

Griffith City Council Employment Lands Strategy

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LIST OF ACRONYMS

CSP	Community Strategic Plan
DCP	Development Control Plan
GELS	Griffith Employment Lands Strategy
LEP	Local Environmental Plan
LSPS	Local Strategic Planning Statement
RAMJO	Riverina Murray Joint Organisation

1 INTRODUCTION

The planning for appropriately located employment lands, integrated with transport connections, with diverse housing options nearby and suitable for the development and operation of industrial activities is an important planning task for Griffith City Council. The number of workers in Griffith City increased from 12,134 persons in 2016 to 13,954 persons in 2021. With an estimated gross regional product of \$2.13 billion as at the end of June 2022, manufacturing (18.2%), health care & social assistance (11.4%) and agriculture, forestry & fishing (10.5%) are the top three industries contributing to employment within Griffith at 2021/22. In comparison, New South Wales recorded total employment in these industries of 6.2%, 14.2% and 2.1 % respectively (Profile.Id, 2023). This demonstrates how important manufacturing activity is to Griffith, underpinning a range of key economic sectors for the Griffith local government area (LGA) and providing employment for almost 2,900 people in 2021/22.

Griffith's Local Strategic Planning Statement 2020 (LSPS) includes a strategy to increase the supply of employment lands in strategic locations, including along the Southern Industrial Link Road which serves as a bypass for heavy vehicles to avoid travelling through the city centre. It undertakes to prepare an employment land strategy to address this issue. As such, this report forms the Griffith Employment Lands Strategy (GELS) which has been prepared in response to the LSPS actions.

The GELS guides the planning and suitable supply of employment lands, meeting projected demands for sustainable employment growth in the Griffith local government area (LGA). It is supported by an economic report (Appendix 1), which provides the evidence base for the recommendations that guides future strategic decision making by Council, in line with the priorities and opportunities identified through practical, economy growing interests to benefit the Griffith and broader community.

The GELS has been prepared to address all employment lands within Griffith and also provides the justification/ rationale to inform any potential changes to the Griffith Local Environmental Plan 2014 (LEP), which would need to be advanced through the preparation of a future Planning Proposal.

The GELS also recognises the importance of supporting the continued growth in employment in Griffith with robust and diverse housing supply including affordable options in close proximity to employers.

1.1 Vision

The LSPS establishes the overarching strategic vision for Griffith as follows:

Griffith is a thriving regional capital with a vibrant lifestyle and diverse economy; embracing community, heritage, culture and the environment (LSPS, 2020)

Building on from this, the Vision for the GELS is as follows:

Griffith is the agricultural powerhouse of the Riverina and is one of the most diverse and productive regions in Australia. It has a thriving economy, providing a diverse range of employment options, leveraging off its historical agricultural base. Employment opportunities are dynamic, providing for maximum value add, flexibility and innovation, which evolves in response to changing needs.

Griffith provides manufacturing, poultry production, wineries, construction, commercial and retail and construction. It also caters for continued growth and ensures adequate affordable housing is available for existing and new residents to ensure that they are able to both work and live in Griffith.

1.2 Griffith City Snapshot

Griffith City is located in the Riverina Region of south western New South Wales, approximately 450 kilometres north of the Melbourne CBD and 570 kilometres west of the Sydney CBD. Griffith City is accessed via Burley Griffin Way to the east and Kidman Way to the south and north west. The region can also be accessed via direct flights from Sydney to Griffith Airport (refer Figure 1).

“Griffith was established in 1916 as part of the NSW State Government’s Murrumbidgee Irrigation Area project to supply irrigation from the Murrumbidgee River in western NSW. Initially known for dryland cropping and livestock production, the Western Riverina region became prominent in rice, cereals, citrus, grapes and fruit production.

Recently, producers have adopted more sustainable farming practices and further diversified into high value, long yield crops such as nuts, cotton, olives and vegetables. The emergence and growth in poultry production has been significant, with wine production, ranging from boutique wineries to some of the largest in the world, also playing a big part in our region’s growth. Griffith’s largest industry is the manufacturing industry, employing 2,742 people with an output of \$969 million in 2019.

A key feature of the Western Riverina region is the scale of its operations and the intensity of investment in the agribusiness, food and beverage manufacturing sectors. Griffith is the headquarters to some of Australia’s most innovative and sustainable industry leaders, with 87% of Griffith businesses believing that innovation and technology is a key strength in their business (2019 Griffith Business Survey).” (Local Strategic Planning Statement, 2020)

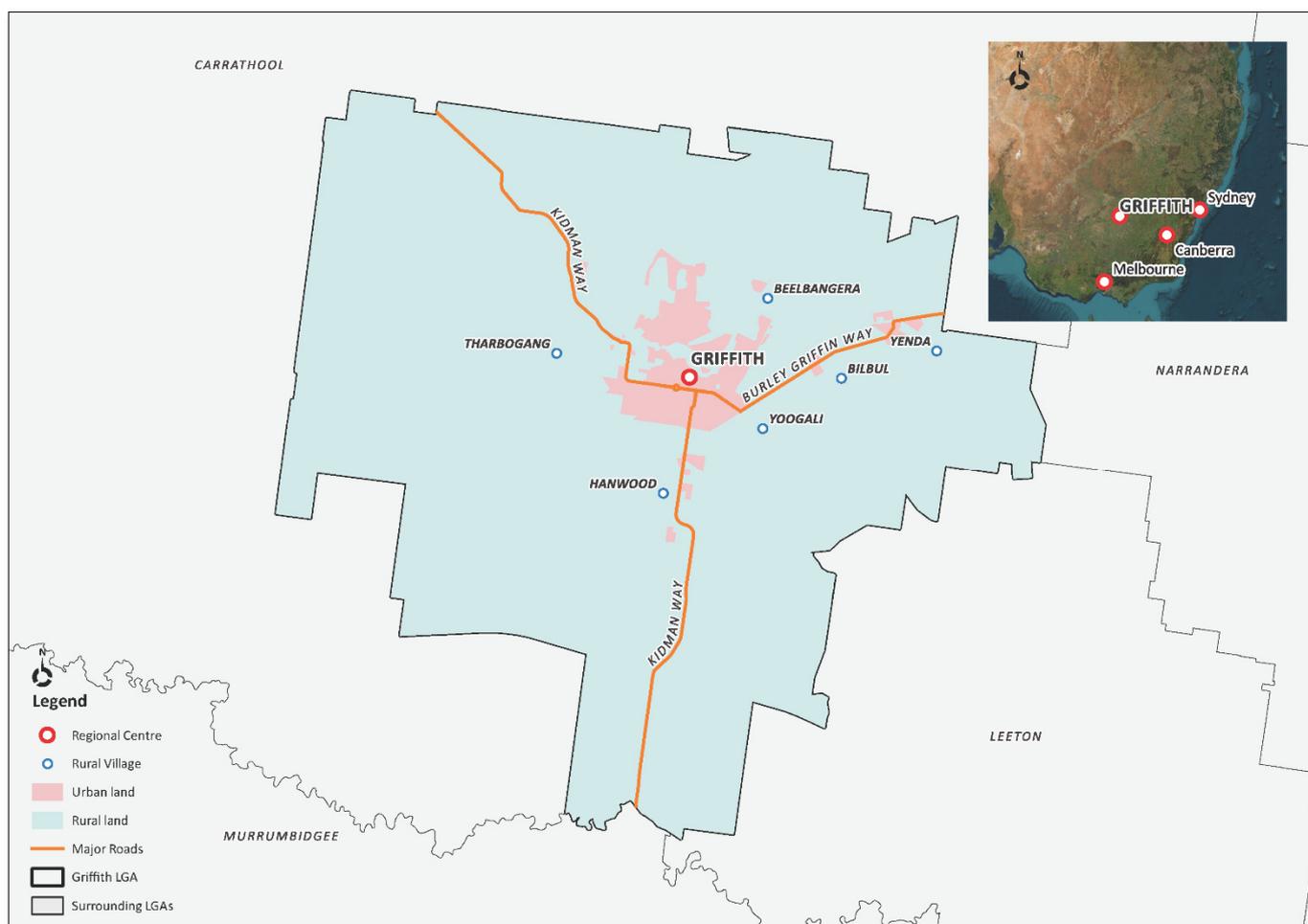


Figure 1 – Map of Griffith City Council

1.3 GELS Structure

The GELS has been structured as follows:

1. Section 1 – Introduction
2. Section 2 – Background Policy Review
3. Section 3 – Demographics and Key Employment Issues Overview
4. Section 4 – Employment Activity and Demand and Supply Analysis

- 5. Section 5 – Employment Planning Issues for Griffith
- 6. Section 6 – Recommendations

2 BACKGROUND POLICY REVIEW

A review of the relevant background policy documents has been undertaken to inform the preparation of the GELS. These documents provide important background context in terms of Council’s established policy framework for the management of employment lands and the desired future for employment and economic development for the Griffith LGA.

There are a wealth of strategies, policies and other planning documents which establish some of the baseline information and underlying policies to inform the development of the GELS. To varying degrees these documents will influence the GELS, however the LSPS in particular establishes a clear action to prepare an employment lands strategy in order to test the need for additional employment lands within the LGA. Specifically, this relates to the new Southern Industrial Link Road providing opportunities for new employment lands or highway services lands to locate. This has been investigated through the development of the GELS.

Figure 2 demonstrates the relationship of the below strategies and documents to the development of the GELS.

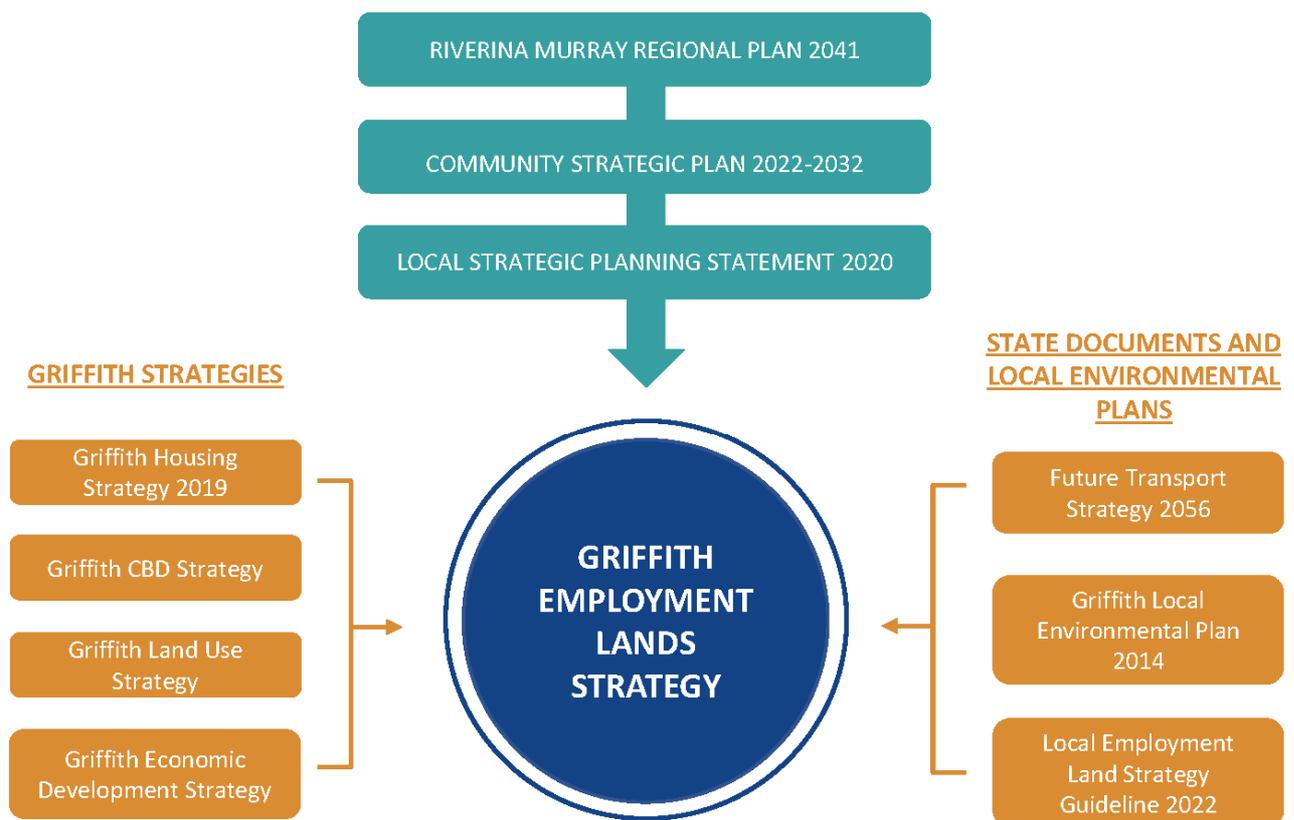


Figure 2 – Relationship of Documents to GELS

2.1 Riverina Murray Regional Plan 2041



The Riverina Murray Regional Plan 2041 highlights Griffith as a major transportation and logistics hub for the region. It also notes that as a result, there can be higher rates of heavy vehicle traffic through the city centre than would be expected in similar contexts. Griffith Airport is also key regional infrastructure that should be protected from encroachment of incompatible development.

The Regional Plan supports the need to provide adequate land in Griffith for employment purposes to allow Griffith to fulfill its role as a regional hub.

The competitive advantages for Griffith being a key agricultural area, aligns with the regional goals of the Riverina Murray Regional Plan 2041. It identifies the critical functions provided by the Murrumbidgee Irrigation Area (MIA), not just for the region's irrigation network, but also significant employment opportunities associated with both the infrastructure and the agricultural lands it services.

In particular, the Regional Plan identifies priority growth sectors in agribusiness with regional actions, including:

- Removing restrictive land use zonings to encourage agribusiness diversification;
- Ensuring employment lands considers the management of interfaces with agricultural lands; and
- Supporting the agricultural supply chain by identifying and considering freight and logistics opportunities.

2.2 Griffith Community Strategic Plan 2022-2032 – Guiding Griffith 2040

The Griffith City Council Community Strategic Plan (CSP) is based on the aspirations, knowledge and values of the Griffith community.

The CSP aligns with the NSW State Plan, Riverina Regional Plan and Riverina Murray Joint Organisation (RAMJO) priorities and has been prepared with regard to the social justice principles of access, equity, participation and rights, and addresses social, environmental, economic and governance matters (Griffith CSP, 2022).

The CSP integrates a number of plans and encourages more holistic planning throughout the city. It prioritises the following areas:

- Creating accessible and safe, liveable places to live
- Promoting and celebrating our cultural diversity and cosmopolitan identity
- Developing Griffith as a centre of choice for trade, business, health, recreation and employment
- Facilitate sustainable growth

The CSP raises the following matters related to the provision of employment within Griffith:

- Improving service levels in the hospital
 - Improving outpatient and community care
 - World class public service
 - Boost industry, workforce and jobs which is one of the RAMJO strategic statement priorities
- Be a location of choice for innovative agriculture and manufacturing
 - Strategic land use planning and management to encourage investment in the region.
 - Provide, renew and maintain a range of quality infrastructure, assets, services and facilities.

The CSP references creating opportunities for apprentices, trainees and work experience and starting up businesses. Undertaking education and vocational training are also measures which will contribute to a skilled workforce within Griffith.

2.3 Griffith Land Use Strategy: Beyond 2030



The Griffith Land Use Strategy: Beyond 2030, is a non-statutory planning policy that explores potential changes to land use in response to projected growth in the region. Non-residential expansion opportunities that are identified in the Strategy include more land availability for food processing facilities, additional large-lot industrial sites that are accessible for larger vehicles and anticipated demand for service industries and storage associated with the Griffith Airport redevelopment.

Whilst the Strategy has since been superseded by the Local Strategic Planning Statement, it nevertheless demonstrates continuity and consistency in the vision for Griffith as an industrial and logistics hub, which has been well-established over many years.



2.4 Future Transport Strategy 2056



The Future Transport Strategy 2056 sets the 40-year vision, directions and outcomes framework for customer mobility in NSW, guiding transport investment over the longer term. It is being delivered through the strategy and a series of plans such as The Services and Infrastructure Plans, The Future Transport Technology Roadmap, and Supporting Plans.



The Transport vision for regional NSW is to improve local connections for communities and customers within, to and from their region. A key pillar of this is to facilitate a 'hub and spoke' network across NSW, to enable local access for communities to central hubs that provide services, employment and social interaction. Improved connectivity will also be a key enabler of regional freight economic development. The Strategy identifies Griffith as a Regional City Transport Hub, as shown in Figure 3.

As outlined in the Strategy, infrastructure and services were historically focused on north-south transport connections in regional NSW. Future Transport seeks to improve east-west connectivity, capacity and safety between coastal and inland and remote populations, as well as freight linkages such as Inland Rail and inland ports.

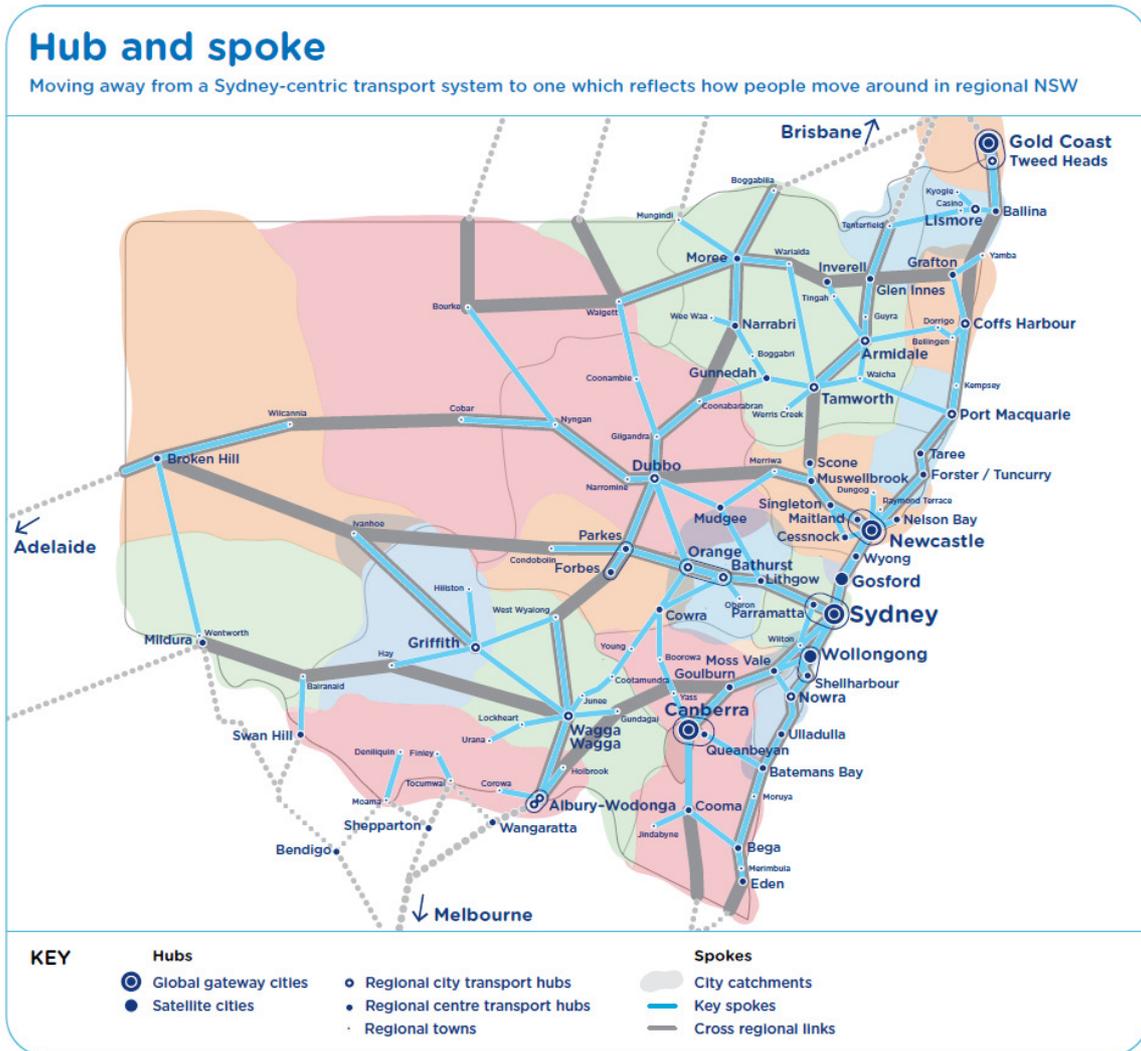


Figure 3 - Hub-and-spoke network (Source: Future Transport Strategy 2056)

Other major initiatives across regional NSW include the Fast Rail Network Strategy and Regional Rail Fleet. The vision for the fast rail network is to support growth in NSW’s regions, generating job opportunities and attract skilled workers. This will provide more choice for people to live and work in regional NSW, with improved connectivity between regional centres, and from cities and international gateways.

Bus services are also being upgraded, benefitting regional cities around NSW. 16 Regional Cities program aims to identify gaps and opportunities with current bus services in each city and deliver improvements to better meet customer needs, making it easier for them to get where they need to go. Improvements include adding in more services to current routes, creating new routes, extending service hours, putting in new types of services such as On Demand public transport and providing services that connect easily to bordering States. Griffith is one of the regional cities to benefit from the improvements.

2.5 Griffith Local Strategic Planning Statement 2020



The Griffith Local Strategic Planning Statement (LSPS) identifies the 25 year vision for Griffith and the strategic planning actions needed to facilitate the achievement of the vision and to direct how future growth will occur.

It also implements Council’s Community Strategic Plan (CSP) – Guiding Griffith 2040 and the Riverina Murray Regional Plan, and is aligned to the themes within the CSP, as well as the overarching Plan Goals of the Riverina Murray Regional Plan.

The key economic drivers for Griffith which are explored in the LSPS include:

- Agriculture;
- Poultry production;
- Manufacturing;
- Wineries;
- Commerce and retail;
- Construction; and
- Tourism and hospitality.

Growth of employment lands is one of the key planning priorities of the LSPS. Several of the identified actions and implementation strategies which relate to employment, include:

1. Investigate the adequacy and location suitability of Griffith's Industrial Lands, and support industrial zoning at the Griffith Airport;
2. Support the growth of a health and educational precinct;
3. Investigate suitable zoning for the Southern Industrial Link Road;
4. Extend commercial area to include a supportive mix of uses including residential; and
5. Create additional lot frontage in the CBD.

Griffith City Council is currently undertaking a Health Precinct Master Plan in the precinct around Griffith Base Hospital redevelopment site, which will address the specific needs of that precinct. The LSPS identifies the preparation of an industrial lands strategy as a specific action. It also identifies that the new Southern Industrial Link Road would provide opportunities for new employment lands or highway services lands to locate. Council will investigate suitable employment lands and commercial zoned lands around the Southern Industrial Link Road, through the development of the employment lands strategy.

2.6 Griffith CBD Strategy



The Griffith CBD Strategy seeks to rejuvenate the city centre in the area bound by Wakaden Street, Coolah Street, Crossing Street and Kookora Street. The Strategy aims to develop an attractive city centre that makes people want to visit more frequently and stay for longer periods of time, allowing businesses greater opportunity.

The main recommendations presented in the strategy include:

- Upgrading Kooyoo Street and Yambil Street as inviting areas to walk, socialise and stay – Stage 1 of the Kooyoo Street redevelopment is complete and Stage 2 is under construction and expected to be completed in late 2023.
- Redeveloping Neville Place into a civic open garden
- Upgrading Banna Avenue to promote the main street and retail core
- Developing Olympic Park into a major Youth precinct and activity zone
- Redeveloping the Main Canal as a recreational attraction in the city
- Upgrading off street car park to provide a higher level of amenity

Completion of streetscape works within the city centre improved the CBD's sense of vibrancy and vitality. The CBD, the town centre generates significant levels of human engagement for shopping, education, work and services. This will hopefully encourage further businesses to locate within the CBD, increasing both living and employment opportunities.

2.7 Evolve Griffith 2021-2025 – Economic Development Strategy



Evolve Griffith 2021-2025 is Council’s Economic Development Strategy, which sets out a five-year plan to support the vibrancy, diversity and sustainability of the City of Griffith to 2025 and beyond. It presents a plan of action to facilitate and support local economic activity into the future. It does this by (among other things), encouraging partnerships and alliances between Griffith City Council, State and Federal government agencies, regional development bodies, local businesses and the community. It seeks to deliver a clear, actionable and achievable road map for economic development focused on the growth and retention of existing businesses and residents; new industry employment; the attraction of visitors; and increased employment.

The Strategy establishes a detailed understanding of the economic structure and dynamics of the Griffith local government area (LGA) and relevant regional policy settings which influence and inform a framework for prosperity. The Strategy also articulates economic development issues, challenges and opportunities for Griffith City Council to consider in its role as a facilitator and promoter of economic development.

The three key themes of the Strategy are all of relevance to the development of employment opportunities within Griffith and they include:

- A Location of Choice for Innovative Agriculture & Dynamic Manufacturing
- A Location of Choice for Business Investment, Employment, Learning & Living
- A Destination of Choice for Regional Tourism

The GELS seeks to support the objectives of the economic development strategy in identifying opportunities to consolidate areas of employment and consider new areas of employment opportunities.

2.8 Griffith Local Environmental Plan 2014

Within the current Griffith LEP2014 there are several zones which support varying levels of employment land uses. In December 2021, the reform of employment zones in New South Wales was finalised, with five employment zones and three supporting zones introduced into the Standard Instrument (Local Environmental Plans) Order 2006, to replace the existing zones.

Table 1 details the correspondence of current employment zonings and new zonings within Griffith City.

Table 1 - Translation of Current and New Zonings within Griffith City

Previous zoning	New Zoning
IN1 General Industrial	E4 General Industrial
IN3 Heavy Industrial	E5 Heavy Industrial
B7 Business Park	Mostly to E3 Productivity Support, with a land parcel to E4 General Industrial
B6 Enterprise Corridor	E3 Productivity Support
B4 Mixed Use	MU1 Mixed Use
B1 Neighbourhood Centre	E1 Local Centre
B2 Local Centre	E1 Local Centre

Figure 4 provides an overview of the geographic location of existing employment zones within Griffith.

Table 2 outlines the intent for each of the new employment zones, as relevant to Griffith.

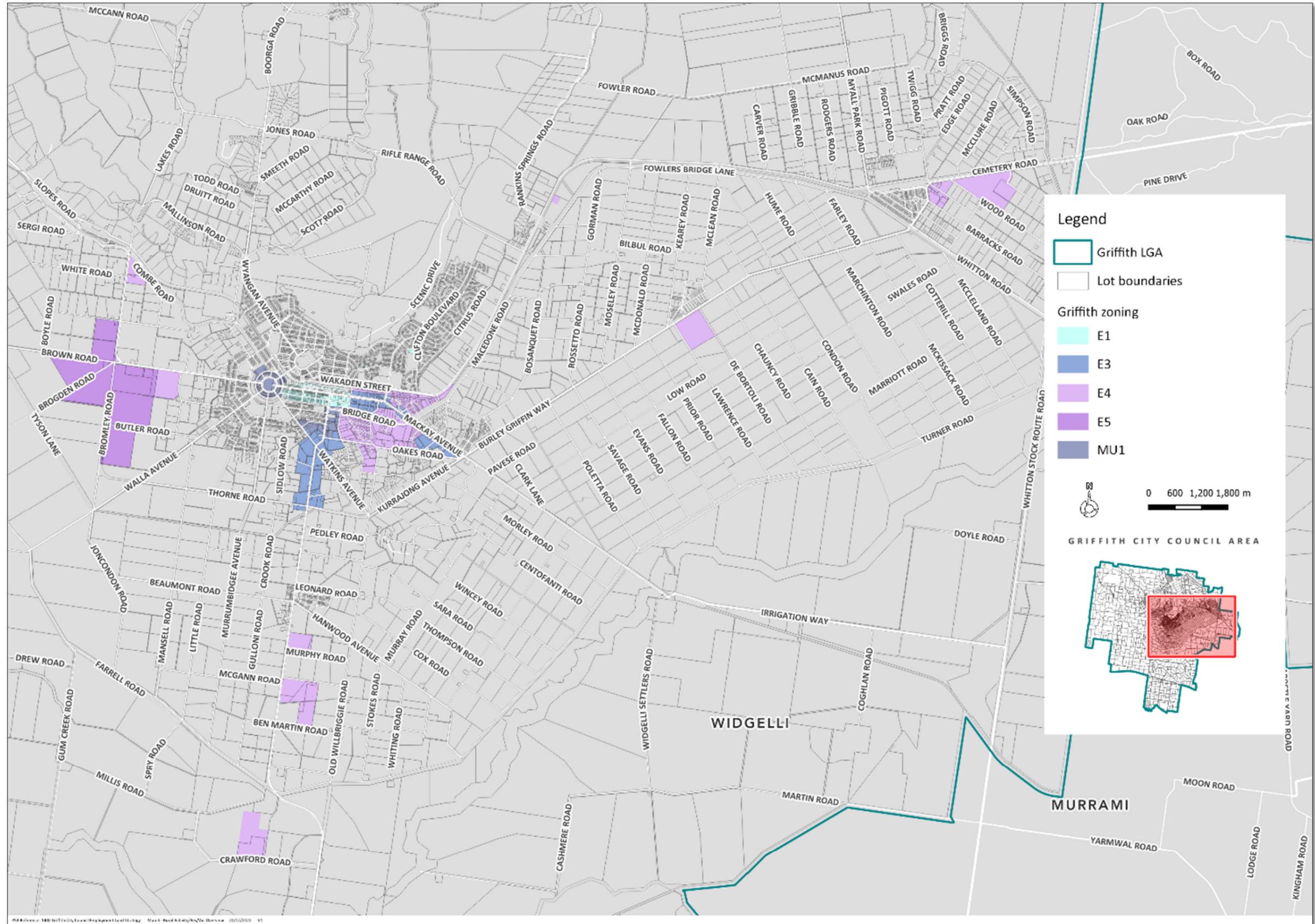


Figure 4 – Griffith City Existing Employment Zones

Table 2 - Retail and Industry Zone Hierarchy – Griffith City

	Strategic Intent	Desired Characteristics	Longer Term Considerations
Centre Uses			
E1 Local Centre	<p>To provide centres of all sizes and scales that offer:</p> <ul style="list-style-type: none"> ▪ A diversity of retail, business, office, community, accommodation and entertainment uses to the community ▪ A focus for active vibrant communities to come together ▪ Employment opportunities in accessible locations ▪ Where available, a focus for public transport 	<ul style="list-style-type: none"> ▪ Commercial focus, either as offices, retail and business premises or a mix of uses ▪ A range of uses and services commensurate to the size of the centre ▪ Entertainment and dining options, tourist and visitor accommodate, after hours uses, community and social infrastructure 	<ul style="list-style-type: none"> ▪ Facilitate centres as community hubs, offering shopping services and events ▪ Support the night-time economy ▪ Accommodate collaborative and co-working spaces ▪ Potentially include residential development on upper levels to establish a population catchment for a vibrant centre ▪ Accommodate some local light industries
MU1 Mixed Use	<ul style="list-style-type: none"> ▪ To support a mix of compatible land uses including residential, commercial and light industrial ▪ To transition between uses (e.g. a centre and another land use such as residential) ▪ To apply to mixed use centres, along corridor, or surrounding centres where genuine mixed uses are sought ▪ Can continue to be applied to existing B4 areas that are primarily residential 	<ul style="list-style-type: none"> ▪ Activities at ground floor and on street fronts ▪ Differentiation between a centre and urban support areas in a mix of zones to manage the impacts of out of centre development ▪ Well-designed mixed use developments are vibrant and support community needs 	<ul style="list-style-type: none"> ▪ Manage out of centre development ▪ Use permitted land uses to shape the intent and desired outcome of the area
Industrial Uses			
E3 Productivity Support	<p>To provide land and floor space for:</p> <ul style="list-style-type: none"> ▪ A range of urban or rural services that cater to and support the local population and businesses ▪ Businesses not suited to a centre location <p>Industries and activities that are lower on the land vale hierarchy than retail and commercial office uses</p>	<ul style="list-style-type: none"> ▪ Fine grain and/or large format employment ▪ Land and floorspace responses to local business need ▪ Mix of specialised niche or trade focussed retail, including business focused retail ▪ Mix of light industrial, office, infrastructure and other urban service uses ▪ Capability to service the needs of local workers with food and drink, convenience retail and child care ▪ Low impact creative and emerging industries 	<ul style="list-style-type: none"> ▪ Allow a broader range of permissible land uses to accommodate emerging and changing industries ▪ Cater to a range of floor pate and floor to ceiling requirements across a variety of locations
E4 General Industrial	<p>To provide suitable land and floor space for a range of industrial activities</p>	<ul style="list-style-type: none"> ▪ General and light industries, warehousing and supporting businesses ▪ Complementary uses including office (associated with industrial), auto-related industry (excluding sales), large format indoor recreation, artisan food and drink 	<ul style="list-style-type: none"> ▪ Protect land for industrial purposes ▪ Accommodate new industries and changing requirements of industries ▪ Allow for industries to innovate and evolve

	Strategic Intent	Desired Characteristics	Longer Term Considerations
		<ul style="list-style-type: none"> ▪ Capability to service the needs of local workers ▪ Access to arterial roads and freight routes ▪ Diversity of lot sizes, with capability to support a mix of fine grain and large format retail uses 	<ul style="list-style-type: none"> ▪ Co-locate industry with businesses that directly support industry or have similar amenity impacts
E5 Heavy Industrial	<ul style="list-style-type: none"> ▪ To provide suitable areas for industries that need to be separated from other land uses ▪ To minimise the impact of heavy industry on other land uses ▪ To protect land suited to heavy industries 	<ul style="list-style-type: none"> ▪ Capability to support hazardous or offensive industry and storage with buffers to sensitive receptors ▪ Capability to support depots, warehousing and storage premises that support heavy industry ▪ Physically separate from other higher amenity land uses ▪ Good access to arterial roads and freight routes ▪ Large lot as required by safety and amenity 	<ul style="list-style-type: none"> ▪ Continue to provide sites suited to heavy industry

The GELS gives consideration to the need for additional areas of land to be zoned for employment purposes, based on the zoning classifications outlined above. Any areas for potential new employment lands must be justified based on the economic analysis undertaken in support of the GELS, which has provided a supply and demand assessment of land that is required, the land that is available to meet the projected demand and whether the land that is currently available for employment purposes is fit-for-purpose and meets the needs of the market.

2.9 Griffith Housing Strategy 2019

Whilst the GELS deals primarily with employment lands, it is also essential that any employment opportunities provided within Griffith can be realised, in terms of workers seeking to relocate to Griffith also having suitable options for meeting their housing needs. As such, the GELS also strongly promotes the development of sufficient housing to support the needs of the workforce.

Griffith City Council adopted the Griffith Housing Strategy in 2019. The strategy is a detailed analysis of the current state of housing availability in Griffith and suggests methods of increasing access to diverse housing options for key target groups in the City experiencing housing stress.

The Housing Strategy determined that Griffith is under-supplied with smaller dwellings and requires a larger supply of 1 and 2 bedroom strata dwellings. The projected increase in the number of dwellings required is 1,744 dwellings by 2036. To enable suitable development, Griffith City Council amended its Development Control Plan (DCP) to facilitate the development of diverse, affordable and lower cost housing by including amendments to Floor Space Ratios, providing for reduced parking requirements for Residential flat buildings and Multi dwelling housing. The removal of height restrictions and reduction of private open space per ground floor have also been applied to dwelling requirements in the CBD. Council are also encouraging increased development of residential flat buildings through re-zoning amendments to the Local Environmental Plan (LEP).

The GELS supports the provision of employment lands in close proximity to residential land providing a diversity of housing options including affordable housing.

3 DEMOGRAPHICS AND KEY EMPLOYMENT ISSUES

This section provides an overview of the key demographic and employment issues for Griffith which are relevant to the development of the GELS.

3.1 Summary of Key Socio-Economic Characteristics

Figure 4 provides an overview of the key socio-economic characteristics of Griffith. The GELS addresses population, age, growth in household type and educational attainment. In relation to the economy, the key factors include key economic sectors and growth that particularly draw on industrial land and finally, consideration is given to housing, noting the inexorable link between the need for appropriate housing to attract and retain a stable work force.

Griffith is a city that is younger compared to the region and New South Wales, having an average age of 39.4, compared with 40.2 for the Western Riverina region and 40.2 in New South Wales. Griffith also has a relatively high incidence of couple families with children (33%). The region is considered relatively affordable, with significantly lower mortgage and rent payments (\$1632/month and \$283/week respectively), compared to New South Wales (\$2,425/month and \$441/week respectively).

Workers within the region are less likely to have a post school qualification (37.4%, compared with 50.4% for New South Wales). This could be influenced by fewer in-person training opportunities that exist within Griffith compared with larger regional centres. The key sectors of employment are manufacturing (2,861 persons or 20.5%), retail trade (1,555 persons or 11.1%), agriculture, forestry and fishing (1,609 persons or 11.5%) and health care and social assistance (1,765 persons or 12.7%). Between 2016 and 2021, most of these sectors were key drivers of additional employment opportunities. Workers within Griffith City were typically sourced locally (over 95%) or from the surrounding LGAs of Murrumbidgee, Carrathool and Leeton.

The population has increased by 0.7% per annum in the past ten years, exceeding 1% per annum in this period for Griffith (West), Griffith (Central – South) and Griffith (East) – Collina. Population growth for the city as a whole was particularly high in 2014, 2015, 2017 and 2018 at 1.0% per annum.

Outside of Griffith (East) – Collina, there has been relatively little growth in the size of the working age population. Over the next twenty years, population projections prepared by Informed Decisions suggest growth is anticipated to be highest in Griffith (East) – Collina and Lake Wyangan – Nericon.

Despite relatively steady population growth in the past ten years, the employment outcomes of residents have improved significantly between 2016 and 2021. Growth in the number of persons employed full time, translated to a significant decline in the unemployment rate to 3% in 2021, compared with 4.9% in New South Wales.

The key agricultural commodities in Griffith City include poultry processing, cereal crops, grapes and oranges. Poultry processing is particularly significant within the regional context, accounting for approximately a quarter of the value of production within the Riverina SA4.

Griffith City is agriculturally focussed, both in terms of production and processing. The significant decline in the unemployment rate between 2016-2021 is indicative of a prosperous regional economy. Whilst Griffith City offers affordable housing relative to other parts of New South Wales, the city is generally comprised of a lower skilled workforce. To ensure the continued success of Griffith City, it is imperative that the skills of the workforce remain tailored to the evolving needs of established businesses, particularly given that labour is typically sourced from within Griffith itself.

Increasing the provision of housing and accommodation is also essential in ensuring that any employment opportunities arising within Griffith can be realised by providing sufficient housing to accommodate workers looking to relocate to Griffith.

The skills of the local workforce must remain tailored to the evolving needs of businesses, particularly given that labour is typically sourced from within Griffith itself.

The provision of housing is essential in ensuring that any employment opportunities arising within Griffith can be realised by providing sufficient housing to accommodate workers looking to relocate to Griffith. Options to increase the supply of diverse housing options in Griffith in close proximity to employment should be supported.

GRIFFITH SNAPSHOT

OUR AGE

19.4%
of Griffith's population aged from 0-14 years old
COMPARED TO
NSW with 18.2%



...lower average age of
39.4 compared to
NSW with 40.2



HOUSEHOLD STRUCTURE

33%
couple families with children



26.8%
couple families without children



2+
persons
2.7
average household size



INDUSTRY SECTORS



Lower blue collar workers due to dominance in Agriculture and Manufacturing

KEY SECTORS:



20.5%
Manufacturing



11.5%
Agriculture, Forestry & Fishing



12.7%
Health Care and Social Assistance

KEY AGRICULTURAL COMMODITIES:

- Poultry Processing
- Cereal Crops
- Grapes
- Oranges

EMPLOYMENT



Full-time employment of
62.9%

HIGHER THAN



NSW with
60.3%



Unemployment rate of
3.0%

LOWER THAN



NSW with
4.9%

EDUCATION



Less likely to have a post-school qualification
COMPARED TO
NSW



Residents who held a post-school qualification are **most likely** to hold a certificate qualification



31.3%
of households fully owning a home
COMPARED TO
NSW with 30.3%



30.5%
of households rent a home
COMPARED TO
NSW with 31.3%

HOUSEHOLD OWNERSHIP

Average weekly household income of
\$2,011 per week **lower than** the NSW average of \$2,279 per week

Average monthly housing loan repayments of
\$1,632 per week **lower than** the NSW average of \$2,425 per week

Average weekly rent payment repayments of
\$283 per week **significantly lower than** the NSW average of \$441 per week

HOUSEHOLD INCOME

Figure 5 – Griffith City Socio-Economic Profile Infographic

3.2 Employment Trends

Technology advancements over recent years have provided for increasing automation in processes. Of relevance to Griffith is that these innovations have enhanced crop and manufactured yields and quality control and allowed for early intervention when growing or manufacturing conditions require adjustment.

However, automation can also displace low skilled workers (in the absence of on-the-job training), with manual jobs increasingly declining. It is important to provide opportunities to upskill the local workforce, to ensure that the skill sets continue to align with the evolving needs of businesses within Griffith. It is anticipated that additional skill sets could be delivered both through local training institutions and through remote learning (e.g. through CCU Western Riverina).

In Griffith, the automation of manufacturing processes can enhance employment opportunities for the monitoring of automated systems in the manufacturing process, the repair and maintenance of machinery used in manufacturing which is increasingly sophisticated and the development of bespoke technology responses to support the manufacturing sector. These opportunities could be delivered both within Griffith and through businesses servicing the Griffith region.

A number of innovative approaches established to intensify agricultural and horticultural production have the potential to be applied in Griffith. This includes the potential for a range of uses for by-products of poultry processing as well as more broadly in industrial processes.

Griffith should also consider ways to provide for a for a range of lifestyle opportunities and services to entice more knowledge workers to relocate to Griffith, rather than simply a place to work. Griffith City would need to ensure that employment precincts such as the town centres, neighbourhood centres, and industrial areas are considered appealing and offered a range of services and facilities to attract and retain knowledge workers.

In addition, should there be an increase in the available office space for short term leasing or co-working facilities (which is understood to be limited in its availability), then it is imperative that these facilities are well connected to the global network through substantial technological infrastructure.

It is important to provide opportunities to upskill local Griffith residents to ensure that these skill sets align with the evolving needs of businesses.

Consideration should be given to ways to provide for a for a range of lifestyle opportunities and services to entice more knowledge workers to relocate to Griffith. Employment precincts such as the town centre, neighbourhood centres, and industrial areas must be considered appealing and offer a range of services and facilities to attract and retain knowledge workers.

Short term lease and co-working office space facilities should be provided which are well connected to the global network through substantial technological infrastructure.

3.3 Griffith Freight Network

The Riverina Murray Regional Plan highlights the Riverina Murray as one of the most significant locations for freight and logistics in Australia. The Regional Plan contains several priorities which are applicable to Griffith: the development of freight hubs and intermodal facilities, such as the Western Riverina Intermodal Freight Terminal located between Griffith and Leeton, have the potential to reshape the way freight is moved – particularly with the potential from the Inland Rail.

According to the Griffith Local Strategic Planning Statement 2020 (LSPS), Griffith is actively developing new by-pass routes (Industrial Link Roads) to ensure heavy vehicles avoid Griffith's urban areas. These new Industrial Link Roads would provide opportunities for new employment lands or highway services lands to locate.

The Future Transport Strategy 2056 includes the New South Wales Freight and Ports Plan which has five objectives:

1. Increased economic growth;
2. Increased efficiency, connectivity and access;
3. Greater freight capacity;
4. Improved safety; and
5. Enhanced sustainability.

Regional New South Wales' freight task is forecast to grow by around 12 per cent by 2036, from 255 million to 286 million tonnes. The forecast growth in the freight task will require a higher capacity and efficient freight network. One way of reducing overall truck movements is to increase the volume of freight carried per trip.

The implementation of the New South Wales Heavy Vehicle Access Policy Framework (HVAPF), which outlines a strategic approach to heavy vehicle access in New South Wales for both state and council roads, will aim to achieve safe and efficient movement of road freight in New South Wales now and into the future. The framework will establish networks for modern high-productivity vehicles (HPVs) - these are vehicles that can carry more payload than a B-double, such as Performance Based Standards (PBS) vehicles, road trains, and other restricted access vehicles including those operating at higher mass limits.

In regional New South Wales, the government will continue regulatory reforms to ensure the efficient working of supply chains from farms, mines and processing plants to trading ports and domestic markets; and plan and prioritise key infrastructure upgrades, including access to the 'last mile' of local road and bridge networks for heavy vehicles.

Inland Rail will open up new routes and increase the demand for rail freight paths on a range of corridors. Figure 6 shows Griffith is located on Country Regional network, which is connected to Inland Rail existing and future links.

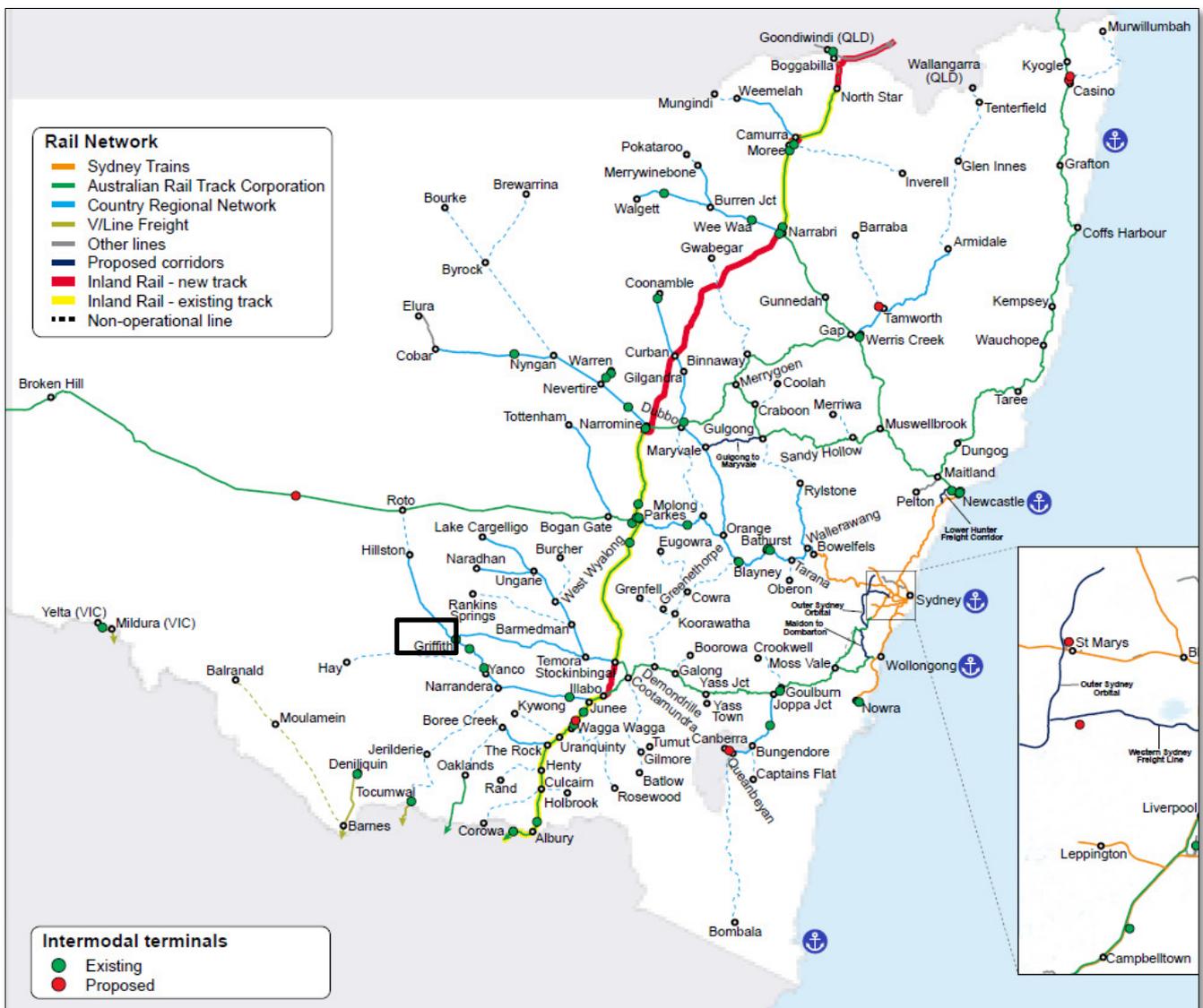


Figure 6 - Regional and outer metropolitan NSW freight rail network (Source: Future Transport Strategy 2056)

Given Griffith's heavy reliance on manufacturing and agriculture as two of its key employment sectors, having access to a high quality and efficient freight network is paramount to its ability to efficiently service these sectors now and into the future. It is important that Griffith continue to provide and advocate for an effective regional freight network, in order to service its employment generating industries efficiently, particularly manufacturing and agriculture.

It is important that Griffith continue to provide and advocate for an effective regional freight network, in order to service its employment generating industries efficiently, particularly manufacturing and agriculture.

3.4 Housing

The provision of sufficient, diverse and affordable housing to meet the needs of employees seeking to live and work in Griffith is critical to ensuring that employment opportunities can be realised.

Both the LSPS and the Housing Strategy recognise the importance of providing a diverse range of housing options as a priority for Council. The Griffith Housing Strategy identifies the crucial need for alternative housing options, especially affordable housing.

The LSPS outlines a range of actions aimed at improving housing diversity through new development. It identifies that Griffith's Residential DCP currently permits 25% of new greenfield subdivisions to contain medium density housing and that Council will investigate other avenues to support housing diversity in new subdivisions.

The Low-Rise Housing Diversity Code will be promoted for use in appropriate residential areas as a means of increasing the provision of medium density housing. Further actions to remove impediments to delivering housing diversity through planning controls will also be explored as an ongoing action in terms of considering:

- Lot size averaging in new residential subdivision;
- Promote the use of Concept Proposals to inform the location of medium density development and use of existing LEP provisions supporting multi-dwelling development;
- Review zoning of land around the CBD and implement appropriate Floor Space Ratio (FSR) controls; and
- Permit concessions to development controls for affordable housing developments.

Providing greater housing choice including more small dwellings and units including build to rent developments, can ensure that the needs of the community can be met, in terms of what their specific housing needs are. Importantly, providing for greater housing supply and diversity will ensure that people wishing to work in Griffith can also choose to live there too. With over 95% of the Griffith workforce currently also living within Griffith City, it is important to continue to provide opportunities for employees to both work and live within the LGA. Sufficient housing supply will also ensure that any employment opportunities can be better realised by offering more certainty to workers wishing to both work and reside within Griffith that their housing needs can also be met.

Council should continue to facilitate the delivery of more diverse and affordable housing through ongoing planning control amendments, to support the housing needs of both residents and/or employees.

3.5 Education and Training

In 2021, Griffith City demonstrated a relative significance in employment in the manufacturing industry compared to New South Wales. However, as the size of the ageing population grows, younger people will need to be recruited to this industry. By taking advantage of educational opportunities in regional New South Wales and in Sydney, and by participating in the implementation of new technologies, the region could have an advantage within the manufacturing sector. Collaboration with universities, research institutes and commercialised service providers would be integral in realising the potential in Griffith.

Griffith City has less than half the proportion of professional, scientific and technical service industry employment of New South Wales. This demonstrates a weakness in the City, which could lead to economic losses as the Australian economy moves towards a primarily service-based workforce. Despite the lack of employment in the professional services industry, Griffith City has experienced growth between 2011 and 2016 in the health care and social assistance sector as well as in the education and training sector. Furthermore, the agriculture, forestry and fishing sector is a particularly strong industry within Griffith City, and has the potential to become a high-skill, knowledge intensive field when opportunities for education and training are provided, further creating potential opportunities for Griffith City to specialise.

Opportunities to upskill or obtain higher qualifications within Griffith City in-person include TAFE NSW Griffith, which has a particular focus in wine and food technology, and Western Riverina Community College. Notably, TAFE NSW Griffith also offers certificates in agriculture and agricultural mechanical technology while Western Riverina Community College provides vocational training and education programs. The highest level of education offered at Griffith TAFE is a diploma, while Western Riverina Community College offers a range of national-recognised qualifications.

The Country University Centres (CUC) Western Riverina provides support to distance education students and provides a smooth pathway for TAFE students to transition to Charles Sturt University. Local students studying any degree, diploma or Cert IV pathway are able to access CUC Western Riverina facilities for free (located at Griffith and Leeton). The CUC Western Riverina has risen in popularity, particularly since COVID-19, when students were forced to undertake tertiary studies remotely and recognised the advantages of being able to remain locally in Griffith City and study remotely through CUC Western Riverina.

Data provided from Council indicated in the first semester of 2022, there were over 290 students registered at CUC Western Riverina, with the facility averaging 192 student access hours per month.

Table 3 summarises the tertiary institutions and services within Griffith.

Table 3 - Tertiary Institutions and Services in Griffith City, 2022

Facility	Address	Course Offering
TAFE NSW Riverina Institute	Neville Place, Griffith	Automotive, Engineering, Construction, Early childhood, hair and beauty training academy, nursing student training facilities, wine and food technology centre
Western Riverina Community College	23 Hickey Cres, Griffith	Music, business, community services and health, beauty and hairdressing, hospitality, professional development
CUC Western Riverina	2/1 Olympic Street, Griffith Sycamore Street, Leeton (inside Leeton Shire Library)	Free access to support facilities for local students studying any degree, diploma or Cert IV pathway.

Source: Bull & Bear Economics Analysis (2022)

Through increased access to education, an opportunity arises for the income disparity between Griffith City and New South Wales as a whole to be reduced and wage inequality within Griffith to decrease over time. Given the existing economic structure within the region, it is integral that additional training opportunities are focussed toward understanding automated systems within poultry and agricultural operations and the development of bespoke systems to enhance automation within manufacturing businesses, with a focus on the food and beverage processing sectors. Understanding the repair and maintenance of automated systems within the agriculture / processing sectors will also be a critical skill required within Griffith into the future. It is anticipated that these skills / training opportunities would be delivered both through the TAFE NSW Riverina Institute and universities (course work to be delivered online).

Through increased access to education and training, an opportunity arises for the income disparity between Griffith City and New South Wales as a whole to be reduced and wage inequality within Griffith to decrease over time.

Recommended measures for Griffith to consider include:

- 1. Encourage opportunities to upskill or obtain higher qualifications within Griffith City, such as through TAFE NSW Griffith, and Western Riverina Community College. The Country University Centres (CUC) Western Riverina also provides support to distance education students and provides a smooth pathway for TAFE students to transition to Charles Sturt University.*
- 2. Encourage opportunities to develop partnerships between local industry/s with existing educational facilities within the Riverina region to encourage new employees to the area. This will lead to an increase in skill level of the workforce therefore diversifying the existing employment portfolio in the area and allowing skillsets to keep pace with advancements in technology and processes, particularly in the area of agriculture.*
- 3. Promote opportunities for online businesses to operate out of Griffith City focussed on the sale of quality agricultural outputs (leverage off the existing strengths of the region) as opposed to attracting online businesses more broadly.*
- 4. In collaboration with State government and education facilities, investigate strategies to rapidly expand the value of agricultural production by linking intensive small scale farming to research, employment and training.*

4 EMPLOYMENT ACTIVITY AND DEMAND AND SUPPLY ANALYSIS

The economic analysis undertaken in support of the preparation of the GELS (refer Appendix 1), provides a detailed assessment of the existing employment activity and supply and demand for employment lands, which provides the rationale for any recommendations arising from the GELS in relation to new employment lands (if warranted). Below provides a summary of that analysis.

4.1 Existing Employment Activity and Available Land

4.1.1 Industrial Land

A site inventory (September 2022) identified an approximate 341 businesses on industrial zoned land within Griffith City. Of the 51.7 hectares of vacant and underutilised land that remains to accommodate future growth, most of this is located within the E4 General Industrial and E3 Productivity Support zones. Despite the significant quantum of vacant and underutilised land, the availability and suitability of this land does not necessarily align with the demand for industrial land within Griffith, particularly in terms of location or lot size.

The E3 Productivity Support zoned land can only accommodate limited industrial uses and can only meet a small portion of future demand within Griffith.

Table 4 below displays the total volume of development ready vacant and underutilised industrial land within Griffith City categorised by zone as of September 2022.

Table 4 - Volume of Vacant and Underutilised Industrial Zoned Land (Ha) – Griffith City, 2022

Zone	Vacant	Underutilised	Total
E4 General Industrial	23.8	6.8	30.6
E3 Productivity Support	17.6	3.5	21.1
Total	41.4	10.3	51.7

Source: Bull & Bear Economics Analysis (2022)

Tables 5 and 6 outline the composition of vacant and underutilised land within the E3 Productivity Support and E4 General Industrial zones. The analysis clearly demonstrates that vacant and underutilised lots are typically less than 5,000m² in size, with very limited opportunities in the form of larger allotments.

Table 5 - Vacant and Underutilised Land in E3 Productivity Support Zone

Lot Size	Vacant		Underutilised	
	No of Lots	Total Area (ha)	No of Lots	Total Area (ha)
<5,000sqm	13	1.2	4	0.6
5,000sqm-1ha	3	2.2	1	0.9
1-2 ha	5	8.6	1	2.0
2-5ha	2	5.6	0	0.0
5+ ha	0	0.0	0	0.0
Total	23	17.6	6	3.5

Source: Bull & Bear Economics Analysis (2022)

Table 6 - Vacant and Underutilised Land in E4 General Industrial Zone

Lot Size	Vacant		Underutilised	
	No of Lots	Total Area (ha)	No of Lots	Total Area (ha)
<5,000sqm	19	2.2	17	3.3
5,000sqm-1ha	5	3.1	2	1.3
1-2 ha	2	2.6	2	2.2
2-5ha	3	10.4	0	0.0
5+ ha	1	5.5	0	0.0
Total	30	23.8	21	6.8

Source: Bull & Bear Economics Analysis (2022)

The size and location of vacant and underutilised lots elsewhere in Griffith are only suitable for low impact and service industry uses and do not align with the future demand for larger lot general industrial development. As such, there is a need to identify the potential for additional E4 zoned land within the city, which is suitably serviced, located and sized.

Action 3.1A of the LSPS 2020 identifies an opportunity to strategically rezone lands around the Southern Industrial Link Road for highway service corridors and employment lands in the short term. Griffith is actively developing a new by-pass route to ensure heavy vehicles, including road trains, avoid Griffith’s urban areas. The new Southern Industrial Link Road would provide opportunities for new employment lands or highway services lands to locate.

Figure 7 shows the existing industrial zoned land within and around the Griffith city centre, including vacant and underutilised land. A full copy of the mapping showing all industrial land within the LGA can be found in the economic report in Appendix 1.

Figure 8 depicts Stage 2B of the Southern Industrial Link at the intersection of Thorne Road and Kidman Way, which provides opportunities for employment uses to establish, maximising exposure and access to the bypass road and removing heavy vehicle traffic from the town centre.

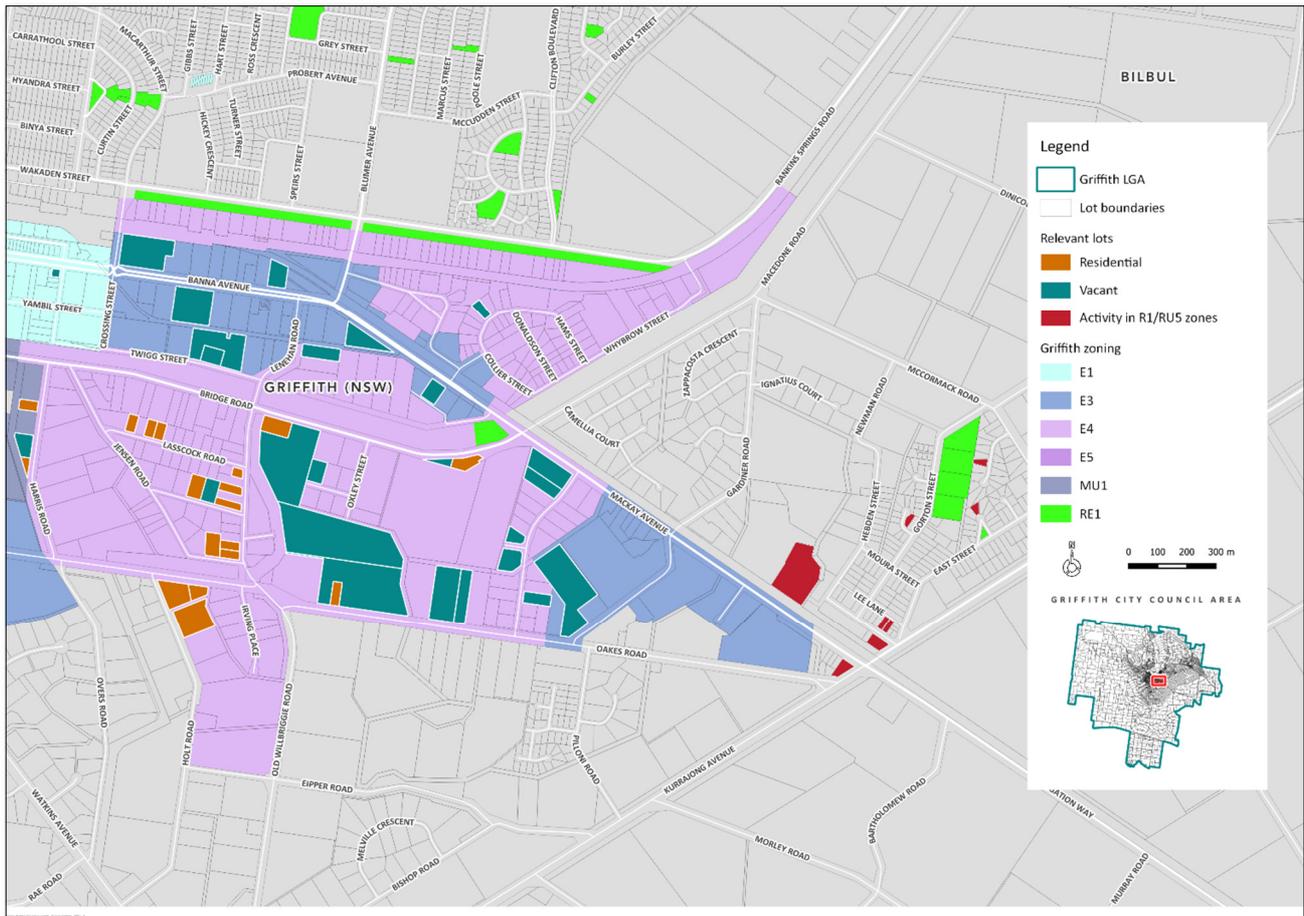


Figure 7 – Industrial zoned land within Griffith (source: Bull & Bear Economics)



Figure 8 - Stage 2B – Southern Industrial Link - Roundabout at Intersection of Thorne Road and Kidman Way (source: <https://sussanley.com/new-roundabout-provides-safer-passage-griffith/>)

4.1.2 Centres Land

The inventory (September 2022), identified 110,512m² of retail and commercial floor space within the centre zones in Griffith (i.e. E1 Local Centre and MU1 Mixed Use zones). Of this, approximately 66% was classified as retail floorspace, with approximately 34% classified as commercial floor space.

Figure 9 outlines the geographic extent of centres zoned land in Griffith City, including residential and vacant land allotments.

There are high vacancy rates within Griffith’s centre zones, which suggests an oversupply of retail floor space within the commercial/retail parts of the city. Whilst the quantum of vacant land within centres zones (4.1 hectares) was significantly lower than for industry zones, significant remnant housing is located within the centre zones, particularly within the MU1 Mixed Use - Benerembah Street precinct, which also had the highest centres vacancy rate.

Table 7 details the centre zoned land business activity by use and zone within Griffith City as per the inventory conducted in September 2022.

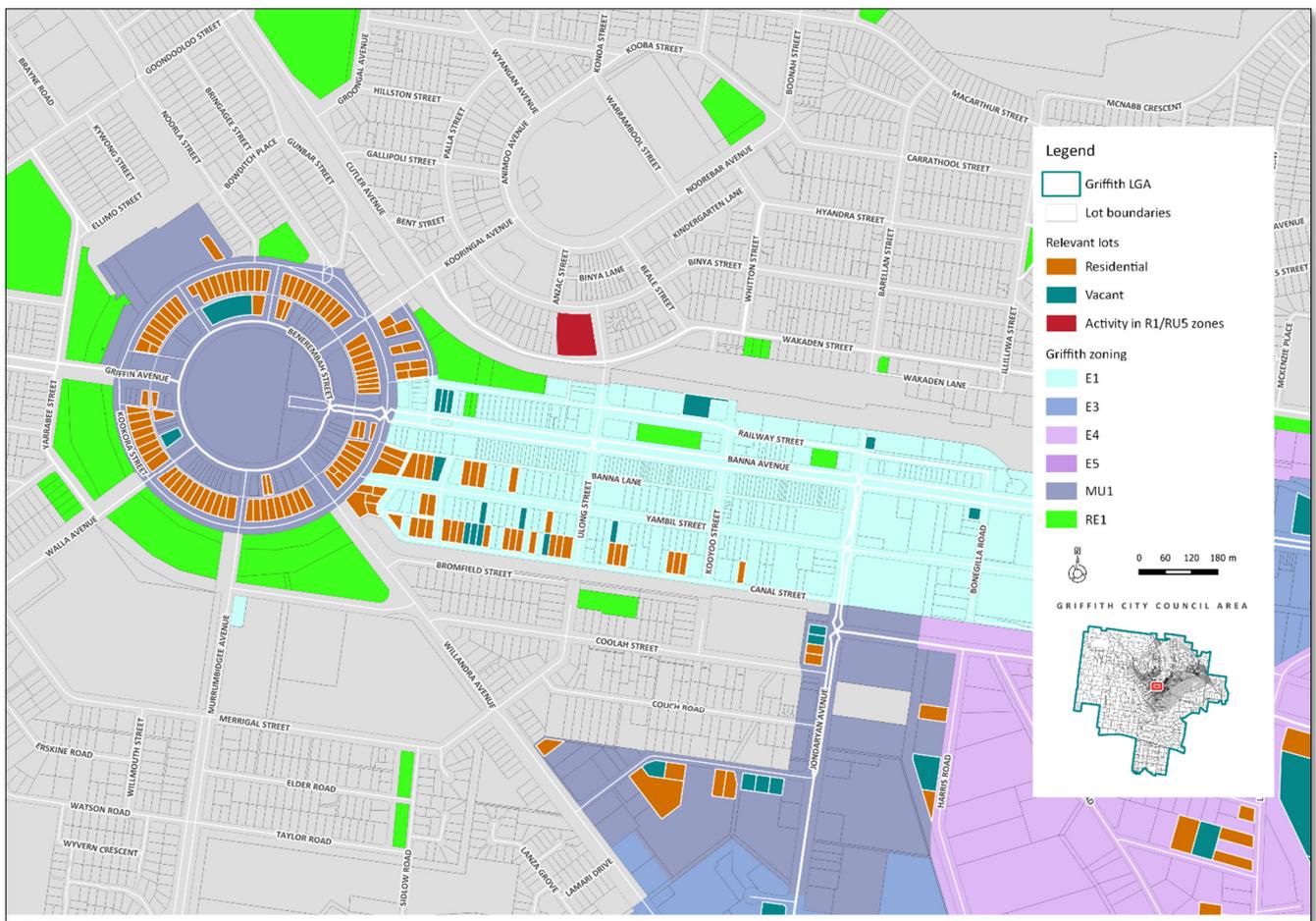


Figure 9 – Centres Zoned Land in Griffith (Source: Bull & Bear Economics, 2023)

	MU1 - Benerembah Street		E1 - Banna Avenue and Yambil Street		MU1 - Jondaryan Avenue		E1 - Drivers Plaza, East Griffith		Griffith City	
	sqm	%	sqm	%	sqm	%	sqm	%	sqm	%
Retail Classes										
Groceries and take-home food	3,902	20.5%	6,620	6.0%	2,628	22.4%	575	36.6%	13,725	9.6%
Dining and take-away food	444	2.3%	10,749	9.8%	4,465	38.1%	371	23.6%	16,028	11.3%
Clothing, footwear and apparel	0	0.0%	13,506	12.3%	0	0.0%	0	0.0%	13,506	9.5%
Personal and other goods	534	2.8%	18,443	16.8%	1,931	16.5%	246	15.7%	21,154	14.8%
Core bulky goods	600	3.1%	2,556	2.3%	1,392	11.9%	0	0.0%	4,548	3.2%
Ancillary bulky goods	0	0.0%	3,295	3.0%	0	0.0%	0	0.0%	3,295	2.3%
Hardware	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Take away liquor	0	0.0%	482	0.4%	0	0.0%	0	0.0%	482	0.3%
Total Retail	5,480	28.7%	55,650	50.5%	10,416	88.9%	1,192	75.9%	72,737	51.1%
Commercial Classes										
Financial and insurance services	387	2.0%	4,189	3.8%	0	0.0%	0	0.0%	4,576	3.2%
Rental, hiring and real estate services	0	0.0%	2,106	1.9%	0	0.0%	0	0.0%	2,106	1.5%
Health care and social assistance	752	3.9%	3,925	3.6%	1,300	11.1%	116	7.4%	6,093	4.3%
Professional, scientific and technical services	300	1.6%	9,907	9.0%	0	0.0%	45	2.9%	10,252	7.2%
Administrative and support services	517	2.7%	4,459	4.0%	0	0.0%	32	2.0%	5,008	3.5%
Public administration and safety	1,900	10.0%	7,541	6.8%	0	0.0%	0	0.0%	9,441	6.6%
Education and Training	0	0.0%	221	0.2%	0	0.0%	78	5.0%	299	0.2%
Total Commercial	3,856	20.2%	32,347	29.4%	1,300	11.1%	271	17.3%	37,774	26.5%
Summary Retail and Commercial	9,336	48.9%	87,997	79.9%	11,716	100.0%	1,463	93.1%	110,512	77.6%
Vacant Tenancy	9,739	51.1%	22,106	20.1%	0	0.0%	108	6.9%	31,953	22.4%
Total (including vacant tenancy)	19,075	100.0%	110,103	100.0%	11,716	100.0%	1,571	100.0%	142,465	100.0%

Table 7 - Centre Zoned Floorspace by Retail and Commercial Use and Zone (sqm) – Griffith City, 2022 (Source: Bull & Bear Economics (2022))

There were 110 businesses identified within the centre zones in Griffith which represent uses often found in centre zones, such as recreational services (such as gyms), industrial businesses, accommodation providers, community services and car washes. The majority (55.5%) of these businesses were industrial businesses, with 61 businesses identified. In addition, 18 were accommodation providers and a further 18 were community services. These businesses were predominantly located within the E1 Local Centre zone along Banna Avenue and Yambil street, as well as several in the MU1 Mixed Use zone surrounding the TAFE.

Table 8 below details the number of industrial and accommodation businesses within Griffith City centre zones by area.

Table 8 - Centre Zoned Other Businesses – Griffith City, 2022

	MU1 - Benerembah Street	E1 - Banna Avenue and Yambil Street	MU1 - Jondaryan Avenue	E1 - Drivers Plaza, East Griffith	Griffith City
Recreational Services	1	7	0	2	10
Industrial	13	35	12	1	61
Accommodation	4	11	3	0	18
Community	7	10	1	0	18
Car Wash	0	2	1	0	3
Summary	25	65	17	3	110

Source: Bull & Bear Economics (2022)

Across the centre zones in Griffith City there were several lots which were identified as not having an existing business. These included private sheds, vacant lots, residential lots, carparks and lots under construction. In total, 27.7 hectares of non-business land was identified within the centre zones, with just over half of this land occupied by remnant housing (15.7 hectares).

Table 9 below details the amount and proportion of centre zoned land not used for business purposes.

Table 9 - Centre Zoned Non-Business Land by Use and Zone (sqm) – Griffith City, 2022

	MU1 - Benerembah Street		E1 - Banna Avenue and Yambil Street		MU1 - Jondaryan Avenue		E1 - Drivers Plaza, East Griffith		Griffith City	
	sqm	%	sqm	%	sqm	%	sqm	%	sqm	%
Carpark	3,542	3.5%	24,780	28.7%	0	0.0%	0	0.0%	28,322	10.2%
Vacant Land	0	0.0%	19,307	22.3%	22,043	24.9%	0	0.0%	41,350	14.9%
Residential	95,878	94.2%	37,949	43.9%	23,223	26.2%	0	0.0%	157,050	56.8%
Under construction	0	0.0%	4,142	4.8%	42,034	47.5%	0	0.0%	46,176	16.7%
Privately Owned	2,344	2.3%	272	0.3%	1,193	1.3%	0	0.0%	3,809	1.4%
Summary	101,764	100.0%	86,449	100.0%	88,493	100.0%	0	0.0%	276,706	100.0%

Source: Bull & Bear Economics (2022)

There was an estimated 4.1 hectares of vacant centres land identified within Griffith City, with the majority identified within the MU1 zone on Jondaryan Avenue (2.2 hectares) and the E1 zone on Banna Avenue and Yambil Street (1.9 hectares).

4.1.3 Summary of Existing Employment Zoned Land

There is a range of industrial activity within Griffith City, with an estimated 340 businesses identified on industrial zoned land at the time of the site inventory (September 2022). The inventory identified 113.7 hectares of vacant and underutilised land to accommodate future growth, mostly within the E4 General Industrial and E3 Productivity Support zones. Whilst this quantum of vacant and underutilised land seems significant, the availability and suitability of this land does not align with the demand profile of the region.

The composition of vacant and underutilised lots elsewhere in Griffith (both in terms of size and location) are suited only for low impact and service industry uses and do not align with the future demand profile within the region.

The inventory identified persistently high vacancy rates within the centres zones in Griffith City, suggestive of an oversupply of retail floor space within the region. Whilst the quantum of vacant land within centres zones (4.1 hectares) was significantly lower than for industry zones, it was also noted that significant housing was within the centre zones, particularly within the MU1 Mixed Use - Benerembah Street precinct, which also had the highest centres vacancy rate.

Griffith has a some vacant and underutilised industrial land, however the availability and suitability of this land does not necessarily align with the demand for industrial land within Griffith, particularly in terms of location or lot size.

The Southern Industrial Link Road provides opportunities for new employment lands or highway services lands to locate, if a new employment precinct were developed.

There is an oversupply of retail floor space within the commercial/retail parts of the city. There is a need to consolidate employment land uses within the centres zones and encourage alternative land uses which are complementary to the town centre.

4.2 Employment Supply and Demand

In light of the existing employment activity occurring on land zoned for these purposes, an assessment of the employment supply and demand has been undertaken as part of the economic analysis undertaken in Appendix 1. An overview of the supply and demand analysis for employment lands within Griffith is provided in the sections below. This supply and demand analysis establishes the need (or otherwise) for additional employment lands within Griffith to 2041.

4.2.1 Industrial Lands

The economic assessment has compared the remaining vacant industrial land within Griffith City against the projected demand for industrial land to identify any modelled shortfalls over the next twenty years to 2041. This analysis represents only a direct comparison of the remaining zoned land to projected demand and does not consider the appropriateness of remaining supply to accommodate projected demand, whether a need exists to transition existing industrial land precincts due to encroachment of incompatible uses (e.g. residential), whether the remaining zoned supply is appropriately serviced and the realistic availability of this land for industrial development. Despite these limitations an adequate assessment of land supply against demand was able to be undertaken and provides the basis for appropriate conclusions to be identified.

The quantitative analysis suggests there is sufficient zoned industrial land to accommodate growth within Griffith City to 2041, as summarised in Table 10 below.

Table 10 – Projected Industrial Land Demand – Griffith LGA, 2021 to 2041

	2021	2026	2031	2036	2041	Ave. Ann. Growth, 2021-41
Land Demand (Ha)						
Large Footprint and General Industry	76.6	83.9	91.8	98.3	104.5	1.6%
Service Industry	28.0	28.6	28.6	29.4	30.1	0.4%
Warehousing & Storage	12.5	14.3	15.9	17.6	19.1	2.1%
Transport Uses	27.1	29.0	30.4	31.5	32.6	0.9%
Total Industrial Land Demand	144.1	155.7	166.8	176.8	186.3	1.3%
Incremental Demand (Ha)						
Large Footprint and General Industry	-	7.3	15.2	21.8	27.9	-
Service Industry	-	0.6	0.7	1.4	2.1	-
Warehousing & Storage	-	1.7	3.4	5.0	6.6	-
Transport Uses	-	1.9	3.3	4.4	5.5	-
Incremental Industrial Land Demand	-	11.5	22.6	32.7	42.1	-

Source: Bull & Bear Estimates (2022)

Industrial land demand represents the total demand for industrial land at a point in time (e.g. in 2041, industrial land demand is approximately 186.3 hectares), whilst incremental industrial land demand represents the additional demand between two points in time. As the base year in Table 10 above is 2021, incremental demand in 2041 would be additional demand over and above the 2021 levels (e.g. if 2041 demand is 186.3 hectares and 2021 demand was 144.1 hectares, incremental demand would be approximately 42 hectares).

Over the next 20 years, there is anticipated to be demand for an additional 42.1 hectares of industrial land in Griffith City, driven by growth in food and beverage product manufacturing and the road transport sector. Based on modelling undertaken, the analysis suggests there is sufficient industrial land to meet future needs to 2036 (with a small shortfall by 2041), based on an estimated remaining supply of 38.4 hectares of vacant zoned industrial land.

However, the composition of the remaining industrial land supply does not align with the future needs of businesses within Griffith due to the following factors:

- This modelled supply demand balance must be interpreted carefully as it assumes that all remaining lots are suited to accommodate industrial growth and do not face significant constraints which limit developability of each lot. However, as identified in Table 5 above, the majority of vacant lots within the E4 General Industrial Zone are less than one hectare in size, which limits these sites to accommodate only small scale industrial businesses.
- The remaining zoned land suited to accommodate industrial activity falls within the E4 General Industrial and E3 Productivity Support to the east of the Griffith city centre. The remaining E3 Productivity Support allotments are suited to only a small portion of industrial land demand (i.e. population serving activity such as warehousing and storage). However, the E4 General industrial land is mostly located on Oakes Road, which does not offer direct access to road trains, which is increasingly required by industrial businesses in Griffith. Additionally, the intensity of activity that can be supported on these lots is limited by the presence of remnant housing, mostly to the west of Lenehan Road.

Furthermore, as residential activity intensifies in Griffith, this is likely to only place further pressure on industrial development on the fringe of the Griffith township to locate within other parts of the local government area, particularly if the business is reliant on heavy vehicle freight movements or has reverse amenity impacts which would impact surrounding residential development.

Additional industrial zoned land (E5 Heavy Industrial) was released to the west of the Griffith urban area along Kidman Way, but this land is mostly yet to be taken up and is predominantly occupied by farming activity. However, the establishment of the Southern Industrial Link Road (Kurrajong Avenue / Thorne Road bypass route), which will ensure heavy vehicles, including road trains, avoid Griffith's urban areas, will likely enhance the appeal and marketability of this land to prospective industrial land users, provided that appropriate infrastructure and services are delivered.

It is also anticipated that the establishment of this land for employment purposes would encourage the relocation of industrial users within the Griffith township that rely on heavy vehicle movements, given the connectivity offered by the bypass route relative to the local road network servicing existing industrial estates.

However, the opportunities presented by this land are potentially limited due to the urban release area layer which is partially located over this land. Should significant residential development occur within this precinct, the opportunity to establish industrial activity may be compromised. Additionally, the demand profile indicates most of the projected demand would be best accommodated within E4 General Industrial land, with limited need for the E5 Heavy Industrial zoning.

It is suggested that further investigations identify the potential to establish an industrial precinct directly off the Southern Industrial Link Road to meet the future needs of the region and allow for the relocation of existing businesses who are looking to expand and that require direct road train access.

To ensure the success of any newly established industrial precinct, the provision of trunk infrastructure is critical, as is the delivery of larger lots (at least one hectare in size) to accommodate manufacturing and processing facilities, along with associated transport uses.

It is noted that larger scale food processors in the region have sites of approximately 20 hectares in size. It is suggested that future industrial areas offer a range of lots at least one hectare in size and ensuring sites of five or more hectares are available within this precinct, to meet an existing market gap of the region and reflecting the requirements of prospective land users.

Land on the northern side of the Southern Industrial Link Road could be rezoned for E4 General Industrial, which provides an opportunity for industrial businesses requiring larger land parcels to locate, having direct road train access to the bypass. This may require reconciliation with any planned future residential development in the area.

A structure plan would need to be prepared, which nominates specific locations at which any industrial estate would have direct access to the Southern Industrial Link Road, as direct access will be limited. Lots of at least 1 hectare and 5 hectares or greater in size should be accommodated. Sufficient infrastructure must also be provided to adequately service the new industrial precinct, as well as the imposition of appropriate buffers and mitigation measures for any future residential development.

4.2.2 Centre Lands

Section 4.1.2 of the report identified that significant levels of vacancy in centres zones exist within Griffith, particularly within the E1 zone along Banna Avenue and Yambil Street (approximately 20 % vacancy rate) and the MU1 zone on Benerembah Street (approximately 51% vacancy rate). A review of the MU1 zone in Benerembah Street identified that a significant quantum of tenancies were identified as being of a poor standard, which is likely contributing to relatively high vacancy rates in this part of Griffith. There is also little incentive to improve the shopfronts in this part of Griffith, given that the outlook for centres floor space demand indicates there is more than sufficient capacity within existing vacant tenancies to accommodate projected growth to 2041. Whilst the tenancy quality in the centre core is of a higher standard, high vacancy rates also persist, due to low growth in demand for centres floor space in Griffith.

Given the modest growth outlook for centres floorspace in Griffith, it is suggested that Council seek to limit approvals of centre uses outside of centres zones and support tenants who wish to transition their existing tenancy for an alternative use (e.g. residential or community based use). This is line with the recommendations in the Griffith Local Strategic Planning Statement which are supportive of additional residential development around the CBD on the south side of Yambil Street and on vacant sites along Banna Avenue, Railway Street, Kookora Street and Benerembah Street. It is anticipated that the most significant challenge faced by prospective developers would be the assembly of a suitably large site, given the existing fragmentation of lots within centre zones in Griffith.

The economic assessment has compared the existing retail floor space within Griffith against the projected demand generated by residents within Griffith. A comparison of existing supply against projected demand highlights an existing oversupply of retail floor space, indicative of existing tenants likely trading below benchmark trading levels.

Whilst the degree of oversupply is anticipated to decrease over time, the analysis clearly highlights there is sufficient retail floor space within Griffith City to accommodate projected demand over the next twenty years to 2041.

Table 11 - Retail Floorspace Supply Demand Balance (sqm) – Griffith LGA, 2021 to 2041

	2021	2026	2031	2036	2041
Supply	68,301	68,301	68,301	68,301	68,301
Demand	42,057	44,007	46,054	48,185	50,384
Supply-Demand Balance	26,244	24,293	22,247	20,116	17,917

Source: Bull & Bear Estimates (2022)

The assessment has also included the existing commercial office floor space within Griffith against the projected demand generated by workers within the LGA. This analysis is suggestive of an oversupply of commercial office floor space of approximately 9,000m² as at 2021.

The supply demand balance for commercial floor space within Griffith is summarised in Table 12.

Table 12 - Commercial Floorspace Supply Demand Balance (sqm) – Griffith LGA, 2021 to 2041

	2021	2026	2031	2036	2041
Supply	37,774	37,774	37,774	37,774	37,774
Demand	29,084	32,214	33,298	35,146	37,100
Supply-Demand Balance	8,690	5,560	4,476	2,628	674

Source: Bull & Bear Estimates (2022)

Discussions with stakeholders indicated there is a lack of suitable commercial office floor space available to purchase or rent, with available opportunities mostly on the second floor, which does not provide the exposure, access and parking demanded by prospective tenants. Additionally, there has been some misalignment between spaces demanded (typically between 20m² and 150m²) and space available to rent as evidenced by the relative difficulty in leasing larger spaces.

Therefore, in reality it is likely that the office market is relatively balanced in Griffith at present, with tenants occupying larger spaces than what is suggested by the modelling (i.e. more than an average of 20 m² per worker).

However, this analysis, when considered in conjunction with the quantum of vacant tenancies within the centre zone, highlights limited need to provide additional commercial office floor space in Griffith City, over and above what is already available. However, consultation has also identified that tenants in some cases have had to upgrade their offering to meet the expectations of clients. There may potentially be a role in incentivising tenancy refurbishment / upgrades to reduce the level of centre vacancy within Griffith City.

Given the modest growth outlook for centres floorspace in Griffith, it is suggested that Council seek to limit approvals of centre uses outside of centres zones and support tenants who wish to transition their existing tenancy for an alternative use (e.g. residential or community based uses).

There may be a role to incentivise tenancy refurbishments/upgrades to reduce centre vacancies within Griffith City Centre.

4.3 Summary of Economic Analysis

Figure 10 outlines the summary of findings that have been developed as a result of the economic analysis conducted in support of the GELS. These findings have been used to inform the recommendations within the GELS and provide a strategy for Council moving forward with respect to implementation.

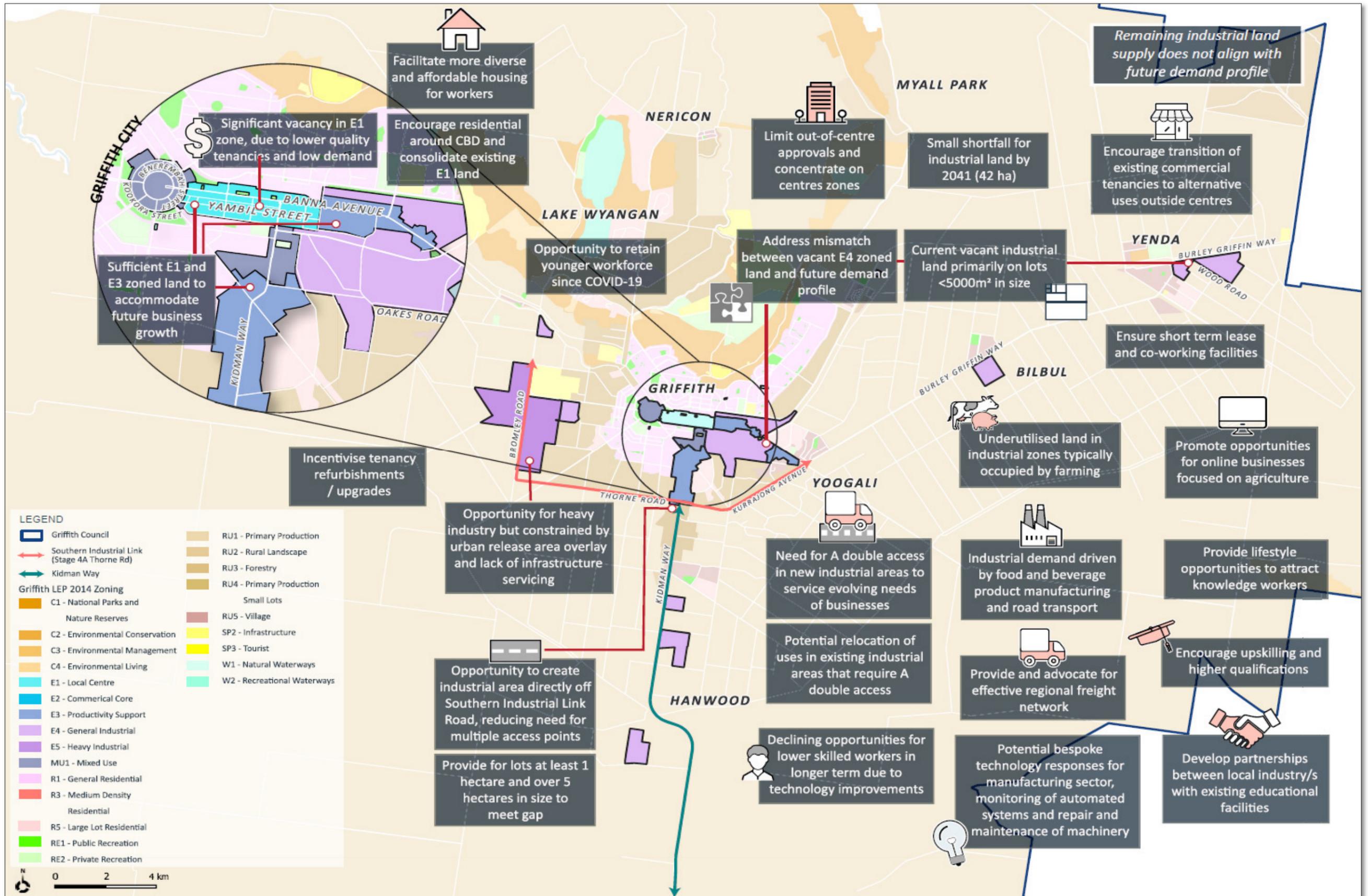


Figure 10 – Griffith Employment Lands Strategy Plan on a Page

5 EMPLOYMENT PLANNING ISSUES FOR GRIFFITH

The assessment undertaken as part of the GELS demonstrated that there is sufficient land zoned in Griffith City to accommodate centre uses to 2041, however there is a shortfall in industrial land provision to 2041.

There is a need to consider consolidating the centre zoned land within the Griffith city centre, by encouraging the transition of existing commercial tenancies to alternative uses outside centres. This should assist in addressing the current oversupply, as well as (potentially) encouraging the provision of additional housing within and around the CBD, to meet the need to provide more small dwellings as identified within the Housing Strategy. This approach could have a twofold effect in both providing for more housing, whilst also providing employers with the ability to attract more workers to Griffith and realise their employment potential.

Further, out-of-centre approvals for both retail and office uses should be discouraged to allow for concentrated efforts to be focused on land specifically zoned for centre purposes. Where possible and practicable, it is suggested that community uses (e.g. indoor sport and recreation centres, theatres, long day care centres) are also encouraged to locate within the Griffith City Centre. There may be a role to incentivise tenancy refurbishments/upgrades to reduce centre vacancies within the Griffith City Centre.

There is a mismatch between the demand for industrial land and what is actually available currently, primarily in terms of lot size and location (i.e. proximity to existing residential development etc.). Essentially, much of the land that is zoned for E4 General Industrial to the east of the CBD is either too small and/or is inappropriately located to meet the future industrial demand profile of users in the region. As such, there is an opportunity to rezone land to E4 – General Industrial and development of a new industrial precinct immediately adjoining Thorne Road along the Southern Industrial Link Road (refer Map 1), which can focus on developing a fit-for-purpose industrial estate that:

1. Offers an opportunity for existing industrial operations located closer to the town centre, to transition to an industrial estate that is more suitably located and will better meet their needs
2. Provides direct access for road trains to the Southern Industrial Link Road from the new estate, whilst limiting multiple access points;
3. Accommodates a range of larger and more appropriate lot sizes, ranging from at least 1 hectare to 5 hectares or greater in size to better meet the needs of industrial operators;
4. Is able to be adequately serviced to cater for industrial users; and
5. Can be efficiently planned through the preparation of a structure plan to allow for orderly and sequential development.

Additional land adjoining the Southern Industrial Link Road, as well as to the west of Griffith, should be preserved for future industrial/employment purposes, however these are seen as a longer term opportunity and will not be required in the foreseeable future (refer Map 1).

It is important that Griffith continues to provide and advocate for an effective regional freight network, in order to service its employment generating industries efficiently, particularly manufacturing and agriculture.

In lieu of providing for further E4 zoned land immediately adjoining the Southern Industrial Link Road, there will be a corresponding need to recognise the access limitations of existing E4 zoned land to the east of the Griffith City Centre. The new industrial precinct along the Southern Industrial Link Road will gain direct access to the new bypass. The existing industrial uses on the existing E4 land will likely remain on this land in the short-medium term, with the new industrial precinct providing an opportunity for users to transition out of town and relocate to a more fit-for-purpose industrial precinct. The E4 zoned land east of the centre would then only accommodate industrial business not needing direct connectivity or access for road trains.

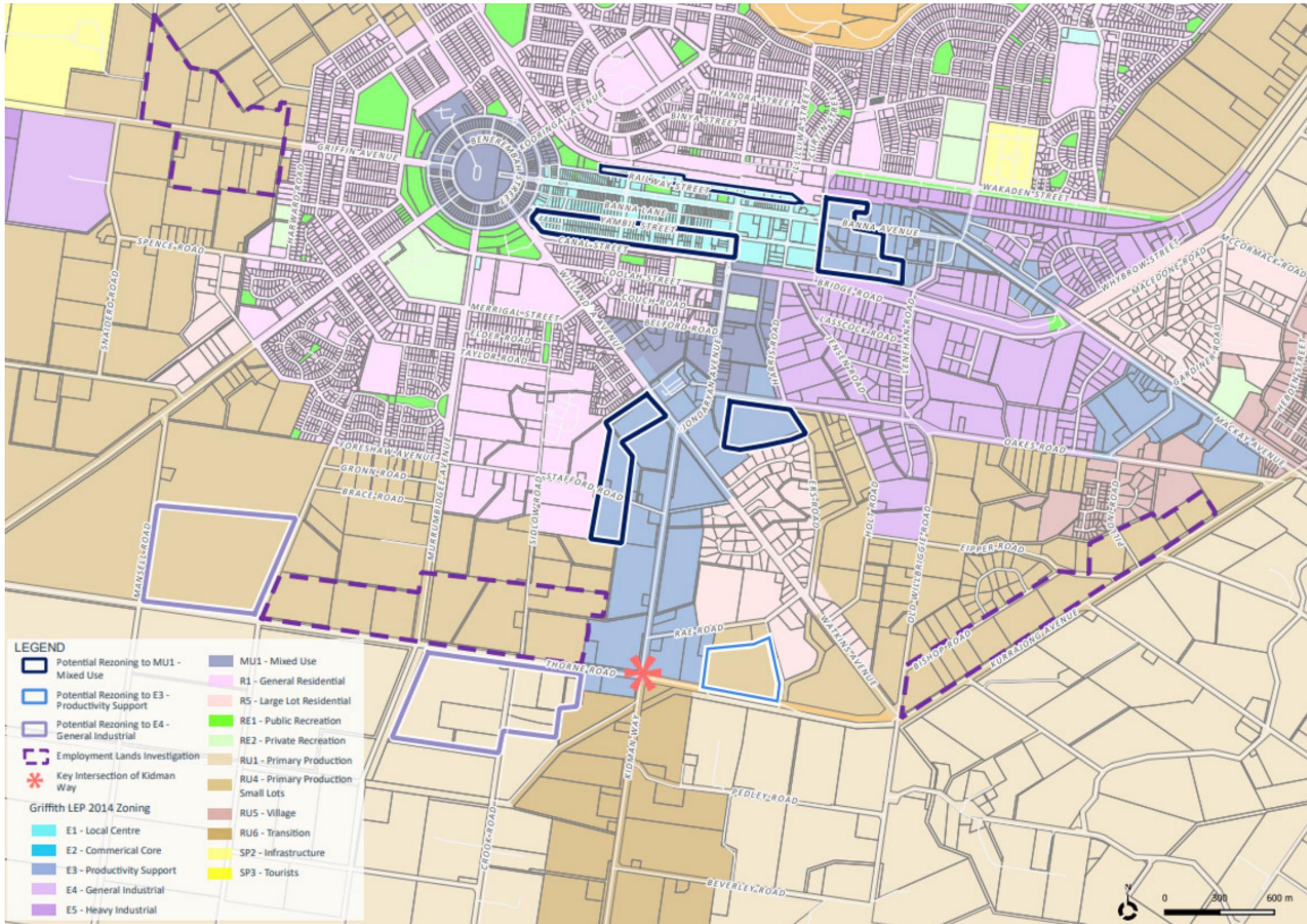
There is also a need to transition some E3 land which does not have frontage to the Kidman Way, or Southern Industrial Link Road to MU1, subject to further investigations into servicing the land. In addition, it is recommended that Council rezone other suitable land with frontage to Kidman Way and Southern Industrial Link Road to E3.

The GELS also recognises the need to implement the recommendations in the Housing Strategy and rezone the following E1 – Local Centre lands to MU1 – Mixed use:

- South side of Yambil Street and Canal Street between Jondaryan Avenue and Canal Street.
- Railway Street – Lots on the north side of Olympic Street and Railway Street between Olympic Park and Bonegilla Road

This would signal to landowners, prospective purchasers and developers that Council is keen to increase the supply of housing in and around the CBD in mixed use settings.

Map 1 outlines the extent of the recommended zoning changes arising from the GELS. A site constraints and infrastructure assessment of each land area is provided in



Map 1 – Proposed Zoning Changes

Council should continue to facilitate the delivery of more diverse and affordable housing (including more 1 and 2 bedroom dwellings) through ongoing planning control amendments, to support the housing needs of both residents and/or employees. This will allow important employment opportunities to be realised, by providing greater certainty that people seeking to work in Griffith can also have their housing needs met.

There are also a number of other economic development and other associated measures that Griffith City Council may wish to pursue, in advancing the Vision of the GELS which has been established in section 1 of this report. This includes a range of recommendations related to increasing education and training opportunities, advocating for an efficient freight network, providing more opportunities for and ensuring that employment centres and lands are seen as appealing places to work, which will attract more workers to Griffith.

6 STRATEGIC RECOMMENDATIONS

As a consequence of the employment lands analysis undertaken, the following recommendations/issues for employment should be considered:

Table 13 – Griffith Employment Lands Strategy Recommendations

NO.	RECOMMENDATIONS
LEP and DCP Amendments	
1.	Consolidate the existing E1 Local Centre zoned land within the Griffith city centre, by encouraging the transition of existing commercial tenancies to alternative uses outside the core centre. This should assist in addressing the current oversupply, as well as (potentially) encouraging the provision of additional housing within and around the CBD, to meet the need to provide more 1 and 2 bedroom dwellings as identified within the Griffith Housing Strategy.
2.	<p>Rezone land immediately adjoining Thorne Road along the Southern Industrial Link Road to E4 – General Industrial (refer Map 1), which can focus on developing a fit-for-purpose industrial estate that:</p> <ol style="list-style-type: none"> 1. Offers an opportunity for existing industrial operations located closer to the city centre, to transition to an industrial estate that is more suitably located and will better meet their needs; 2. Provides direct access for road trains to the Southern Industrial Link Road from the new industrial estate, whilst limiting multiple access points; 3. Accommodates a range of larger and more appropriate lot sizes, ranging from at least 1 hectare to 5 hectares or greater in size to better meet the needs of industrial operators; 4. Is or is planned to be serviced to cater for industrial users; and 5. Can be efficiently planned through the preparation of a structure plan to allow for orderly and sequential development, which nominates specific locations for direct access to the Southern Industrial Link Road. <p>This will require reconciliation with any planned future residential development, including the imposition of appropriate buffers and mitigation measures for any future residential development in the immediate vicinity.</p>
3.	Identify additional land along the Southern Industrial Link Road and to the west of Griffith (refer Map 1) to be preserved for future industrial/employment purposes in the long term.
4.	Continue to facilitate the delivery of more diverse and affordable housing through ongoing planning control amendments, to support the housing needs of both residents and/or employees. This could include supporting the rezoning of infill land for residential purposes with service capacity close to employment lands.
5.	Recognising the access limitations of existing E4 zoned land to the east of the Griffith City Centre, the new industrial precinct along the Southern Industrial Link Road will gain direct access to the new bypass for road trains. The existing industrial uses on the existing E4 zoned land will likely remain on this land in the short-medium term, with the new industrial precinct providing an opportunity for users to transition out of town and relocate to a more fit-for-purpose industrial precinct. The E4 zoned land east of the centre would then only accommodate industrial businesses not needing direct connectivity or access for road trains.
6.	Transition some E3 land which does not have frontage to the Kidman Way, or Southern Industrial Link Road to MU1, subject to further investigations into servicing the land. Also, rezone other suitable land with frontage to Kidman Way and Southern Industrial Link Road to E3.
7.	<p>Implement the recommendations in the Housing Strategy and rezone the following E1 – Local Centre lands to MU1 – Mixed use:</p> <ul style="list-style-type: none"> • South side of Yambil Street and Canal Street between Jondaryan Avenue and Canal Street. • Railway Street – Lots on the north side of Olympic Street and Railway Street between Olympic Park and Bonegilla Road <p>This would signal to landowners, prospective purchasers and developers that Council is keen to increase the supply of housing in and around the CBD in mixed use settings.</p>
8.	Identify land along the north side of the Southern Industrial Link Road for future Employment Lands to guide future strategic planning exercises.

NO.	RECOMMENDATIONS
Other Recommendations (e.g. Economic Development, Development Assessment Policies etc.)	
9.	Incentivise tenancy refurbishments/upgrades to reduce centre vacancies within Griffith City Centre.
10.	Discourage out-of-centre approvals (retail and commercial uses) to allow for concentrated efforts to be focused on land specifically zoned for centre purposes, such as the encouragement of community uses in centre locations where possible and practicable.
11.	Encourage opportunities to upskill or obtain higher qualifications within Griffith City, such as through TAFE NSW Griffith, and Western Riverina Community College. The Country University Centres (CUC) Western Riverina also provides support to distance education students and provides a smooth pathway for TAFE students to transition to Charles Sturt University.
12.	Encourage opportunities to develop partnerships between local industry/s with existing educational facilities within the Riverina region to encourage new employees to the area. This will lead to an increase in skill level of the workforce therefore diversifying the existing employment portfolio in the area and allowing skillsets to keep pace with advancements in technology and processes, particularly in the area of agriculture.
13.	Promote opportunities for online businesses to operate out of Griffith City focussed on the sale of quality agricultural outputs (leverage off the existing strengths of the region) as opposed to attracting online businesses more broadly.
14.	In collaboration with State government and education facilities, investigate strategies to rapidly expand the value of agricultural production by linking intensive small scale farming to research, employment and training.
15.	Consider ways to provide for a range of lifestyle opportunities and services to entice more knowledge workers to relocate to Griffith. Employment precincts such as the town centre, neighbourhood centres, and industrial areas must be considered appealing and offer a range of services and facilities to attract and retain knowledge workers.
16.	Ensure short term lease and co-working office space facilities are provided which are well connected to the global network through substantial technological infrastructure.
17.	Continue to provide and advocate for an effective regional freight network, in order to service Griffith's employment generating industries efficiently, particularly manufacturing and agriculture.

Upon finalisation of the GELS, an implementation strategy will be developed, which outlines the actions for advancing the proposed recommendations.

APPENDIX 1: ECONOMIC ANALYSIS

AP01

APPENDIX 2: CANDIDATE SITE CONSTRAINTS AND INFRASTRUCTURE ASSESSMENT

AP02