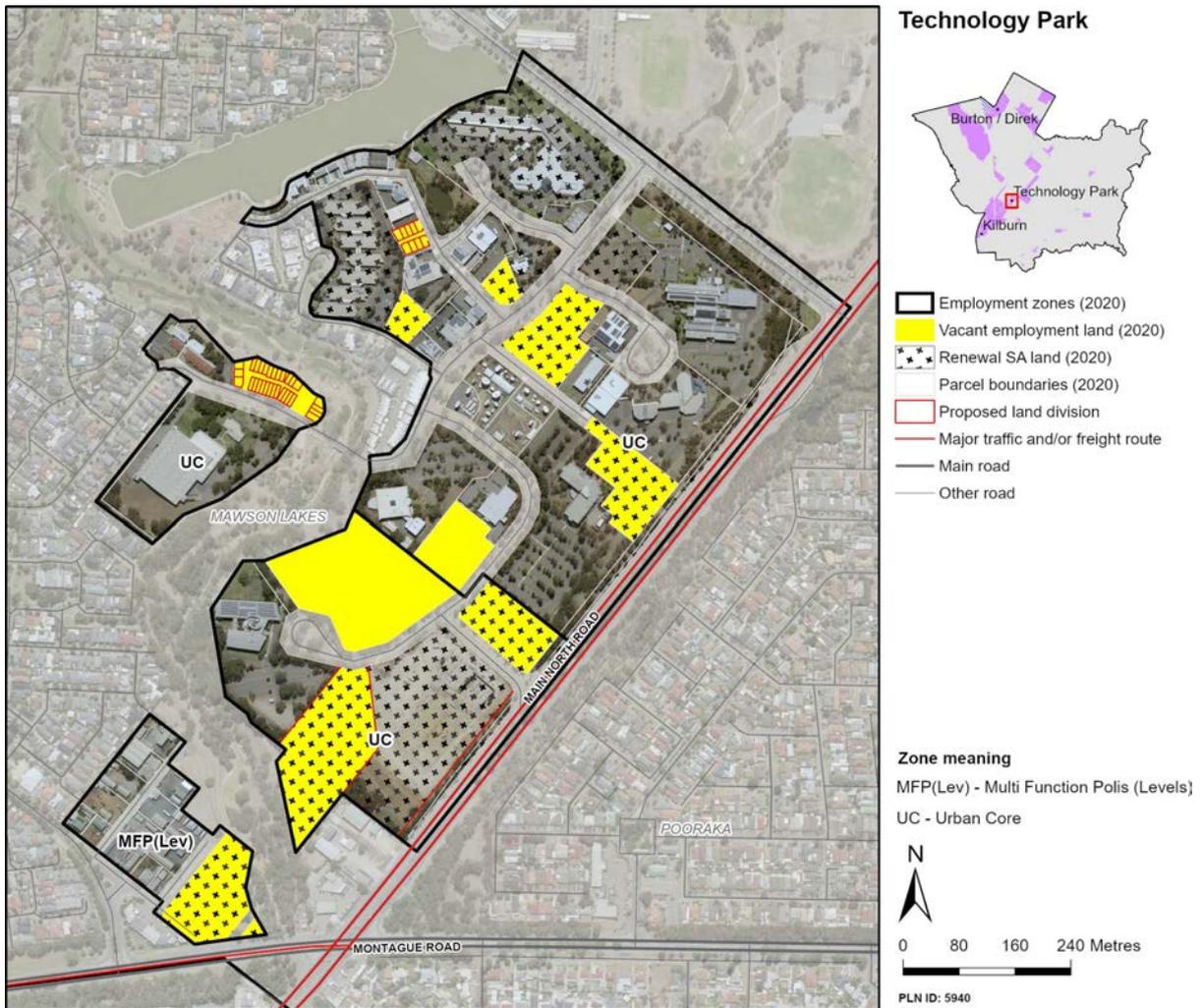
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- The precinct has a comparative advantage in population serving activities, with retail trade the largest employer.
- Land has good access to key arterial roads, and sits directly adjacent the Regency Park intermodal (road and rail) facility to the west.
- Allotments fronting Grand Junction Road are buffered from sensitive uses however land to the south and east faces potential interface issues with medium density residential development and urban renewal.

Figure 26: Technology Park



KEY MEASURES

Number of Jobs 2020	2,500
Total Precinct Area (ha)	50
Occupied Land (ha)	38
Vacant Land (ha)	12
Future Employment Land (ha)	0

RELATIVE EMPLOYMENT SHARES (2030)



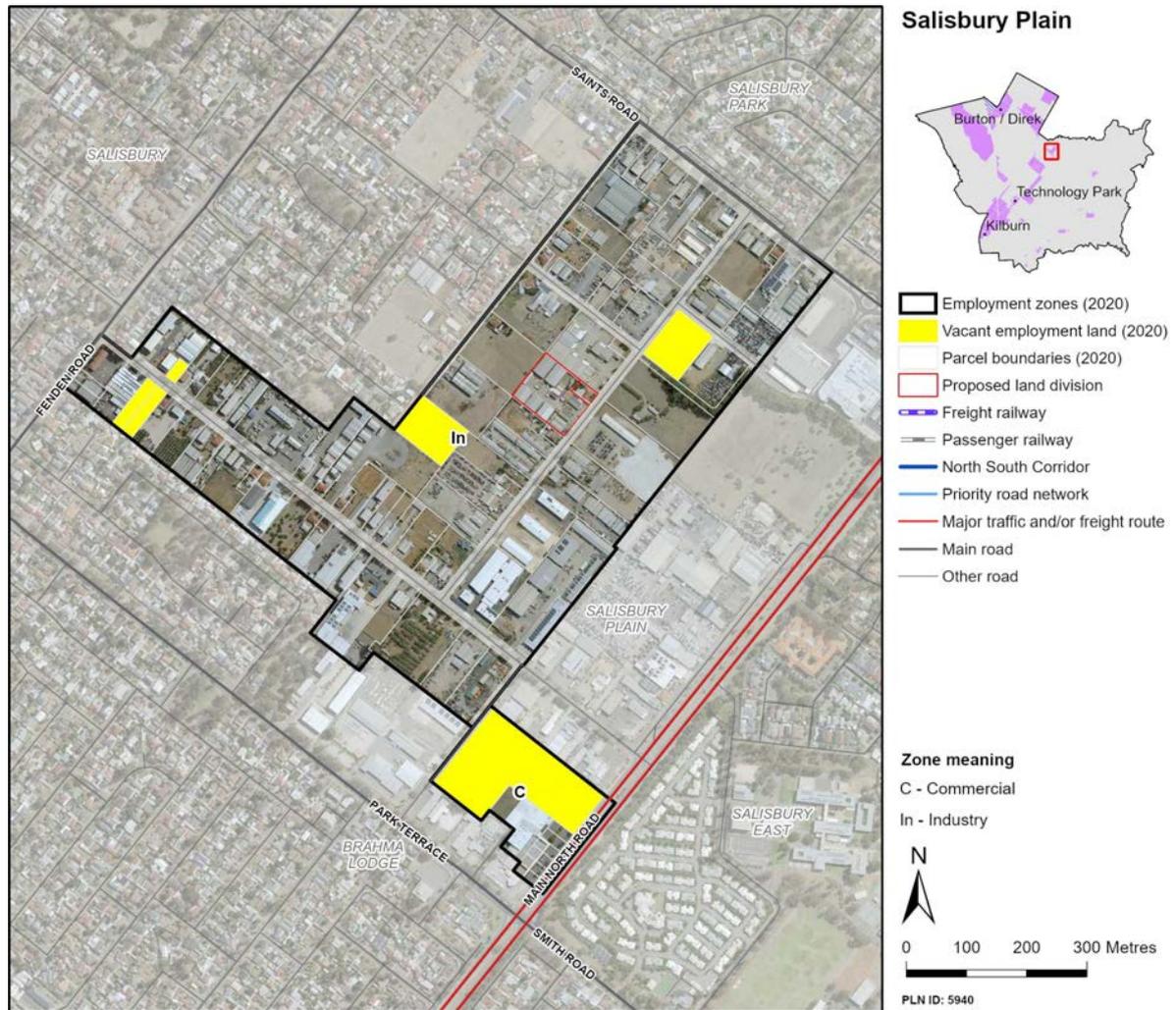
CONTEXT

- Land developed by Renewal SA.
- Remaining vacant land has, for the most part, now been sold and is awaiting further development.
- The fifth largest precinct in the region for total employment in 2020 and 2030.

ANALYSIS

- As a percentage of total employment, knowledge intensive industries within this precinct is almost double the Greater Adelaide average.
- Rated a top 5 precinct in Greater Adelaide for its comparative advantage in knowledge intensive activities.
- Employment in manufacturing and scientific and technical services account for over 30% of total employment.
- Located adjacent the University of South Australia's Mawson Lakes campus, presenting opportunities for collaboration.
- Precinct has access to well-maintained open spaces and frequent public transport services, which are considered important to fostering growth and activity in knowledge-intensive activities.

Figure 27: Salisbury Plain



KEY MEASURES

Number of Jobs 2020	600
Total Precinct Area (ha)	49
Occupied Land (ha)	45
Vacant Land (ha)	4
Future Employment Land (ha)	0

CONTEXT

- The precinct is relatively well developed.
- The core part of the precinct is set back from Main North Road, which is the only gazetted B-double route servicing the precinct.
- Land along Main North Road was rezoned to accommodate a Neighbourhood Centre and Bulky Goods Zone in 2012 and 2016, respectively.

ANALYSIS

- Precinct has a comparative advantage in population-serving activities.
- Residential development to the north and west may reduce the options for expansion of operations within due to potential impacts on resident amenity (noise, traffic and fumes).
- Competes with larger employment clusters to the north and south which have better access to key freight routes, impacting its share in other employment activities.

RELATIVE EMPLOYMENT SHARES (2030)

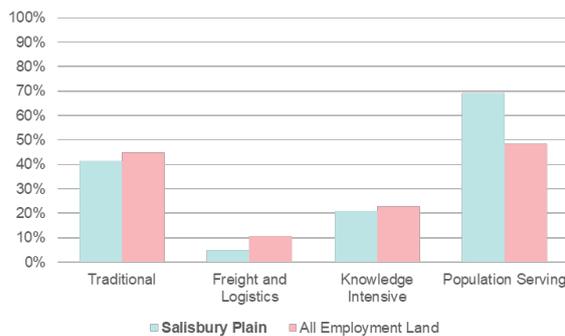
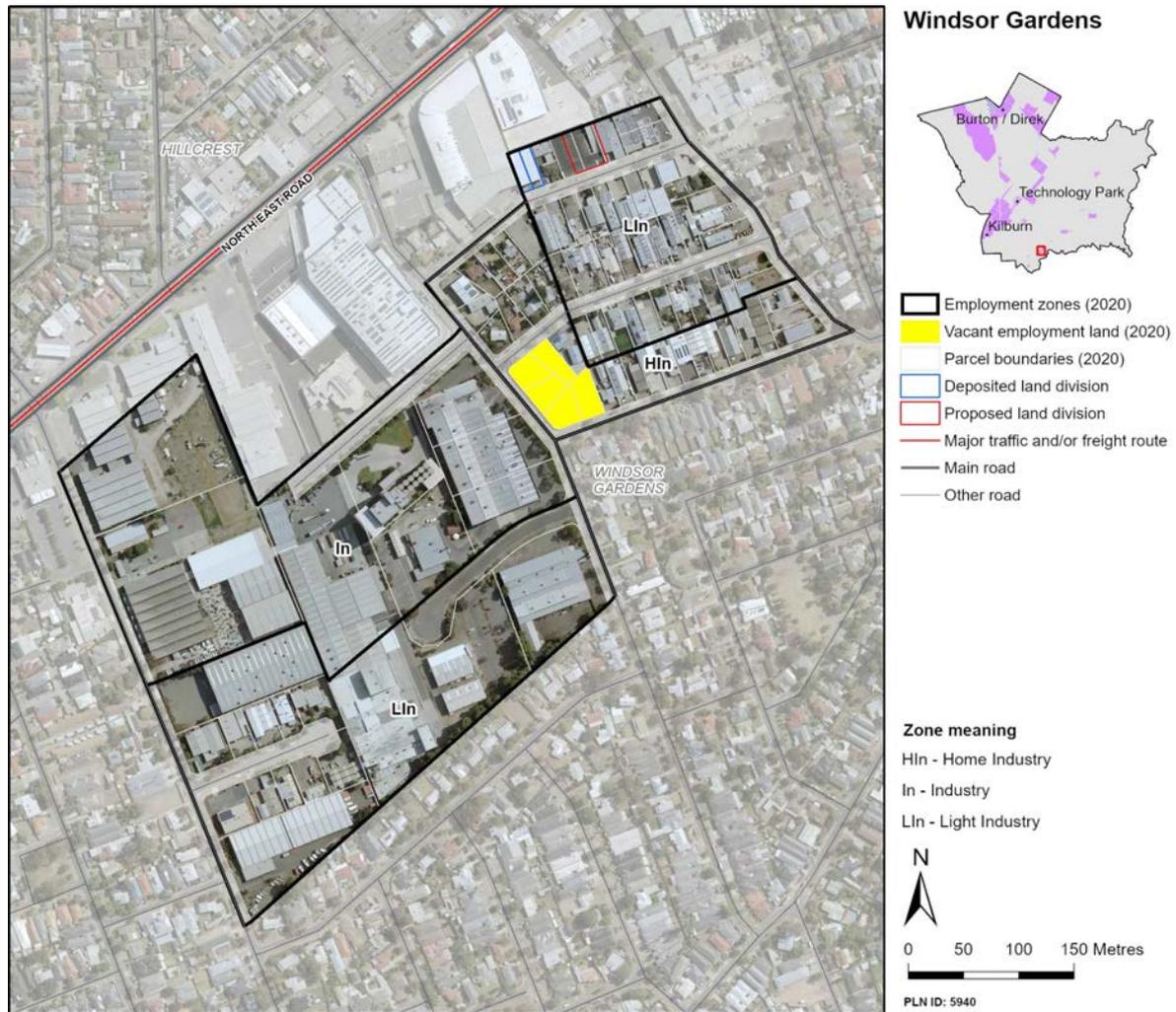


Figure 28: Windsor Gardens



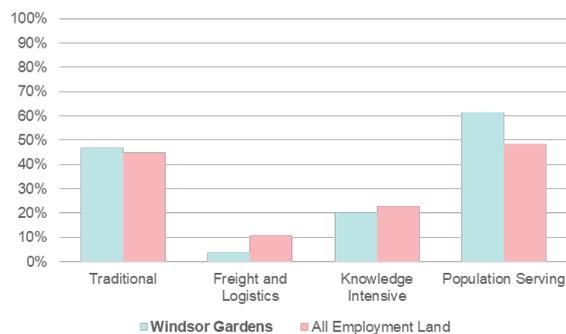
KEY MEASURES

Number of Jobs 2020	400
Total Precinct Area (ha)	18
Occupied Land (ha)	18
Vacant Land (ha)	>1ha
Future Employment Land (ha)	0

CONTEXT

- Precinct is well established with minimal vacant land.
- San Remo milling plant and packaging / distribution facility is the key landholder in the precinct.
- Land fronting North East Road is zoned Commercial or Neighbourhood Centre.
- Precinct comprises four different 'industry' zones ranging from the more intensive traditional industry zone to home industry.

RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- Precinct has a comparative advantage in both traditional and population serving activities.
- Manufacturing is, and will continue to be the largest employment industry in the precinct, which includes jobs associated with the San Remo milling plant (food production).
- Growth of population serving activities is being driven by increasing demand resulting from additional dwellings being built within the region.
- Lack of direct access to port, key freight routes, producer regions and the airport make it relatively unappealing for manufacturers, and freight and logistics.
- In competition with a number of employment precincts in the north-eastern suburbs, each of which are expected to develop an increasingly population-serving focus.

3.6 Employment land summary and strategic issues

Table 9 sets out the comparative advantages¹ of Inner North employment land precincts by looking at the share of activity for each of the broad industry categories (BICs) relative to the average for metropolitan employment lands.

Comparative advantage is an economic concept that recognises (in this case) certain employment precincts will have attributes that make them better suited to the provision of some activities over others.

By calculating the share of jobs by broad industry category (BIC) for each precinct in 2030 and comparing this figure to the share across all metropolitan employment lands, it is possible to understand the relative strengths of individual precincts, or their *comparative advantage*.

Looking first at strategic uses, the table shows that a number of Inner North precincts have comparative advantages in *traditional* employment uses. There are strong existing clusters, particularly in manufacturing, with these industries supported by blue collar worker pools. Burton / Direk in particular will continue to have a concentration of traditional industries, with this activity supported by large lot sizes, separation from sensitive uses and excellent access to freight corridors.

Freight and logistics uses tend to cluster around freight networks. The Burton / Direk precinct is located close to the Northern Connector, and has one of the highest concentrations of employment in freight and logistics activities in Greater Adelaide. Gepps Cross / Cavan / Pooraka is another precinct with long-standing strengths in freight and logistics. These strengths were traditionally shaped by its location at the Grand Junction Road / Main North Road intersection, and its proximity to an intermodal terminal and rail line.

In Australian cities, centripetal forces tend to pull knowledge-intensive uses towards central parts of metropolitan areas (CBDs and inner cities). However the exceptions to this are Technology Park and Edinburgh Parks, which are important precincts and home to defence and aerospace industries. On the basis of their relative share of activity in knowledge intensive activities, these two precincts are among the top five in the metropolitan region for knowledge-intensive employment. Technology Park in particular is unique in the Adelaide context, being co-located with a university.

Precincts without a clear strategic role tend to focus on the provision of population-serving uses to surrounding populations.

Table 9: Comparative advantage analysis for identified precincts

PRECINCT	STRATEGIC			Population Serving
	Traditional	Freight and Logistics	Knowledge Intensive	
Gepps Cross / Cavan / Pooraka				
Edinburgh Parks				
Burton / Direk				
Salisbury South / Para Hills West				
Kilburn				
Technology Park				
Salisbury Plain				
Windsor Gardens				

Comparative advantage, among top 5 assessed precincts

Comparative advantage

No comparative advantage

¹ Precincts are deemed to have a 'comparative advantage' if the proportion of workers in a broad industry category is more than 20% above the proportion in that category across all Greater Adelaide employment lands.

Based on the comparative advantage analysis the following conclusions can be drawn:

- Edinburgh Parks and Technology Park are identified as having one of the highest concentrations of jobs in knowledge intensive employment activities. This is aided by their proximity and relationship to appropriately skilled worker pool sources (i.e. RAAF Airbase, DSTO and University of SA campus).
- The Burton / Direk precinct is identified as having one of the highest concentrations of jobs within traditional and freight and logistic employment activities. The precinct accommodates the Vicinity Industrial Base, which is serviced by necessary infrastructure to support such activity. This, coupled with favourable separation from sensitive land uses (i.e. residential), makes the precinct ideal for these types of activities.
- Gepps Cross / Cavan / Pooraka is a well-rounded precinct, providing employment opportunities in a range of industry types. The precinct is well located and serviced by infrastructure and key freight routes, supporting its comparative advantage in traditional, population serving and freight and logistic employment activities.
- All other identified precincts have a comparative advantage in population serving activities, which service and support the growing population of northern Adelaide.



Source: City of Salisbury

4. EMPLOYMENT LAND SUPPLY – ADELAIDE WEST

4.1 Overview

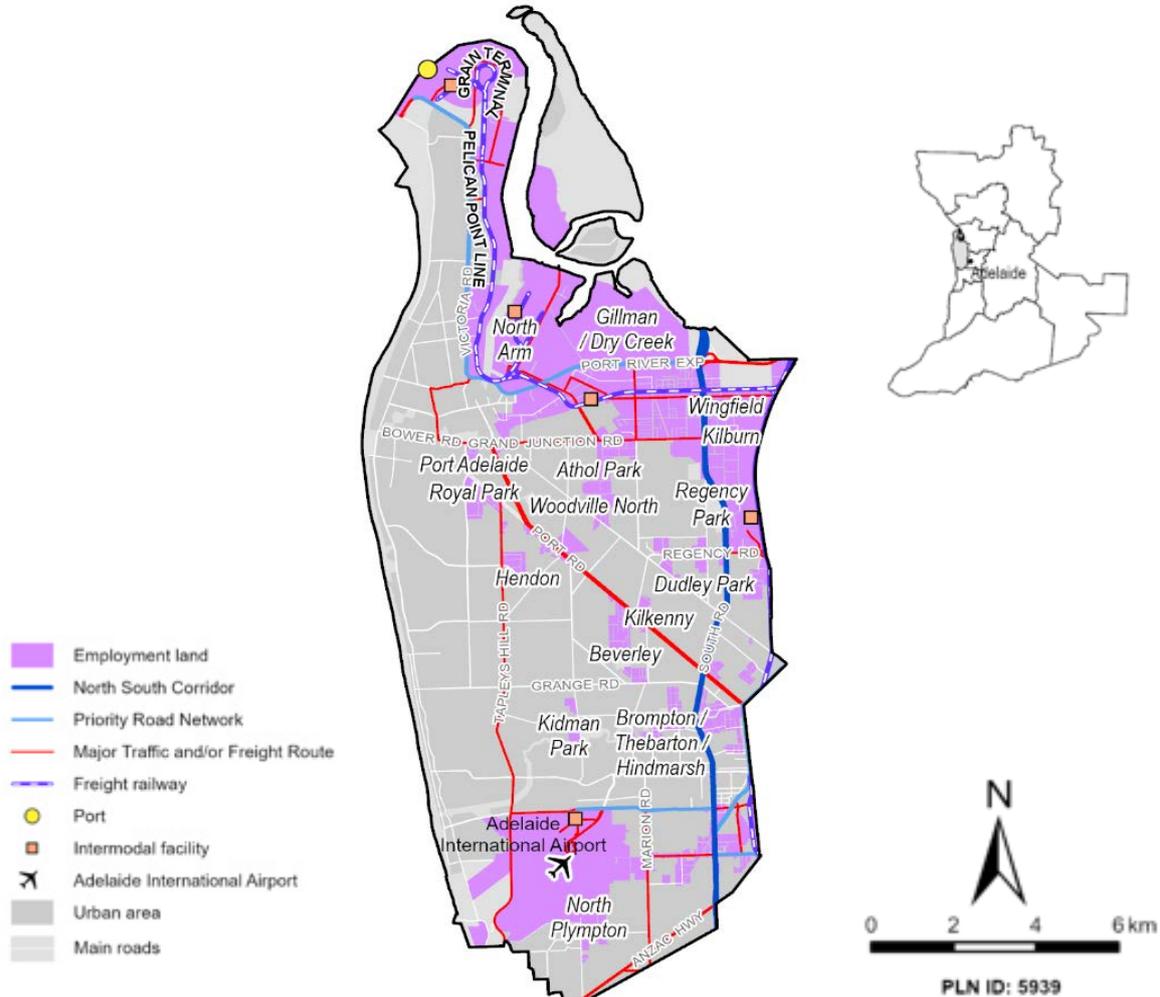
EMPLOYMENT LAND JOBS	ZONED EMPLOYMENT LAND	KEY INDUSTRY TYPES
 <p>59,900 in 2020</p>	 <p>4,441ha</p>	<ol style="list-style-type: none"> 1. Manufacturing 2. Transport, postal and warehousing 3. Construction

The Adelaide West region, as illustrated in Figure 29, comprises some of the most strategically important employment land in the State with the Adelaide International Airport, Outer Harbor Port and the Osborne naval shipbuilding yards all located within the region.

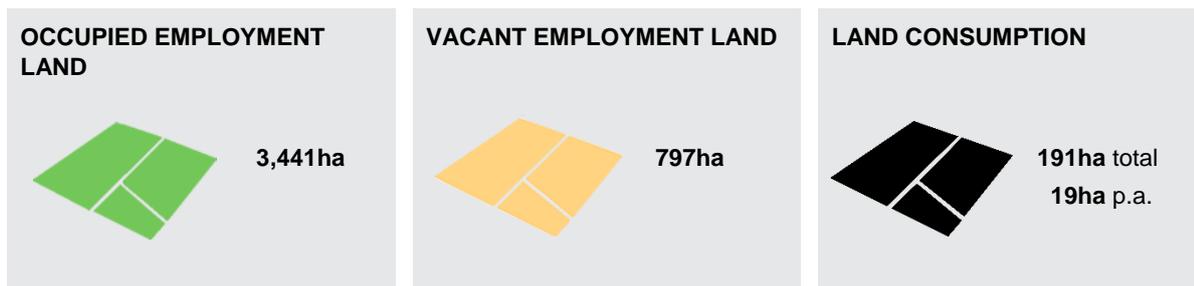
In 2020, it was estimated the regions employment lands supported around 60,000 jobs, representing over 50% of total jobs across all of Greater Adelaide’s employment lands. Manufacturing, a traditional form of development, accounts for 20% of total jobs in 2020, with its share projected to increase by 2030 as result of the shipbuilding projects located at Osborne.

The region appears well placed to accommodate projected employment growth over the next ten years, with access to key freight and logistic infrastructure making it an attractive proposition for existing and new business to invest.

Figure 29: Adelaide West employment land overview



4.2 Employment land supply and consumption



A stocktake of employment land supply, as of June 2020 and employment land consumption based on the period between 2008 and 2018 highlights the following:

- The region accommodated 4,441 hectares of zoned employment land, which is spread across a number of individual precincts, the majority of which are identified in Figure 30 and detailed in Table 10.
- 797 hectares of zoned land remained vacant, accounting for over 40% of total vacant land within the Greater Adelaide region.
- Almost half the regions vacant land was located in the Gillman / Dry Creek precinct which is not considered ‘development ready’. Significant site works and infrastructure connections are required.
- A further 232 hectares of vacant land remains within the Le Fevre Peninsula. This land will likely accommodate a range of businesses aligned with various shipbuilding and defence projects at Osborne.
- 191 hectares of vacant land was consumed between 2008 and 2018, accounting for 31% of total employment land consumption within Greater Adelaide, only the Inner North region consumed more.
- The region does not contain any identified future employment land.

Figure 30: Total employment land supply by precinct, June 2020

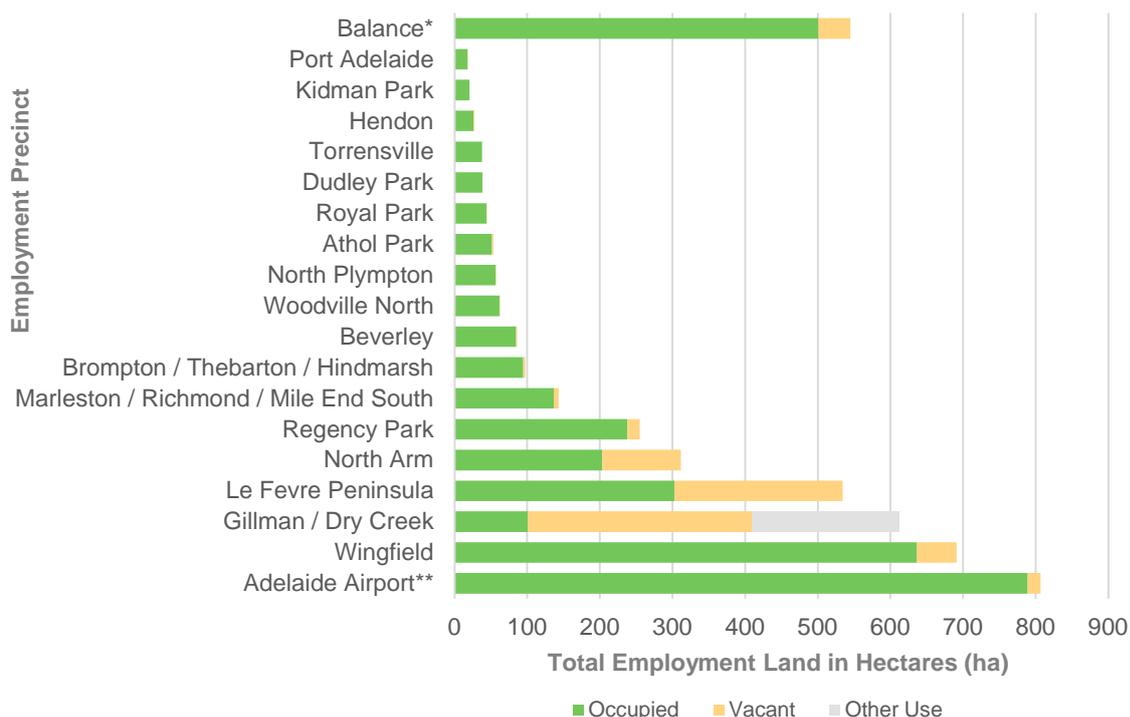


Table 10: Summary of identified employment precincts, Adelaide West region, June 2020

PRECINCT	Occupied Land (ha)	Vacant Land (ha)	Other Use (ha)	Total Area (ha)	Future Land (ha)
Adelaide Airport**	789	18	-	807	-
Wingfield	636	55	-	691	-
Gillman / Dry Creek	101	308	203	612	-
Le Fevre Peninsula	303	232	-	534	-
North Arm	203	108	-	312	-
Regency Park	238	17	-	255	-
Marleston / Richmond / Mile End South	137	6	-	143	-
Brompton / Thebarton / Hindmarsh	95	3	-	97	-
Beverley	85	1	-	86	-
Woodville North	62	1	-	62	-
North Plympton	57	1	-	57	-
Athol Park	52	2	-	53	-
Royal Park	44	0	-	44	-
Dudley Park	38	0	-	38	-
Torrensville	38	0	-	38	-
Hendon	26	1	-	27	-
Kidman Park	20	0	-	20	-
Port Adelaide	18	0	-	18	-
Balance*	501	44	-	545	-
TOTAL	3,441	797	203	4,441	0

*Includes Le Fevre Peninsula South, Torrens Island, Port Adelaide East, Ottoway, Albert Park, and Glenelg North.

4.3 Recent changes to employment land supply



Table 11 highlights changes to zoned employment land between 2008 and 2020. Key changes include:

- A single rezoning at Gillman / Dry Creek in 2015 resulted in an additional 395 hectares of zoned employment land being made available.
- 47 hectares of employment land was rezoned from employment land to other uses between 2008 and 2020.
- The most notable losses were linked to key residential developments at Bowden and AAMI Stadium.
- In addition, there were rezoning's which did not result in a net loss or gain of employment land, however still impacted the way in which existing land could be used and developed. The most notable example was the introduction of an Urban Renewal (Mixed Use Transition) zone over land at Underdale and Torrensville, which sought to allow residential development to be mixed with the continuation of existing employment activities / uses.
- 5 DPA's are currently under consideration by relevant authorities. These proposals seek to rezone employment land at Albert Park, St. Clair, Kilkenny, Croydon Park and Kidman Park, with the aim of facilitating mixed use residential development.

Table 11: Employment land changes, 2008 - 2020

DPA NAME	GAZETTED	DESCRIPTION
Allotment 113 and portion of allotment 115 Cowan Street, Angle Park	Sept 2020	0.3ha of land zoned light industry was rezoned in conjunction with additional land, to facilitate residential development.
Devon Park Residential	Apr 2020	0.8ha of land zoned light industry (ENTECH Electronics) was rezoned to facilitate residential development.
Findon Road, Kidman Park (North) Mixed Use (Residential and Commercial)	Feb 2020	Approximately 7.8ha of land was rezoned land from urban employment to mixed use. Some land sits within policy area 50 which supports the continuation home, light and service industry land uses.
Bowden-Brompton Mixed Use (Residential and Commercial)	Jun 2019	11.45ha of urban employment land was re-zoned to urban core to facilitate residential and mixed use development.
Underdale and Torrensville Urban Renewal	Feb 2018	40ha of land rezoned from industry to urban renewal (mixed use transition). Whilst the overarching policy area still allows for existing and new businesses there are limitations which were not previously there.
Seaton Mixed Use (Residential and Commercial)	Jan 2018	Approximately 2.6ha of land rezoned from Urban Employment to Suburban Activity Node to facilitate higher residential density and mixed use development.
Urban Employment Zone	Oct 2017	Replaced existing industry zones to urban employment. Core industry policy areas were created to focus more intensive industry activities in locations away from sensitive land uses.

DPA NAME	GAZETTED	DESCRIPTION
Port Adelaide Centre Renewal (Part 2)	Jul 2017	1.4ha of light industry land was rezoned to regional centre – policy area 38 (Cruickshank's Corner).
Employment Lands (Gillman/Dry Creek & Wingfield) and General Section Amendments	Sep 2015	395ha of land rezoned from multi-function polis to urban employment.
Devon Park Residential	Sept 2014	Approximately 2ha of land rezoned from industry to residential.
West Lakes (AAMI Stadium Precinct)	Nov 2013	Approximately 5ha of Industry and special industry land rezoned to urban core to facilitate the AAMI Stadium redevelopment.
Bowden Urban Village and Environs	Jul 2012	Approximately 15ha of land rezoned from industry to urban core to facilitate medium / high density residential development.
West Lakes Council Depot	Jun 2010	Approximately 0.69ha of land rezoned from industry to residential.

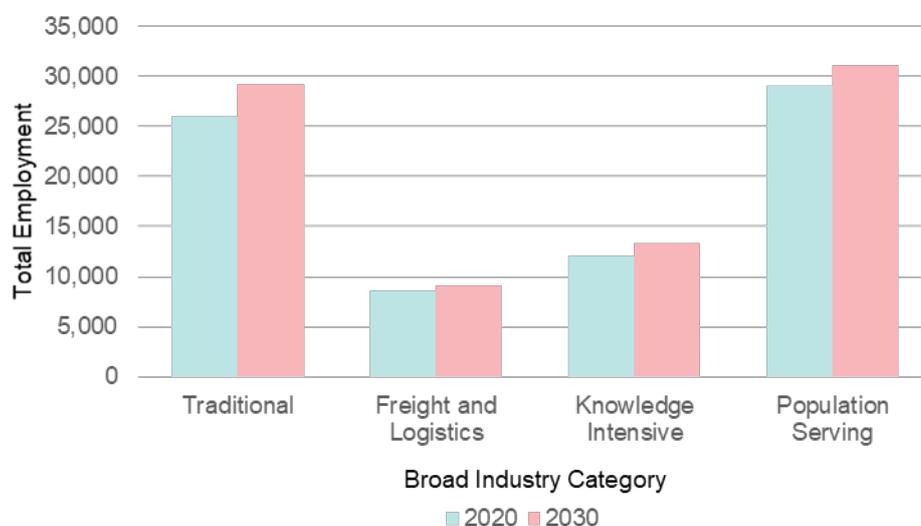
4.4 Projected change in employment, 2020 – 2030

LARGEST INDUSTRY TYPE	LARGEST % GROWTH BY BROAD INDUSTRY CATEGORY	LARGEST GROWTH PRECINCT
<ul style="list-style-type: none"> ▪ Manufacturing - 20% of total jobs in 2020 - 21% of total jobs in 2030 	<ul style="list-style-type: none"> ▪ Traditional (12.3%) - Manufacturing - Construction 	<ul style="list-style-type: none"> ▪ Le Fevre Peninsula - 4,600 jobs (2020) - An 87% increase projected by 2030

Projected changes in employment trends between 2020 and 2030 are summarised as follows:

- The regions employment land supported an estimated 60,000 jobs in 2020, representing over 50% of total jobs across Greater Adelaide's employment lands.
- Manufacturing, a traditional employment activity, accounted for 20% of total jobs.
- The region is projected to account for 56% of all new jobs created across Greater Adelaide's employment lands to 2030.
- Growth is projected to be distributed across all Broad Industry Categories (BICs) with traditional employment activities projected to generate the largest number of additional jobs primarily driven by growth in manufacturing.
- The Le Fevre Peninsula precinct will accommodate over 70% of projected total new jobs across the regions employment lands by 2030.
- The primary driver for manufacturing growth in the region, and specifically the Le Fevre Peninsula, is the \$90 billion dollar future frigate and attack class submarine programs. These works are to be undertaken at the Osborne shipbuilding yards and will be the primary source of jobs growth for the region across the next ten years and beyond.
- Jobs growth in freight and logistic aligned activities are projected to experience slower rates of growth, caused in part by higher rates of automation. That said, it plays a strategically important role for the region, which should not be underestimated, nor should its role as a key driver of demand for employment land (recognising very low employment densities within the sector).

Figure 31: Jobs growth on employment land by Broad Industry Category (BIC), 2020 - 2030



4.5 Key employment precincts – Adelaide West

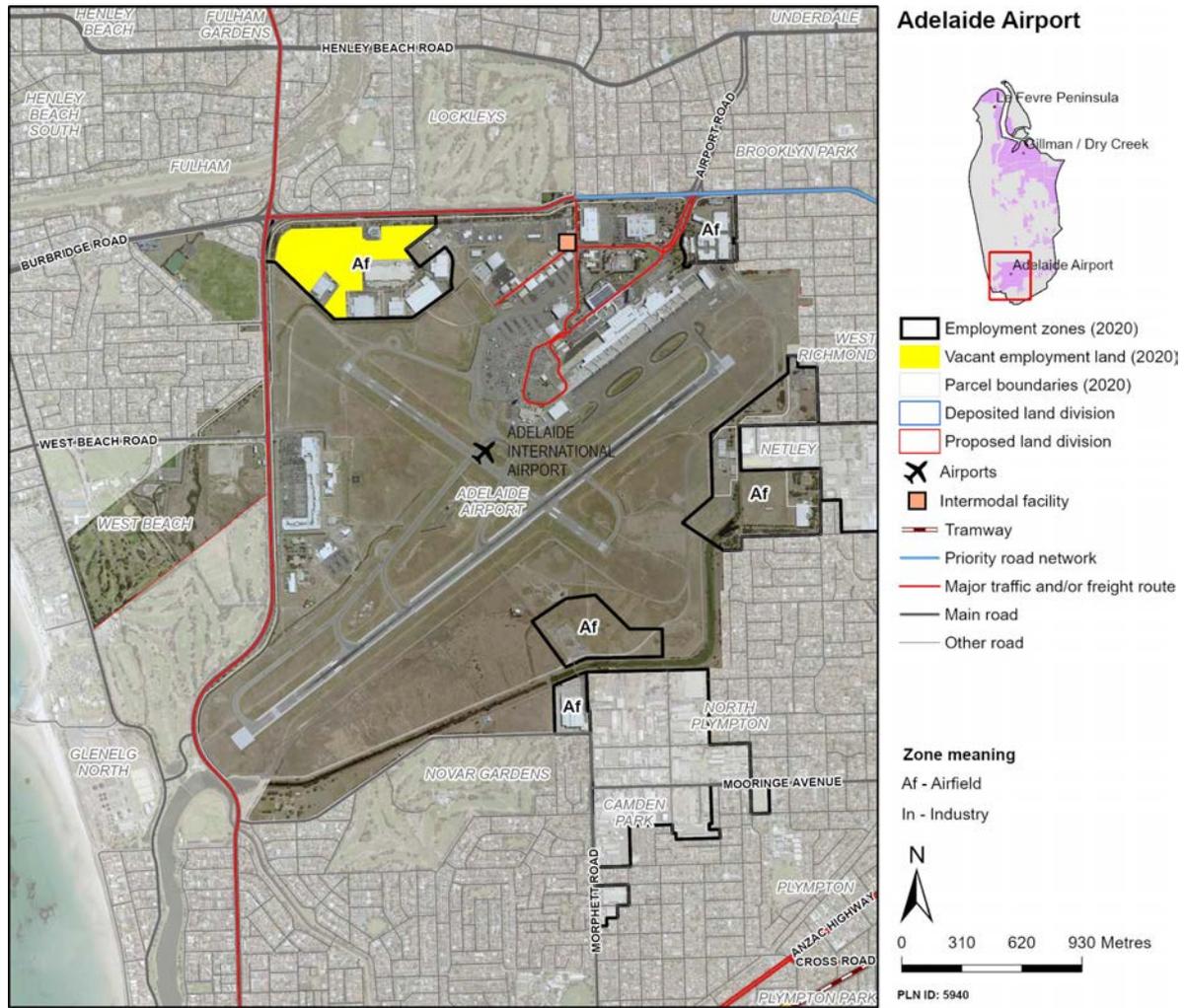
The following section provides analysis on employment land supply and jobs growth for the following precincts:

- Adelaide Airport
- Wingfield
- Gillman / Dry Creek
- Le Fevre Peninsula
- North Arm
- Regency Park
- Marleston / Richmond / Mile End South
- Brompton / Thebarton / Hindmarsh
- Beverley
- Woodville North
- North Plympton
- Athol Park
- Royal Park
- Dudley Park
- Torrensville
- Hendon
- Kidman Park
- Port Adelaide

Analysis of each precinct includes:

- A map, illustrating the full extent of the precinct, vacant land supply (as of June 2020) and proposed lots (2020);
- A table summarising key measures, including total number of jobs at 2020, and total precinct area (ha);
- A graph illustrating the share of total jobs across all four broad industry categories in 2030, relative to the share across Greater Adelaide;
- Overview of the strengths, constraints and opportunities.

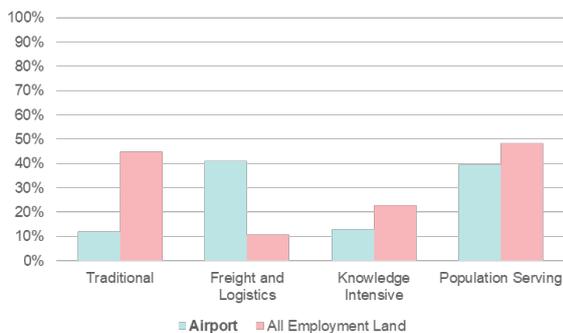
Figure 32: Adelaide Airport



KEY MEASURES

Number of Jobs 2020	6,000
Total Precinct Area (ha)	807
Occupied Land (ha)	789
Vacant Land (ha)	18
Future Employment Land (ha)	0

RELATIVE EMPLOYMENT SHARES (2030)



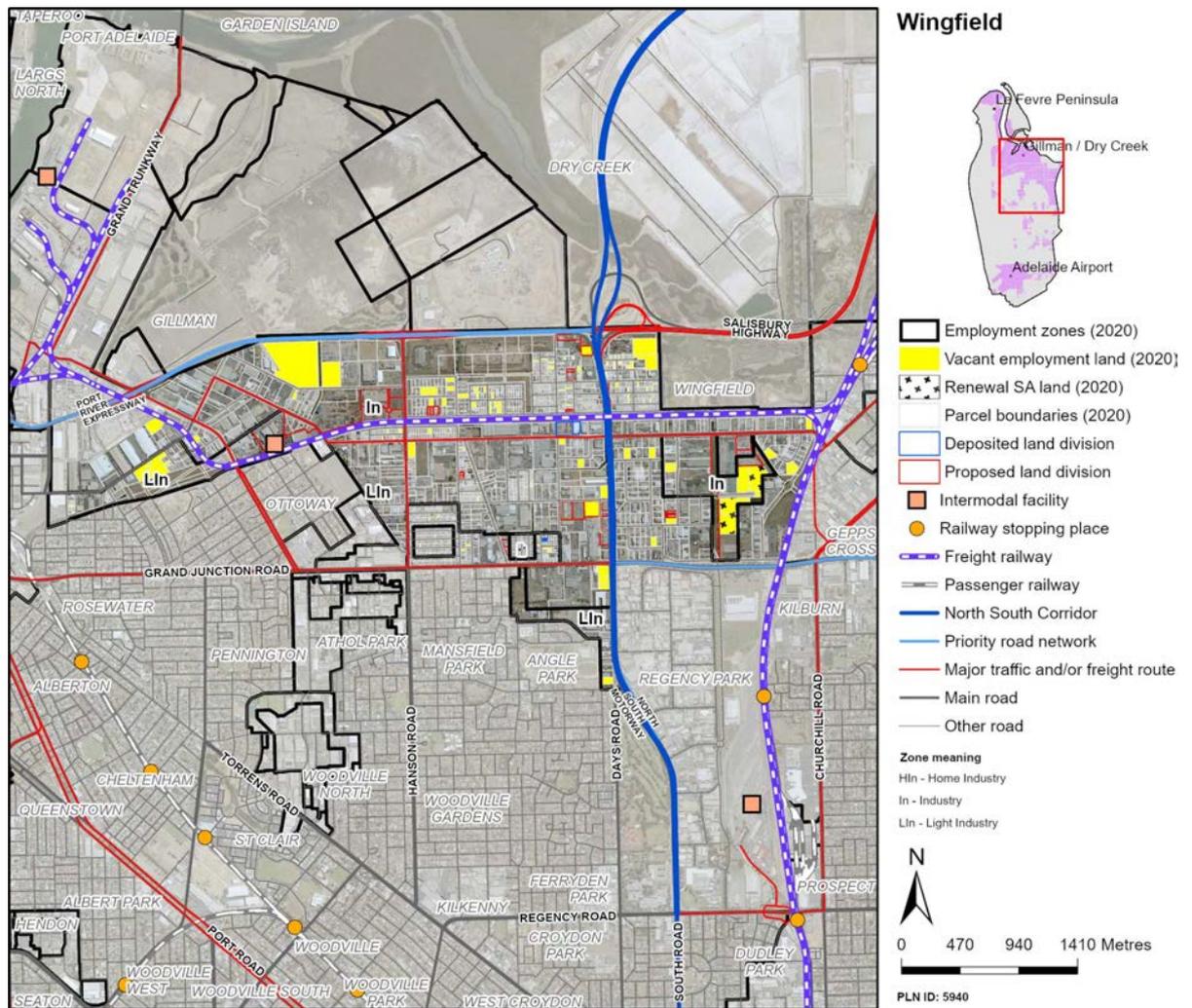
CONTEXT

- Economic activity within this precinct is heavily influenced by airport freight movements.
- Accessibility and visibility also supports entertainment and bulky goods uses.
- The Adelaide Airport Masterplan (2019) identifies areas for future employment development, particularly in the southern and eastern portions of the precinct.
- The masterplan also identifies potential new road links, which would connect land at Netley (east) to land at North Plympton (south).
- Vacant land still remains within Burbridge Business Park.

ANALYSIS

- One of the highest concentrations of jobs in freight and logistic activities when benchmarked against all employment land within Greater Adelaide.
- Freight and logistic activities are projected to account for 41% of jobs within the precinct by 2030.
- Given the suitability of the precinct for freight and logistic activities, and the strong underlying demand for retail and entertainment uses, there is a threat that, if left to market forces, important strategic land could be lost to population serving uses which play a limited strategic role.

Figure 33: Wingfield



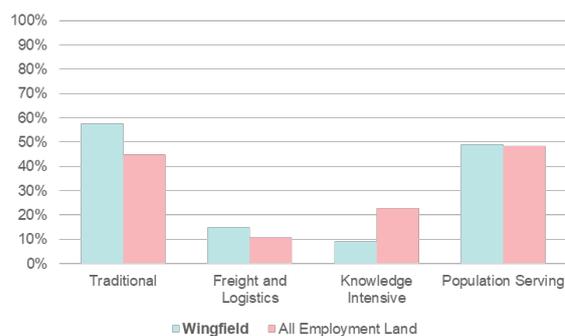
KEY MEASURES

Number of Jobs 2020	8,900
Total Precinct Area (ha)	691
Occupied Land (ha)	636
Vacant Land (ha)	55
Future Employment Land (ha)	0

CONTEXT

- Third largest precinct in 2020 for total jobs.
- Serviced by multiple gazetted road train and B-double routes, including the Port River Expressway and Grand Junction Road.
- Land well located with access to key distribution networks at Regency Park (intermodal), Outer Harbor (deep sea port) and Adelaide International Airport (air freight).
- Precinct is relatively well established, however still has a few small pockets of vacant land scattered throughout.

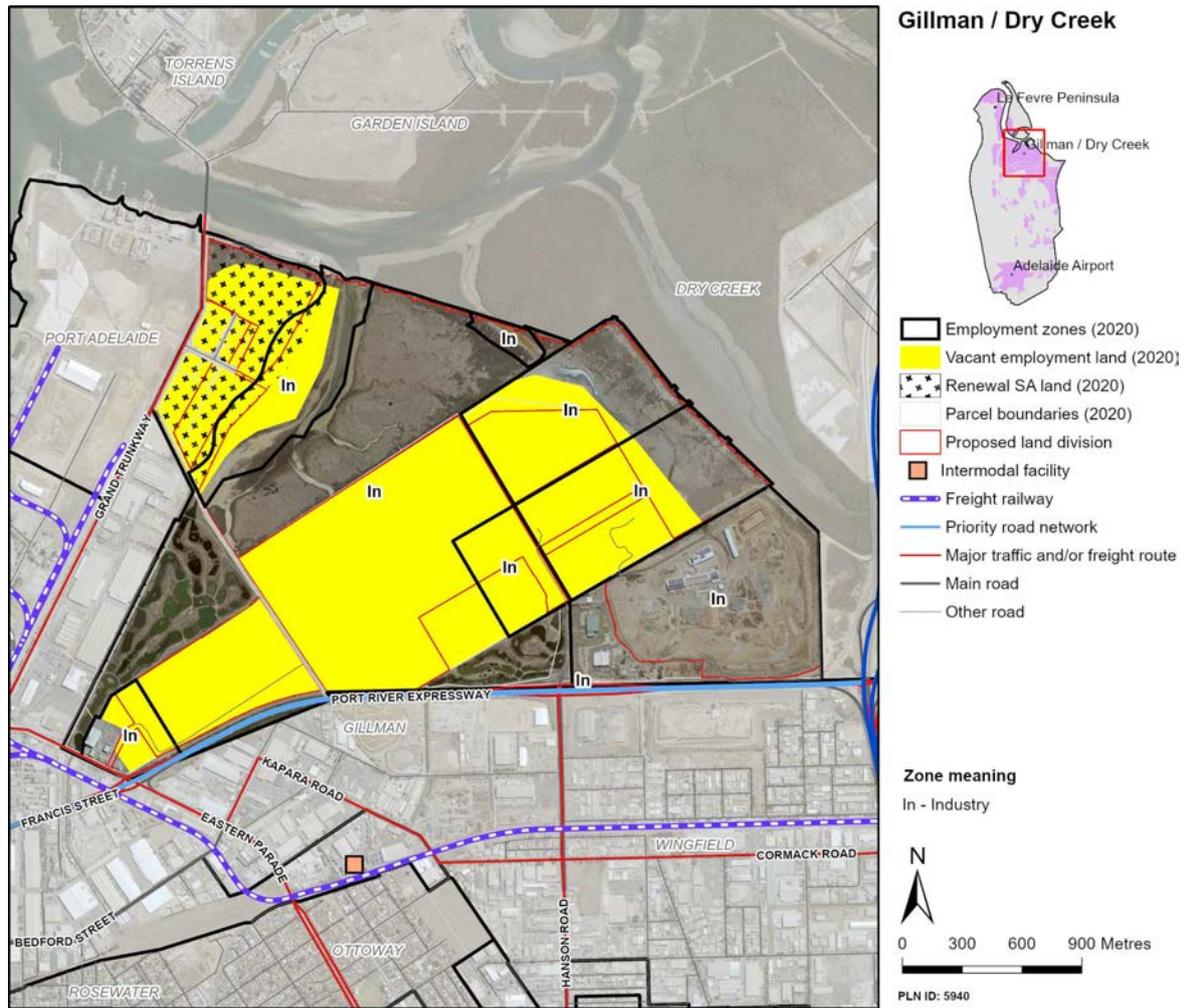
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- Precinct is identified as having one of the highest concentrations of jobs in traditional and freight / logistic based employment activities across Greater Adelaide.
- The northern and central core of the precinct is void of sensitive land uses creating opportunities for higher intensity activities.
- Increased levels of residential development on land to the south may create interface issues.
- Jobs in manufacturing are projected to decline, which will be offset by increased employment in sectors linked to other traditional activities such as construction.
- Jobs in freight and logistics are also expected to increase, given the precincts proximity to key freight networks and distribution facilities.

Figure 34: Gillman / Dry Creek



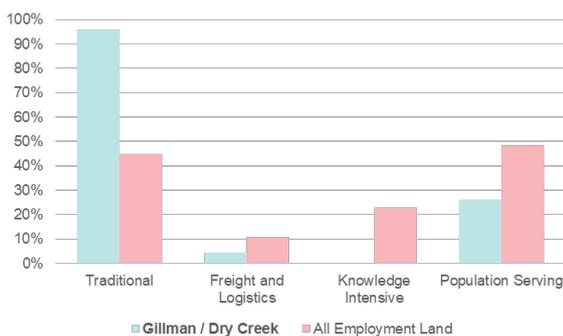
KEY MEASURES

Number of Jobs 2020	100
Total Precinct Area (ha)	612
Occupied Land (ha)	101
Vacant Land (ha)	308
Other Uses (ha)	203
Future Employment Land (ha)	0

CONTEXT

- In 2015 land was rezoned, providing an additional 395 hectares of employment land. This land is being developed by Renewal SA.
- Land identified as ‘other uses’ includes wetlands and waterways, as specified within the relevant concept plan identified within the relevant Development Plan.
- Largest single source of vacant employment land in Greater Adelaide.
- The precinct has direct frontage and vehicle access to the Port River Expressway a gazetted road train route.

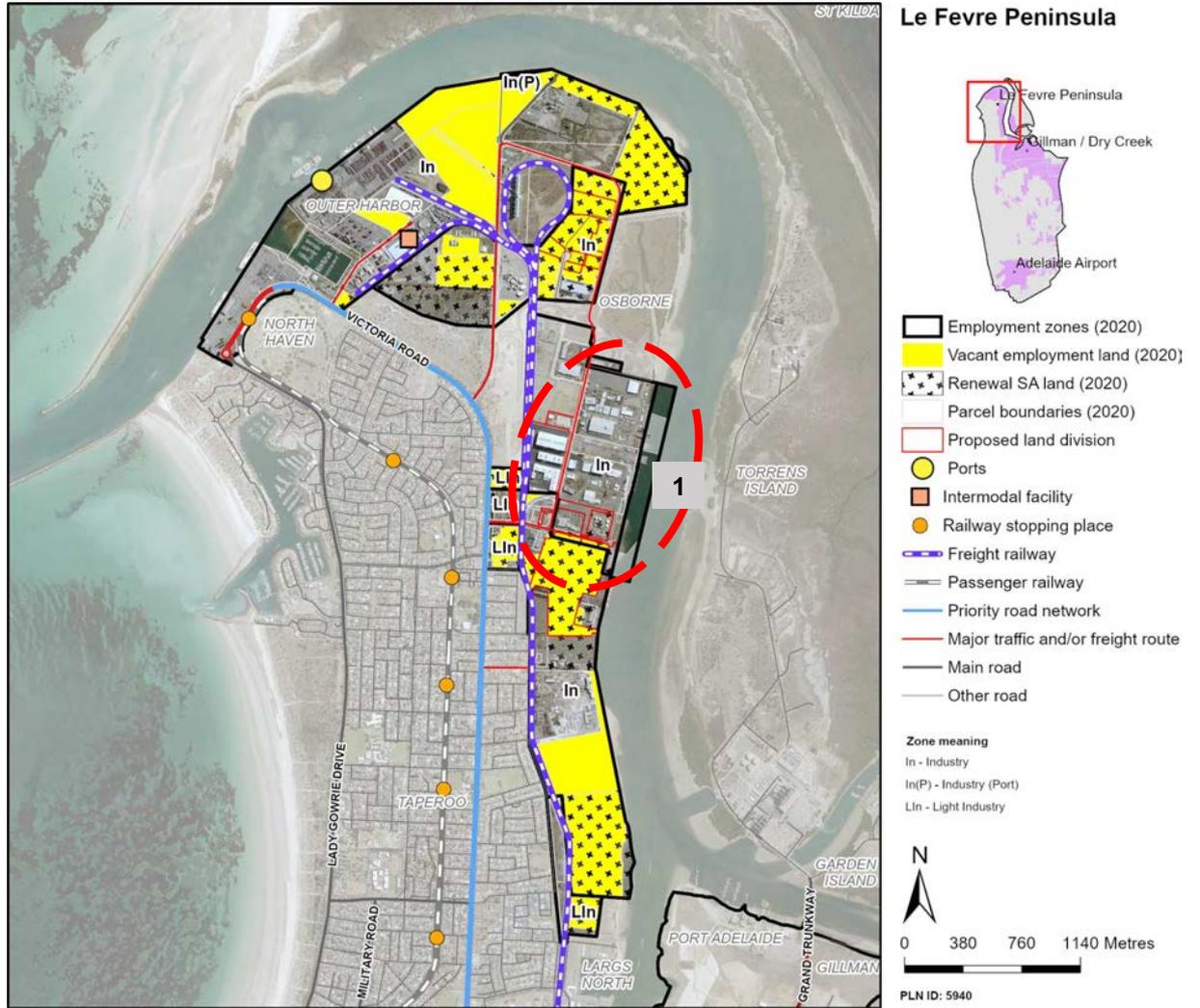
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- Analysis indicates the precinct has a clear comparative advantage in traditional uses, it should be noted this is based on a smaller number of total jobs.
- Investment is required to get much of the vacant land supply to a ‘development ready’ state.
- Road connections provide access to Outer Harbor, the north-south corridor, the Northern Connector and intermodal (road / rail) facilities at Regency Park.
- Its location relative to key infrastructure and distribution networks provides an opportunity to establish freight and logistics activities within the precinct.
- Land is not directly impacted by sensitive land uses, which provides the opportunities for higher intensity uses.

Figure 35: Le Fevre Peninsula



KEY MEASURES

Number of Jobs 2020	4,600
Total Precinct Area (ha)	534
Occupied Land (ha)	303
Vacant Land (ha)	232
Future Employment Land (ha)	0

CONTEXT

- Accommodates some of the State’s most strategically important employment land, which includes the States only containerised deep-water port (Outer Harbor), and naval shipyards at Osborne, labelled ‘1’ on the corresponding precinct map.
- Victoria Road is a gazetted road train route. The precinct is also serviced by a freight rail link to Outer Harbor.
- 232 ha of land remained vacant, however it is understood a number of these allotments have been earmarked for development.
- A masterplan for the precinct is currently being undertaken by Renewal SA.

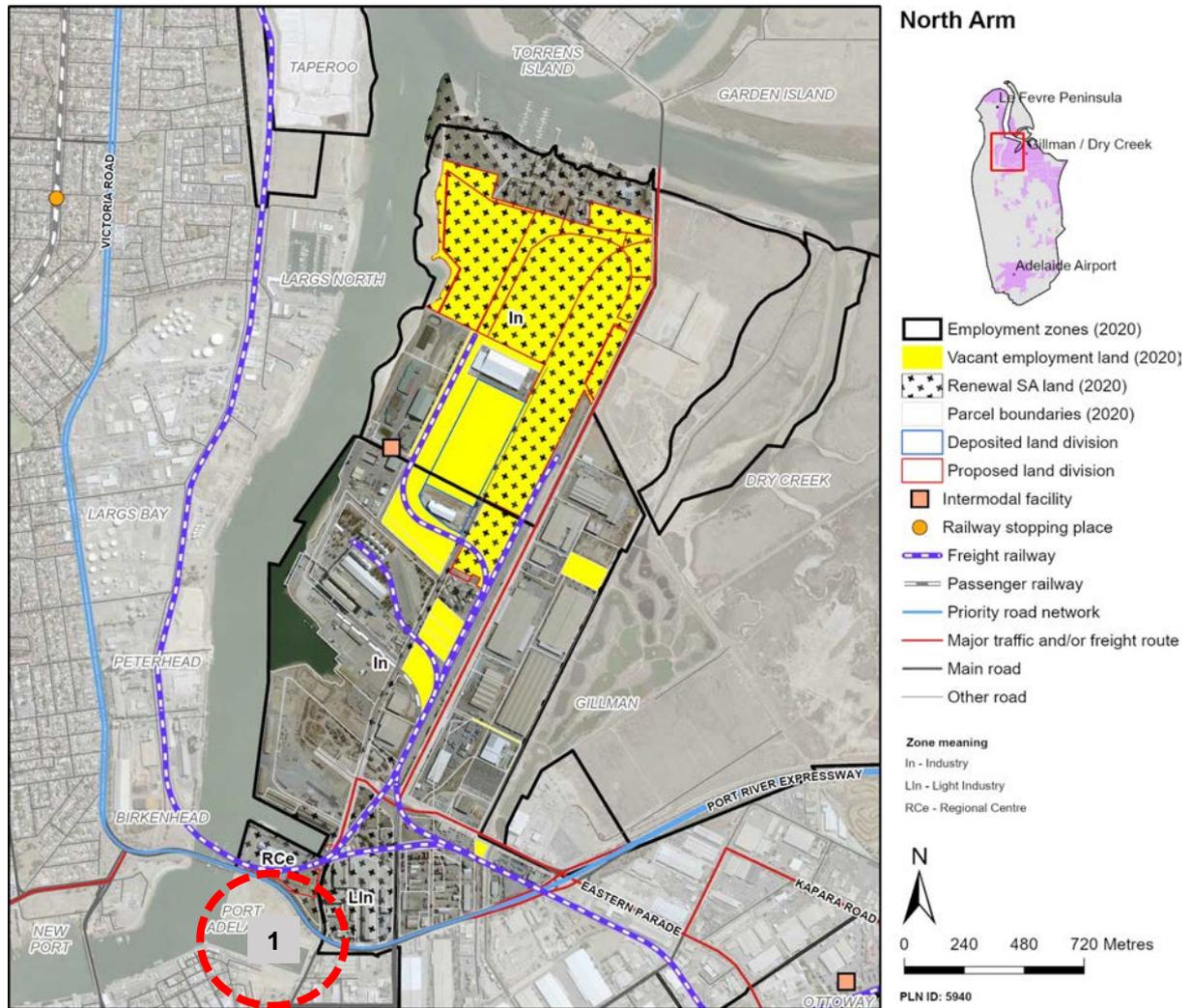
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- Precinct has a clear comparative advantage in traditional uses, driven primarily by its strength in manufacturing.
- Jobs in manufacturing are projected to grow rapidly over the next 10 years as work associated with the future frigates and submarine program accelerates.
- State and Federal Government investment in defence activities are likely to be ongoing, presenting opportunities for related activities to the north of Osborne.
- Given the proximity to Outer Harbor, the precinct is also likely to have competitive advantage in freight and logistics.

Figure 36: North Arm



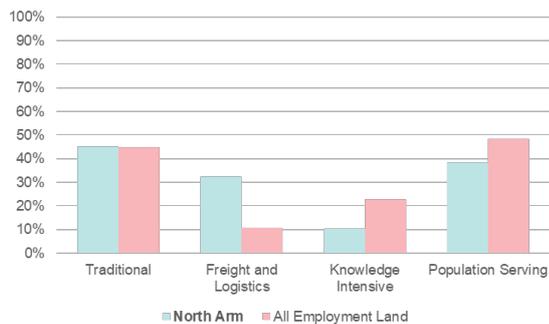
KEY MEASURES

Number of Jobs 2020	2,900
Total Precinct Area (ha)	312
Occupied Land (ha)	203
Vacant Land (ha)	108
Future Employment Land (ha)	0

CONTEXT

- Strategic waterfront land with access to deep-water docks.
- Land serviced by the Grand Trunkway and Port River Expressway, which are authorised road train routes.
- Significant vacant land holdings remain, which are predominantly owned by Renewal SA.
- Dock One and the Port Approach, identified as '1' on the corresponding map, are active residential strategic infill development sites.

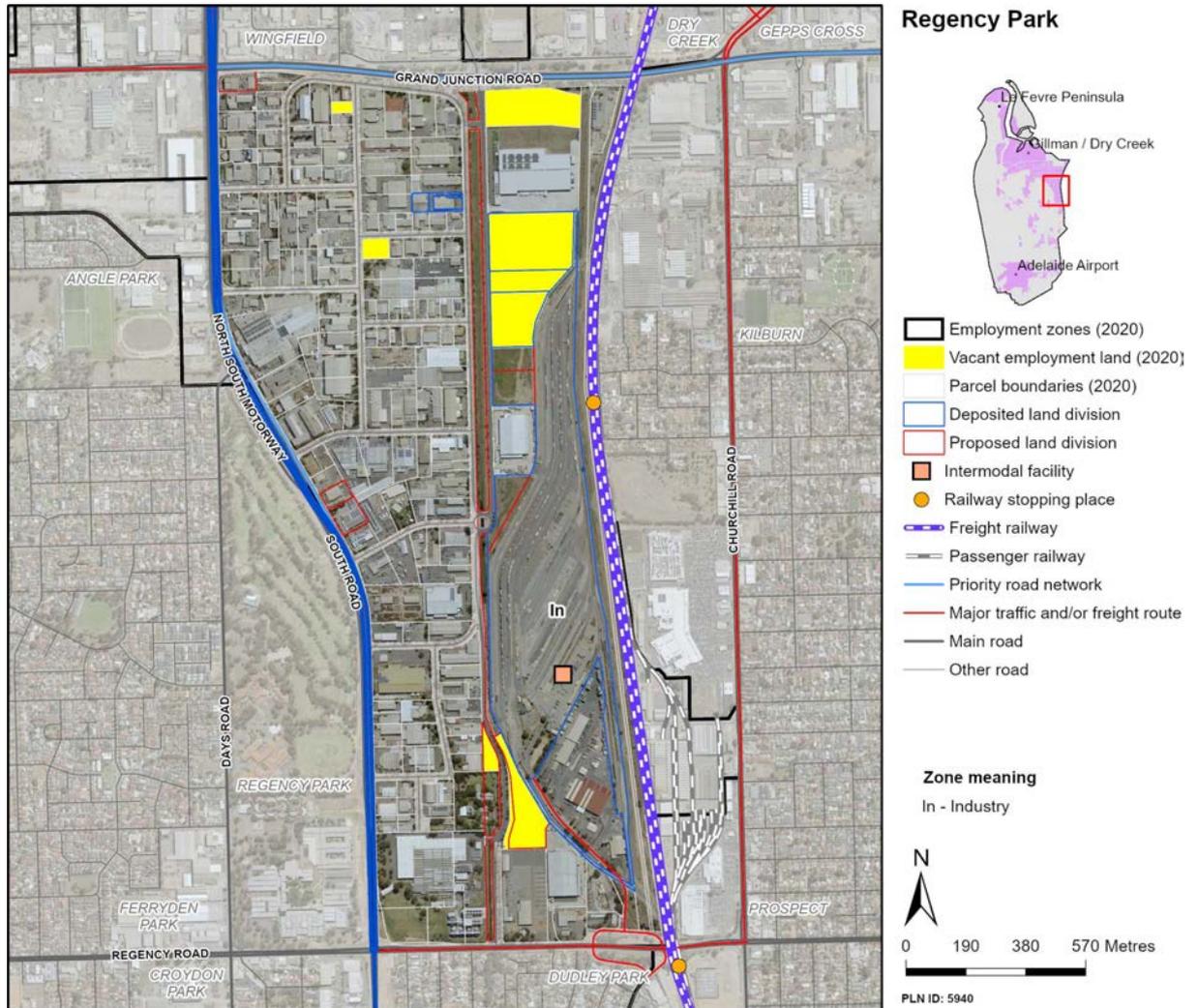
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- Comparative advantage in traditional employment activities, notably manufacturing and construction.
- Transport and warehousing, a freight and logistics activity, accounts for over 30% of total jobs in the precinct.
- Some areas lack physical infrastructure and require major investment to facilitate development.
- Good linkages to Outer Harbor and freight routes, supporting comparative advantage in freight and logistics.
- Well separated from sensitive land uses, allowing more intense activities which generate higher levels of noise, odour and vehicle movement.

Figure 37: Regency Park



KEY MEASURES

Number of Jobs 2020	4,300
Total Precinct Area (ha)	255
Occupied Land (ha)	238
Vacant Land (ha)	17
Future Employment Land (ha)	0

RELATIVE EMPLOYMENT SHARES (2030)



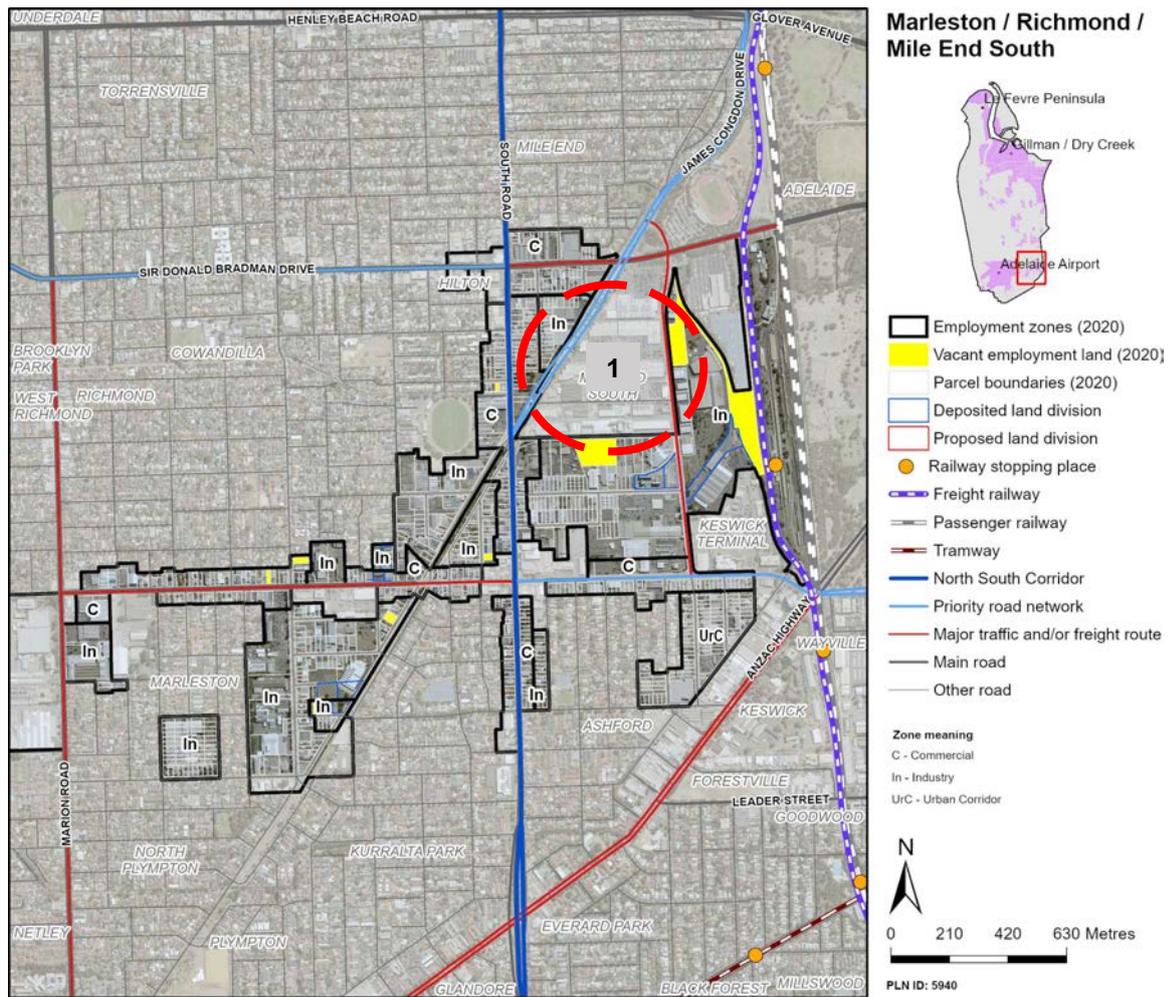
CONTEXT

- Major intermodal facility (road and rail) located in the eastern portion of the precinct.
- Adjacent the north-south motorway, which links directly with the recently completed northern connector.
- Approximately 17 hectares of vacant land west of the freight rail line.

ANALYSIS

- Well located relative to existing freight corridors (road and rail) and trade gateways, supporting its comparative advantage in freight and logistics activities.
- The projected completion of the South Road corridor by 2030, rising trade and increased levels of local consumption are likely to boost its credentials as a freight and logistics precinct.
- Relatively well buffered from sensitive land uses, providing opportunities for higher intensity activity, which along with its position relative to key freight routes, supports its competitive advantage in traditional uses.
- Geographically close to the centre of Adelaide, making it appealing as a location for distribution centres (e.g. Aldi).
- Transport and warehousing is projected to be the largest industry type for total jobs in the precinct by 2030.
- This speaks to its prime location adjacent key freight routes and access to intermodal facilities.

Figure 38: Marlestone / Richmond / Mile End South



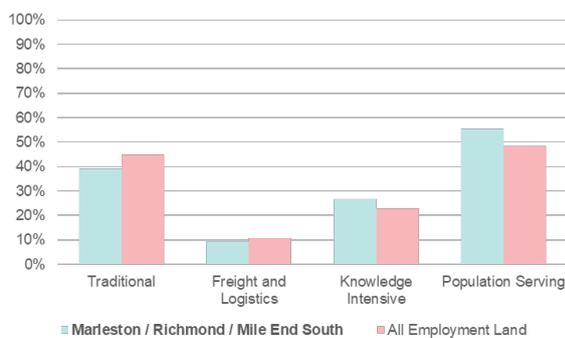
KEY MEASURES

Number of Jobs 2020	12,200
Total Precinct Area (ha)	143
Occupied Land (ha)	137
Vacant Land (ha)	6
Future Employment Land (ha)	0

CONTEXT

- This is a diverse precinct which supports activity across a range of sectors.
- The final alignment option adopted for the final sections of the north-south road corridor project will impact the function of this precinct.
- Precinct is located adjacent the Adelaide Parklands.
- Land identified as area '1' on the corresponding map was rezoned from Industry to Bulky Goods, facilitating the development of the Mile End Homemaker Centre. Large components of this land are still used for more traditional employment activities.

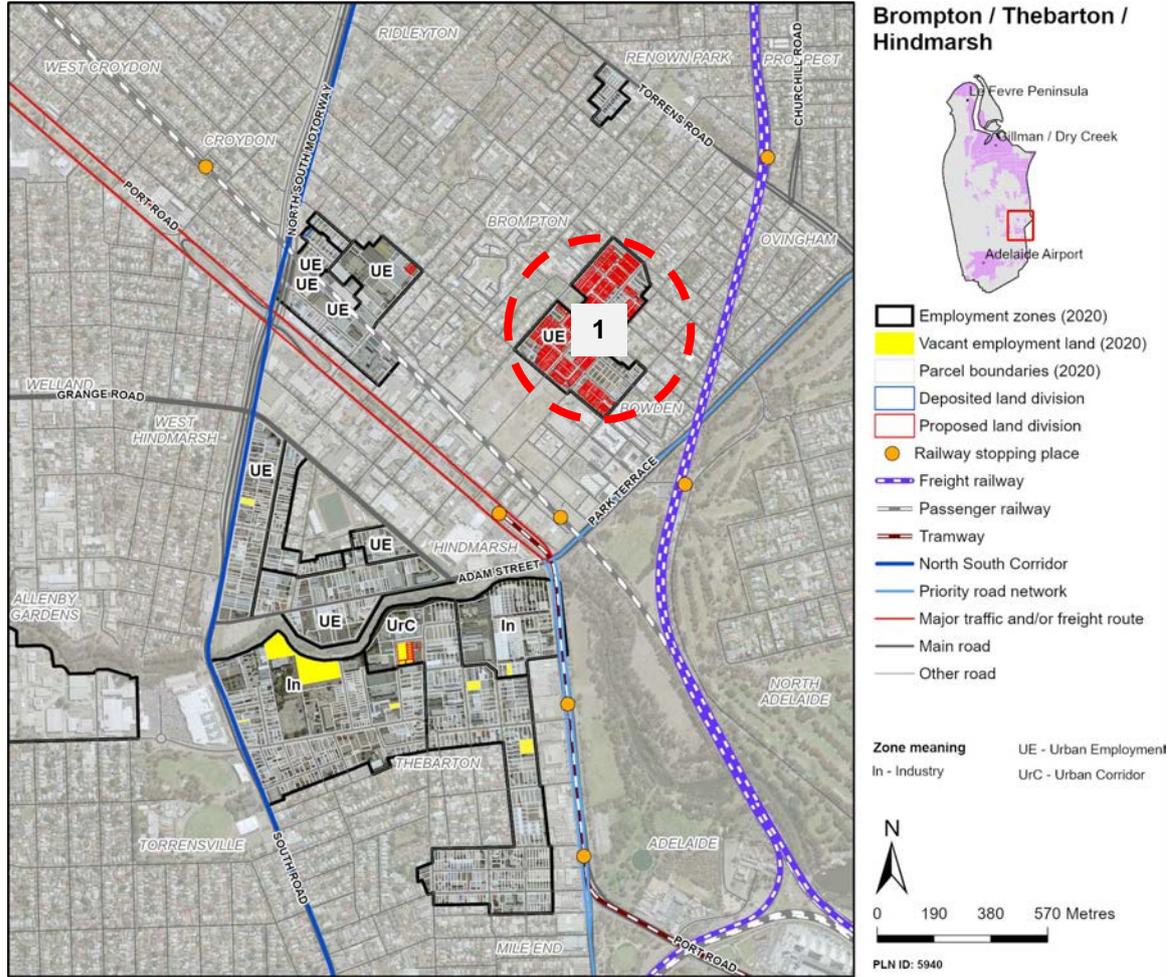
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- Knowledge intensive activities play an important role within the precinct, primarily driven by its location relative to the CBD and key worker pools.
- The shift to knowledge intensive forms of employment reduces the likelihood of conflict with adjacent residential uses, although still needs to be managed.
- Substantial portions of the precinct have key road frontages, making it attractive for highway-based retail.
- Fragmentation makes part of the precinct susceptible to transition to other 'non-employment' type land uses.
- Employment in manufacturing is projected to decline.

Figure 39: Brompton / Thebarton / Hindmarsh



KEY MEASURES

Number of Jobs 2020	9,100
Total Precinct Area (ha)	98
Occupied Land (ha)	95
Vacant Land (ha)	3
Future Employment Land (ha)	0

CONTEXT

- Located directly adjacent the City and 5km from the Adelaide International Airport.
- Several major factories have closed in recent years, most recently this included the West End brewery in Thebarton.
- Precinct is well established with minimal vacant land remaining.

ANALYSIS

- The precinct is transitioning from traditional employment activities to an emerging precinct with strengths in knowledge intensive and population serving activities.
- Land has good access to South Road, providing linkages to key export gateways.
- Projected declines in manufacturing will be partially offset by increased employment in other employment activities.
- The north-south corridor project has potential to generate land value uplift, creating opportunities for new development.
- A high representation of jobs in IT, professional services, arts and recreation sectors highlights opportunities for knowledge intensive employment within inner city precincts.
- Land identified as area '1' was rezoned in 2019 from urban employment to urban core, to facilitate residential development.
- Remaining pockets of employment land in Brompton are likely to remain under constant pressure for residential development.

RELATIVE EMPLOYMENT SHARES (2030)

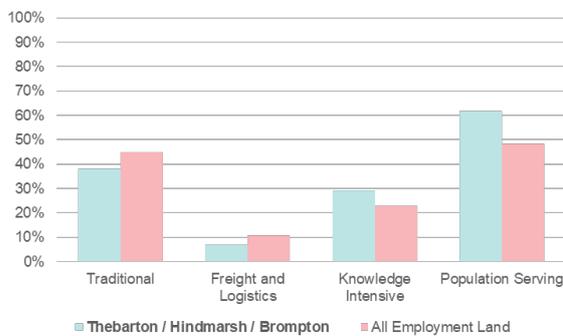
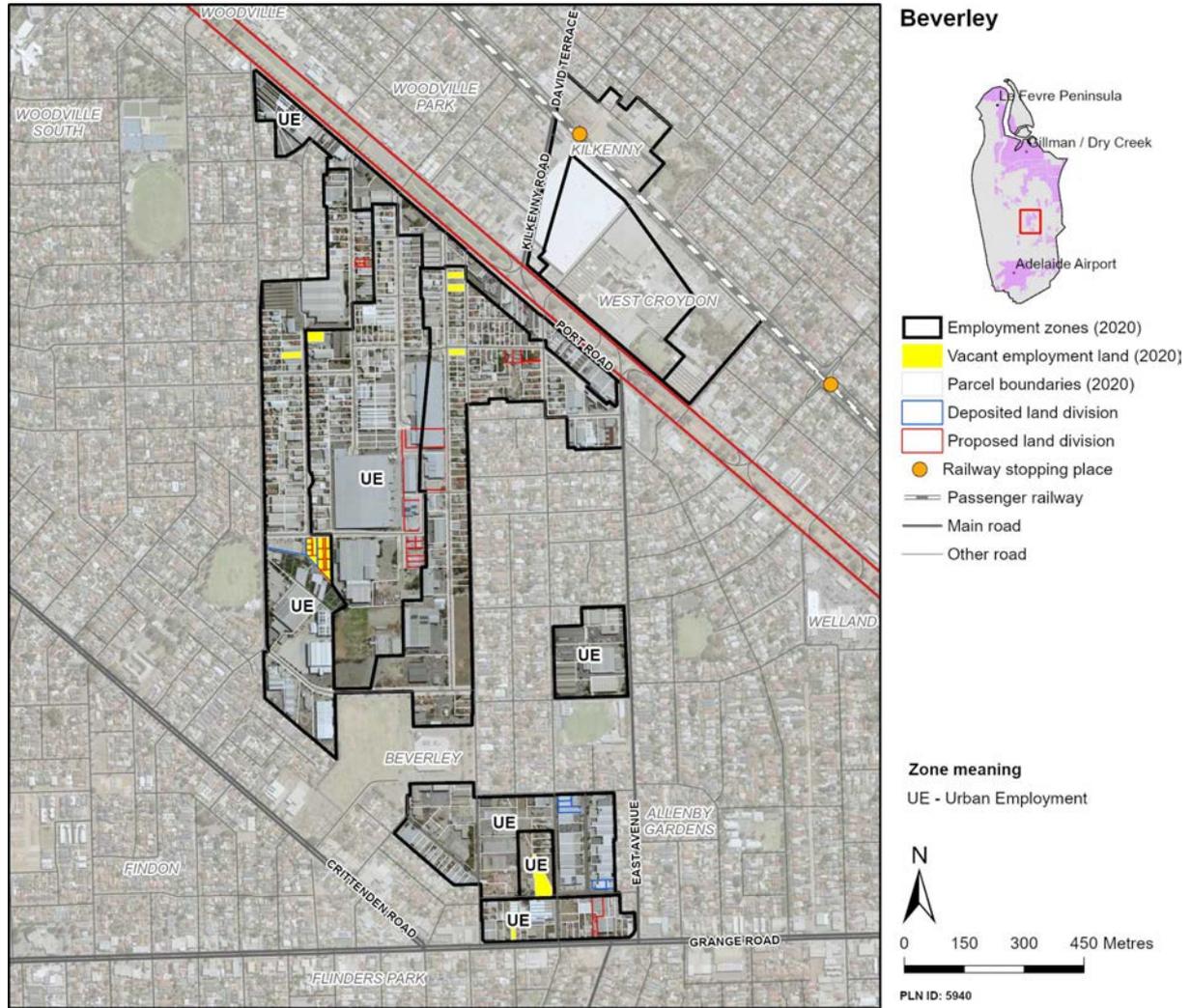


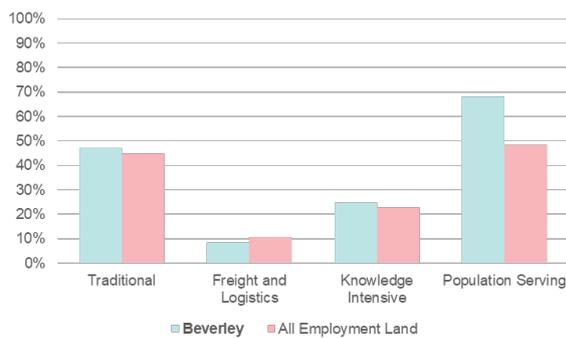
Figure 40: Beverley



KEY MEASURES

Number of Jobs 2020	2,600
Total Precinct Area (ha)	86
Occupied Land (ha)	85
Vacant Land (ha)	1
Future Employment Land (ha)	0

RELATIVE EMPLOYMENT SHARES (2030)



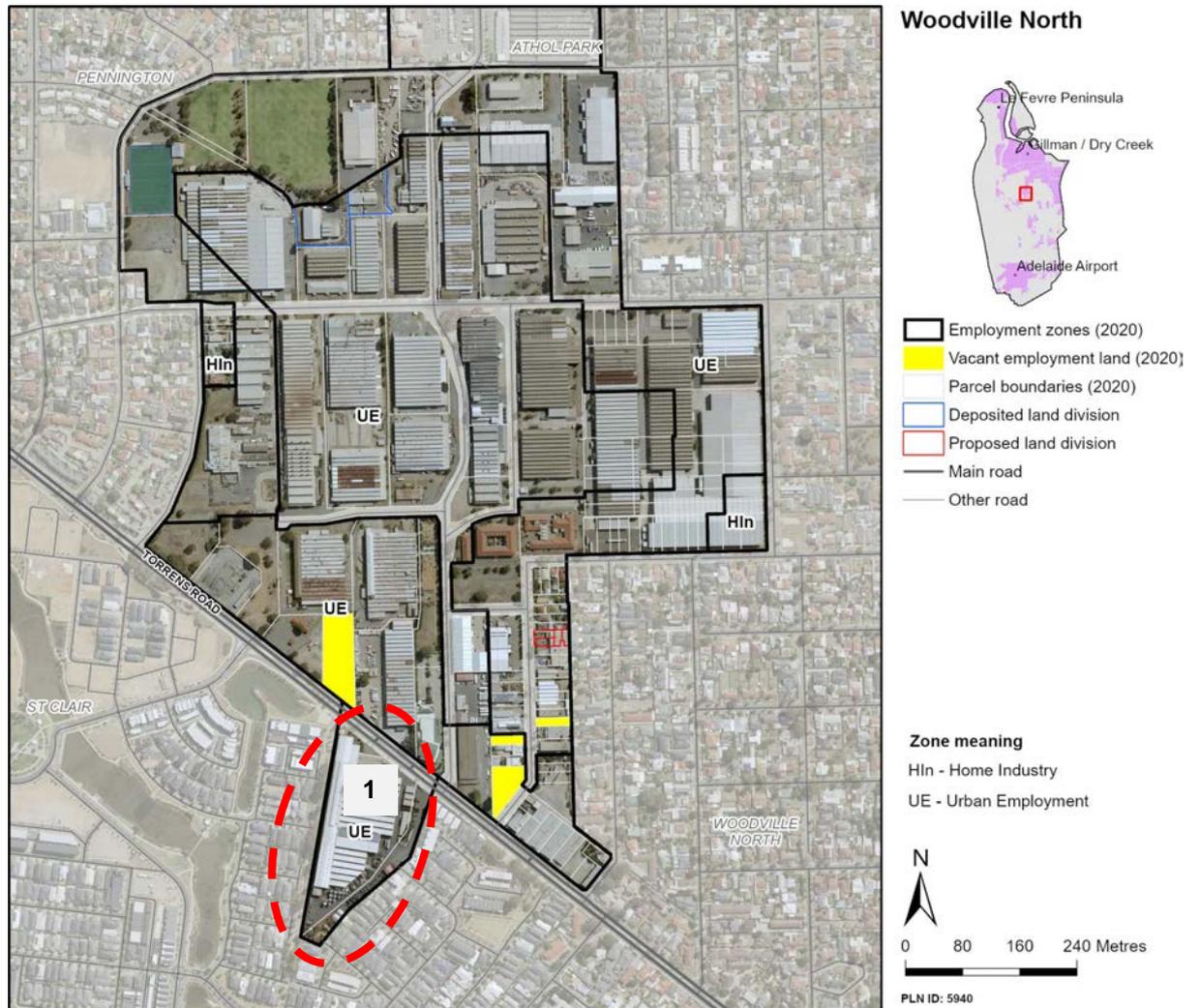
CONTEXT

- A Main Road Policy Area was created along the Port Road frontage to attract a mix of commercial and retail activities.
- Direct vehicle access to Port Road, links the precinct to the CBD and key distribution networks to the south and west.
- Relatively well established with minimal vacant land available.

ANALYSIS

- A clear relative strength in population serving uses, in particular focused around construction, health care and social assistance.
- Strength in traditional employment activities, driven by manufacturing and construction, although jobs in manufacturing are expected to decline.
- Pockets of residential allotments are located throughout the precinct, with land also directly adjacent zoned residential land.
- Interface issues are likely to support development of less impactful activities, driving many forms of manufacturing and other uses reliant on heavy vehicle movements to more strategically located and buffered precincts.
- Fragmentation of employment land results in a greater number of interface problems, hence rezoning pressures are likely to continue.

Figure 41: Woodville North



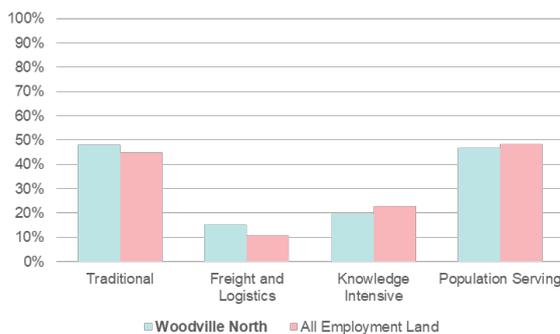
KEY MEASURES

Number of Jobs 2020	600
Total Precinct Area (ha)	62
Occupied Land (ha)	62
Vacant Land (ha)	0
Future Employment Land (ha)	0

CONTEXT

- Land is serviced by Hanson Road, Torrens Road and Audley Street, which are authorised B-double routes.
- Land identified as area '1' currently the subject of a DPA seeking to rezone land from urban employment to residential.
- Residential development, associated with St Clair, has impinged the existing uses ability to grow and expand.

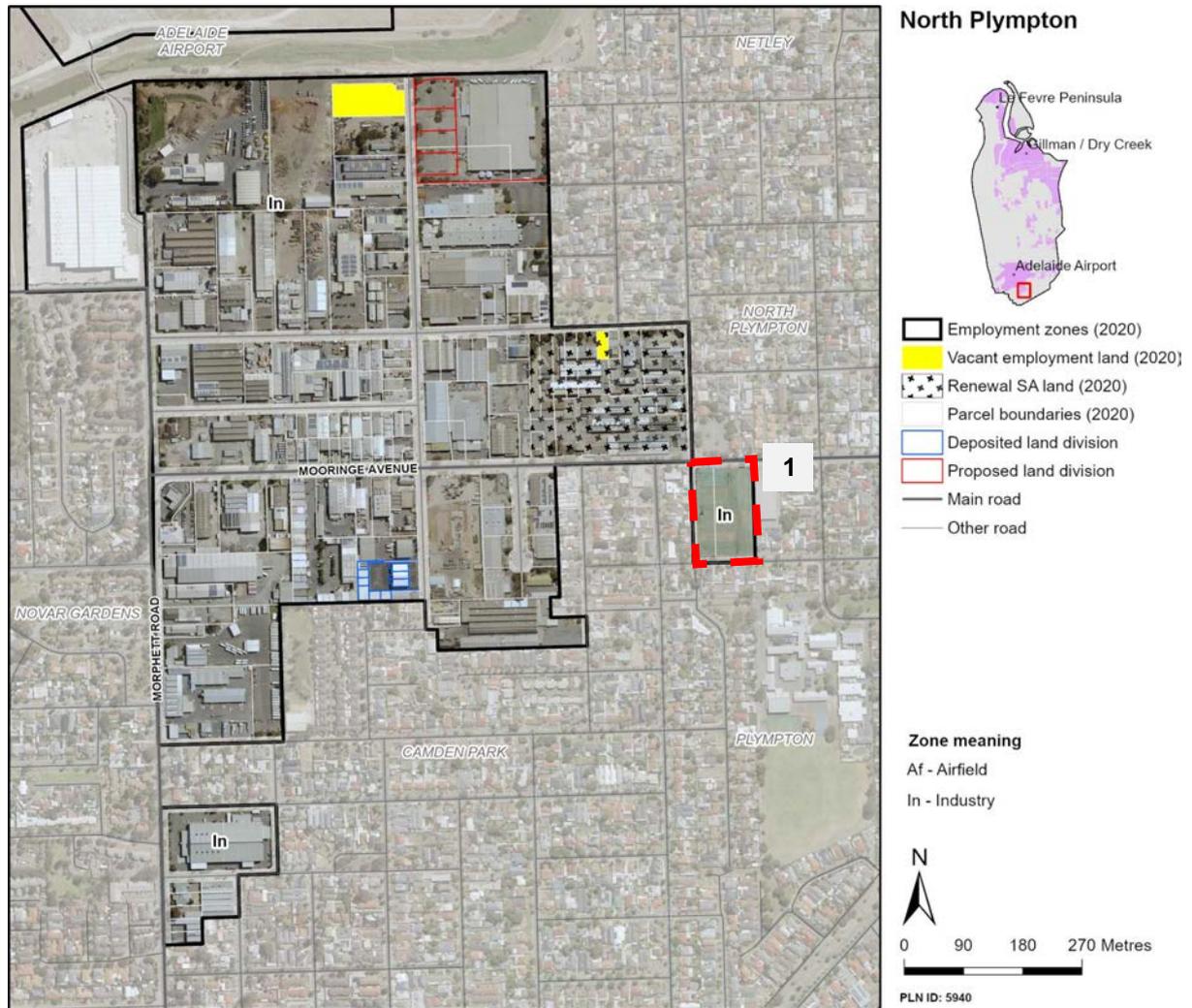
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- A central 'core' is well buffered from sensitive land uses leaving the precinct well-suited to higher intensity uses, such as freight and logistics and manufacturing.
- Direct access to Grand Junction Road via Glenroy Street also supports ongoing freight and logistics uses in particular.
- Management of the Torrens Road interface is important given its proximity to residential areas, and potential demand for highway-oriented retail and commercial activities.
- Employment in manufacturing is expected to decline slightly over the next ten years, with this decline partially offset by increased employment in other sectors including population serving and knowledge intensive activities

Figure 42: North Plympton



KEY MEASURES

Number of Jobs 2020	1,000
Total Precinct Area (ha)	57
Occupied Land (ha)	57
Vacant Land (ha)	0
Future Employment Land (ha)	0

CONTEXT

- The precinct is located directly south of the Airport, and is serviced by Morphett Road to the west, which is a gazetted B-double route.
- The precinct is bounded by airport land to the north, facilitating 'traditional' activities in this area.
- Residential interfaces elsewhere are likely to present ongoing issues, for example areas marked '1' which have been sighted for rezoning to facilitate residential development.

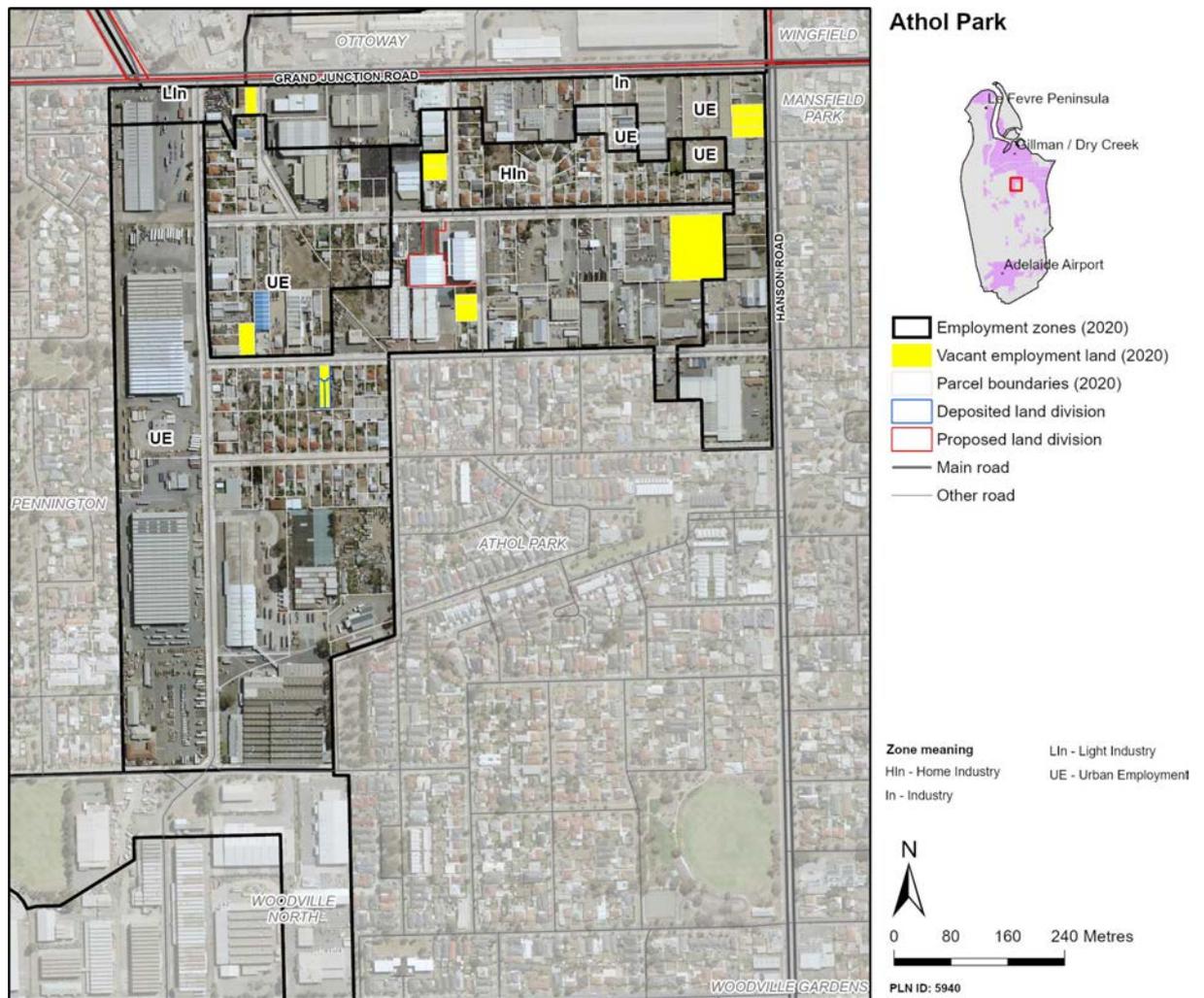
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- Proximate to the airport, though uses at the site appear to be shaped by other factors.
- The precinct is not particularly well-located for traditional and freight and logistics uses. Employment in manufacturing in particular is projected to continue its decline within the precinct.
- Knowledge intensive and population serving uses will drive employment growth over the next decade.
- The increasing role of these businesses on interface lots will reduce the potential for land use conflict.

Figure 43: Athol Park



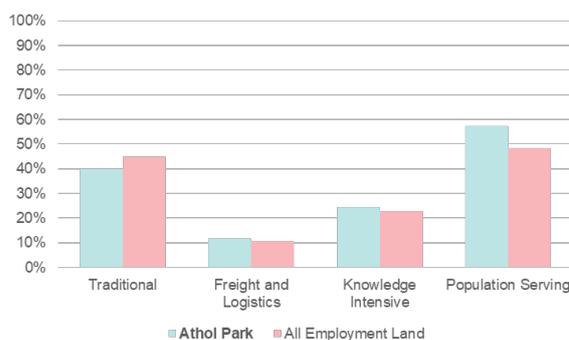
KEY MEASURES

Number of Jobs 2020	900
Total Precinct Area (ha)	53
Occupied Land (ha)	52
Vacant Land (ha)	1
Future Employment Land (ha)	0

CONTEXT

- Grand Junction Road – a key freight route – runs along the northern boundary of the precinct. In addition, Glenroy and Athol Street, which are gazetted B-double routes link precinct with Woodville North to the south.
- Precinct is relatively well established with minimal vacant land remaining.
- Pockets of residential allotments are located throughout the precinct. These present interface challenges for many types of business that would otherwise be well suited.

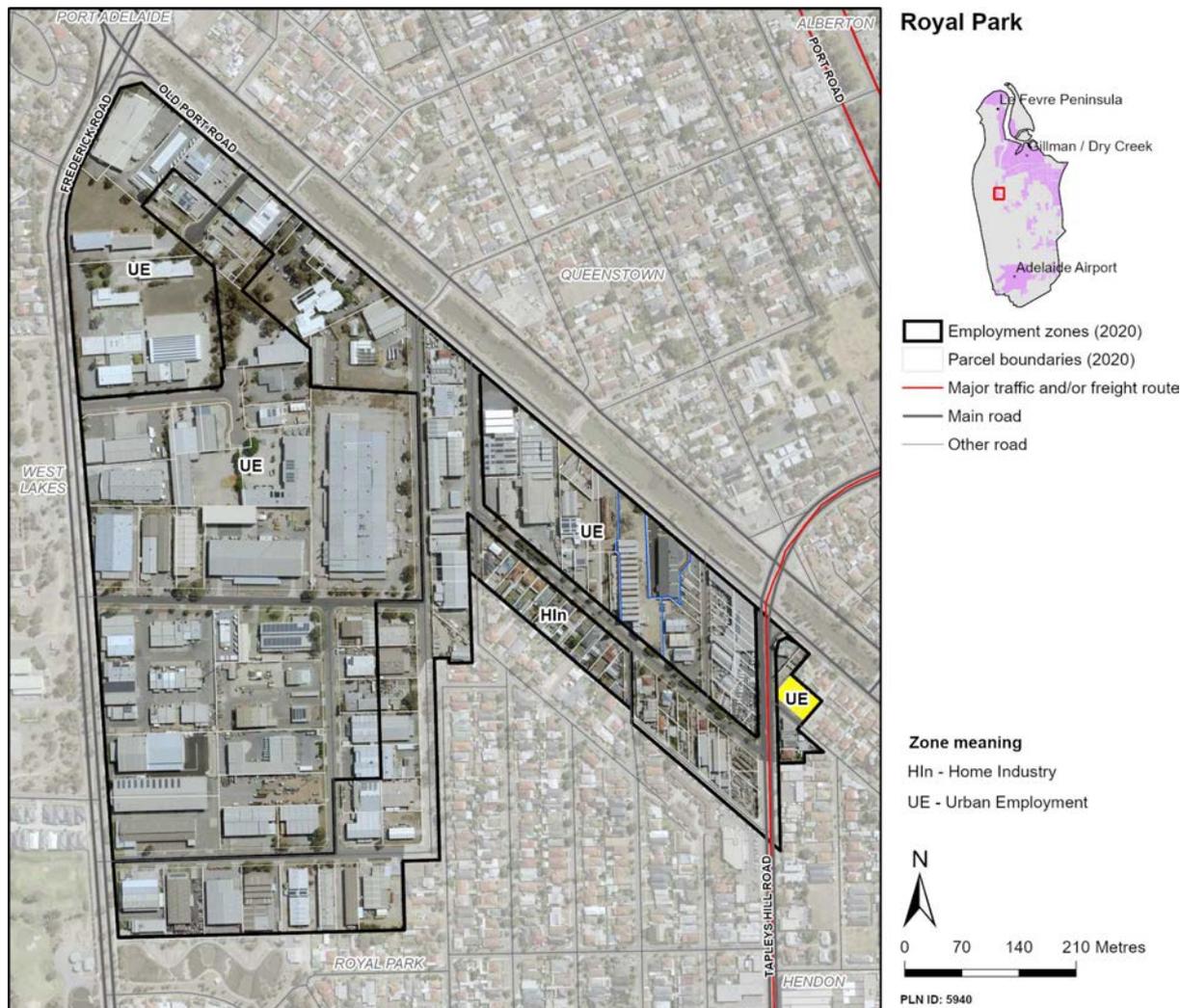
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- BIC analysis suggests that Athol Park has relative strengths in freight and logistics and population serving employment uses.
- Access to Outer Harbor and South Road via Grand Junction Road have the potential to shape land use, and drive freight and logistics activities in particular.
- Land directly adjacent Grand Junction Road is located within a Main Road Policy Area which seeks to encourage a mix of land uses and businesses. These have the potential to attract sensitive land uses that might constrain the activities of some strategic land uses.

Figure 44: Royal Park



KEY MEASURES

Number of Jobs 2020	400
Total Precinct Area (ha)	44
Occupied Land (ha)	44
Vacant Land (ha)	0
Future Employment Land (ha)	0

CONTEXT

- Employment land east of Clovelly Avenue and fronting Old Port Road is covered by a Policy Area which supports bulky goods development.
- This precinct was identified as a ‘prime industrial area’ by Council, when assessed against the relevant criteria associated with the *Metropolitan Industrial Land Strategy - 2007*.
- The precinct is established with minimal vacant land.

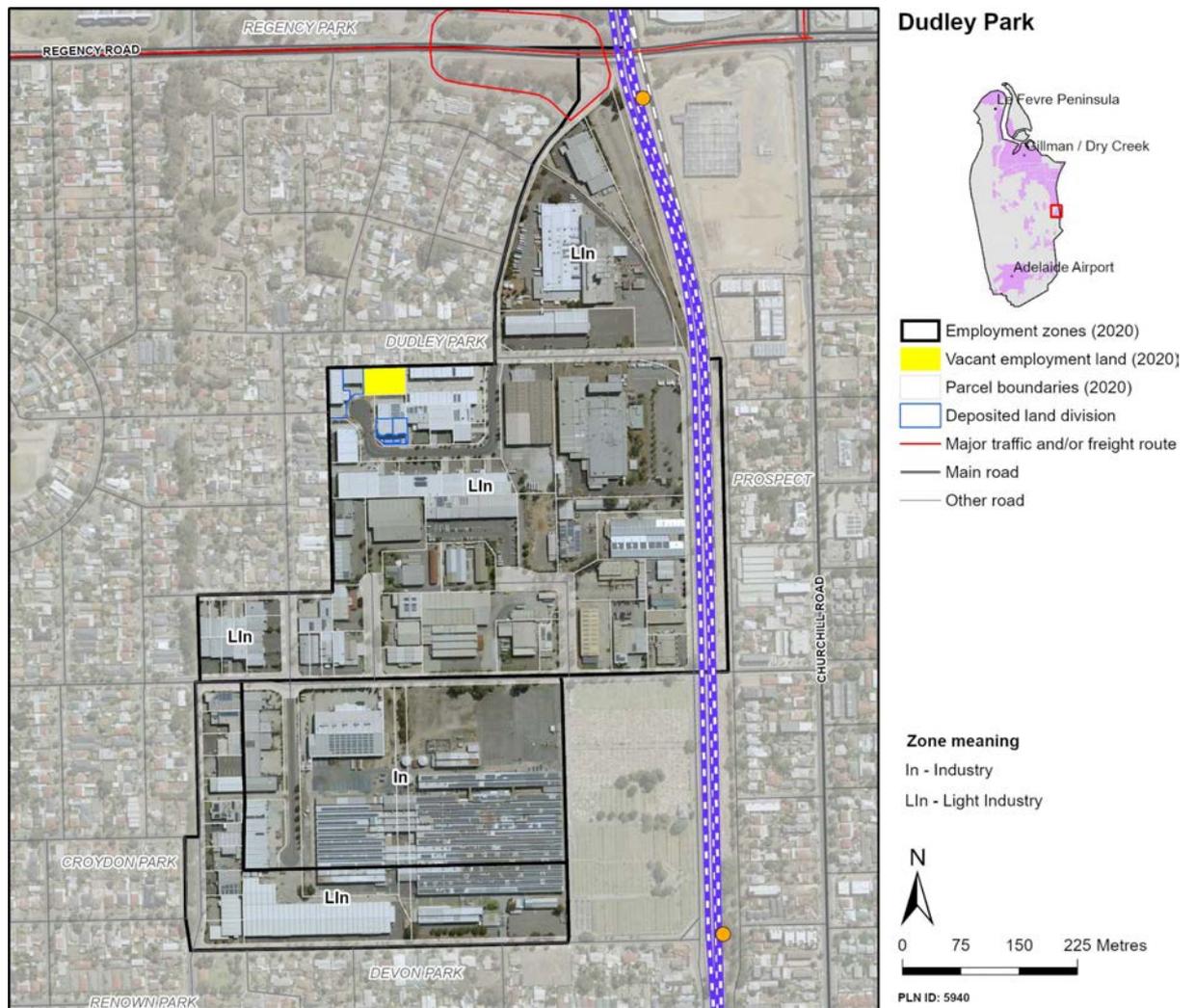
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- The precinct has strengths in population serving uses, with a relatively high share of jobs in related industries in 2030.
- Employment in construction and urban services are relatively dominant across the precinct, driving growth.
- The precinct is expected to play an important role providing products and services sought after by catchment business and residents.

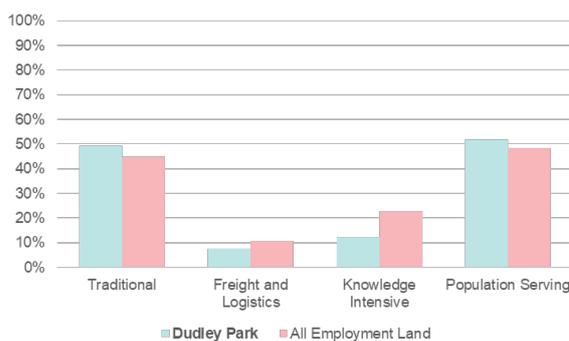
Figure 45: Dudley Park



KEY MEASURES

Number of Jobs 2020	1,600
Total Precinct Area (ha)	38
Occupied Land (ha)	38
Vacant Land (ha)	0
Future Employment Land (ha)	0

RELATIVE EMPLOYMENT SHARES (2030)



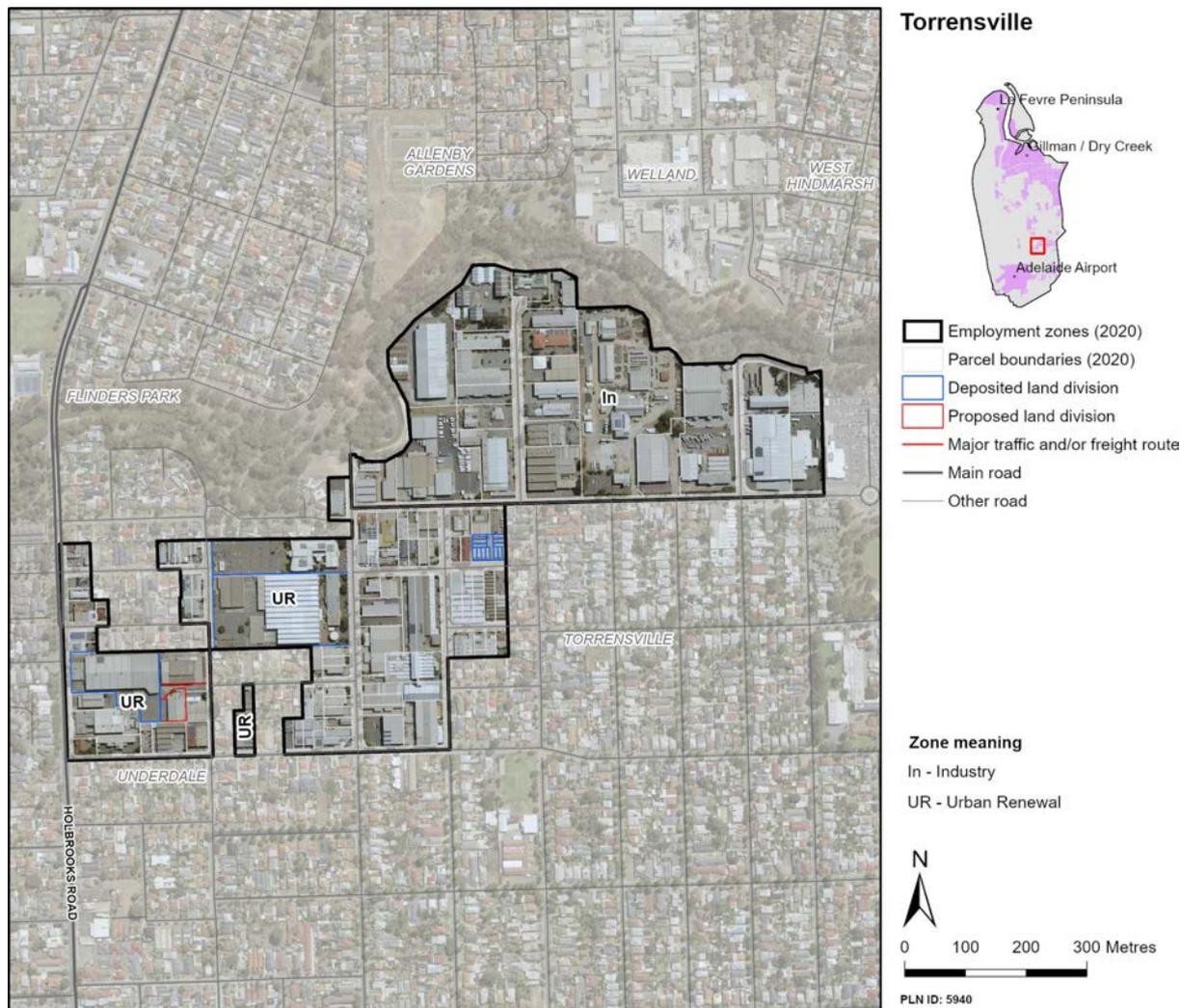
CONTEXT

- Regency Road, to the north, is accessed via Pedder Crescent, which is a gazetted B-double route. This route also provides access to the intermodal rail facility in Regency Park to the north.
- The Electrolux factory in the southern portion of the precinct is the largest landholder.

ANALYSIS

- The precinct has a comparative advantage in traditional employment activities.
- Manufacturing is the key industry type, accounting for 30% of total employment. Although its share is projected to decline by 2030.
- Residential land uses to the south and west, will limit the intensity of development at the interface.
- Proximity to South Road and the intermodal facility at Regency Park support ongoing manufacturing activities in the precinct.

Figure 46: Torrensville



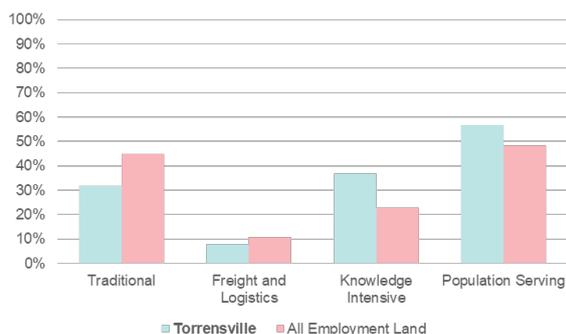
KEY MEASURES

Number of Jobs 2020	1,500
Total Precinct Area (ha)	38
Occupied Land (ha)	38
Vacant Land (ha)	0
Future Employment Land (ha)	0

CONTEXT

- Land parcels located south of Ashwin Parade were rezoned in 2018 from Industry (In) to Urban Renewal (UR), Mixed Use Transition. Encouraging a gradual shift from employment based activities to residential development.
- Land is serviced by Ashwin Parade and South Road, which are gazetted B-double routes.
- Precinct is established, with no vacant lots remaining.

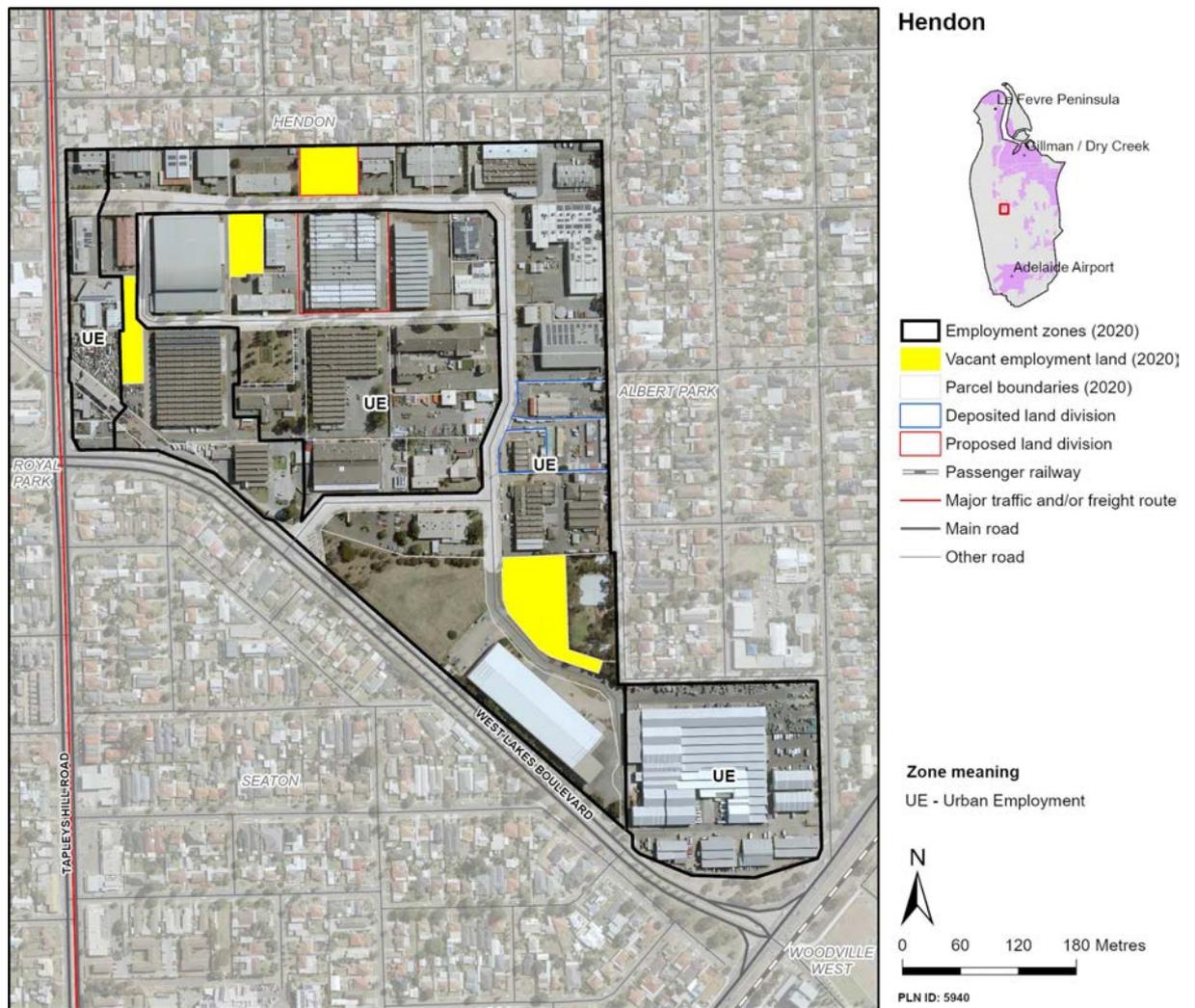
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- Has a competitive advantage in knowledge intensive activities. This is supported through access to skilled worker pools and its proximity to the city.
- Proximity to the South Road corridor is likely to generate opportunities for businesses across a range of sectors.
- River frontage presents an opportunity to create a unique inner-city employment precinct.
- With the precincts strategic importance in knowledge intensive employment activities, consideration should be given to ensuring remaining land is not rezoned for residential uses, without a longer term strategic view being undertaken.

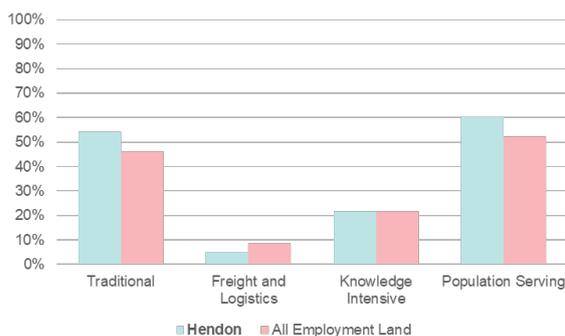
Figure 47: Hendon



KEY MEASURES

Number of Jobs 2020	1,000
Total Precinct Area (ha)	27
Occupied Land (ha)	26
Vacant Land (ha)	1
Future Employment Land (ha)	0

RELATIVE EMPLOYMENT SHARES (2030)



CONTEXT

- Land is serviced by gazetted B-Double routes to the south and west.
- Zoned residential land is located directly north and east of the precinct.

ANALYSIS

- The precinct has a comparative advantage in population serving activities focused around construction.
- Infill development occurring in the vicinity, continues to drive demand for population serving uses.
- The largest employment industry type however is manufacturing, accounting for 18% of total employment by 2030.
- Regions to the south and west are relatively poorly serviced by employment land, this land maybe suitable for population serving activities in the future.
- Access to skilled worker pools, and relatively good precinct amenity present opportunities for increases in Hendon’s share of knowledge intensive employment.

Figure 48: Kidman Park



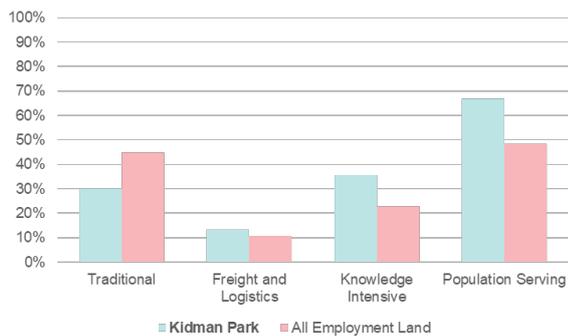
KEY MEASURES

Number of Jobs 2020	600
Total Precinct Area (ha)	20
Occupied Land (ha)	20
Vacant Land (ha)	0
Future Employment Land (ha)	0

CONTEXT

- Land identified as '1' was rezoned in 2020 from Urban Employment to Mixed Use.
- Land identified as '2' is subject to a DPA which would result in land being rezoned from employment in order to facilitate a residential development.
- Grange Road and Findon Road are gazetted B-double routes.

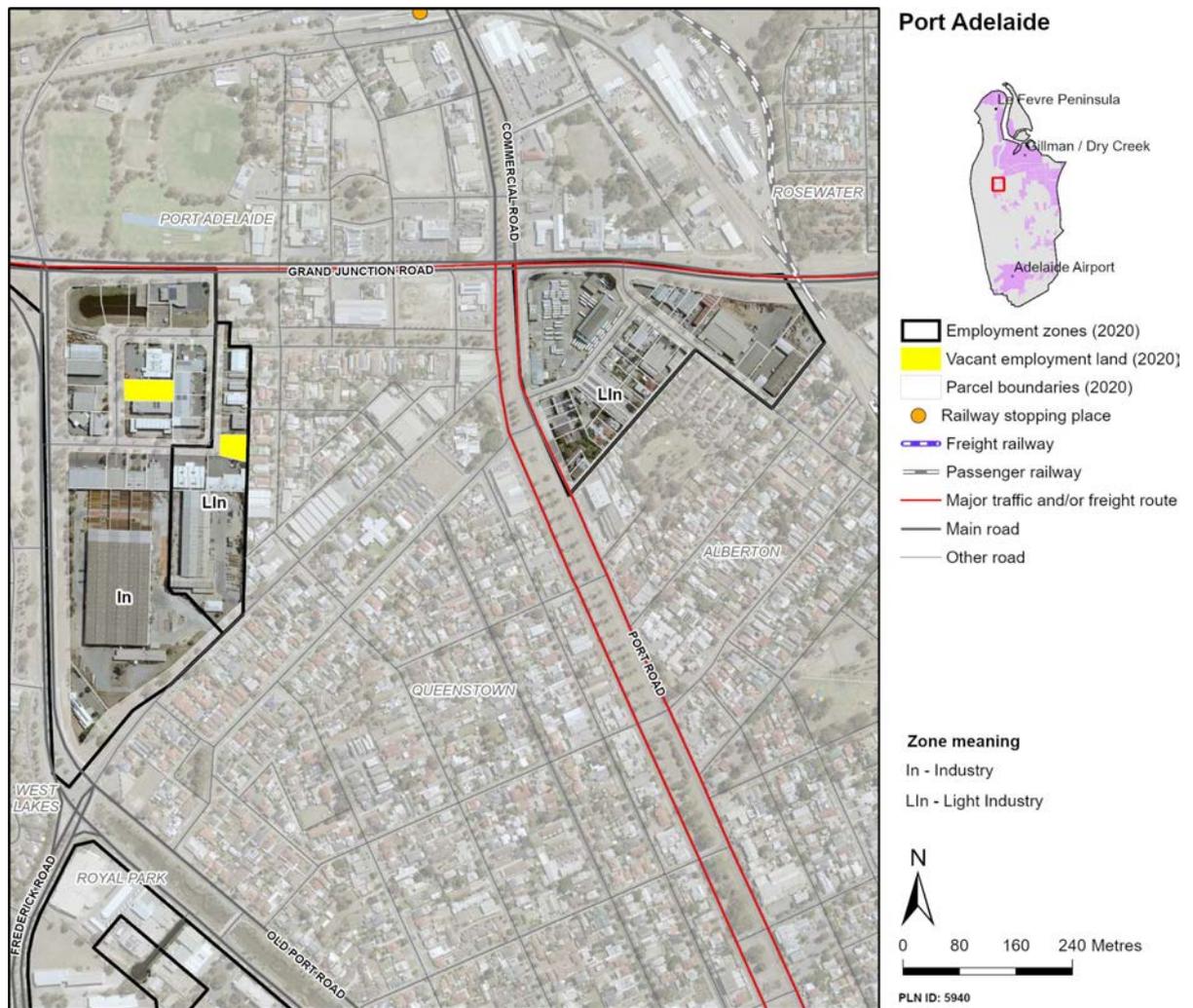
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- Precinct has a comparative advantage in all strategic and population serving activities, aside from traditional.
- The precincts competitive advantage in freight and logistics, results from the existence of a somewhat anomalous distribution centre, presently the subject of a DPA (area marked '2').
- Should the DPA over land identified as '2' be approved, there will be no more zoned employment land within Kidman Park.

Figure 49: Port Adelaide



KEY MEASURES

Number of Jobs 2020	600
Total Precinct Area (ha)	18
Occupied Land (ha)	18
Vacant Land (ha)	0
Future Employment Land (ha)	0

RELATIVE EMPLOYMENT SHARES (2030)



CONTEXT

- Precinct immediately north of the Royal Park employment precinct.
- Smallest precinct for total zoned land within the region.
- Grand Junction Road is a gazetted road train route.

ANALYSIS

- Precinct has a comparative advantage in population serving activities, particularly in retail trade.
- Employment as a percentage, in freight and logistic based activities is also higher than the Greater Adelaide average.
- The rejuvenation of the Port Adelaide precinct for medium to high density residential living may place pressure on this land for future residential use.
- Increased residential densities will also likely impact the ability for established or new businesses to grow and expand.
- Land is strategically well located to service the growing population.

4.6 Employment land summary and strategic issues

This region is home to South Australia’s primary trade gateways; Adelaide Airport and Outer Harbor. These major pieces of infrastructure are connected to the state’s producers, manufacturers, retailers and households via some of Adelaide’s most important arterial roads, namely the South Road Corridor, the Northern Expressway, and Grand Junction Road. A major intermodal terminal is also located within the Regency Park precinct, with this driving substantial freight and logistics activity through the region. With so much critical freight infrastructure it is no surprise that it is the most important region for freight and logistics uses.

Comparative advantage is an economic concept that recognises (in this case) certain employment precincts will have attributes that make them better suited to the provision of some activities over others.

By calculating the share of jobs by broad industry category (BIC) for each precinct in 2030 and comparing this figure to the share across all metropolitan employment lands, it is possible to understand the relative strengths of individual precincts, or their *comparative advantage*.

The region contains some of the most important freight and logistics precincts in the metropolitan region.

Table 12 sets out the comparative advantages¹ of Adelaide West employment land precincts by looking at the share of activity for each of the broad industry categories relative to the average of Greater Adelaide’s employment land.

Table 12: Comparative advantage analysis for identified precincts

PRECINCT	STRATEGIC ACTIVITIES			Population Serving
	Traditional	Freight and Logistics	Knowledge Intensive	
Adelaide Airport				
Wingfield				
Gillman / Dry Creek				
Le Fevre Peninsula				
North Arm				
Regency Park				
Marleston / Richmond / Mile End South				
Brompton / Thebarton / Hindmarsh				
Beverley				
Woodville North				
North Plympton				
Athol Park				
Royal Park				
Dudley Park				
Torrensville				
Hendon				
Kidman Park				
Port Adelaide				

Comparative advantage, among top 5 assessed precincts
 Comparative advantage
 No comparative advantage

¹ Precincts are deemed to have a ‘comparative advantage’ if the proportion of workers in a broad land use category is more than 20% above the proportion in that category across all Greater Adelaide’s employment land.

Based on the comparative advantage analyses the following conclusions can be drawn:

- A large number of precincts have comparative advantages in traditional employment uses reflecting historic strengths in sectors such as manufacturing, wholesale trade and construction.
- For the Le Fevre Peninsula, its comparative advantage in traditional employment land uses is driven primarily by manufacturing, which is by far the most dominant sector.
- Wingfield is supported by a more 'balanced' range of *traditional employment uses*, with the strength of the region underpinned by relative strengths in manufacturing, wholesale trade, construction and utilities.
- Land located within the Adelaide Airport, North Arm and Regency Park precincts have a comparative advantage in the freight and logistics sector given their access to multiple modes of transport options and routes.
- Closer to the CBD, precincts such as Mile End South / Richmond / Marleston, and Thebarton / Hindmarsh / Brompton also have comparative advantages in knowledge intensive sectors.



Source: defenceconnect.com.au



Source: Robern Menz, Glynde, SA

5. EMPLOYMENT LAND SUPPLY – INNER METRO

5.1 Overview

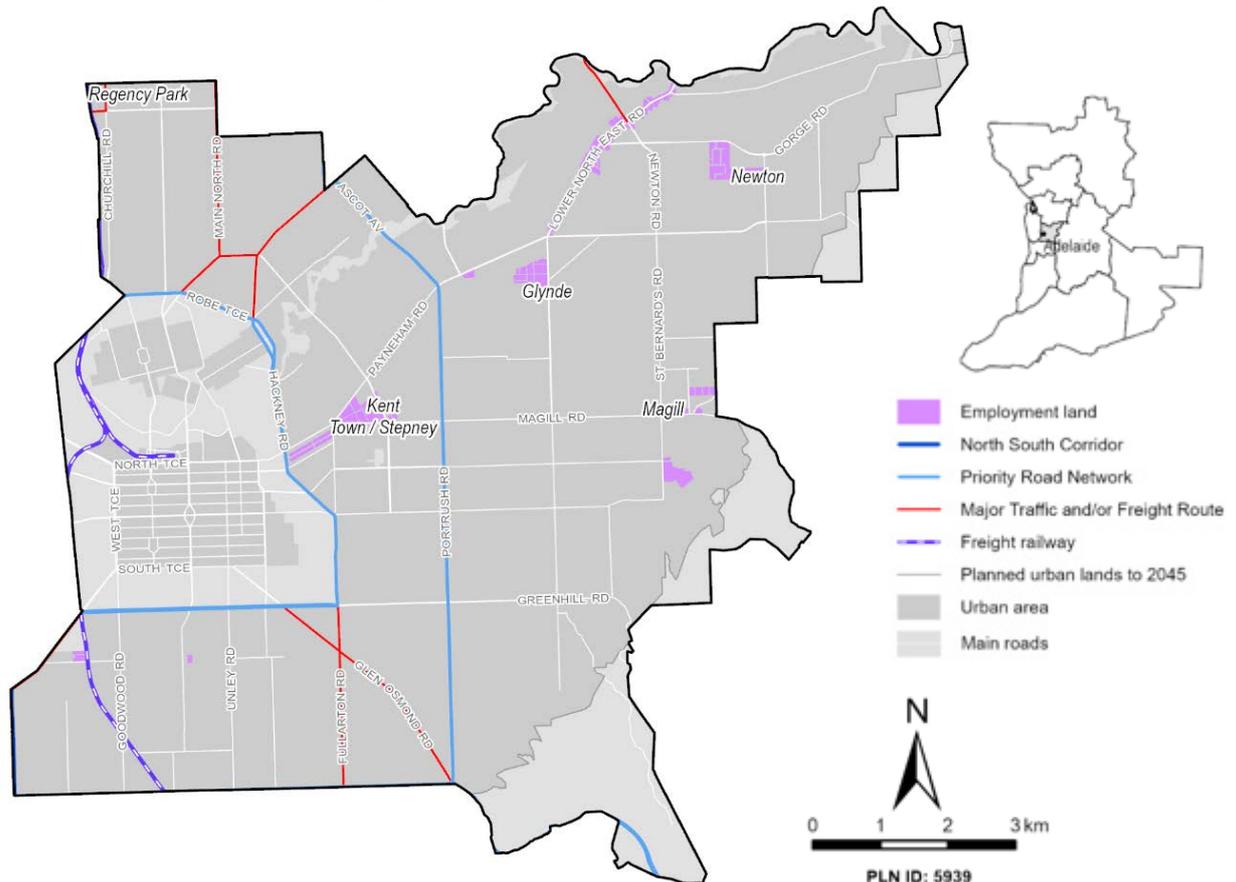
EMPLOYMENT LAND JOBS	ZONED EMPLOYMENT LAND	KEY INDUSTRY TYPES
 <p>3,900 in 2020</p>	 <p>116ha</p>	<ol style="list-style-type: none"> 1. Health Care and Social Assistance 2. Professional, Scientific and Technical Services 3. Other Services

The Inner Metro region, as illustrated in Figure 50, accounts for less than 1% of total zoned employment land within Greater Adelaide. Key employment precincts are aligned along the Payneham and Lower North East Road corridor, which are under increasing pressure from encroaching residential development.

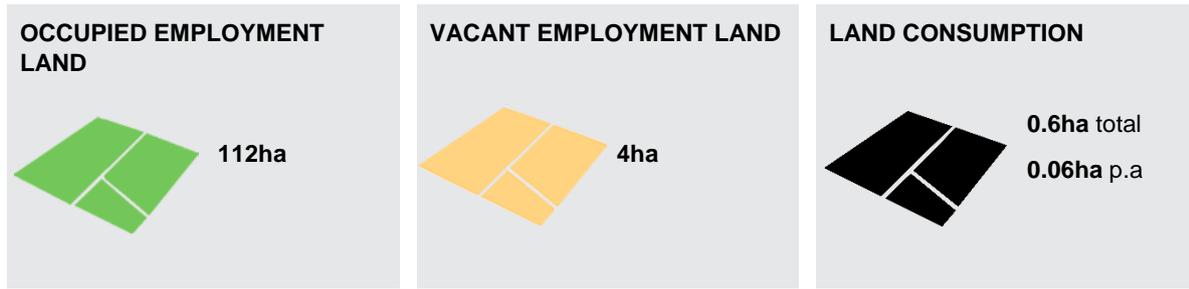
In 2020, it was estimated the regions employment lands supported over 3,900 jobs. Population serving activities accounted for over 65% of total jobs in the region, with the health care and social assistance sector the major contributor. Knowledge intensive employment activities were also a significant contributor, giving the region a comparative advantage in this sector compared to other employment regions and precincts in Greater Adelaide.

Projected growth and demand for knowledge intensive jobs presents the greatest opportunity for the regions employment lands over the next 10 years. This is driven and supported by its proximity to the City, tertiary institutions and key medical centres.

Figure 50: Inner Metro employment land overview



5.2 Employment land supply and consumption



A stocktake of employment land supply as of June 2020 and land consumption between 2008 and 2018, identifies the following:

- The region accommodated 116 hectares of zoned employment land, as illustrated in Figure 51 and detailed in Table 13.
- 4 hectares of zoned land remained vacant, the lowest amount across all regions.
- 0.6 hectares of vacant zoned land was consumed between 2008 and 2018, the lowest consumption rate across all regions, including the Adelaide Hills and Fleurieu Peninsula.
- A lack of employment land supply means that new sources will likely come through refurbishment and redevelopment of existing sites.
- Increasing land values of Inner Metro employment lands will continue to contribute to ongoing pressure for changes in this land use.

Figure 51: Total employment land supply by precinct, June 2020

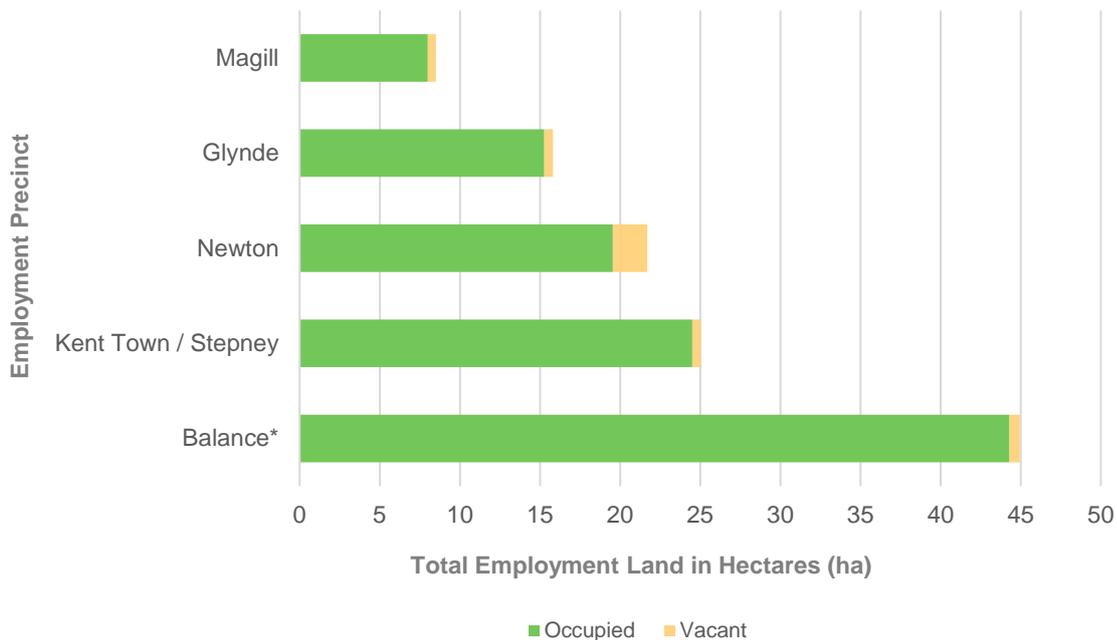


Table 13: Summary of identified employment precincts, Inner Metro region, June 2020

PRECINCT	Occupied Land (ha)	Vacant Land (ha)	Other Use (ha)	Total Area (ha)	Future Land (ha)
Kent Town / Stepney	24.5	0.5	-	25	-
Newton	19.5	2.2	-	22	-
Glynde	15.3	0.5	-	16	-
Magill	8.0	0.5	-	8	-
Balance*	44.3	0.7	-	45	-
TOTAL	111.6	4.4	0	116	0

* Includes Magill Estate Winery, Payneham Road and Lower North East Road corridors.

5.3 Recent changes to employment land supply

REZONING GAINS	REZONING LOSSES	KEY CHANGES
 NONE	 15ha	Urban Corridor Zones Norwood Green (former Caroma factory) development

Table 14 highlights changes to zoned employment land between 2008 and 2020. Key changes include:

- A net loss of 15 hectares in zoned employment land.
- The most significant planning policy change in the region affecting employment land was the introduction of the Urban Corridor zones.
- The first iteration of corridor zones was introduced in 2013, with major transport and employment corridors, notably Churchill Road, Prospect Road, Main North Road and North Terrace (Kent Town).
- In 2017 additional sites were identified, subsequently leading to their rezoning from employment land to urban corridor.
- Whilst these rezoning's allowed for the retention of employment activities, the core intent was to facilitate residential development.
- There is currently a Development Plan Amendment (DPA) under consideration which seeks to rezone 2 separate parcels of employment land in Stepney and Payneham to Urban Corridor, which would facilitate density residential development¹.

Table 14: Employment land changes, 2008 - 2020

DPA NAME	GAZETTED	DESCRIPTION
Inner and Metropolitan Corridor	Dec 2017	Approximately 2.3ha of land rezoned from Business and Mixed Use A to Urban Corridor. A total 8ha of land in Forestville rezoned from Industry to Urban Corridor. Approximately 5ha of land rezoned from Commercial and Industry to Urban Corridor.
Employment Growth DPA	Aug 2017	Review zoning of existing employment areas and align new zoning to support and facilitate growth.
Inner Metropolitan Growth Amendment (multiple Council's affected)	Oct 2013	Rezoned local business and centre zone land (amongst others) to Urban Corridor to facilitate mixed use and residential development.

¹ The Payneham and Stepney Strategic Sites DPA was approved on 11 February 2021

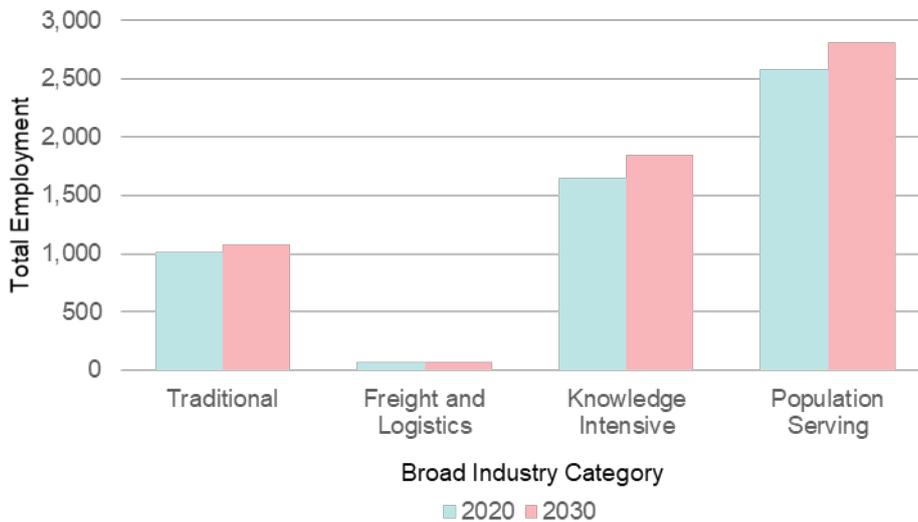
5.4 Projected change in employment, 2020 – 2030

LARGEST INDUSTRY TYPE	LARGEST % GROWTH BY BROAD INDUSTRY CATEGORY	LARGEST GROWTH PRECINCT
<ul style="list-style-type: none"> Health Care and Social Assistance - 16% of total employment in 2020 - 17% of total employment in 2030 	<ul style="list-style-type: none"> Knowledge Intensive (12%) - Health care and social assistance - Professional, scientific and technical services 	<ul style="list-style-type: none"> Kent Town / Stepney - 2,800 jobs in 2020 - An 11% increase is projected by 2030

Projected changes in employment between 2020 and 2030 are summarised as follows:

- The regions employment land supported an estimated 4,000 jobs in 2020, representing 3% of total jobs across Greater Adelaide’s employment lands.
- In 2020, population serving activities accounted for over 65% of total jobs. This figure sits substantially higher than the Greater Adelaide average of just under 50%.
- Jobs in the health care and social assistance sector, a population serving and knowledge intensive activity, accounted for over 15% of total jobs in 2020.
- The region is projected to accommodate just under 4% of total new jobs created across Greater Adelaide’s employment lands over the next 10 years.
- Population serving activities, which include jobs within the health care and social assistance sector, are projected to accommodate the largest net gain in total jobs over the same period.
- Knowledge intensive activities are projected to have the largest percentage increase in total employment to 2030. This is driven by continued growth in the health care and social assistance sector.
- Growth in knowledge intensive activities will require continued access to skilled worker pools.
- Employment in freight and logistics activities are projected to decline. This is a combination of improved efficiencies through new technologies and the availability of land in better suited locations.

Figure 52: Jobs growth on employment land by Broad Industry Category (BIC), 2020 - 2030



5.5 Key employment precincts – Inner Metro

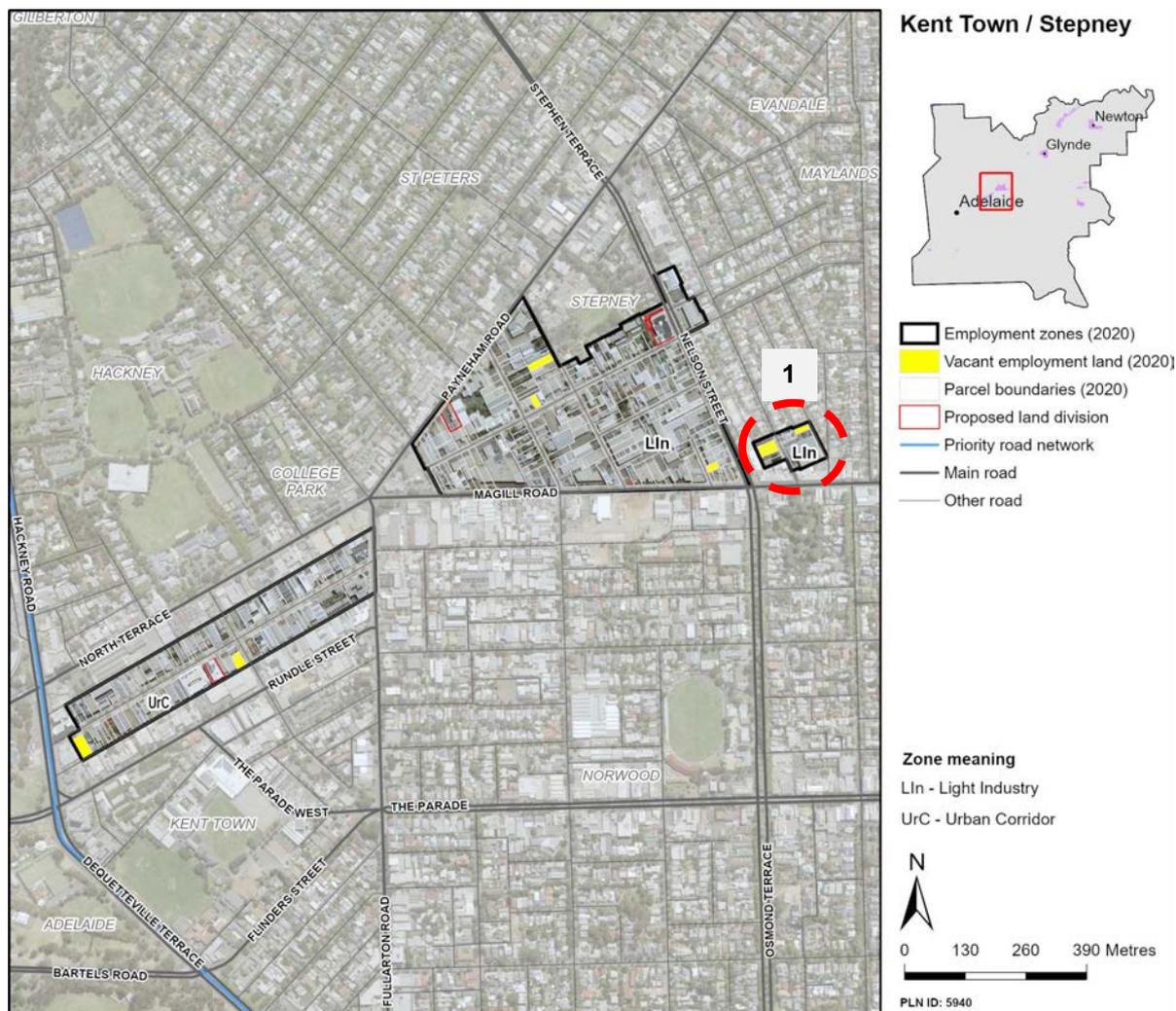
The following section provides analysis on employment land supply and jobs growth for the following precincts:

- Kent Town / Stepney
- Newton
- Glynde
- Magill

Analysis of each precinct includes:

- A map, illustrating the full extent of the precinct, vacant land supply (as of June 2020) and proposed lots (June 2020);
- A table summarising key measures, including total number of jobs in 2020 and the total precinct area (ha);
- A graph illustrating the share of total jobs across all four broad industry categories in 2030, relative to the share across Greater Adelaide;
- Overview of the strengths, constraints and opportunities.

Figure 53: Kent Town / Stepney



KEY MEASURES

Number of Jobs 2020	2,800
Total Precinct Area (ha)	25
Occupied Land (ha)	24.5
Vacant Land (ha)	0.5
Future Employment Land (ha)	0

CONTEXT

- Land in Kent Town was rezoned to Urban Corridor, Policy Area (Business) in 2013.
- Land identified as '1' on the corresponding map is currently subject to a DPA seeking to rezone land to Urban Corridor (Transit Living Area), residential development.

ANALYSIS

- Precinct has been identified as a top 5 precinct in Greater Adelaide, for its comparative advantage in knowledge intensive activities.
- Within close proximity to public and private sector clusters, and key institutions in the CBD and highly accessible to skilled worker pools.
- One of the few significant employment land precincts east of the CBD.
- The establishment of high-density residential uses within the precinct limits the range of uses which can occur, with amenity impacts on residents always a consideration.

RELATIVE EMPLOYMENT SHARES (2030)

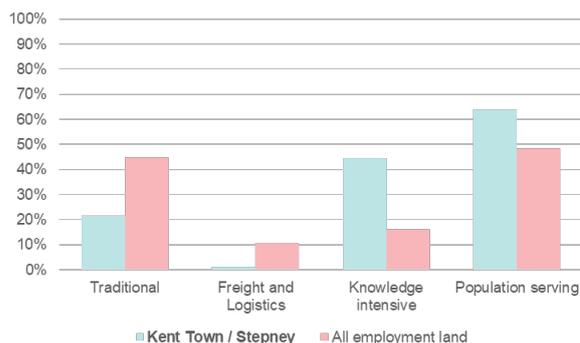
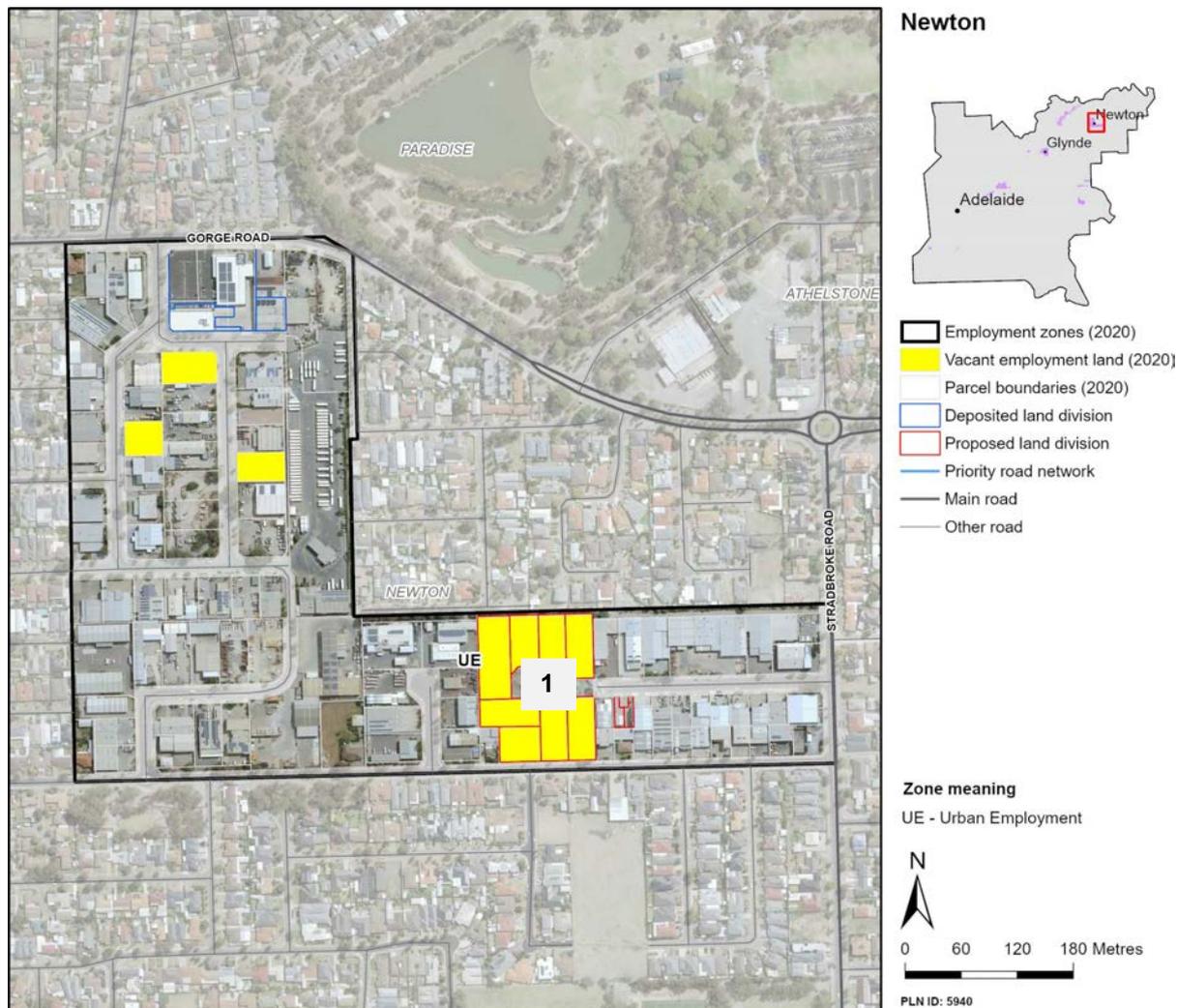


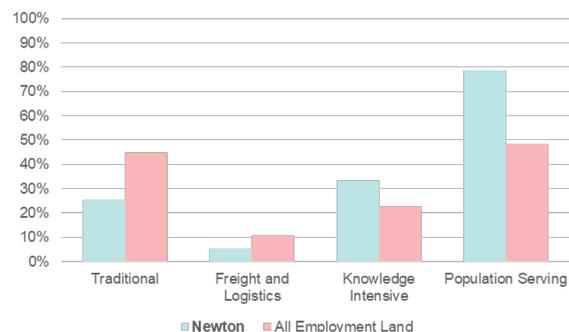
Figure 54: Newton



KEY MEASURES

Number of Jobs 2020	300
Total Precinct Area (ha)	22
Occupied Land (ha)	19.5
Vacant Land (ha)	2.2
Future Employment Land (ha)	0

RELATIVE EMPLOYMENT SHARES (2030)



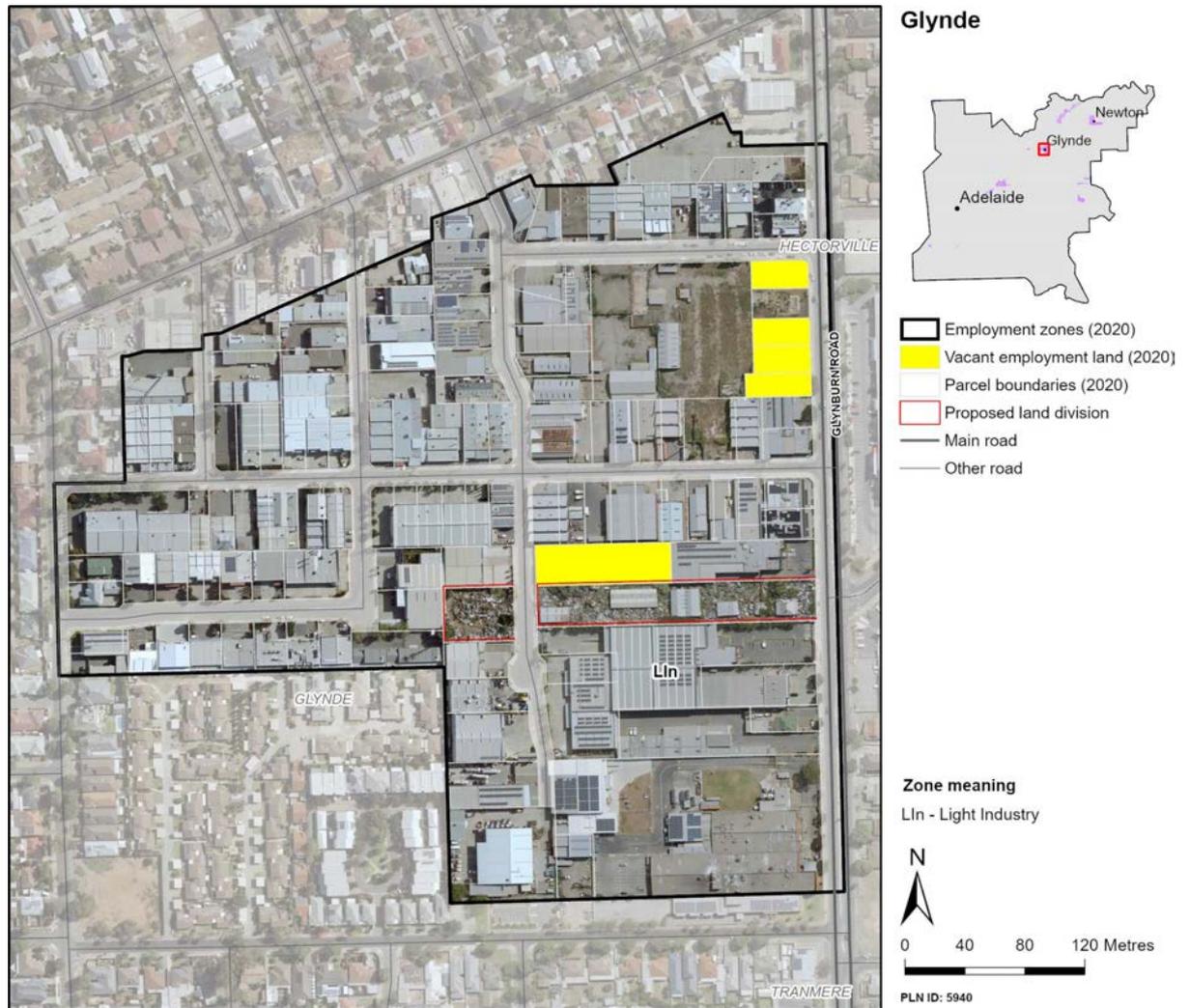
CONTEXT

- The area identified as '1' on the corresponding map, was occupied at the time of the 2018 snapshot, but has subsequently been demolished to accommodate 8 smaller allotments.
- The closest gazetted b-double routes is North East Road, which is located over 3km to the north-west.

ANALYSIS

- Precinct has a comparative advantage in knowledge intensive and population serving activities.
- Retail trade accounts for 22% of total employment.
- As one of the few significant employment land precincts east of the CBD, well-positioned to support population-serving activities.
- Poor linkages to the road freight network limit opportunities to attract other uses.
- The interface between residential and urban employment zones may impede the scope and nature of development on the edges of the zones.
- Retail uses have started to entrench themselves in the northern portion of the precinct, reflected by a recent supermarket development which fronts Gorge Road.

Figure 55: Glynde



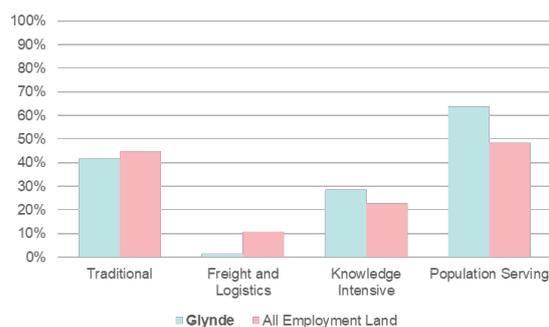
KEY MEASURES

Number of Jobs 2020	600
Total Precinct Area (ha)	16
Occupied Land (ha)	15.3
Vacant Land (ha)	0.5
Future Employment Land (ha)	0

CONTEXT

- Second largest employment precinct in the region for total jobs in 2020.
- The closest gazetted b-double route is Portrush Road, which is located 1km west of the precinct.
- The western section of the precinct is characterised by smaller warehouse style development, with larger land occupiers located in the southern portion of the precinct.

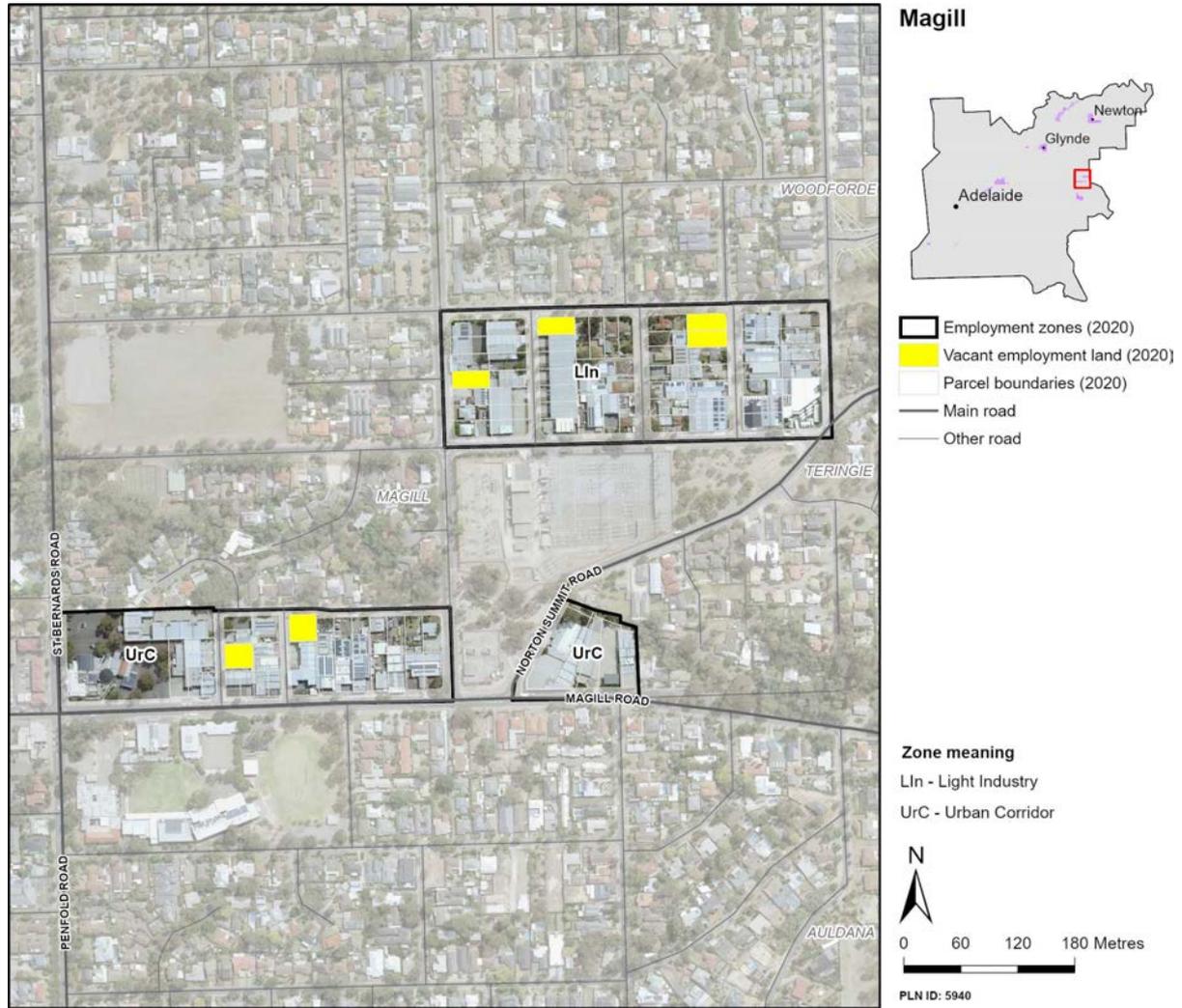
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- Precinct has a comparative advantage in knowledge intensive and population serving activities.
- Manufacturing, including food manufacturing (Menz), is the largest employment industry type.
- Highly accessible to skilled worker pools.
- One of the few employment land precincts east of the CBD, with a relatively large catchment for population-serving uses.
- Portions of the precinct have a direct interface with residential land, minimising the effectiveness of existing and new businesses to expand and grow.

Figure 56: Magill



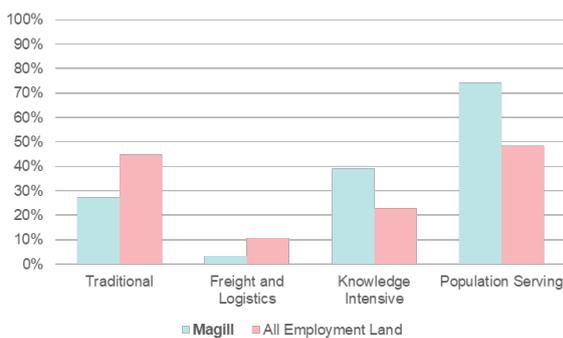
KEY MEASURES

Number of Jobs 2020	200
Total Precinct Area (ha)	8.5
Occupied Land (ha)	8.0
Vacant Land (ha)	0.5
Future Employment Land (ha)	0

CONTEXT

- The smallest precinct in the region for total employment in 2020 and for total zoned land.
- The closest gazetted b-double route is Portrush Road, which is located over 3km west of the precinct.
- Precinct is located directly west of the Hamilton Hill residential development on Glen Stuart Road.
- Precinct is well established with minimal vacant land remaining.

RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- Precinct has a comparative advantage in knowledge intensive and population serving activities.
- Highly accessible to skilled worker pools.
- Lack of employment land options in the eastern suburbs means future demand for employment land in this precinct is likely to remain.
- Remnant residential uses in parts of the precinct, in conjunction with proximity of existing residential uses adjacent the precinct, limits potential for employment land uses to operate and expand.

5.6 Employment land summary and strategic issues

Table 15 sets out the comparative advantages² of Inner Metro employment land precincts by looking at the share of activity for each of the broad industry categories (BICs) relative to the average for metropolitan employment lands.

Comparative advantage is an economic concept that recognises (in this case) certain employment precincts will have attributes that make them better suited to the provision of some activities over others.

By calculating the share of jobs by broad industry category (BIC) for each precinct in 2030 and comparing this figure to the share across all metropolitan employment lands, it is possible to understand the relative strengths of individual precincts, or their *comparative advantage*.

All Inner Metro precincts have a comparative advantage in *knowledge intensive* activities. Kent Town / Stepney has a clear comparative advantage, with one of the largest concentrations of knowledge intensive activities in Greater Adelaide. This is a result of its proximity to the CBD, access to skilled workers, and generally good urban amenity. It also highlights the strategic importance of this precinct, and others like it, highlighting the need to plan to avoid strategically important employment activities being crowded out by more commercially appealing land uses, such as residential and retail.

In addition, each of the four assessed Inner Metro precincts have relative strengths in the provision of population-serving uses.

In regard to strategic uses, the table shows that no Inner Metro precincts have comparative advantages in the provision of either *traditional* employment uses or *freight and logistics* uses. This is unsurprising given the characteristics of each precincts urban context.

Table 15: Comparative advantage analysis for identified precincts

PRECINCT	STRATEGIC ACTIVITIES			POPULATION SERVING
	Traditional	Freight and Logistics	Knowledge Intensive	
Kent Town / Stepney				
Newton				
Glynde				
Magill				

Comparative advantage, among top 5 assessed precincts
 Comparative advantage
 No significant comparative advantage

Based on the comparative advantage analysis the following conclusions can be drawn:

- All precincts have a comparative advantage in knowledge intensive and population serving activities;
- Kent Town / Stepney is identified as having one of the highest concentrations of jobs in knowledge intensive activities across Greater Adelaide’s employment lands, primarily due to its close proximity to the CBD and access to skilled worker pools/
- Conflict with adjacent residential development limits opportunities for higher intensity employment activities, typically associated with traditional and freight / logistic uses.

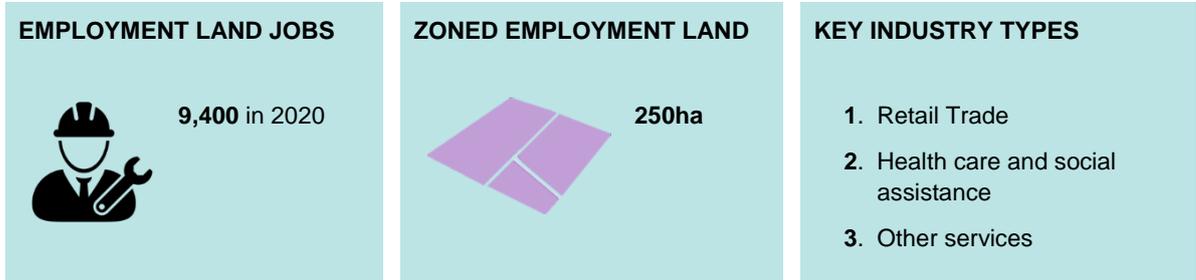
² Precincts are deemed to have a ‘comparative advantage’ if the proportion of workers in a broad industry category is more than 20% above the proportion in that category across all Greater Adelaide employment lands.



Source: Tonsley Innovation District, Tonsley

6. EMPLOYMENT LAND SUPPLY – INNER SOUTH

6.1 Overview

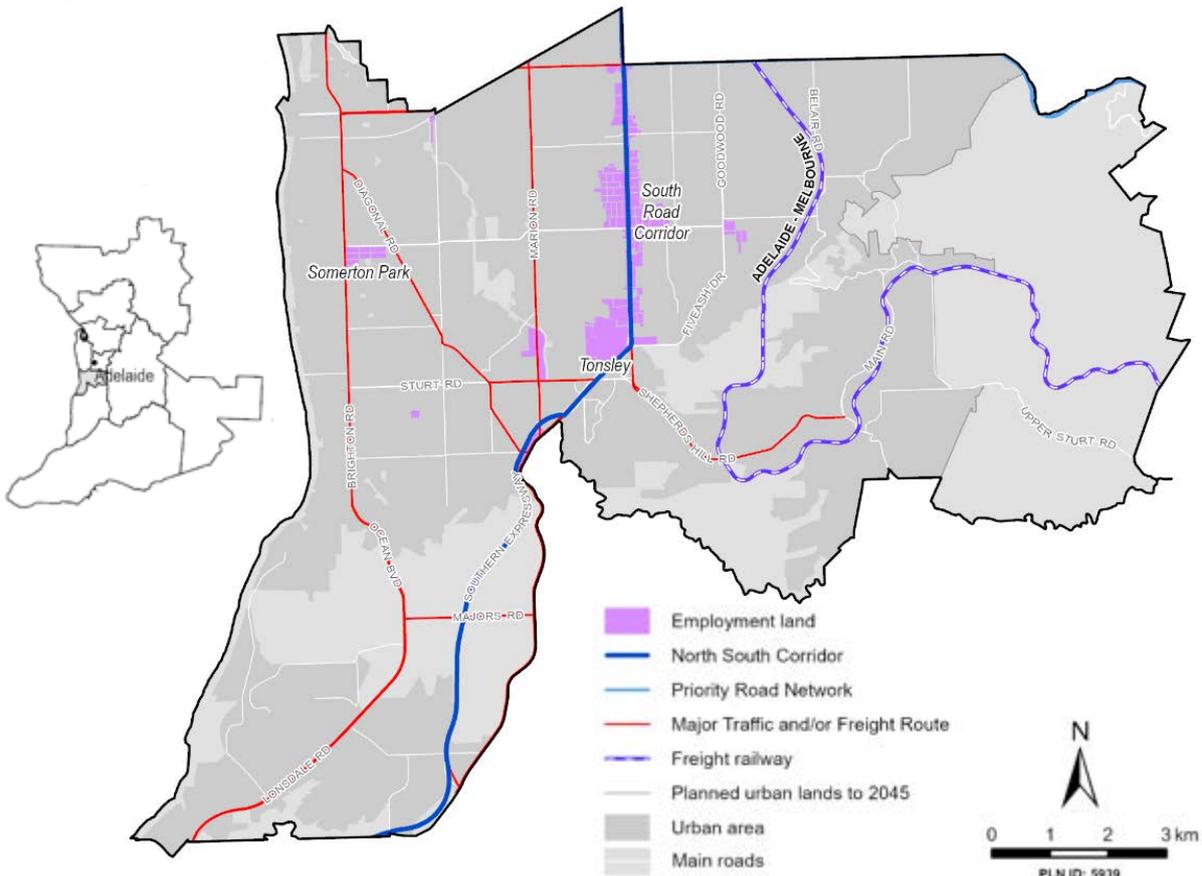


The Inner South region, as illustrated in Figure 57, accounts for just under 2% of total zoned employment land within Greater Adelaide. With the majority of land located along the South Road corridor, which has been and will continue to be subject to significant change over the next ten years and the north-south corridor project is completed.

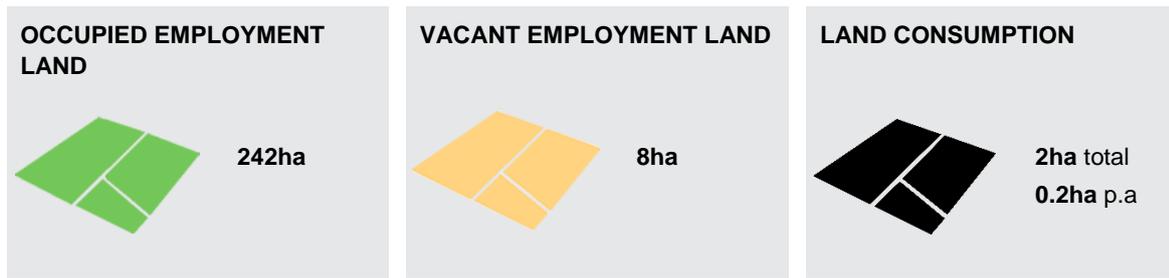
In 2020, it was estimated the regions zoned employment lands supported 9,400 jobs. Over 60% of these jobs were within industries aligned to population serving activities, most notable retail trade. It is projected these activities will continue to be the main source of employment by 2030. Jobs in manufacturing are projected to increase, supported by continued development of the Tonsley Innovation District.

Continued population growth in adjoining residential areas will place pressure on existing employment precincts to adapt and evolve, whilst ensuring sufficient services and jobs are provided. This will also be heavily influenced by the works associated with the completion of the north-south corridor.

Figure 57: Inner South employment land overview



6.2 Employment land supply and consumption



A stocktake of employment land supply in June 2020 and land consumption between 2008 and 2018 demonstrated:

- The region accommodated a total 250 hectares of zoned employment land, 50% of which was located along the South Road corridor, as illustrated in Figure 58 and detailed in Table 16.
- 8 hectares of zoned land remained vacant, the majority within the Tonsley precinct.
- 2.2 hectares of vacant zoned land was consumed between 2008 and 2018, the second lowest consumption rate across Greater Adelaide.
- It is important to note that availability of employment land along the South Road corridor will be subject to change as a result of the completion of the North-South corridor project.

Figure 58: Total employment land supply by precinct, June 2020

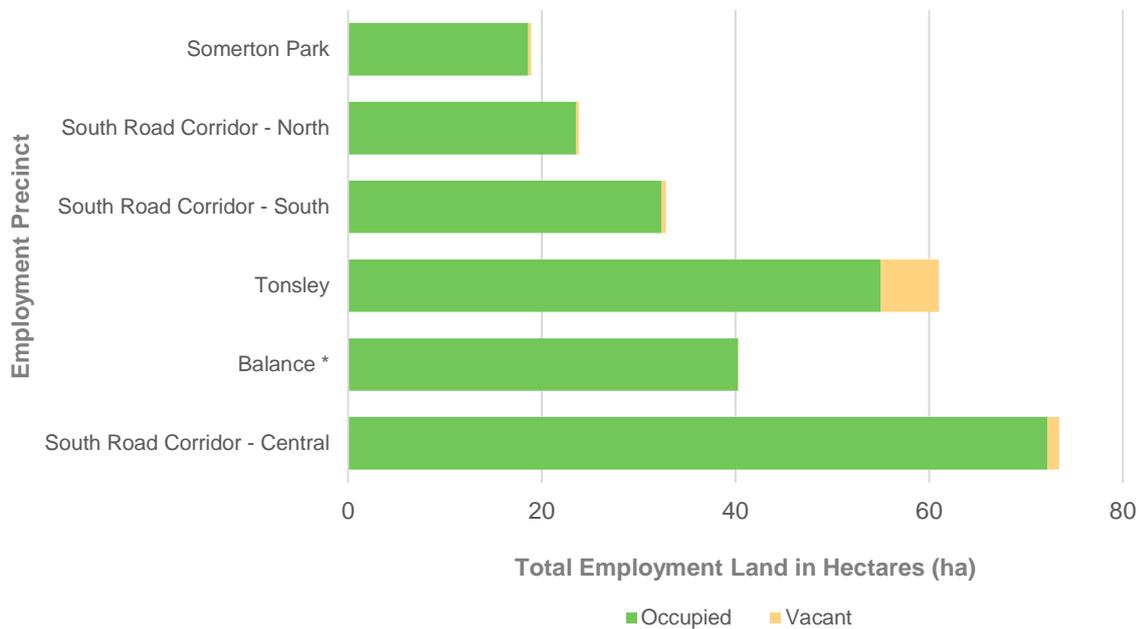


Table 16: Summary of identified employment precincts, Inner South region, June 2020

PRECINCT	Occupied Land (ha)	Vacant Land (ha)	Other Use (ha)	Total Area (ha)	Future Land (ha)
Somerton Park	19	0.3	-	19	-
South Road Corridor - Central	72	1.2	-	73	-
South Road Corridor - North	24	0.3	-	24	-
South Road Corridor - South	32	0.4	-	33	-
Tonsley	55	6	-	61	-
Balance *	40	0.1	-	40	-
TOTAL	242	8	0	250	0

* Includes South Road Corridor at Darlington, Panorama, Marion Road corridor and small sections along South Road.

6.3 Recent changes to employment land supply



Table 17 highlights changes to zoned employment land between 2008 and 2020. Key changes include:

- A net loss of 19 hectares in zoned employment land.
- The largest DPA involved the rezoning of land associated with the former Mitsubishi site at Tonsley to facilitate a mixed use residential development.
- The Statewide Bulky Goods DPA in 2011 aimed to facilitate retail showroom and bulky goods development within existing industry zones along South Road.
- The Seacliff Park Residential and Centre DPA was approved in late 2020 which allowed land formally zoned Residential and Mineral Extraction to be rezoned in order to facilitate a residential development.

Table 17: Employment land changes, 2008 - 2020

DPA NAME	GAZETTED	DESCRIPTION
Seacliff Park Residential and Centre DPA	Nov 2020	12ha of land rezoned from Residential and Mineral Extraction to facilitate a density residential development.
Mitcham Growth Precincts*	Aug 2020	Approximately 9ha of land in Panorama rezoned from Light Industry to Mixed Use and Suburban Neighbourhood.
Morphettville Racecourse	May 2020	Approximately 2.1ha of land associated with the tram depot rezoned from Commercial to Light Industry to better reflect its current use.
Southern Innovation Area	Nov 2019	Approximately 30ha of land rezoned from Suburban Activity Node and Industry to Regional Activity, Open Space and Commercial. New zoning still envisages traditional 'industrial' land uses, but typically in conjunction with other uses, including residential.
Castle Plaza Activity Centre	Feb 2018	Approximately 8ha of land rezoned from Industry to Mixed Use.
Tonsley Park Redevelopment & General Section Amendments	Dec 2013	Rezoned the former Mitsubishi site from Industry to Urban Employment and Suburban Activity Node to facilitate a mixed use development.
Statewide Bulky Goods	Feb 2011	Altered existing industry policy along sections of south road to support bulky goods and retail showroom development.

6.4 Projected change in employment, 2020 - 2030

LARGEST INDUSTRY TYPE	LARGEST % GROWTH BY BROAD INDUSTRY CATEGORY	LARGEST GROWTH PRECINCT
<ul style="list-style-type: none"> ▪ Manufacturing - 20% of total employment in 2020 - 23% of total employment in 2030 	<ul style="list-style-type: none"> ▪ Traditional (22%) - Manufacturing - Construction 	<ul style="list-style-type: none"> ▪ South Road Corridor - Central - 7,800 jobs (2020) - An 8% increase projected by 2030

Projected changes in employment between 2020 and 2030 are summarised as follows:

- The regions employment land supported an estimated 9,400 jobs in 2020, representing roughly 8% of total jobs across Greater Adelaide’s employment lands.
- Population serving activities accounted for over 60% of total jobs in 2020, which along with jobs in knowledge intensive activities, represented a higher concentration when compared to the Greater Adelaide average.
- Although manufacturing, a traditional employment activity, accounted for 20% of total jobs making it the largest employing industry type in the region.
- Jobs growth within zoned employment land is projected to grow by just under 15% to 2030, the third largest percentage increase of all regions across Greater Adelaide’s employment lands, behind Adelaide West and the Inner North.
- Jobs in traditional employment activities are projected to grow by over 20% across the next ten years, driven primarily by manufacturing, which will account for just under 50% of all new jobs created.
- By 2030, the South Road Corridor (Central) employment precinct will account for 45% of total jobs within the region.
- Completion of the north-south corridor may change this, and will likely act as a catalyst for development of the regions employment lands, however this is dependent on the final alignment option adopted.

Figure 59: Jobs growth on employment land by Broad Industry Category (BIC), 2020 - 2030



6.5 Key employment precincts – Inner South

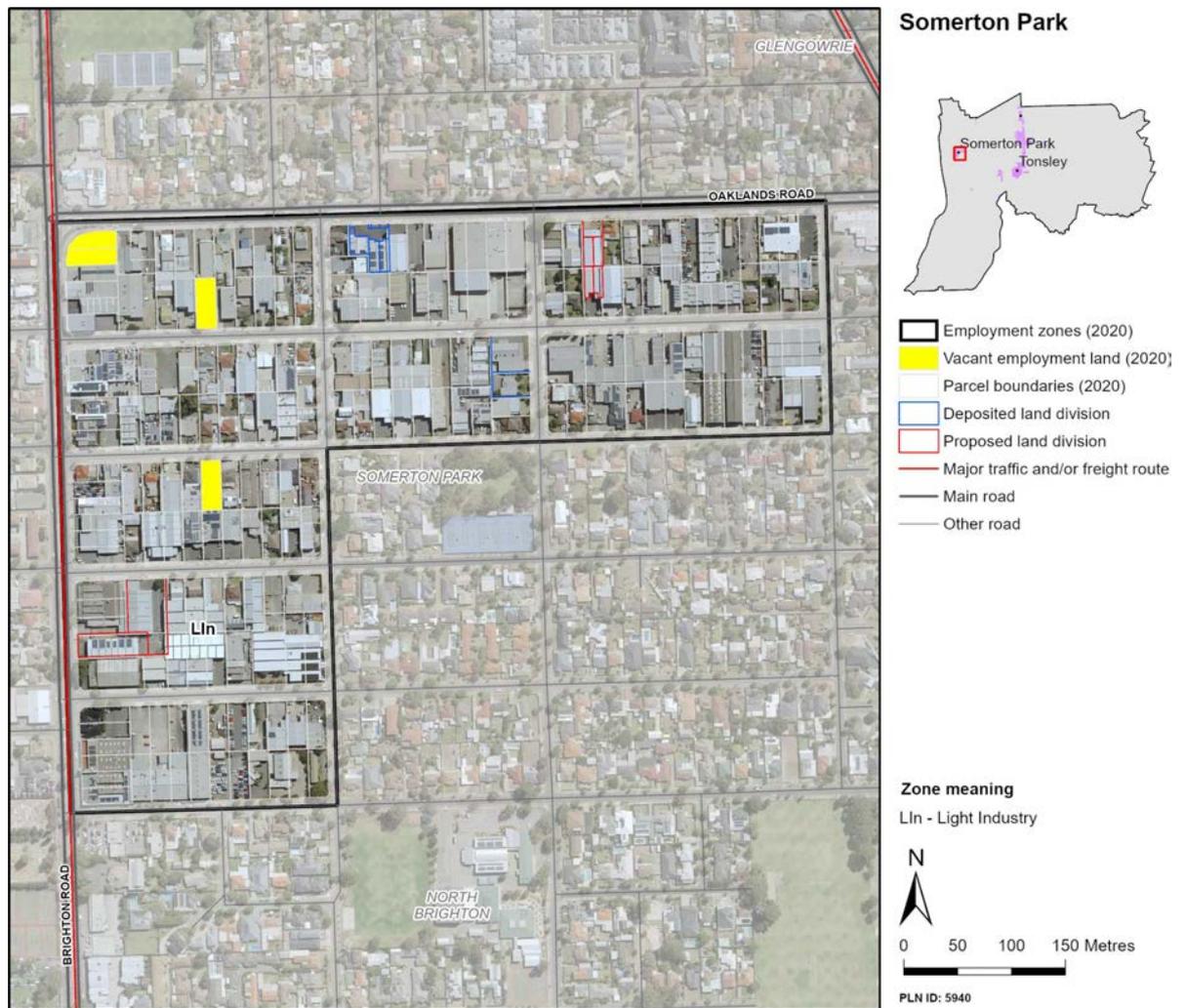
The following section provides analysis on employment land supply and jobs growth for the following precincts:

- Somerton Park
- South Road Corridor - Central
- South Road Corridor - North
- South Road Corridor – South
- Tonsley

Analysis of each precinct includes:

- A map, illustrating the full extent of the precinct, vacant land supply (as of June 2020) and proposed lots (2020);
- A table summarising key measures, including total number of jobs in 2020, and total precinct area;
- A graph illustrating the share of total jobs across all four broad industry categories in 2030, relative to the share across Greater Adelaide;
- Overview of the strengths, constraints and opportunities.

Figure 60: Somerton Park



KEY MEASURES

Total Number of Jobs 2020	400
Total Precinct Area (ha)	19
Occupied Land (ha)	19
Vacant Land (ha)	0
Future Employment Land (ha)	0

RELATIVE EMPLOYMENT SHARES (2030)



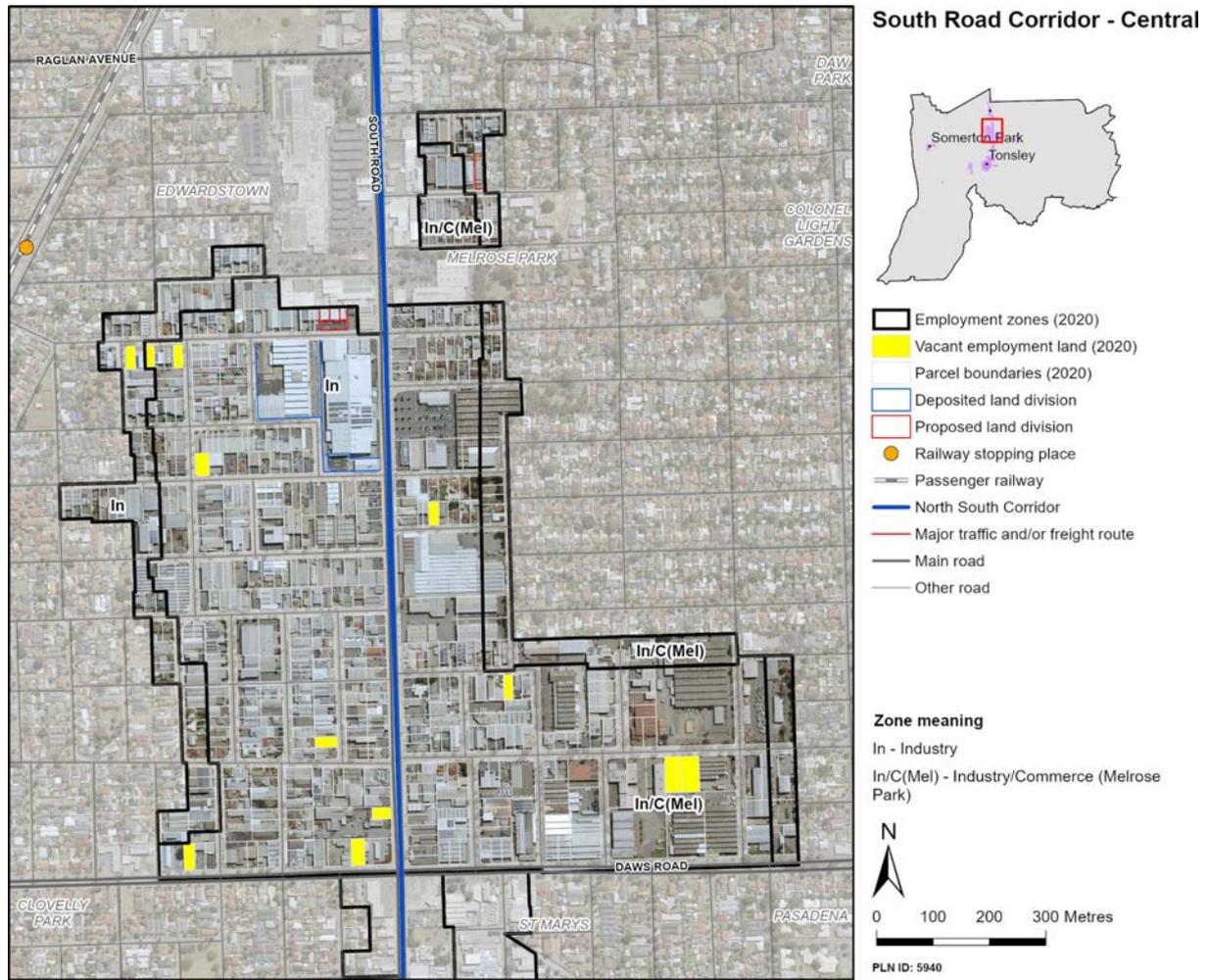
CONTEXT

- The smallest precinct for total zoned area and total employment within the region.
- The precinct has direct frontage and vehicle access to Oakland's and Brighton Road.

ANALYSIS

- Precinct has a comparative advantage in both knowledge intensive and population serving activities.
- By 2030 population serving activities are projected account for over 75% of total employment.
- Employment in construction based activities, which is both a population serving and traditional, is projected to account for 15% of the precincts total employment by 2030.
- The importance of this precinct will continue as surrounding, established suburbs, are further developed to accommodate projected population growth.

Figure 61: South Road Corridor – Central



KEY MEASURES

Total Number of Jobs 2020	4,100
Total Precinct Area (ha)	73
Occupied Land (ha)	72
Vacant Land (ha)	1.2
Future Employment Land (ha)	0

RELATIVE EMPLOYMENT SHARES (2030)



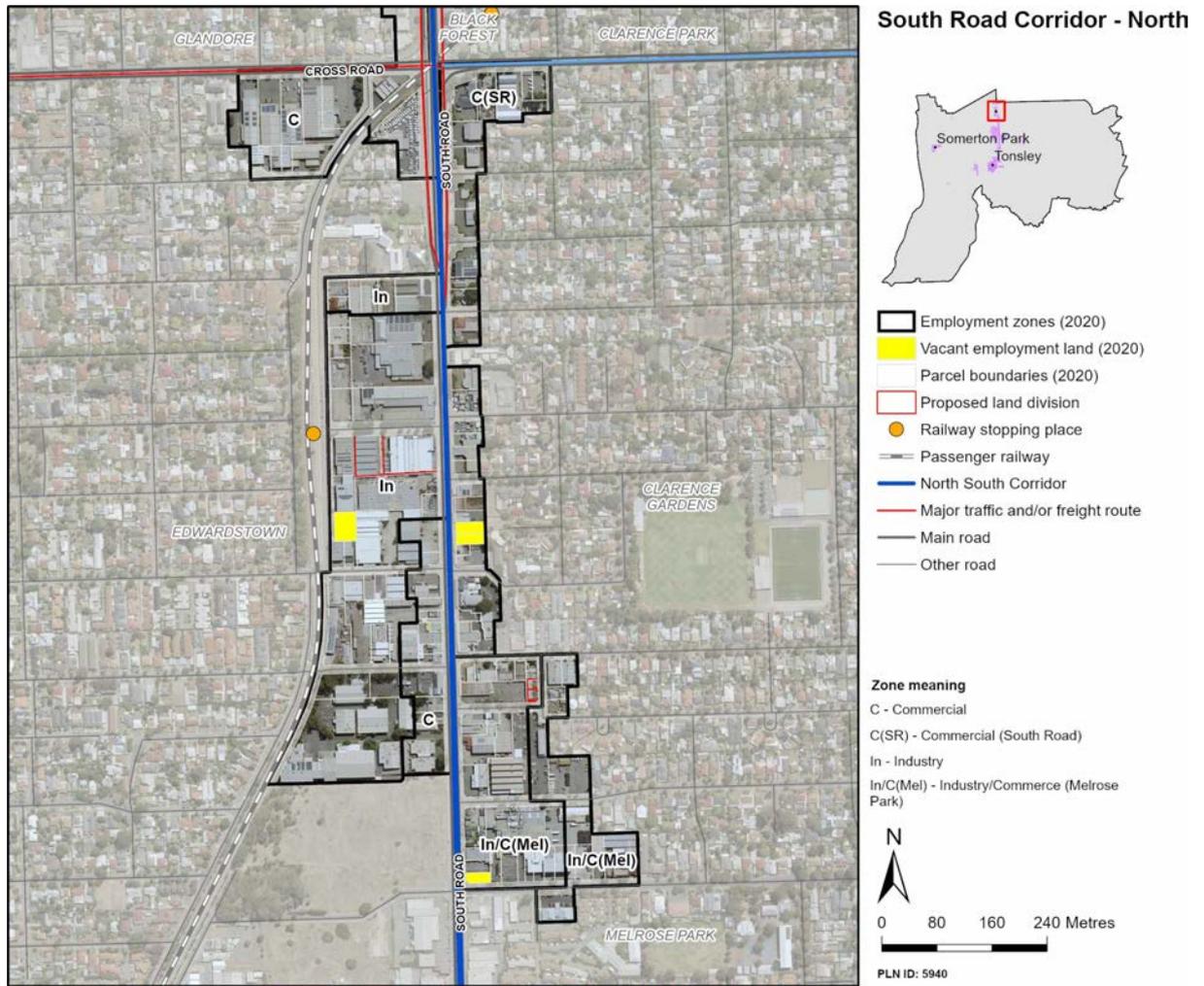
CONTEXT

- Precinct is the largest for total zoned land and total employment in the region.
- Land is serviced by gazetted B-double routes.

ANALYSIS

- Population serving activities are projected to account for over 57% of total employment within the precinct by 2030.
- Traditional activities such as manufacturing will continue to play an important role within the precinct, accounting for over 26% of total employment by 2030.
- The central core is well protected from sensitive land uses providing opportunities for higher intensity development such as extended operating hours and manufacturing.
- Smaller parcels of land on the outskirts may come under pressures from encroaching residential development.
- The final alignment option for the north-south corridor will have significant implications on the short, medium and long-term development of this precinct.

Figure 62: South Road Corridor – North



KEY MEASURES

Total Number of Jobs 2020	2,500
Total Precinct Area (ha)	24
Occupied Land (ha)	24
Vacant Land (ha)	0.3
Future Employment Land (ha)	0

CONTEXT

- Land has direct frontage and vehicle access gazetted B-double routes.
- Land fronting Cross Road is located within a 'Commercial' zone which envisages a wider range of land uses.
- Land on the western side of South Road is separated from adjacent residential by the Tonsley passenger rail line.

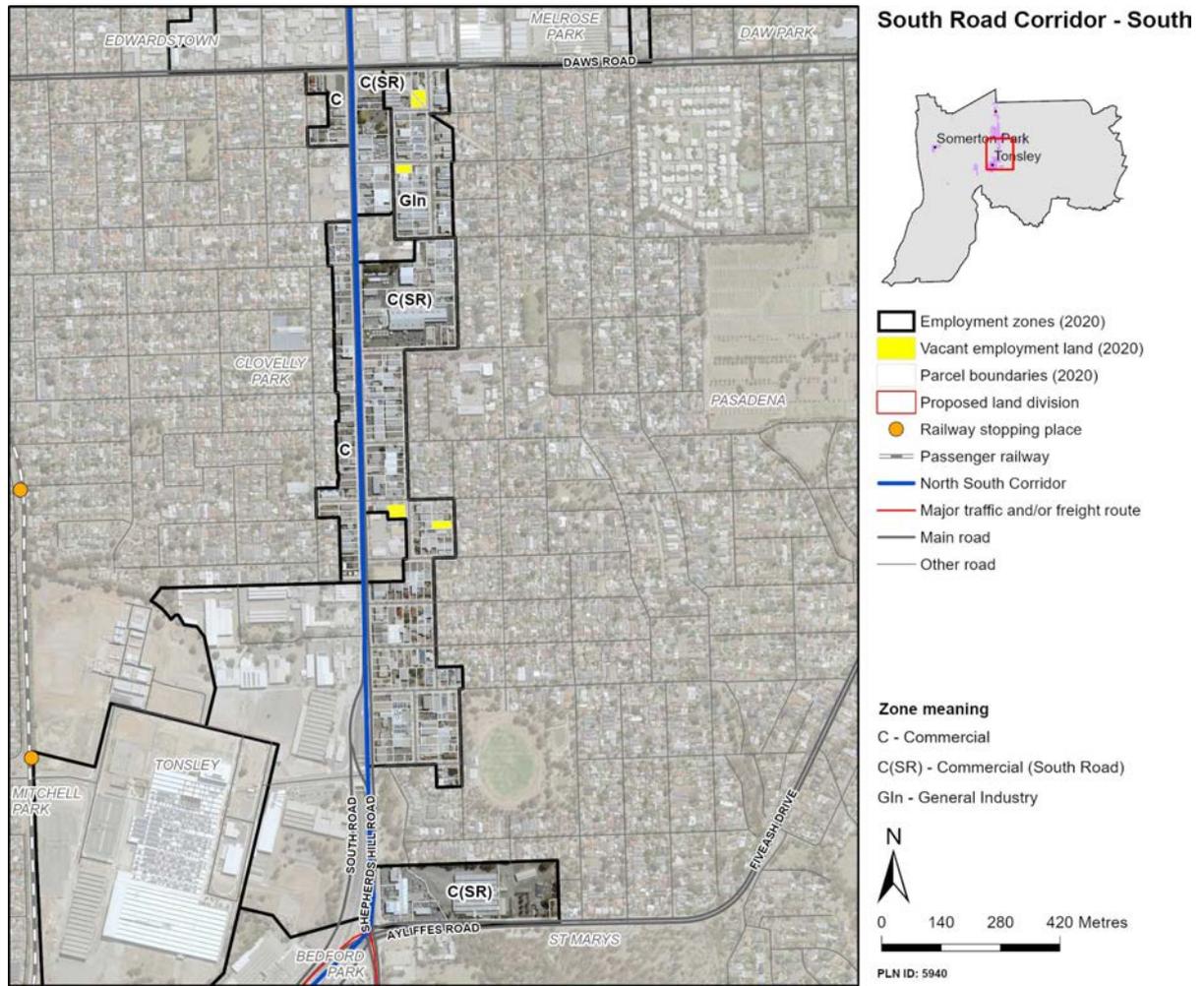
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- Precinct has a comparative advantage in both knowledge intensive and population serving activities.
- By 2030, population serving activities are projected to account for over 65% of total employment.
- Manufacturing will continue to play an important role in the precinct, as the largest employing industry type.
- The final alignment option for the north-south corridor will have significant implications on the short, medium and long-term development of this precinct.

Figure 63: South Road Corridor - South



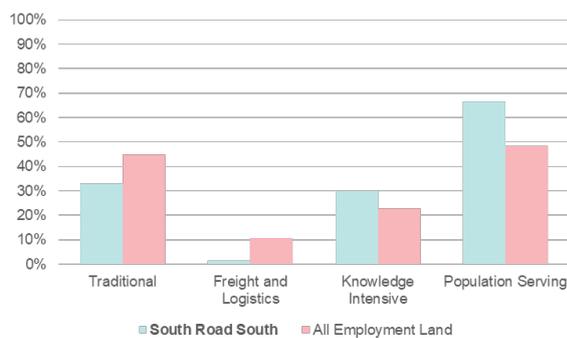
KEY MEASURES

Total Number of Jobs 2020	1,200
Total Precinct Area (ha)	33
Occupied Land (ha)	32
Vacant Land (ha)	1
Future Employment Land (ha)	0

CONTEXT

- Land has direct frontage and vehicle access multiple gazetted B-double routes.
- The South Road, Shepherds Hill and Ayliffes Road intersection has recently been upgraded as part of the north-south corridor project.
- Precinct is relatively well established with minimal vacant land remaining.

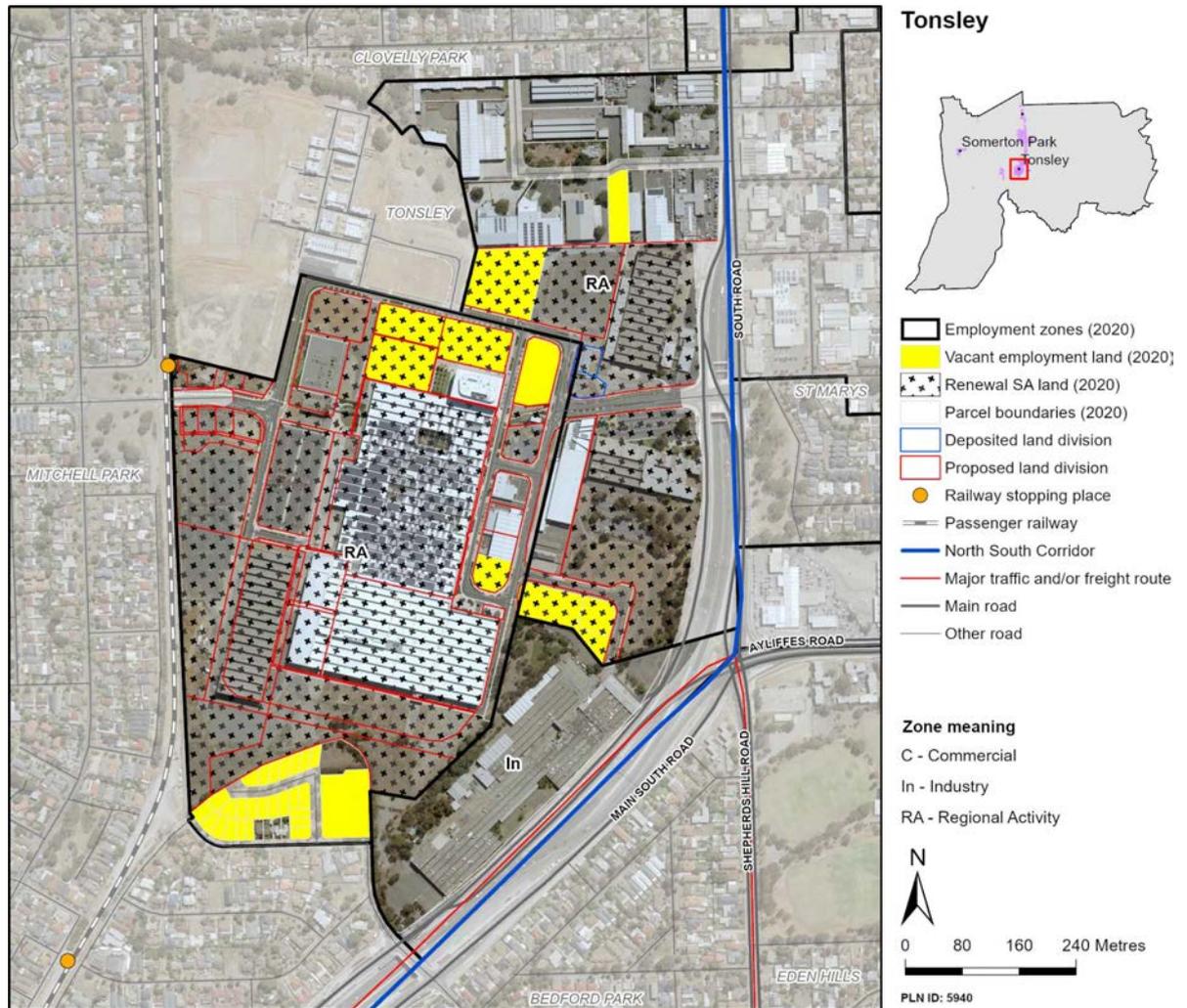
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- Precinct has a comparative advantage in both knowledge intensive and population serving activities.
- By 2030, population serving activities are projected to account for over 66% of total employment.
- This is primarily driven by growth in retail trade, which will account for over 30% of new jobs.
- The final alignment option for the north-south corridor will have significant implications on the short, medium and long-term development of this precinct.

Figure 64: Tonsley



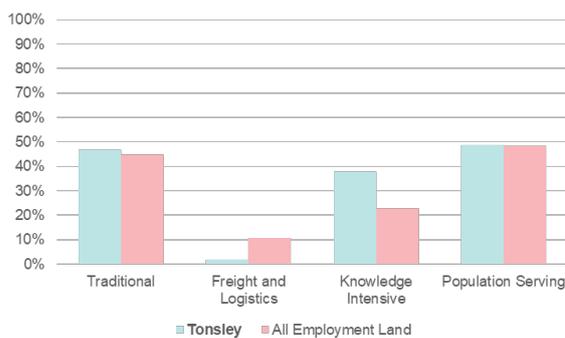
KEY MEASURES

Total Number of Jobs 2020	1,200
Total Precinct Area (ha)	61
Occupied Land (ha)	55
Vacant Land (ha)	6
Future Employment Land (ha)	0

CONTEXT

- Land is serviced by Main South Road, which is a gazetted B-double route. This section of South Road was recently upgraded as part of the north-south corridor project.
- Land was rezoned from Industry to Regional Activity in 2018 to facilitate a wider range of land uses within the precinct, ranging from light industry, service trade and residential.

RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- The precinct has one of the highest concentrations of knowledge intensive employment within Greater Adelaide.
- This is supported by its affiliation with Flinders University, which is now directly connected to the precinct via passenger rail (Flinders Link).
- The precinct represents adaptive reuse of former traditional industrial sites (former Mitsubishi factory), and how they can transition to highly productive and competitive employment clusters / precincts.
- Manufacturing will drive this growth, accounting for 62% of projected employment growth over the next 10 years.
- The type of manufacturing being undertaken does not have the same level of intensity as more traditional forms, and therefore can co-exist with more sensitive land uses such as residential.

6.6 Employment land summary and strategic issues

Table 18 sets out the comparative advantages¹ of Inner South employment land precincts by looking at the share of activity for each of the broad industry categories (BICs) relative to the average for metropolitan employment lands.

The analysis shows that employment lands in the Inner South region tend to focus on the provision of knowledge intensive and population servicing uses. With precincts such as Tonsley accommodating a Flinders University campus, and the region generally having good access to skilled worker pools, they are a natural location knowledge intensive activities. Population serving uses are relatively overrepresented in Inner South precincts.

Manufacturing and freight and logistics presently play a relatively minor role in the region's employment lands. The looming completion of the South Road corridor will reduce travel times between the Inner South and trade gateways, potentially driving demand for manufacturing and freight activities south of the CBD. That said, with relatively small lot sizes and significant interface issues, these sorts of uses are also likely to find other parts of metropolitan Adelaide which may be more appealing.

Comparative advantage is an economic concept that recognises (in this case) certain employment precincts will have attributes that make them better suited to the provision of some activities over others.

By calculating the share of jobs by broad industry category (BIC) for each precinct in 2030 and comparing this figure to the share across all metropolitan employment lands, it is possible to understand the relative strengths of individual precincts, or their *comparative advantage*.

Table 18: Comparative advantage analysis for identified precincts

PRECINCT	STRATEGIC ACTIVITIES			Population Serving
	Traditional	Freight and Logistics	Knowledge Intensive	
Somerton Park				
South Road Corridor – North				
South Road Corridor – Central				
South Road Corridor – South				
Tonsley				

Comparative advantage, among top 5 assessed precincts
 Comparative advantage
 No comparative advantage

Based on the comparative advantage analyses the following conclusions can be drawn:

- Precincts in this region have comparative advantages in knowledge intensive and population serving activities, as illustrated in Table 18.
- The Tonsley precinct has been identified as having one of the highest concentrations of jobs in knowledge intensive employment activities across all identified employment precincts within Greater Adelaide.
- No precincts were identified as having comparative advantages in either traditional or freight and logistic activities. This can be partly attributed to land in the Adelaide West and Inner

¹ Precincts are deemed to have a 'comparative advantage' if the proportion of workers in a broad land use category is more than 20% above the proportion in that category across all metropolitan employment lands.

North regions having greater access to a range of key transport facilities (intermodal, airport and port) and freight routes.

- The South Road – Central precinct does not have any identified comparative advantage when compared to the remainder of Greater Adelaide’s employment lands, and is more of a general ‘all-rounder’.



7. EMPLOYMENT LAND SUPPLY – OUTER SOUTH

7.1 Overview

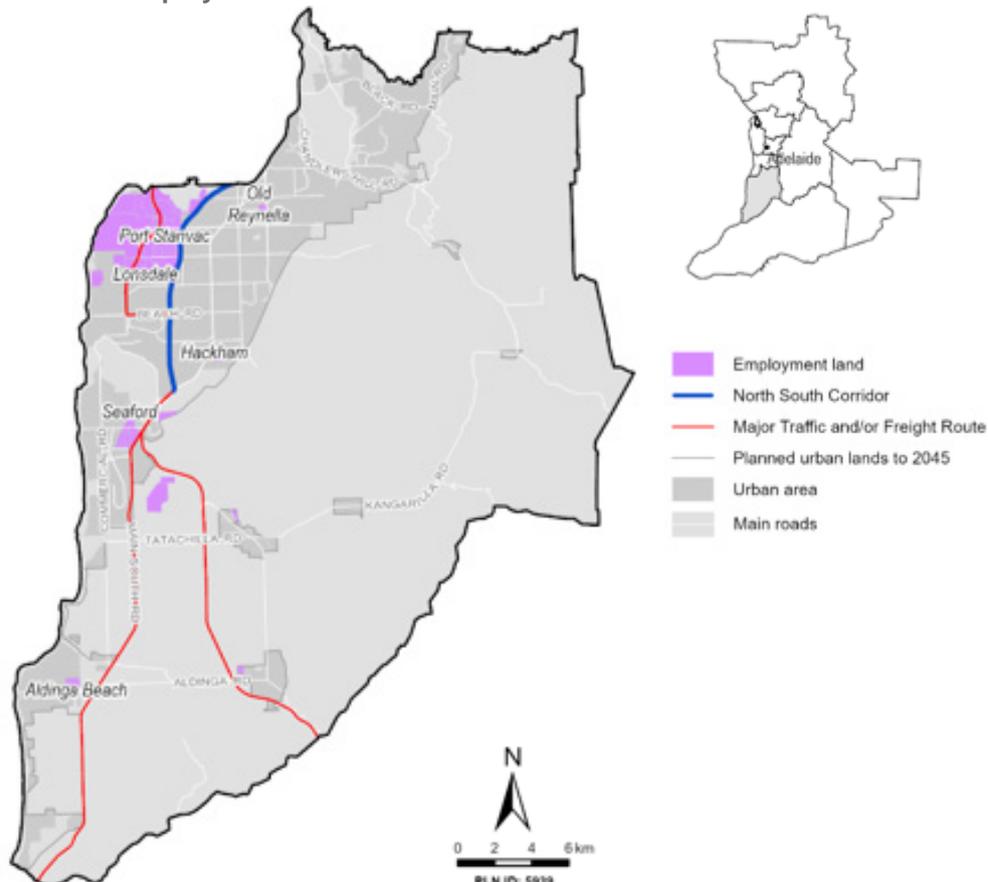
EMPLOYMENT LAND JOBS	ZONED EMPLOYMENT LAND	KEY INDUSTRY TYPES
 <p>7,200 in 2020</p>	 <p>1,139ha</p>	<ol style="list-style-type: none"> 1. Manufacturing 2. Construction 3. Other services

The Outer South region, as illustrated in Figure 65, accounts for 8% of total zoned employment land within the Greater Adelaide region. The largest employment precinct, Lonsdale and Port Stanvac is also the largest precinct in Greater Adelaide for zoned employment land, and includes the former oil refinery site, which currently remains vacant.

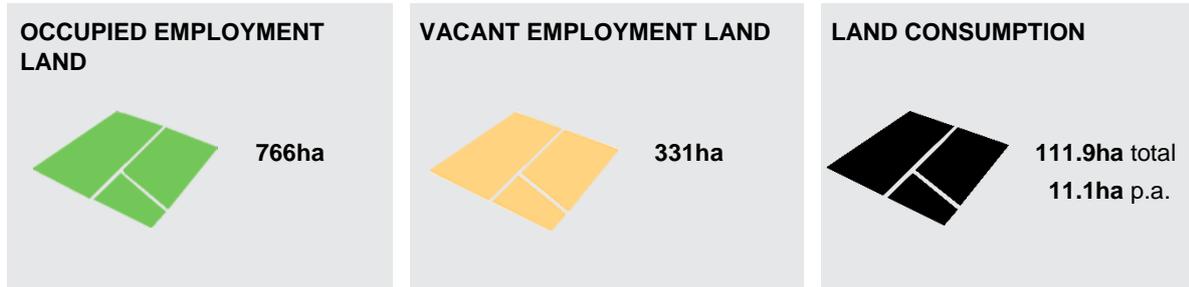
In 2020, it was estimated that the regions employment lands accommodated over 7,200 jobs. Traditional industries such as manufacturing were attributed to over 60% of these jobs. Its share is projected to remain steady to 2030. Jobs within population serving industries however, are projected to grow by close to 6% over the next ten years, the largest increase of all broad industry employment categories within the region.

Population growth associated with Greenfield development at Seaford, Hackham and Aldinga over the next ten years will place pressure on zoned land to provide employment opportunities and services. This in turn highlights the need to consider how to best to utilise land associated with the former oil refinery site at Port Stanvac.

Figure 65: Outer South employment land overview



7.2 Employment land supply and consumption



A stocktake of employment land supply at June 2020 and land consumption between 2008 and 2018 identifies the following:

- The region accommodated 1,139 hectares of zoned employment land, as illustrated in Figure 66 and detailed in Table 19.
- 331 hectares of zoned land remained vacant, accounting for 18% of total vacant employment land supply across Greater Adelaide. The former oil refinery site located at Port Stanvac accounts for over 240 hectares of his supply.
- Whilst the region does not contain any identified future employment land, there is vacant employment land at Port Stanvac, which requires significant remediation works prior to any comprehensive redevelopment of the site.
- Eliminating Port Stanvac, the vacant land supply in the region is more realistically around 126 hectares.
- 111.9 hectares of zoned land was consumed between 2008 and 2018, the third highest rate of consumption across all regions, behind the Adelaide West and Inner North, demonstrating an underlying demand for employment land in the region.
- Assuming historical rates of consumption continue, it is projected the region will have sufficient zoned vacant land to accommodate demand over the next ten years and beyond.

Figure 66: Total employment land supply by precinct, June 2020

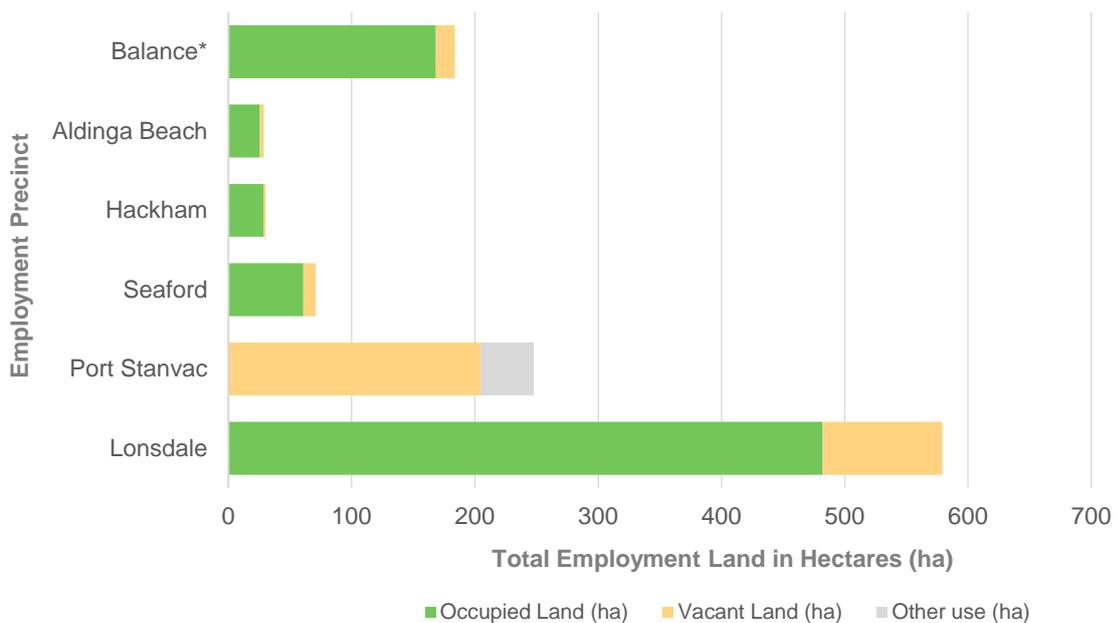


Table 19: Summary of identified employment precincts, Outer South region, June 2020

PRECINCT	Occupied Land (ha)	Vacant Land (ha)	Other Use (ha)	Total Area (ha)	Future Land (ha)
Lonsdale	482	97	-	579	-
Port Stanvac	0	204	43	247	-
Seaford	61	10	-	71	-
Hackham	29	1	-	30	-
Aldinga Beach	26	3	-	29	-
Balance*	168	15	-	184	-
TOTAL	766	331	43	1,140	0

* Includes Willunga, waste facilities at McLaren Vale, O'Sullivan Beach waste water and Old Reynella Winery.

7.3 Recent changes to employment land supply



Table 20 highlights changes to zoned employment land between 2008 and 2020. Key changes include:

- A net loss of 21 hectares in zoned employment land.
- Most of the employment land lost was rezoned to facilitate residential development.
- Demolition works associated with the former oil refinery at Port Stanvac were completed in 2014 the site now sits vacant. Future redevelopment is limited until extensive, and costly remediation works have been undertaken.
- SA Water also recently purchased approximately 14 hectares of land within the defined Port Stanvac precinct area. This is to accommodate an expansion of their existing solar farm, which is used to offset the energy requirements of the Adelaide desalination plant.

Table 20: Employment land changes, 2008 - 2020

DPA NAME	GAZETTED	DESCRIPTION
Lonsdale Residential	Jul 2020	Approximately 5ha of Urban Employment land was rezoned to Residential.
Old Reynella Former Winery Site	May 2020	Approximately 11ha of Urban Employment land rezoned to Residential. Portion of the site was retained Urban Employment.
Employment Lands	Feb 2018	Converted both the Industry and Light Industry Zones across to the Urban Employment Zone.
Bulky Goods	Dec 2013	Approximately 5ha of Urban Employment Land was rezoned to Bulky Goods.

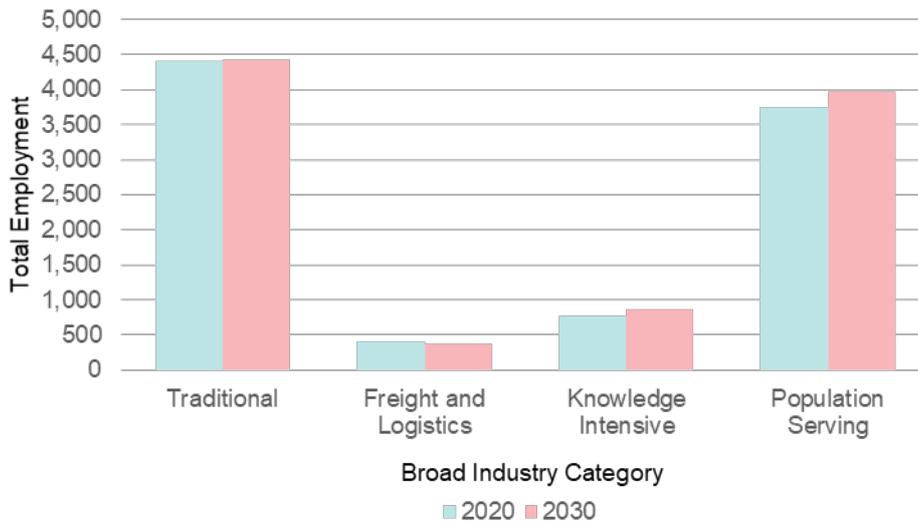
7.4 Projected change in employment, 2020 – 2030

LARGEST INDUSTRY TYPE	LARGEST % GROWTH BY BROAD INDUSTRY CATEGORY	LARGEST GROWTH PRECINCT
<ul style="list-style-type: none"> ▪ Manufacturing - 29% of total employment in 2020 - 25% of total employment in 2030 	<ul style="list-style-type: none"> ▪ Knowledge Intensive (11%) - Health care and social services - Professional, scientific and technical services 	<ul style="list-style-type: none"> ▪ Lonsdale / Port Stanvac - 6,400 jobs in 2020 - A 1% increase projected to 2030

Projected changes in employment between 2020 and 2030 are summarised as follows:

- The regions employment land supported an estimated 7,200 jobs in 2020, representing around 6% of total jobs across Greater Adelaide’s employment lands.
- In 2020, traditional employment activities accounted for 60% of total jobs which is notably higher than the Greater Adelaide average of 45%.
- A substantial component of these jobs were in manufacturing, which accounted for just under 30% of total jobs in 2020.
- Population serving activities are projected to accommodate the largest net gain in total jobs across the region to 2030, driven by jobs in construction.
- Whilst knowledge intensive activities are projected to experience the largest percentage increase of job growth to 2030.
- The Lonsdale / Port Stanvac employment precinct accounts for just under 90% of total jobs within the regions zoned employment lands, and is projected to account for half of all new jobs created over the next 10 years.
- Declining employment within the regions freight and logistics sector can be attributed to the availability of land in the West and Inner North regions, which comprise better access key freight corridors, producer markets and trade gateways, and improvements in technology reducing demand for labour.

Figure 67: Jobs growth on employment land by Broad Industry Category (BIC), 2020 - 2030



7.5 Key employment precincts – Outer South

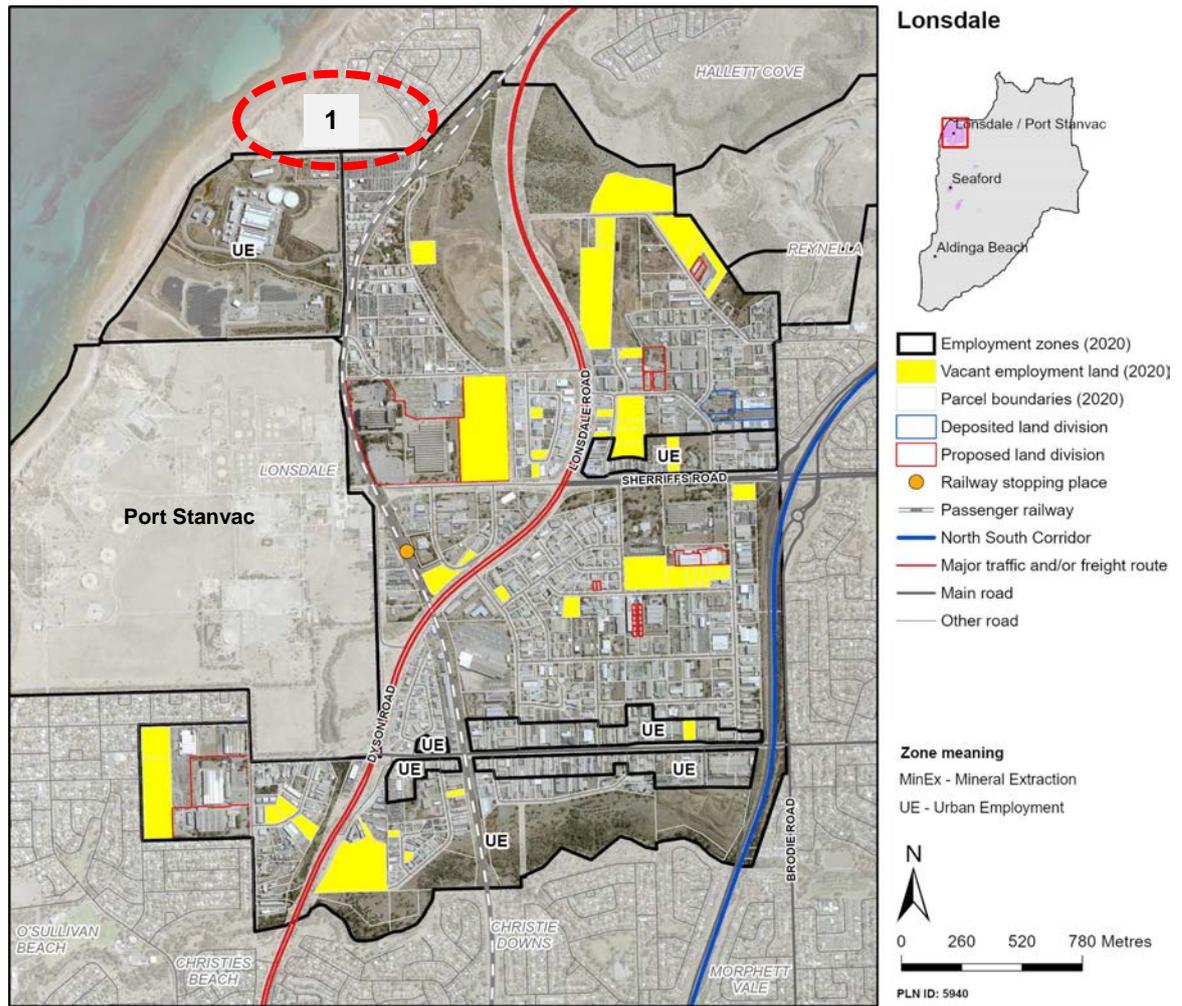
The following section provides analysis on employment land supply and jobs growth for the following precincts:

- Lonsdale
- Port Stanvac
- Seaford
- Hackham
- Aldinga Beach

Analysis of each precinct includes:

- A map, illustrating the full extent of the precinct, vacant land supply (as of June 2020) and proposed lots (June 2020);
- A table summarising key measures, including total number of jobs in 2020 and the total precinct area (ha);
- A graph illustrating the share of total jobs across all four broad industry categories in 2030, relative to the share across Greater Adelaide;
- Overview of the strengths, constraints and opportunities.

Figure 68: Lonsdale



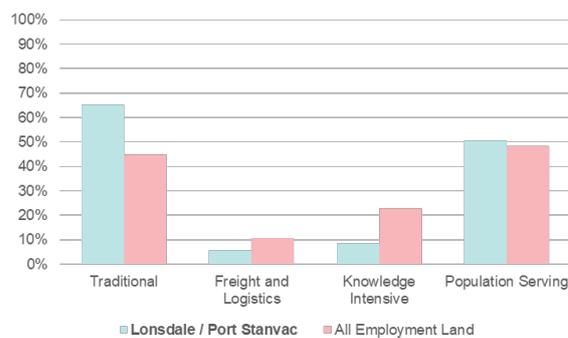
KEY MEASURES

Total Number of Jobs 2020	6,400
Total Precinct Area (ha)	579
Occupied Land (ha)	482
Vacant Land (ha)	97
Future Employment Land (ha)	0

CONTEXT

- The third largest employment precinct in Greater Adelaide for zoned land behind Wingfield and Gillman / Dry Creek.
- Largest precinct in the region for total number of jobs.
- Vacant land identified as area '1' was rezoned in 2020 to facilitate residential development.
- Vacant land on the northern and southern sections of the precinct are constrained, in-part, by slope.

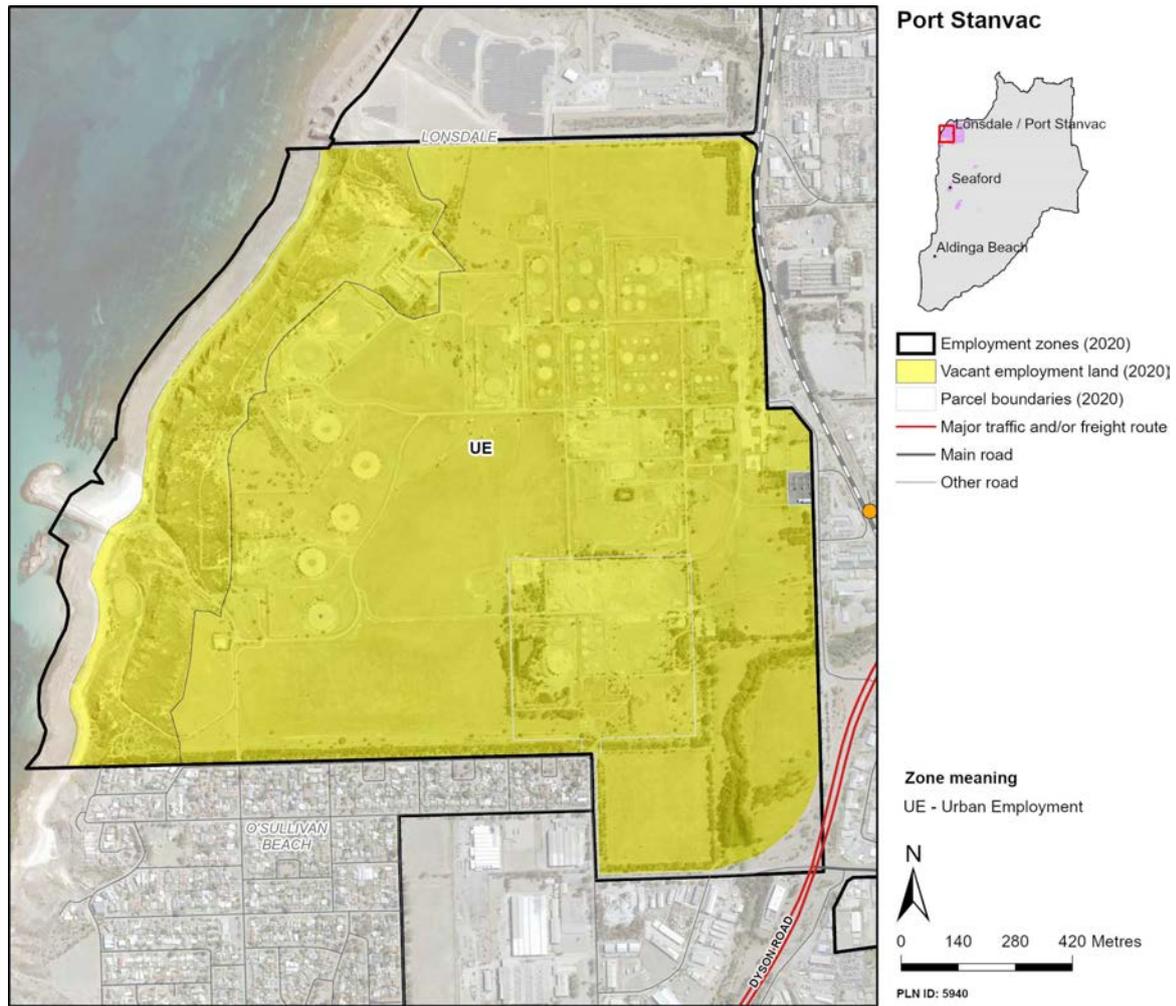
RELATIVE EMPLOYMENT SHARES (2030)



ANALYSIS

- Identified as having one of the highest concentrations of traditional employment activities across all of Greater Adelaide's employment land.
- Manufacturing, a traditional employment activity, accounts for 32% of total employment in 2020, with its share projected to decline to 29% by 2030.
- Land is well separated from sensitive land uses, providing opportunities for higher intensity development.

Figure 69: Port Stanvac



KEY MEASURES

Total Number of Jobs 2020	0
Total Precinct Area (ha)	247
Occupied Land (ha)	0
Vacant Land (ha)	204
Agriculture / Other use (ha)	43
Future Employment Land (ha)	0

CONTEXT

- Land has sat idle since the refinery ceased operations in 2003.
- All structures were demolished in 2014.
- Included with the broader Lonsdale employment precinct, it forms part of the largest employment precinct in Greater Adelaide for zoned land.

ANALYSIS

- The majority of the site is well separated from sensitive land uses, providing opportunities for higher intensity development.
- Any future development would require consideration to site contamination and remediation works.

RELATIVE EMPLOYMENT SHARES (2030)

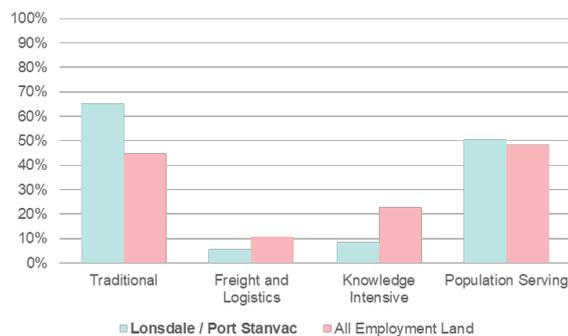
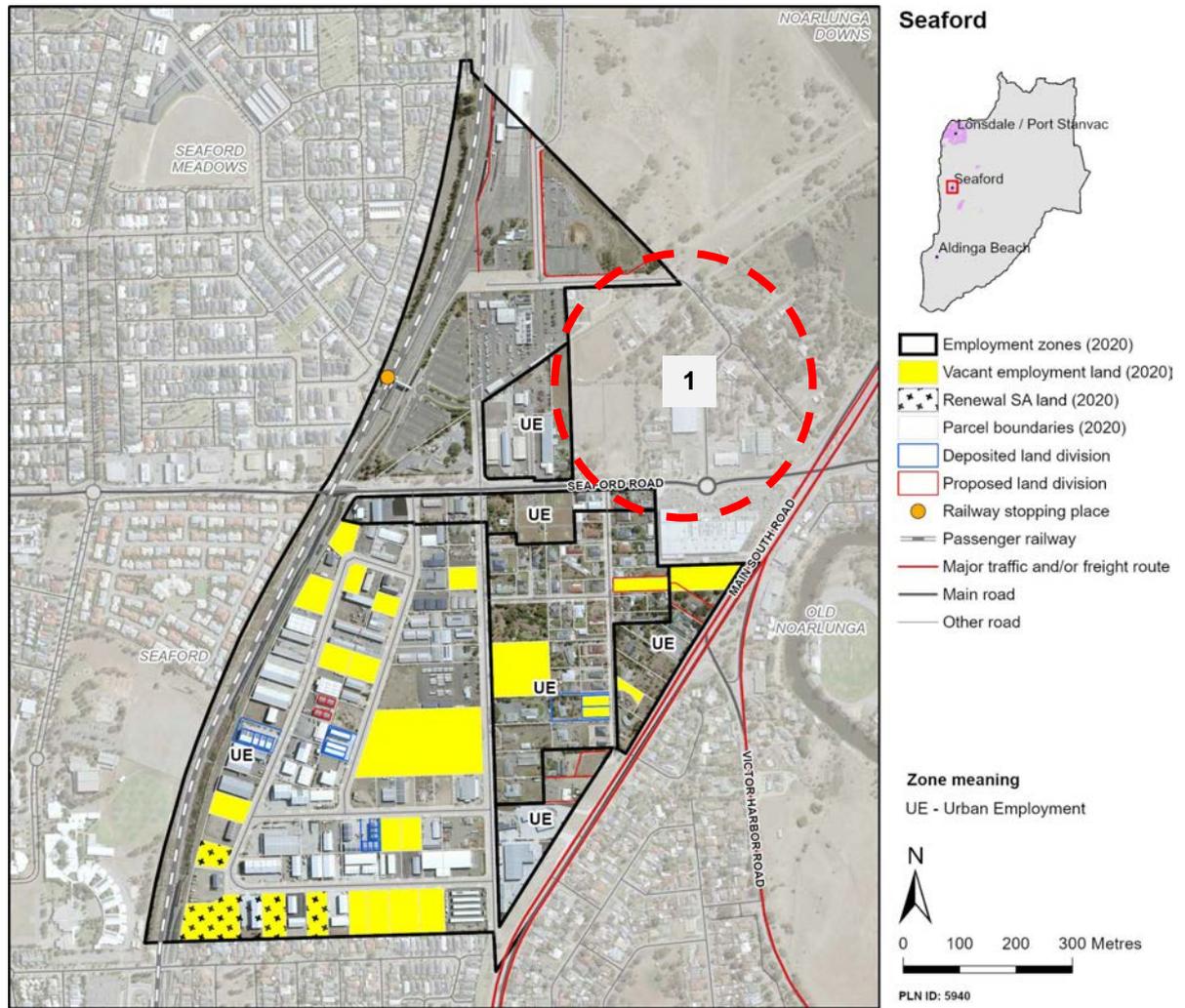


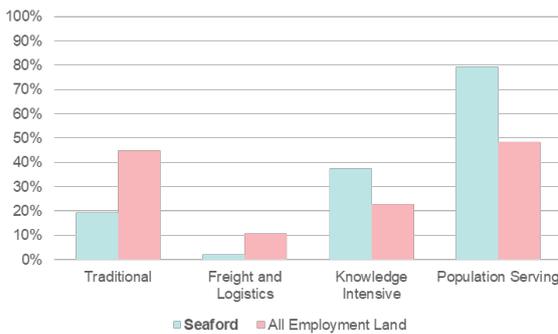
Figure 70: Seaford



KEY MEASURES

Total Number of Jobs 2020	300
Total Precinct Area (ha)	71
Occupied Land (ha)	61
Vacant Land (ha)	10
Future Employment Land (ha)	0

RELATIVE EMPLOYMENT SHARES (2030)



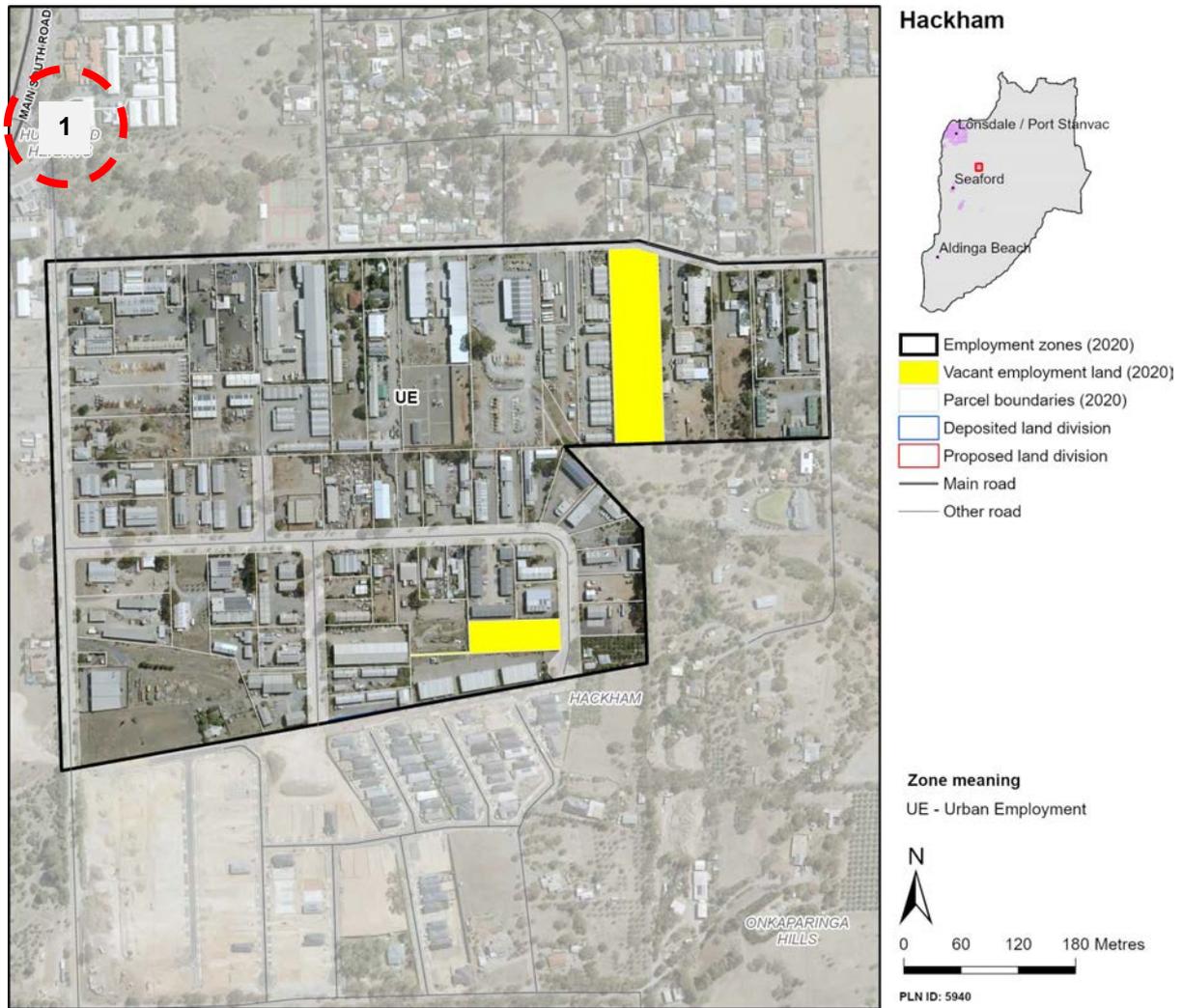
CONTEXT

- Second largest precinct for zoned land in the region.
- Land serviced by Main South Road, and within 2km of the Southern Expressway entrance.
- Land shown as area '1' was rezoned to Bulky Goods.
- Land located north of Seaford Road used to accommodate a park & ride facility and Council's field operations centre.
- Zoned land adjacent Main South Road is located in a Home Business Policy Area, which envisages lower intensity land uses, to operate in conjunction with a residential component.

ANALYSIS

- Population serving activities account for 80% of all employment within the precinct primarily driven by employment in retail trade.
- Growth is reliant upon continued growth in the local population and access to skilled worker pools.
- Duplication of Main South Road to Aldinga and Sellicks Beach, and the duplication of Victor Harbor Road to McLaren Vale may increase access to new markets.

Figure 71: Hackham



KEY MEASURES

Total Number of Jobs 2020	400
Total Precinct Area (ha)	30
Occupied Land (ha)	29
Vacant Land (ha)	1
Future Employment Land (ha)	0

CONTEXT

- Precinct is relatively well established.
- The second largest precinct in the region for total employment in 2020.
- The precinct is reliant upon the Gates Road (identified as '1' on map) intersection for left and right turn vehicle movements to Main South Road.

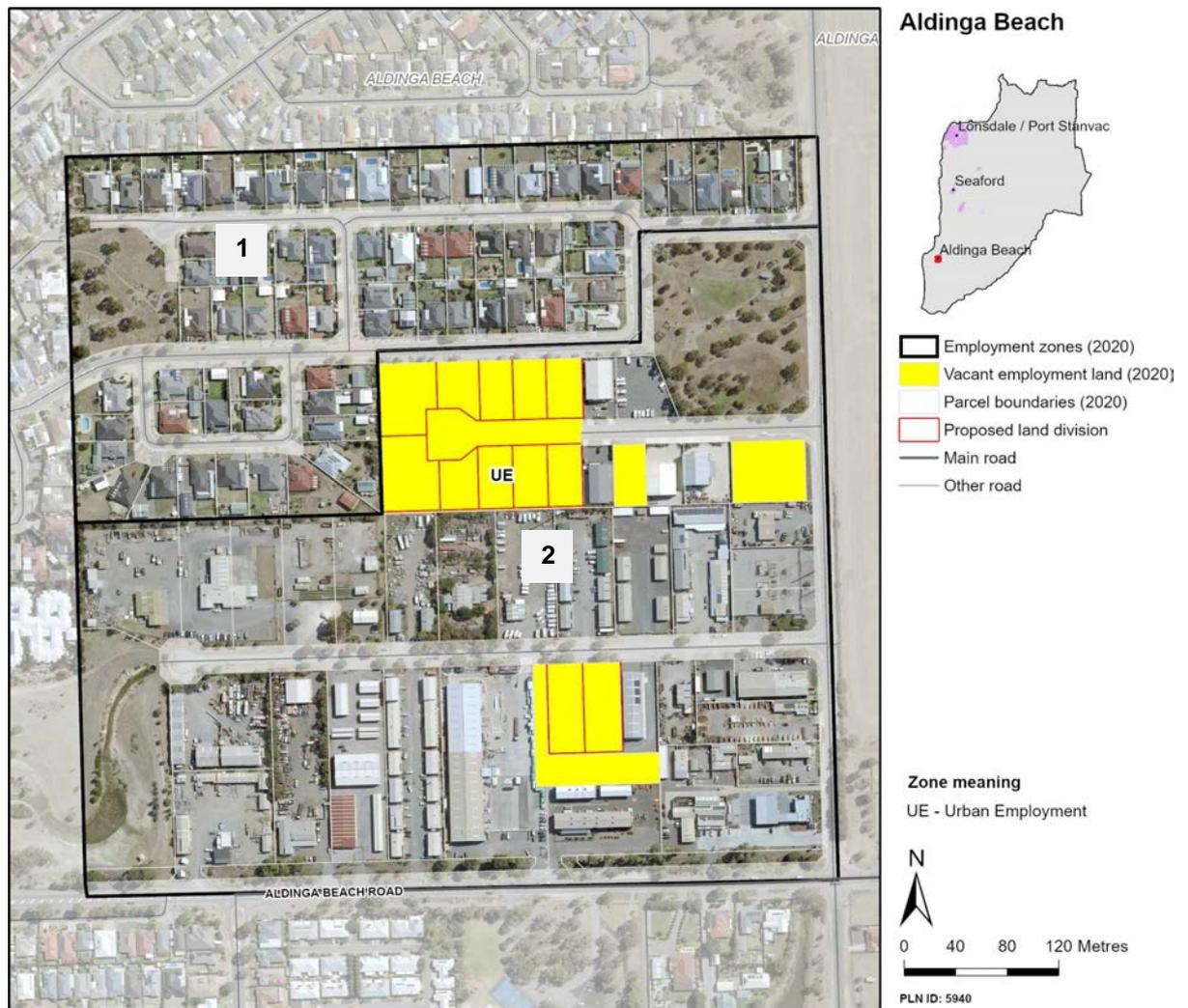
ANALYSIS

- The precinct has comparative advantages in knowledge intensive and population serving activities.
- Increased residential densities on adjacent land to the south (Onkaparinga Views), may impact the intensity of development within the precinct especially given limited vehicle access points to Main South Road.
- This precinct is likely to play a crucial role in supporting projected population growth in these new residential growth areas.
- Managing the inevitable interface issues associated with increased residential development in proximity to these employment lands will be critical.

RELATIVE EMPLOYMENT SHARES (2030)



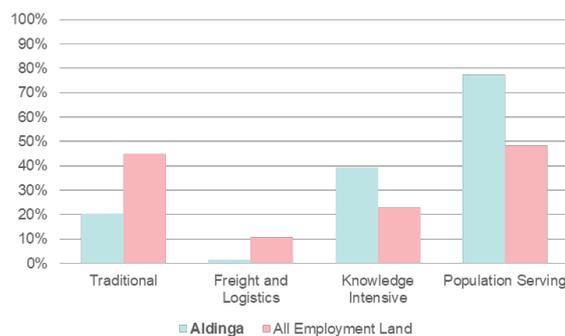
Figure 72: Aldinga Beach



KEY MEASURES

Total Number of Jobs 2020	100
Total Precinct Area (ha)	29
Occupied Land (ha)	26
Vacant Land (ha)	3
Future Employment Land (ha)	0

RELATIVE EMPLOYMENT SHARES (2030)



CONTEXT

- Land identified as '1' sits within a Home Business Policy Area, which supports smaller scale, lower intensity employment activities in conjunction with a residential use.
- Land identified as '2' sits within the more traditional form of employment zoning, accommodating a wider range of activities.
- Precinct is relatively well established.
- Land sits east of future urban growth land, which is likely to be developed in stages across the next 10 years.

ANALYSIS

- The precinct has comparative advantages in knowledge intensive and population serving activities, which account for over 77% of total jobs.
- This is driven by projected population growth associated with development of adjacent future urban land over the course of the next 10 years.
- Interface issues with existing businesses and new residential development will need to be carefully considered to minimise potential conflict.
- Growth may be supported by the proposed duplication of Main South Road to Aldinga.

7.6 Employment land summary and strategic issues

Table 21 sets out the comparative advantages¹ of Outer South employment land precincts by looking at the share of activity for each of the broad industry categories (BICs) relative to the average for metropolitan employment lands.

Analysis reveals that the region's largest precinct, Lonsdale / Port Stanvac, has strengths in 'traditional' employment activities, with large numbers of jobs in manufacturing. Its competitive advantage is partly explained as it is the only precinct of this size and type south of the CBD and is well separated from sensitive land uses.

Comparative advantage is an economic concept that recognises (in this case) certain employment precincts will have attributes that make them better suited to the provision of some activities over others.

By calculating the share of jobs by broad industry category (BIC) for each precinct in 2030 and comparing this figure to the share across all metropolitan employment lands, it is possible to understand the relative strengths of individual precincts, or their *comparative advantage*.

Freight and logistic employment activities play a relatively minor role in the Outer South, though there is potential for this to change in coming years. Significant producer regions nearby, large amounts of (theoretically) vacant land and potential for direct access to trade gateways via Sheriffs Road and the North-South corridor, are likely to open new opportunities for freight and logistics activities (as well as some forms of 'traditional' activities such as manufacturing).

There is a high representation of population serving and knowledge intensive employment in the three smaller Outer South precincts of Seaford, Hackham and Aldinga Beach.

Table 21: Comparative advantage analysis for identified precincts

PRECINCT	STRATEGIC ACTIVITIES			Population Serving
	Traditional	Freight and Logistics	Knowledge Intensive	
Lonsdale / Port Stanvac				
Seaford				
Hackham				
Aldinga Beach				

Comparative advantage, among top 5 assessed precincts
 Comparative advantage
 No comparative advantage

Based on the comparative advantage analysis the following conclusions can be drawn:

- The Lonsdale / Port Stanvac precincts have been identified as having one of the highest concentrations of jobs in traditional employment activities across Greater Adelaide, most notably manufacturing.
- These employment activities are supported by favourable separation distances to sensitive land uses (i.e. residential).
- All other precincts have a comparative advantage in knowledge intensive and population serving activities.
- Maintaining a comparative advantage in population serving activities within Seaford, Hackham and Aldinga's employment precincts will become more critical new residential development fronts are set to open over the next couple of years.

¹ Precincts are deemed to have a 'comparative advantage' if the proportion of workers in a broad land use category is more than 20% above the proportion in that category across all metropolitan employment lands.

- The region is not suited to freight and logistic based activities given lack of access to critical freight infrastructure, when compared to employment precincts in Adelaide West and the Inner North regions. This may change once the north-south corridor is completed.





www.plan.sa.gov.au

Attorney-General's
Department
Level 5, 50 Flinders Street
GPO Box 1815
Adelaide South Australia 5001