

WHITEHORSE INDUSTRIAL STRATEGY



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City of Whitehorse

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EXECUTIVE SUMMARY

BACKGROUND

In July 2008, Council's Business and Economic Development Unit engaged The Planning Group Australia, assisted and supported by Charter Keck Cramer, to develop an industrial strategy which would provide a framework for on-going employment and business investment in eight key industrial areas located within the City of Whitehorse.

The purpose of the study was to:

*“ Identify an appropriate market position for these (eight key) precincts within the context of metropolitan Melbourne;
and
Propose options to enable these market positions to be achieved.”*

In early 2011, Whitehorse City Council engaged The Planning Group to update the Industrial Strategy presented in October 2009 to take account of recent developments and the completion of other planning and development documents.

This update focussed on the background elements of the development and minor changes to the recommendations to reflect work that has been undertaken since the finalisation of the report. The tasks involved in this update include the following:

- Site inspection of all precincts.
- Review of latest valuation data provided by Council and updating of data within the report as appropriate.
- Review of the latest development approvals within the industrial precincts.
- Review of new planning documents that have been completed since October 2009.
- Incorporate zoning maps for each precinct and the immediate surroundings.
- Incorporate key-attributes tables for each precinct.

The update has focussed on the development of key sites, and has not updated the report with regard to vacant premises. Recent site visits identified a number of premises listed as vacant at the time of the original report are now occupied. In comparison some buildings that were occupied in 2009 are now vacant. It would appear that this level of change in take up of premise is not unusual in industrial / commercial areas. To understand the changes further would require indepth investigations and a detailed re-survey of owners and occupants. This was agreed to be outside the update brief.

The review of the strategy therefore identifies high level changes that have occurred which will assist Council in future work to implement the recommendations of the strategy.

WHAT DOES THE INDUSTRIAL STRATEGY ADDRESS?

Council's objective underpinning the development of an industrial strategy was:

“ to provide for appropriate business conditions within industrial areas to support long term business investment and ensure that development conditions within industrial areas keep pace with the changing requirements of business in regard to infrastructure and land use”¹

¹ City of Whitehorse Economic Development Strategy, adopted March 2008.

To this end, the industrial strategy assesses the current market indicators, examines the economic drivers & attributes for each of the eight precincts, summarises the existing (town) planning frameworks applicable, comments on urban design issues and proposes a recommended economic-driven strategy for each precinct.

WHAT DOES THE INDUSTRIAL STRATEGY NOT ADDRESS?

The industrial strategy is not a sustainability strategy, nor does it provide engineering-based infrastructure design guidelines; it does not address road management matters, nor does it provide in depth strategic (town) planning recommendations.

Having said that however, the industrial strategy strongly emphasises that addressing of these (non-economic specific) matters is integral to the success of providing “a framework for on-going employment and business investment in eight key industrial areas located within the City of Whitehorse”.

Consequently, a number of additional and specific pieces of work are identified and recommended to be undertaken or commissioned by Council into the future.

THE EIGHT KEY INDUSTRIAL PRECINCTS

The eight key industrial precincts forming the industrial strategy are detailed in Figure 1 and comprise:

1. Blackburn (Mega Mile)
2. Cook Road
3. Evans & Ireland Streets
4. Joseph Street
5. Lexton Road
6. Middleborough and Clarice Roads
7. Redland Estate
8. Rooks Road

STRATEGY METHODOLOGY AND STRATEGY OF FINDINGS

The industrial strategy has been developed by:

- i. undertaking a review of global industrial trends – which demonstrated that Whitehorse industrial activity is focused on the provision of regional services which include service and light industry, wholesale trade, bulky goods retailing, with all driven by the size and composition of the regional population;
- ii. analysing the regional role industry in Whitehorse City performs - which identified that the Whitehorse industry services more the ‘eastern’ region, than the traditionally considered south-east Melbourne metropolitan region, with its main strength being the provision of property & business services;
- iii. examining the attributes of the local industries - e.g. industry sectors, employment numbers, employee occupations, qualifications, hours worked, wages & salaries quantum – which demonstrated that the contribution of the eight industrial precincts to the overall Whitehorse economy was significant, with 73% of all ‘exports’ from Whitehorse and 56% of all output being generated in the eight precincts;

- iv. examining the current industrial supply - available, appropriately-zoned land; characteristics of the recent property market; review of recently released developments; identification of short term development opportunities; existing vacant premises – which demonstrated that market demand was generally accommodated and usually in a ‘gentrified’ form;
- v. examining the existing (town) planning framework – at a state, municipal and local level - noting that the Whitehorse Planning Scheme already contained local planning policies and zones & overlay controls which supported industrial activity. However, ‘on the ground’ shortcomings are also identified. That is, examples of former industrial land being redeveloped for non-industrial uses, in apparent disregard of Council’s Municipal Strategic Statement, are noted and the need for either a Local Planning Policy or the introduction of Design & Development Overlays is suggested.

The above is addressed in greater detail in the following sections by:

- undertaking an analysis of each of the eight industrial precincts;
- addressing urban design issues in a broader context,
- confirming discussions which have been held with other authorities and issues arising; and
- recommending future actions to be undertaken or commissioned by Council.

PRECINCT ANALYSIS AND INVESTIGATIONS

Each of the eight precincts have been examined in terms of:

- market niches
- applicable planning provisions
- current land use and activity
- current built form and visual amenity
- the existing sense of place and public realm
- movement within and accessibility to each precinct
- the attributes of the recent, demonstrated property market, and
- identification of development opportunities and positioning

These form the basis of Council’s actions going forward.

URBAN DESIGN ISSUES

The strategy discusses urban design issues and provides recommendations to address:

- the creation of ‘addresses’ for each of the industrial precincts by the creation of gateways or entrance statements, including appropriate landscaping;
- the unification of streetscape through the provision of such items as landscaping, street trees, signage, street furniture;
- non private-vehicle linkages – for example bike paths, pathways, commuter public transport modes;
- signage, and
- interface with residential or other non-industrial areas addressing such matters as storage, noise, sight and built form conflicts.

CONSULTATIONS & DISCUSSIONS WITH OTHER PUBLIC AUTHORITIES

The outcomes and actions arising from discussions with EPA, Melbourne Water and VicRoads (in particular), United Energy are also detailed.

In terms of discussions with industrial precinct landowners/managers and real estate agents acting in the general locality, the following were also identified:

- the development of EastLink has had and is expected to have minimal impact on industrial land price and/or demand;
- land stock is tightly held and in limited supply;
- vacancy rates are low;
- demand for premises included up to 1,000 square metres; higher ceilings; large (20%) office components;
- likely regentrification of older building stock;
- demand for building subdivisions (of larger, older stock);
- limited conflict with adjoining, residential land use;
- growth in church groups and community organisations.

RECOMMENDED ACTIONS

The strategy recommends on-going Council actions in the specific areas of:

- Precinct market niches
- Land and building supply
- Communication with landowners and managers of key sites
- Marketing
- Business Growth
- Urban design
- Planning measures

The strategy summarises these in the following table:

ACTION	TASKS	IMPLEMENTATION
1. Market Niche	Agree vision and identified supporting market niches	City of Whitehorse, landowners and businesses
2. Urban Design Measures	<p>Prepare Urban Design Guidelines which apply to all precincts addressing:</p> <ul style="list-style-type: none"> • Public realm in relation to Gateways, Street planting, Way finding to facilities and services, Connections to pedestrian and open space linkages, Connections to freight networks and public transport • Private realm in relation to specifications for Lots sizes, Quality development in terms of built form and landscaping, Residential interfaces, Ecological sustainability. Water sensitive design 	City of Whitehorse, landowners and business operators
3. Planning Measures	<p>Revise Clause 21.07 - Economic Development, to incorporate recommendations of the Industrial Strategy, including referencing the Industrial Strategy in this clause, and triggering a newly created Clause 22 Policy.</p> <p>Develop a new Clause 22 Policy - Industrial Development and Design, incorporating the design and development guidelines derived from the Urban Design Guidelines prepared for all precincts.</p> <p>Prepare Precinct Structure Plans for Rooks and Cook Road precincts being those precincts where significant change and future investment potential has been identified.</p> <p>Prepare the necessary Planning Scheme Amendments to introduce the above into the Whitehorse Planning Scheme.</p>	City of Whitehorse, relevant state authorities, landowners, and business operators
4. Traffic Management	Establish a working group to collaborate on the implementation of the Metropolitan Freight Network and SMART truck initiatives	City of Whitehorse, Department of Transport, and business operators
5. Marketing & Communications	<p>Review existing marketing collateral to reflect industrial vision and market niches and promote local industrial competitive advantages</p> <p>Develop a specific prospectus for industrial activity and investment opportunities</p> <p>Maintain and regularly review the business database established via the survey for:</p> <ul style="list-style-type: none"> i. General communications to the industrial sector ii. Targeted communications to Key Site Landowners iii. Targeted communications to landowners of building stock aged <1969 within precincts identified for advanced manufacturing <p>Establish a database of property managers for targeted communications in relation to market niches and desired business activity</p> <p>Collaborate with Invest Victoria in relation to investment for key sites</p>	City of Whitehorse, Invest Victoria, landowners and property managers

ACTION	TASKS	IMPLEMENTATION
6. Investment Attraction	<p>Prepare specific guidelines for all key sites</p> <p>Encourage the refurbishment of older building stock in Rooks, Middleborough, Blackburn and Redlands precincts to strengthen the attractiveness of these precincts as advanced manufacturing hubs</p>	City of Whitehorse, landowners
7. Business Growth	<p>Develop and implement an industrial sector information and training program to facilitate identifying new markets and increasing competitiveness focused on:</p> <ul style="list-style-type: none"> i. Business planning and Succession planning ii. Innovation iii. Exporting iv. Strengthening links between educators and employers v. Environmentally sustainable practices <p>In partnership with the Whitehorse Business Group (WBG) review opportunities for greater links with the South East Melbourne Manufacturers Alliance (SEMMA) and more specifically to identify opportunities for pursuing and promoting the principles of industrial ecology.</p>	City of Whitehorse, Victorian Business Centre, Box Hill Institute, Whitehorse Business Group, and local businesses
8. Monitoring	<p>Maintain and regularly update property data in relation to:</p> <ul style="list-style-type: none"> i. Vacant premises and land ii. Leases and sales iii. Development approvals iv. Land values 	City of Whitehorse

INTRODUCTION

PURPOSE OF THE WHITEHORSE INDUSTRIAL STRATEGY

A key objective of Council's Business and Economic Development Unit is to develop local strategies to maximise business and investment activities that contribute to providing employment opportunities to the local population. To support this role and as part of the development of the current Economic Development Strategy, a key action was identified:

“to provide the appropriate business conditions within industrial areas that will support long term business investment and to ensure that the development conditions within the industrial areas keeps pace with the changing requirements of business with regard to infrastructure and land use.”

With this in mind, the purpose of the Whitehorse Industrial Strategy is to establish a framework for ongoing employment and business investment within the City's eight industrial precincts as identified in Figure 1 and known as:

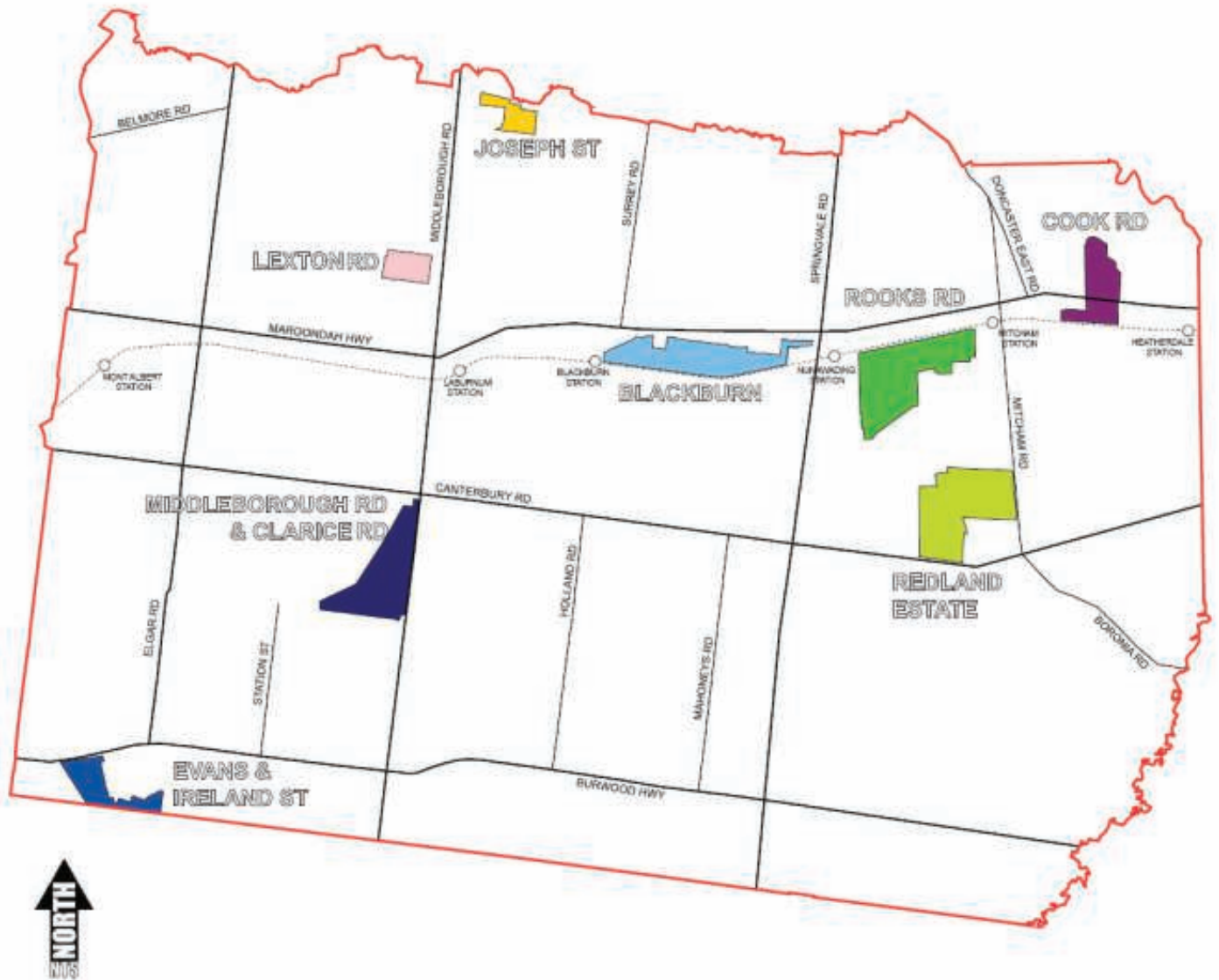
1. Blackburn (and part Mega Mile)
2. Cook Road
3. Evans & Ireland Streets
4. Joseph Street
5. Lexton Road
6. Middleborough and Clarice Roads
7. Redland Estate
8. Rooks Road

More specifically the purpose of the Strategy is to:

- **Identify an appropriate market position for these precincts within the context of metropolitan Melbourne; and**
- **Propose options to enable these market positions to be achieved.**

The development of these market positions and options is based on a strategic audit and an overall market assessment of manufacturing and industrial sectors in Whitehorse completed in partnership by The Planning Group Australia and Charter Keck Cramer.

Figure 1: Whitehorse Industrial Precincts



STRATEGIC AUDIT & MARKET ASSESSMENT

GLOBAL INDUSTRIAL TRENDS

Manufacturing is a core strength of the Victorian economy providing important export earnings, wealth creation, job generation and support to a host of other activities through linkages and flow-ons throughout the economy. Global forces have driven a number of key changes including a decline in labour intensive production, the outsourcing of all but key functions, and the blurring of the distinction between production and service work.

As such it is now generally accepted that there are three broad industrial land development types:

Advanced Manufacturing – includes production, research and development, and management and commercial activities that are driven by businesses that produce goods in a competitive global market for domestic and export sales. They are knowledge and capital intensive and often referred to as ‘high order’ or ‘high value’ industrial activities. They occupy factories, research facilities and offices. They are also typically the most difficult to facilitate within Australia.

Production Support – includes assembly, packaging services, and transport and logistics activities that are driven by the need to move goods for both import and export activity. They occupy ‘factories’, warehouses and container parks and require large floor areas and high internal clearances.

Regional Services – includes service/light industry, wholesale trade, bulky goods retailing and related activities that driven by the size and composition of the regional population. They occupy ‘factoryettes’, warehouses and utilitarian retail complexes.

While providing a comprehensive range of manufacturing activities, Melbourne is emerging as the principal production economy hub in Australia providing strong growth businesses at the ‘higher’ end of the production chain in the form of advanced manufacturing. This change has arisen as industrial activity has become increasingly technologically advanced and has grown to include all facets of the production chain such as administration and/or distribution facilities, business services (back office facilities), ‘next phase’ of industrial related development or discrete facilities for production-linked management, research and development, marketing & sales, service and customer support.

Added to this change has been the increasing specialisation of industrial ‘places’ (precincts) in one or a number of roles in the production chain (e.g. management, R&D, production, distribution, marketing & sales, service & customer support) - but not all of these roles. Hence the rise of the Advanced Manufacturing and Production Support group of activities.

Typically, most industrial land development in Melbourne is in Production Support and Regional Services. Whitehorse industrial activity however, is largely focused just on Regional Services.

As a consequence of these global trends there is a need for a broader and more flexible land use framework that promotes development of a range of activities related to production and complementary business services. Such a framework needs to facilitate the development of characteristics associated with higher value industrial precincts which include as part of their success:

- A range of production related businesses that require a ‘Business Park’ setting (quality finishes and landscaping) with flexible building floors and/or room to expand
- Easy access and proximity to CBD and ports
- Provision for vehicular traffic generation consistent with industry (Heavy vehicles)
- Provision for specific security needs
- No significant off site noise or other emissions
- Highest possible environmental and operational standards

Figure 2: Melbourne South East Economic Region

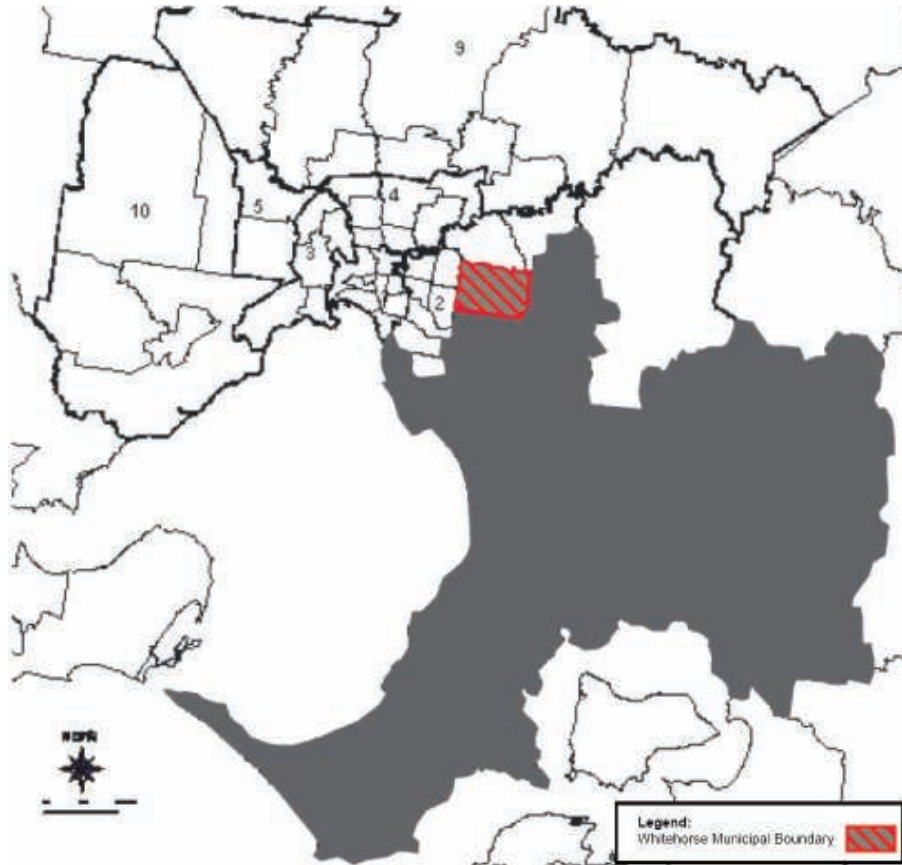


Figure 3: Local Eastern Region



- Provision of uses that meet the needs of workers in the precinct (e.g. child care, gyms) which also support a collaborative and interactive environment for business (e.g. cafes, restaurants)
- Offer a diverse range employment opportunities

As with the key directions established for activity centres it is now recognised within State Government Precinct Structure Planning Guidelines that employment precincts such as industrial precincts also need to:

- Ensure a mix of uses and broaden the activity base of centres to enable a concentration of uses and a diversity of jobs, close to where people live
- Contribute to Melbourne-wide economic growth strategies
- Connect to other employment areas (including activity centres) in the region by arterials roads, the Priority Public Transport Network (PPTN) and freight networks as appropriate
- Provide more connections to surrounding residential areas
- Incorporate services for the benefit of workers, local residents and visitors to the employment area such as education facilities, medical centres, child care facilities, post offices, banks and retail/entertainment services
- Improve the integration of public transport and freight networks
- Incorporate open space that links to the open space network for the benefit of workers, local residents and visitors to the employment area
- Place more emphasis on urban design

These key directions and characteristics all demand much greater flexibility in planning controls and reflect a dramatic shift in the activity mix of industrial precincts where the formerly predominant role of manufacturing now typically accounts for only 20 percent of activity. In particular, there is a need for a more 'flexible' land use framework that promotes development of a range of activities related to production and complementary business services.

REGIONAL ROLE

Whitehorse forms the north western tip of one of Australia's most significant manufacturing regions, generally referred to as Melbourne's South East as shown in Figure 2. This economically connected region comprises eleven municipalities stretching as far as Mornington Peninsula to the south, Cardinia to the east, and Bayside to the west. Unlike some of the industrial powerhouse municipalities contributing to the region, such as Dandenong, Kingston, Knox and Monash, Whitehorse has comparatively limited industrial activity. The main strength in Whitehorse's contribution to this region is its Property and Business Services sector as part of the overall industrial value chain.

However, industrial precincts in Whitehorse perform an important role of providing locations for small and medium size businesses in the more localised eastern region² of Melbourne identified in Figure 3. This role has become more significant as industrial businesses in the inner city have been displaced as a result of rezoning of industrial land for alternative uses. It is therefore more pertinent to review Whitehorse's industrial activity within the context of the eastern region rather than the wider south east region for the purposes of this study.

Industrial land in Whitehorse is characterised by a high underlying land value and a relatively strong market demand generated by:

- A lack of greenfield industrial sites in the immediate area;
- A limited supply of industrial land to the north (Manningham) and to the west between Whitehorse and the CBD
- The socio-economic profile of residents in Whitehorse and surrounding municipalities (which includes entrepreneurs); and
- Strong demand from businesses servicing local households (such as automotive services, construction and property services) and as well as businesses servicing industry in Melbourne's outer eastern region.

² As defined by the Urban Development Program

The local industrial market is driven by the characteristics of the surrounding residential population which consists of educated, higher income, white collar 'entrepreneurial' professionals who seek to establish businesses close to where they live.

The key features of surrounding industrial precincts in the eastern region municipalities are:

- Knox, Maroondah and Yarra Ranges – have a large supply of industrial land in outer suburban locations that would suit transport and logistics businesses as well as small and medium size businesses that would primarily service the outer eastern suburbs;
- Monash – has higher amenity industrial areas with strong links to research and development facilities and institutions, and attracts high technology and corporate users;
- Stonnington and Boroondara – industrial land has been displaced and rezoned and there is now only a minimal amount of industrial land available; and
- Manningham – has a minimal amount of industrial land available to service the local markets demand

The key features of Whitehorse industrial precincts are:

- The primary role of industrial precincts in Whitehorse is as a location for small and medium size businesses that provide products and services to local and regional markets (i.e. a Regional Service focus rather than an Advanced Manufacturing or Production Support focus).
- Industrial precincts in Whitehorse do not directly compete with other industrial areas in the eastern region which are either designed for specific types of businesses (i.e. high tech business, transport and logistics) or attract businesses that provide products and services to other businesses and households within their own local market.
- The high underlying value of Whitehorse industrial properties has supported the redevelopment of larger sites for higher value mixed used developments that suit the owner-occupiers and small to medium sized investors.
- Whitehorse industrial precincts will continue to significantly contribute to the strength in the diversity of the Whitehorse economy and will need to accommodate higher value activities requiring a higher proportion of office space than experienced in the past due to changing global industrial practices.

LOCAL ROLE

Business & Employment Profile

The key industry sectors that provide jobs and require industrial land are manufacturing, wholesale trade, transport and storage, and construction.

Of the 59,382 jobs estimated to be within Whitehorse (REMPPLAN, ABS 2006) these sectors provide 13,795 jobs or 23 percent of all jobs within Whitehorse as shown in Table 1.

Table 1: Industrial Employment

INDUSTRY SECTOR	TOTAL NOS. JOBS			% OF WHITEHORSE JOBS		
	2006* ¹	2001* ²	CHANGE	2006	2001	% CHANGE '01 TO '06
Manufacturing	5,552	7,230	-1,651	9.35	12.18	-23
Wholesale Trade	5,014	4,595	419	8.44	7.74	9
Construction	2,778	2,572	206	4.68	4.33	8
Transport & Storage	870	861	9	1.47	1.45	1
TOTAL	14,214	15,258	-1,017	24	26	-5%

Source: REMPLAN Data Report, Whitehorse City Council 2008- *¹ incorporates 2006 ABS Census data, *² incorporates data source from 2001 ABS Census data

Employment levels in manufacturing declined by 23% while overall employment levels across the selected industrial sectors increased by 18%. This suggests that the industrial precincts have been able to attract alternative businesses and replace employment lost in the manufacturing sector.

There are 2,434 industrial businesses in Whitehorse (ABS 2006 Census Community Profile – Working Population Profile) involved in manufacturing, wholesale trade, construction and transport and storage. However, the composition of businesses across the industrial precincts is diverse and represented by businesses in the following industry sectors:

- Manufacturing
- Wholesale Trade
- Construction
- Communication Services
- Transport and Storage
- Personal and Other Services
- Electricity, gas and water; and
- Retail

When this more diverse profile is taken into account at least a further 5,300 jobs can be accounted for within Whitehorse's industrial precincts.

Working Population Profile

The following data has been obtained from the Australian Bureau of Statistics 2006 Census Community Profile Series which examines the working population (rather than residential) profile of Whitehorse.

Key characteristics of the workforce are as follows:

- At the time of the 2006 Census there were 60,038 people employed in the 8,064 businesses across Whitehorse.
- Businesses are strongly characterised by small enterprises with 1 to 19 employees (62%) with only 6% employing more than 20 people.
- Of these, 13,809 (23%) people were employed, and 2,434 (30%) of business were engaged in, the industrial sector.

- The top 10 employers in the industrial sector account for 70% of all jobs and include:
 - Machinery and equipment wholesaling 17%
 - Construction services 10%
 - Other goods wholesaling 9%
 - Building construction 8%
 - Machinery and equipment manufacturing 6%
 - Printing 6%
 - Road transport 6%
 - Manufacturing 4%
 - Basic material wholesaling 4%
- The industrial sector is characterised by occupations as follows:
 - Technicians & trades workers 20%
 - Managers 17%
 - Clerical & administrative workers 17%
 - Professionals 14%
 - Machinery operators & drivers 14%
 - Labourers 8%
 - Other 10%
- Nearly 70% of persons employed in industrial activity are males.
- Nearly 60% of all employees work more than 40 hours per week and account for a third of employees across all sectors working these extended hours.
- Of the 18,256 employees in Whitehorse who were born overseas, 25% are engaged in the industrial sector and predominantly in the manufacturing and wholesale trade.

This profile highlights that a significant portion of the Whitehorse working population are engaged in small to medium enterprises largely involved in machinery and equipment, building and construction activities. The majority of workers are also likely to be performing a variety of skilled tasks such as applying broad or in-depth technical, trade or industry specific knowledge, and often in support of scientific, engineering, building and manufacturing activities and holding either:

- An Associate Degree, Advanced Diploma or Diploma, or at least three years of experience; or
- Certificate III including at least two years of on-the-job training, or Certificate IV or at least three years of relevant experience

The majority of workers are also male and working more than 40 hours a week.

This profile has important implications for the type and range of facilities and services sought by the working population both for individual premises within which to operate and precincts as a whole. For example it is likely that cafes and restaurants will have higher importance for people working longer hours and they will also demand a wider range of retail products and services than part time workers able to use these facilities outside of working hours.

Economic Contribution

Despite experiencing a downward trend in total numbers of jobs (particularly in manufacturing) the industrial trade sector continues to be Whitehorse's star performer with respect to regional exporting (73%), output (56%) and local expenditure (52%) The total economic contribution of Whitehorse's industrial precincts is summarised in Table 2.

Table 2: Industrial Precincts Contribution to Whitehorse Economy

MEASURE (REFER GLOSSARY)	VALUE OF SELECTED INDUSTRY SECTORS* (\$M)	VALUE OF ALL INDUSTRY SECTORS (\$M)	CONTRIBUTION TO WHITEHORSE ECONOMY (%)
Output	7,776.2	13,977.1	56%
Wages & Salaries	1,426.3	3,838.5	37%
Local Sales	2,002.5	4,314.0	46%
Exports	3,915.0	5,375.3	73%
Local Expenditure	2,226.0	4,314.0	52%
Value Added	2,649.2	6,028.8	44%

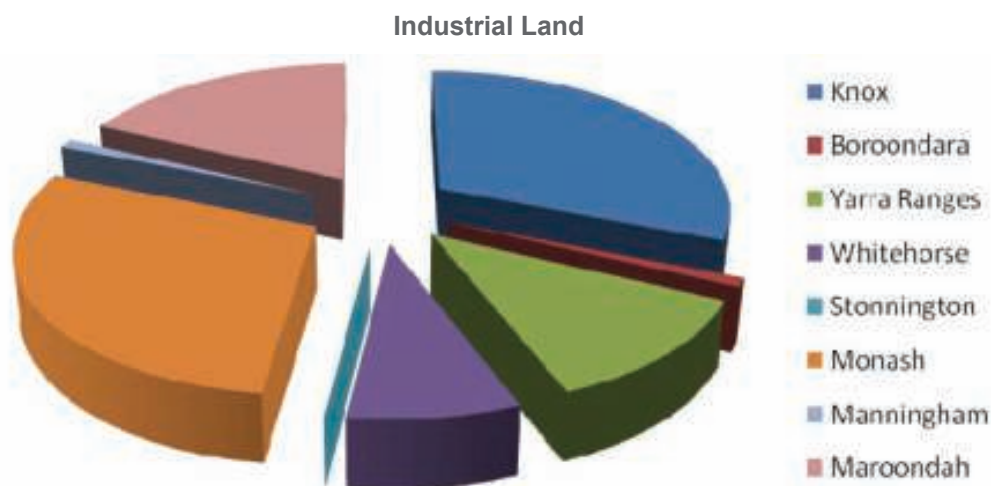
Those manufacturing sectors most crucial to all of these measures are:

- Paper, printing and publishing
- Paper containers and products
- Printing and services to printing
- Publishing and recorded media
- Other machinery and equipment
- Electronic equipment

INDUSTRIAL SUPPLY

The Urban Development Program (UDP), the State Government’s land supply monitor, identifies Whitehorse within the eastern region which also comprises the municipalities of Yarra Ranges, Maroondah, Knox, Manningham, Boroondara, Stonnington and Monash. According to the UDP, this region has a total stock of 2,532 hectares of industrial land, zoned either Industrial 1 or 3, or Business 3. Whitehorse provides 8 per cent of this stock as shown in Figure 4.

Figure 4: Industrial Land Stock in Eastern Suburbs by LGA



The supply of floor space across Whitehorse’s industrial precincts varies with:

- Rooks Road, Evans/Ireland Streets, Redland and Cook Road precincts offering a combination of Industrial 1 and Industrial 3 zoned land while the other precincts are zoned either Industrial 1 or Industrial 3 (refer to Table 3 below); and
- Rooks Road, Middleborough Road/Clarice Road, Blackburn and Mega Mile precincts accounting for approximately two thirds of both industrial floor space and total land area as demonstrated respectively in Figures 5 and 6 below.

Table 3: Whitehorse Land Area Supply by Industrial Precinct

PRECINCT	INDUSTRIAL 1	INDUSTRIAL 2	BUSINESS 1	BUSINESS 2	BUSINESS 3	BUSINESS 4	TOTAL		
	LAND AREA (SQM)	LAND AREA (SQM)	LAND AREA (SQM)	LAND AREA (SQM)	LAND AREA (SQM)	LAND AREA (SQM)	NOS. RATEABLE PROPERTIES	FLOOR SPACE (SQM)	LAND AREA (SQM)
Rooks	334,351	39,933	0	0	0	0	187	159,559	393,178
Middle/Clarice	287,123	0	0	0	0	0	127	178,224	287,178
Blackburn	149,030	0	0	0	0	0	235	143,048	149,030
Mega Mile	0	0	2,593	14,277	0	152,757	248	157,961	169,627
Evans/Ireland	33,747	40,814	0	0	0	021,712	117	94,735	96,273
Lexton	0	96,760	0	0	0	0	96	10,992	96,760
Redland	55,798	197,431	0	0	0	0	194	135,872	253,229
Cook	40,795	53,906	0	0	0	46,494	69	72,887	141,195
Joseph	0	39,427	0	0	0	0	31	41,760	39,427
TOTAL	900,847	468,271	2,593	14,277	0	220,963	1,304	995,038	1,232,664

Source: Whitehorse City Council Property Database

Figure 5: Proportion of Floorspace by Industrial Precinct

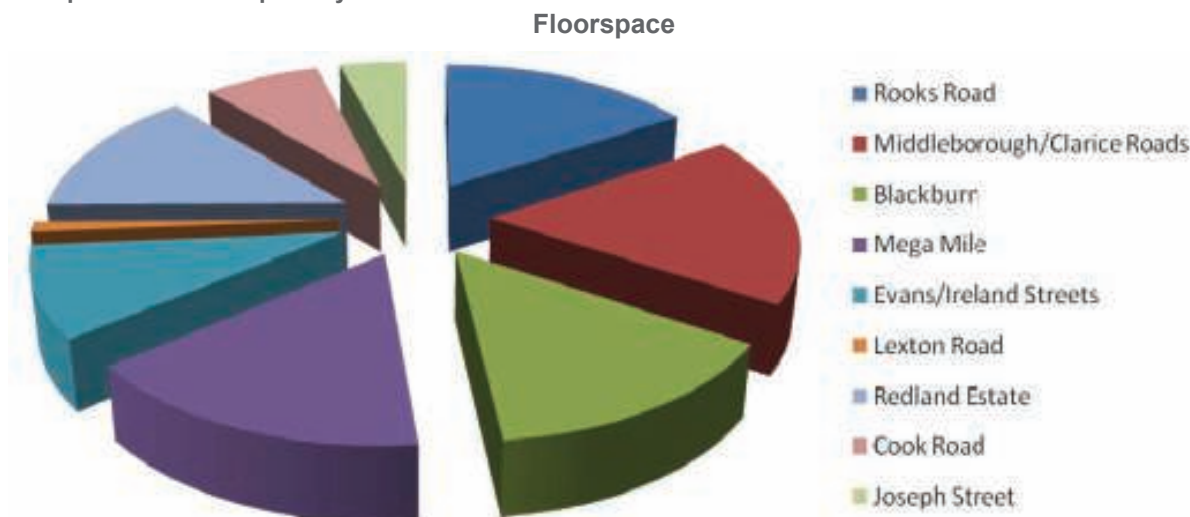


Figure 6: Proportion of Total Land Area by Industrial Precinct



WHITEHORSE PROPERTY MARKET

Prices for industrial properties in Whitehorse range from \$1,200sqm to \$2,000sqm of land area. Prices have remained relatively constant over the last four to five years with variations in values primarily the result of differences in the quality of buildings rather than the industrial precinct a property is located within. This is due to the market viewing these precincts as being similar with little differentiation in geographical location, building style, and infrastructure. Properties are tightly held and rental vacancies have been low across all precincts in the study area.

The strength of the local market has supported the redevelopment of larger sites for higher value mixed use developments that suit the owner-occupiers and small and medium sized investors. These developments require modern business design and infrastructure, an appropriate level of internal access for vehicle and on-site parking for employees and customers. As a result, not only has there been a trend towards more higher value adding activities but also a gentrification of the building stock within Whitehorse's industrial precincts. Institutional investors are not actively involved in these precincts and may only be attracted in the circumstance where larger corporate properties with high exposure are vacated.

Industrial properties are subject to high levels of obsolescence due to the changing nature of manufacturing and distribution systems. Unlike retail properties which draw their value from their locational attributes, the value of industrial properties primarily lies in their improvements. If the local industrial market experiences strong local demand and has a limited supply, high property values make redevelopment of sites more feasible and increases the value of properties.

It is anticipated that East Link will not have a significant impact on businesses moving out of industrial precincts in Whitehorse for two reasons. The first being, that there are very few large logistics, transport and corporate businesses in Whitehorse that would benefit from being located along East Link, and the second reason being the composition of businesses in Whitehorse. As primarily small to medium size businesses, the benefits that may be gained by relocating would not necessarily outweigh the short and medium terms costs involved in moving and potentially losing some of their local customers. As existing businesses obtain no value from moving there are limited opportunities for new businesses to relocate to the municipality. Those businesses that would benefit most from close proximity to such infrastructure, namely logistics and transport enterprises would have difficulty in assembling suitable land parcels and will find less expensive alternatives in Dandenong and to a lesser degree Knox. The net effect of these influences is limited change.

It is expected that the industrial precincts will continue to significantly contribute to the strength and diversity of the Whitehorse economy. There is the potential to continue to attract higher value developments and business in the future and, through the redevelopment of sites, improve the appearance and amenity of the precincts over time. Demand for industrial premises offering a higher proportion of office space will be a key trend that will need to be reflected in Whitehorse's planning and economic development strategies.

Recently Released Developments

There are currently a number of large sites in precincts across Whitehorse at varying stages of development. Some of the key new releases are as follows:

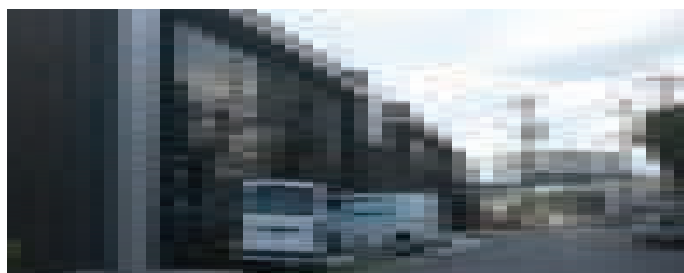
147 Rooks Road in the Redlands precinct has been redeveloped for a 3 office/warehouse/showroom complex



127 Highbury Road in the Evans/Ireland precinct has been redeveloped from a traditional manufacturing facility to a 34 office/warehouse complex



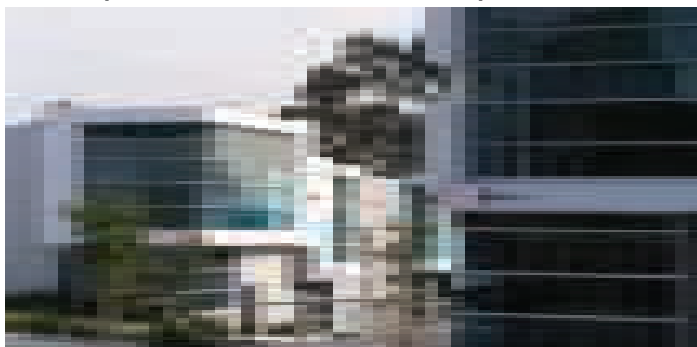
29-31 Clarice Road in the Middleborough/Clarice precinct in Box Hill South has been redeveloped for 13 Industrial warehouses



621 Whitehorse Road in the Cook Road precinct has been redeveloped for large warehouse, industry and ancillary Office complex and properties.



56 Norcal Road in Rooks Road precinct has been redeveloped for 18 office/warehouse complex.



These sites bring new supply to the market and will provide an important indicator of market demand for building formats and the requirements of owner/occupiers and investors. These sites should be closely monitored to determine the long term strength for demand of industrial properties in Whitehorse and the ability for alternative businesses to replace traditional manufacturing as it continues to decline.

Short Term Development Opportunities

A number of use and development approvals are in place for sites as listed in Table 4.

Table 4: Whitehorse Planning Approval 2005 to 2011 not yet commenced

YEAR	PRECINCT	APPROVED
2010	Middleborough / Clarice	23 Clarice Road, 12 Warehouses (2,898sqm)
	Cook Road	25-39 Cook Road Mitcham, 38 warehouses and office space (7,484sqm).
	Cook Road	23 Cook Road, 18 warehouses and set storage facilities
2007	Middleborough/Clarice	249 Middleborough Road (former Amcor site) - use and development of the land for showroom. warehouse, restricted retail premises, trade supplies, office and associated cafe
2005	Rooks Road	51-79 Norcal Road – use and development of 51 warehouses

Industrial land in Whitehorse is characterised by a high underlying land value and a relatively strong market demand. This is a result of a lack of greenfield land to the north in Manningham and to the west between Whitehorse and the CBD. This creates the potential for precincts like Blackburn, Middleborough/Clarice and Rooks in particular to attract higher value development and creates a market across the municipality for:

- Redevelopment of sites of approximately 1,000 to 1,500 sqm
- Larger sites for a mix of contemporary office/warehouse formats to the suit the requirement of owner-occupier and small and medium investors; and
- The renovation of buildings on smaller sites as property values and increasing construction costs impact on the feasibility of redevelopment.

Vacant land also presents a short to medium opportunity for development within Whitehorse. There is currently a total of 125,809m² of vacant land as summarised in Table 5 and detailed in Appendix 1.

Table 5: Vacant Land Sites (as at June 2009)

PRECINCT	AVAILABLE LAND (SQM)	SITES
Cook Road	48,048	613 Whitehorse Road 621 Whitehorse Road
Middleborough/Clarice	40,353	249 Middleborough Road*
Rooks Road	32,859	26-28 & 34-42 Rooks Road 51-53 Norcal Road*
Redland Estate	4,549	159-171 Rooks Road
Blackburn		N/A
Evans & Ireland	0	N/A
Lexton	0	N/A
Joseph	0	N/A
TOTAL	125,809	

*Development approval in place

Of these sites the following present the most significant development opportunities:

51 -53 Norcal Road, 31,490m²



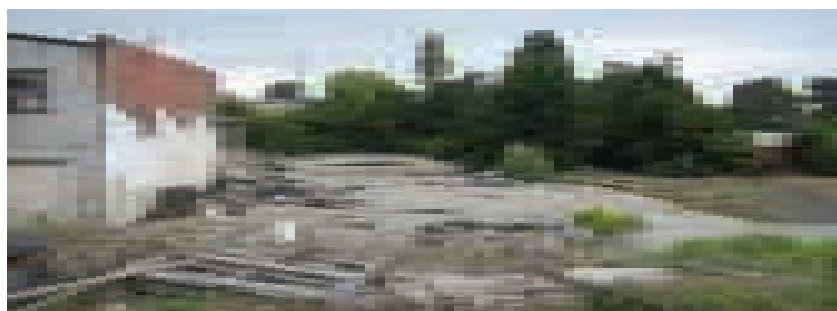
249 Middleborough Road, 24,131m² (former Amcor site)



621 Whitehorse Road, 12,314m²



613 Whitehorse Road, 31,330m²



There is also 67,683m² of vacant floor area as summarised in Table 6 and detailed in Appendix 1. These floor areas present a short term business attraction opportunity or medium term redevelopment opportunity for the City's industrial sector.

Table 6: Vacant Premises Sites (as at June 2009)

PRECINCT	AVAILABLE FLOOR AREAS (SQM)	SITES
Redland Estate	20,347	3 & 12 Azalea St, 7, 21-24 (units 4 & 5), 28 & 29 Redland Dve, 137-145 (units 7, 9, 15, 16, 18, 27 & 30), 147, 157A, 3.162, 170-180 (units 2, 7 & 8), 173-181 (units 7, 9 & 10), 183-185, 187-201 (units 3, 5, 6, 7 & 8) & 190-192 Rooks Rd, 10A, 7-9 & 24 Trade Plce
Joseph	14,301	6/2-4, 21-23 & 21-41 Joseph St (30,532m ² land area)
Blackburn	12,591	13A & B Ceylon St, 8 & 16 King St, 15, 20, 22, 23, 24 & 38 Terra Cotta Dve, 23 & 25 Moncrief Rd, 1, 2, 2A, 4 & 7 Varman Crt, 10 & 25 Cottage St, 11 (units 4, 5 & 6) Mary St, 44 Alfred St
Middleborough/Clarice	7,361	8A, 3/10, 5/10, 6/10, 12, 4/27, 5/27, 29-31 (units 4, 7, 8, 9, 10, 11, 12) & 38 Clarice Rd, 277-289 (units 7, 8 & 11), 199, 205 & 2/205 Middleborough Rd, 6 Ailsa St
Evans & Ireland	5,541	114-116 Burwood Hwy 1, 18 & 19 Harker St 22 McIntyre St, 1 Millicent St 17 Tudor St, 4/6 Duffy St
Cook Road	3,249	37 & 38 Church St, and 23 Cook Road ³
Rooks Road	2,995	93 & 101 Mount Pleasant Rd, 41-49 (units 12, 19, 25, 33 & 51) & 5/56 Norcal Rd, 2/10-12, 23, 2/24 Thornton Cres
Lexton	1,298	8/31-35, 5/58, 6/58 & 77A Lexton Rd
TOTAL	67,683	

While these vacant premises typically comprise floor areas under 500m² the following sites present significant redevelopment opportunities:

21-41 Joseph St, Blackburn North, 30,532m² (Former Hewlett Packard site)



Part 187-201 Rooks Road, Vermont, 7,835m²



³ 23 Cook Road – as at September 2009 it is understood that this property is subject to an active planning application WH/2009/341 (offices/warehouse/self storage facility/cafe).

OVERVIEW OF THE PLANNING FRAMEWORK

This section provides an overview of the Planning Framework for the study area and a summary of the key directions arising from the State, Regional and Local Government policies and strategies that are also applicable to the study area. This provides a valuable checking point against any future land use (development) opportunities raised in the previous section of this report and identifies any conflicts that may need to be resolved to realise these opportunities.

STATE PLANNING POLICY FRAMEWORK

The State Planning Policy Framework (SPPF) provides the following key policies that are relevant to the study area.

Clause 17 Economic Development, particularly with regard to:

Clause 17.03 - Industry

This policy seeks to ensure availability of land for industry and to facilitate the sustainable development and operation of industry and research and development activity. Furthermore that:

- Industrial activity in industrial zones should be protected from the encroachment of unplanned commercial, residential and other sensitive uses which would adversely affect industry viability.
- Planning authorities should protect the quantum of large areas of industrial land of state significance to ensure availability of land for major industrial development, particularly for industries and storage facilities that require significant threshold distances from sensitive uses.
- Existing industrial areas that include key manufacturing or processing industries; a major clustering of allied industries; key industrial infrastructure should be protected and carefully planned where possible to facilitate further industrial development.

Clause 15 Environment, particularly with regard to:

- Clause 15.01 - Protection of catchments, waterways and groundwater:
- Clause 15.04 - Air quality.
- Clause 15.05 - Noise abatement.
- Clause 15.06 - Soil contamination.
- Clause 15.09 - Conservation of native flora and fauna
- Clause 15.11 - Heritage
- Clause 15.12 - Energy efficiency
- Clause 15.13 - Renewable energy

This policy seeks to assist the protection and, where possible, restore or improve the elements as described above. It also seeks to ensure sustainable use of natural resources and achieve development that provides an environmental, social and economic balance.

Melbourne 2030

As the metropolitan strategy for Melbourne this document is based on a concept of establishing a more compact city, which is defined by a series of high density and multi-purpose activity centres that are connected by an effective public transport network.

With regard to industrial areas and the eastern region, Melbourne 2030 has established the following directions:

- Maintain an adequate supply of land for industry and protect well-located industrial land;
- Encourage manufacturing and storage industries to locate close to sea and air ports, and road and rail links;
- Further develop transport links and gateways, and maintain the State's lead position in logistics;
- Create opportunities for innovation and new economy activities;
- Assess demand for the EastLink transport corridor for demand for industrial space in the east;
- Amend where needed the business and industrial zones in planning schemes to provide for the essential needs of the production economy while not undermining the intent of activity centre policy;
- Promote business and university links associated with the Synchrotron;
- Plan urban development to make jobs and community services more accessible; and
- Require that integrated transport plans be prepared for all new major developments – including industrial – and develop guidelines that emphasise sustainable transport.

LOCAL PLANNING POLICY FRAMEWORK

The Local Planning Policy Framework (LPPF) provides the following key policies that are particularly relevant to the study area.

Clause 21.07 Economic Development

In the economic development overview Whitehorse City is committed to playing a key role in facilitating a thriving and sustainable local economy. Council will work in partnership with the local community to:

- Increase investment and employment opportunities that enhance the local economy, natural environment and quality of life for existing and future residents
- Enable appropriate growth of existing and future businesses in order to achieve economic well-being.

The LPPF recognises that the City contains some of the largest industrial areas in this region and nominates Rooks Road (constrained by the abutting residential areas and containing the last remaining extractive industry site), McIntyre Street in Burwood, Middleborough Road in Box Hill South, Joseph Street in Blackburn and Lexton Road in Box Hill, as areas that will be supported for redevelopment that respects and enhances the amenity of the abutting residential properties, while maintaining their industrial focus.

Strategies to facilitate the on-going development and refurbishment of industrial estates includes:

- Direct industrial uses into appropriate locations.
- Discourage non-industrial related uses from locating in industrial areas.
- Ensure industrial uses within these areas are suitable to protect the amenity of abutting land uses, particularly if it is residential.
- Provide a buffer between intense industrial activity and residential areas.
- Require equitable developer contributions to new residential, industrial and commercial areas.
- Developing appropriate zoning, overlay and design guidelines for strategic redevelopment sites, responding to issues such as appropriate treatments to existing residential areas

Industrial activity in the City is a highly important part of the regional economy and provides significant employment opportunities for the local area and the Eastern region. More specifically the following clauses are relevant to the Whitehorse industrial precincts.

Clause 22.09 - Rooks Road Industrial Area

The Rooks Road industrial area is identified as an important focus for industrial activity and a provider of significant employment opportunities. This policy applies in part to areas within the Rooks Road precinct and Redlands Estate precinct. The basis of the policy is:

- It is important that the interface with abutting residential areas is sensitively managed.
- The amenity of the area is improved through the provision of adequate landscaping which is consistent with Clause 21.07 Economic Development.
- Traffic management issues must be addressed to acknowledge the function of Rooks Road as a north/south link between Canterbury and Whitehorse Roads and to direct non-local traffic away from using residential streets.

Clause 22.10 - King and Ceylon Street Industrial Area

Part of the Blackburn industrial precinct, this policy recognises that the streetscape of this industrial area is to be improved with the provision of landscaped areas in the front setback of buildings. This is in keeping with Council's wider aim to improve the amenity of the City of Whitehorse's industrial areas as outlined in Clause 21.07 Economic Development.

The policy aims to:

- To ensure that lots are consolidated to provide for viable development sites and avoid residential properties being isolated between industrial uses.
- To provide for a pleasant setting with the achievement of adequate landscape buffers to road frontages to soften the built form and improve the amenity of the area.

ZONES AND OVERLAYS

The purpose of these zones and overlays are to implement the State Planning Policy Framework and the Local Planning Policy Framework, including the Municipal Strategic Statement and local planning policies. Those specifically relating to industrial activities within Whitehorse are as follows:

33.01 Industrial 1 Zone – IN1Z

The purpose of this zone is to provide for manufacturing industry, the storage and distribution of goods and associated uses in a manner which does not affect the safety and amenity of local communities.

33.03 Industrial 3 Zone - IN3Z

The purpose of this zone is to provide for industries and associated uses in specific areas where special consideration of the nature and impacts of industrial uses is required or to avoid inter-industry conflict. The zone provides a buffer between the Industrial 1 Zone and local communities, which allows for industries and associated uses compatible with the nearby community and ensures that uses do not affect the safety and amenity of adjacent, more sensitive land uses.

34.03 Business 3 Zone - B3Z

The purpose of this zone is to encourage the integrated development of offices and manufacturing industries and associated commercial and industrial uses. Specific to this zone, there is a maximum combined leasable floor area of 4,000 (m²) for all sites.

34.04 Business 4 Zone - B4Z.

The purpose of this zone is to encourage the development of a mix of bulky goods retailing and manufacturing industry and their associated business services.

37.03 Urban Floodway Zone - UFZ.

The purpose of this zone is to identify waterways, major floodpaths, drainage depressions and high hazard areas within urban areas which have the greatest risk and frequency of being affected by flooding. The zone ensures that any development maintains the free passage and temporary storage of floodwater, minimises flood damage and is compatible with flood hazard, local drainage conditions and the minimisation of soil erosion, sedimentation and silting, and protects water quality and waterways as natural resources in accordance with the State policies.

Heritage Overlay - HO

The purpose of these overlays is to:

- Conserve and enhance heritage places of natural or cultural significance.
- Conserve and enhance those elements which contribute to the significance of heritage places.
- Ensure that development does not adversely affect the significance of heritage places.
- Conserve specifically identified heritage places by allowing a use that would otherwise be prohibited if this will demonstrably assist with the conservation of the significance of the heritage place.

The Heritage overlay includes the following industrial sites:

- HO160 overlays 88 Whitehorse Road, Blackburn
- HO156 overlays over 11 A Railroad and 5 Queen Street; 16 Station Street, Blackburn
- HO67 overlays 9-15 Queen Street, Blackburn
- HO68 overlays 95-97 and 91-93 Railroad, Blackburn
- HO78 overlays 58-74 Station Street, Blackburn
- HO5 overlays 656 Mitcham Road, Nunawading

Schedule 4 to the Design and Development Overlay - DDO4.

The purpose of this interim overlay is to ensure that the height of new development is compatible with the character of the neighbourhood centre and adjacent areas, and includes the following sites:

- Cromwell Street, in the Evans/Ireland Industrial Precinct
- Corner of Middleborough and Canterbury Road in the Middleborough Industrial Precinct.

42.02 Vegetation Protection Overlay - VPO

The purpose of this overlay is to

- Protect areas of significant vegetation.
- Ensure that development minimises loss of vegetation.
- Preserve existing trees and other vegetation.
- Recognise vegetation protection areas as locations of special significance, natural beauty, interest and importance.
- Maintain and enhance habitat and habitat corridors for indigenous fauna.
- To encourage the regeneration of native vegetation.

Schedule 1 to the Vegetation Protection Overlay Significant Exotic, Native and Indigenous Trees - VPO1

The purpose of this overlay is to protect vegetation of special significance, natural beauty, interest and importance and relates to 21/2, 26-28 Silma Street in the Rooks Road Industrial Precinct

Schedule 3 to the Vegetation Protection Overlay Significant Exotic, Native and Indigenous Trees - VPO3

The purpose of this overlay is to protect vegetation of special significance, natural beauty, interest and importance and relates to 15-17 Maurice Court, in the Rooks Road Industrial Precinct.

44.05 Special Building Overlay – SBO

The purpose of this overlay is to identify land in urban areas liable to inundation by overland flows from the urban drainage system as determined by, or in consultation with, the floodplain management authority. The overlay ensures that development maintains the free passage and temporary storage of floodwaters, minimises flood damage, is compatible with the flood hazard and local drainage conditions and will not cause any significant rise in flood level or flow velocity. It also protects water quality in accordance with the provisions of relevant State Environment Protection Policies, particularly in accordance with Clauses 33 and 35 of the State Environment Protection Policy (Waters of Victoria). It is applicable to:

- 4, 6, 6A, 8, 10, 12, 14 Beech Street
- 162, 164 Rooks Road, in the Redlands Industrial Precinct.

SUMMARY AND IMPLICATIONS OF PLANNING POLICY FRAMEWORK

The directions established for industrial activity are supported in principal by the existing planning framework. The policy recognises the importance of the precincts as employment generators and accords with State planning policy which requires that industrial zones should be protected and carefully planned where possible to facilitate further industrial development.

A particular difficulty for Whitehorse industrial precincts is the extent to which they directly interface with residential areas which has resulted in an emphasis on the management of this interface rather than the activity itself. This approach is highlighted by the response to two major sites, one within the Nunawading Mega Mile Major Activity Centre Structure Plan (Daniel Roberts Brick Site) and the other being the former brickworks site within the Burwood Heights Major Activity Centre Structure Plan. Despite having had long standing industrial activities these sites have now been converted to mixed residential and commercial activities. This is contrary to the MSS which states that while development of industrial areas needs to respect and enhance the amenity of the abutting residential properties, these precincts need to maintain their industrial focus. Furthermore, the MSS clearly states that non-industrial related uses are to be discouraged from locating in industrial areas.

In the face of higher returns and a desire for more sensitive uses at the interface of residential areas this industrial 'erosion' emphasises the need for a clear planning policy for all remaining industrial land that applies to all Industrial 1 and 3 and Business 3 and 4 zoned land. The objective of the policy must reinforce the MSS and establish a stronger framework for maintaining and encouraging further growth in local employment, industrial and service business activity needs in these zones. This policy should also list all remaining key industrial sites and provide broad future investment directions.

In line with Clause 19 (Design and Built Form) it is also appropriate to include either within the Local Policy or as a new Design and Development Overlay (DDO6) application to the industrial precincts. These guidelines should include clear design objectives regarding subdivision; siting; landscaping; architectural quality; environmentally sensitive design; and signage.

PRECINCT ANALYSIS & INVESTIGATIONS

Even though each of the eight industrial precincts has subtle differences they can be generally considered to be homogeneous as there is little differentiation in geographical location, building style and infrastructure across the precincts.

As such the precincts are generally characterised by:

- Pockets of industrial land with a limited number of vacant development sites;
- Ad hoc redevelopment of sites resulting in varying degrees of development density and building form;
- Changing business requirements for floorspace has resulted in the redevelopment of sites with buildings generally consisting of 30 to 50 percent office space and a combination of light manufacturing and/or warehouse space;
- Most precincts lack prominent road exposure but have access from primary state arterial roads and;
- Internal road networks that were not designed to handle the level of industrial development and density that has occurred resulting in accessibility, traffic and parking conflicts.

MARKET NICHEs

Although the precincts are similar they do vary in terms of size, amenity and development potential and as such can be divided into categories as follows:

Rooks Road, Middleborough Road/Clarice Road, and Blackburn Precincts - these are the largest industrial precincts and have a diverse business mix and variety of lot sizes. They have traditionally been the location of larger corporate and multinational businesses associated with manufacturing. Pockets within these precincts consist of smaller lots with a mix of repair and maintenance, manufacturing, wholesale and construction businesses that service the local market.

A key differentiation that sets these precincts apart is that they have also attracted businesses such as professional, scientific and technical services. These precincts could therefore be successfully positioned for manufacturing activities associated with high added value (e.g. advanced manufacturing) across a diversity of floor areas.

Indicative activity:

- specialised industrial machinery and equipment manufacturing and repairs,
- medical equipment and services
- plastics and polymer product design and manufacturing
- food manufacturing
- construction and safety equipment
- utility and telecommunications equipment and services

Redlands Estate Precinct – contains a large planned area that is the only type of its kind in Whitehorse. It has high building and streetscape design standards and is a highly sought after industrial location in the eastern suburbs. This precinct should be positioned for high value added manufacturing industry associated predominantly with small floor areas (500 to 1,000m²)

Indicative activity:

- industrial machinery and software design
- environmental management systems and services
- architectural and building design services
- engineering and precision equipment design services

Evans/Ireland Streets and Lexton Road Precincts – although these precincts are relatively small they have a diverse mix of businesses consisting of repair and maintenance, manufacturing, wholesale and construction businesses.

The primary function of these precincts is to service the needs of local households and businesses. As such they fulfill an important role in supplying manufacturing activities associated with lower value (e.g. service industries)

Indicative activity:

- industrial machinery and equipment sales and service
- industrial and domestic climate control systems(air conditioning/heating) sales and service
- automotive repairs and service
- domestic appliance servicing and repairs
- building, plumbing and landscaping services
- industrial and domestic cleaning services

Cook Road and Joseph Street Precincts – these are small precincts characterised by large lots that have traditionally comprised manufacturing related businesses. They have limited development potential due to their generally low profile and surrounding residential development but of all the precincts have the best access to the Eastern Freeway and EastLink.

As the few remaining areas of large lots in single ownership these precincts could be developed to meet a market niche for businesses requiring large and medium floor areas (2,000m²+))

Indicative activity:

- small and medium size distribution companies
- product assembly (products requiring assembly and distribution, appliances, computer and electronic equipment, heating cooling and ventilation systems)
- wholesale supplies and servicing (coffee machines, vending machines, retail supplies and packaging)

OVERVIEW

Key factors that may influence the future direction of the precincts are as follows:

Precinct Strengths

- Range of premises and price points on offer
- Diversity of businesses and range of services and products on offer
- Well established and recognised market position
- Access to large and highly skilled workforce
- Access to a large geographic market including inner Melbourne and the south east region via EastLink
- High quality existing infrastructure and utilities; and
- High levels of intra-Whitehorse business relocations

Precinct Opportunities

- Rezoning some precincts to encourage new investment and facilitate a better match between premises and business needs
- Relocation of larger businesses creates opportunities for redevelopment of sites for smaller, higher value adding businesses
- Continued constraint around supply of industrial land in adjoining municipalities directs demand to Whitehorse as the next most accessible supply
- Continued redevelopment of sites, the maintenance of infrastructure, and resulting improvement to the overall amenity increase the attractiveness of the precincts for further investment; and
- Large supply of older buildings requiring new investment

Precinct Weaknesses

- Close proximity of residential areas to many precinct interfaces
- Increasing densities has resulted in traffic congestion and parking conflicts
- Limited opportunities for expansion
- Numerous small properties and ownership creating site amalgamation difficulties
- High underlying land values and demand can be a disincentive to investment in the renovation and/or redevelopment of older buildings
- Diversity in floor space uses required to meet demand may be constrained by existing industrial 1 and 3 zones office floor area restrictions; and
- Lack of amenities, retail and services in some precincts limiting their attractiveness to employees.

Precinct Threats

- Availability of large land parcels being created along EastLink attracting large businesses away from Whitehorse
- Higher amenity of competing precincts in Knox and Monash in particular and now more accessible via EastLink
- Underutilisation of land unable to meet new business needs requiring more flexibility for associated office activities
- Increasing pressure on industrial zoned land with good main road exposure for alternative forms of development such as bulky goods retailing
- Increasing pressure on industrial land to accommodate uses often incompatible with residential areas such as places of assembly.
- The amount of offices located on industrial land.

Figure 7: Age of Building Stock

Source: Whitehorse Property database

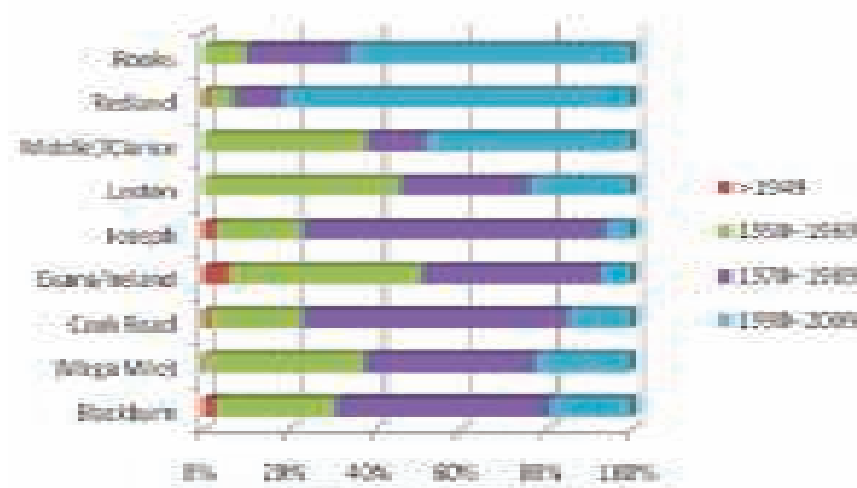


Figure 8: Floor Areas

Source: Whitehorse Property database

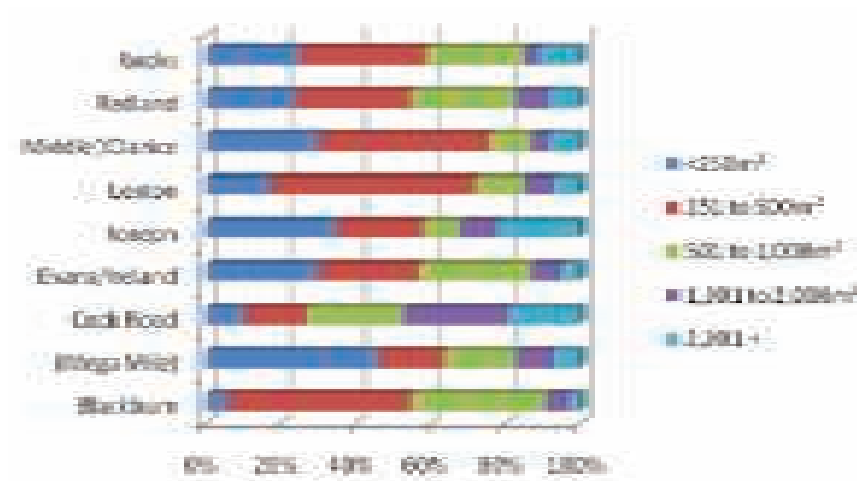
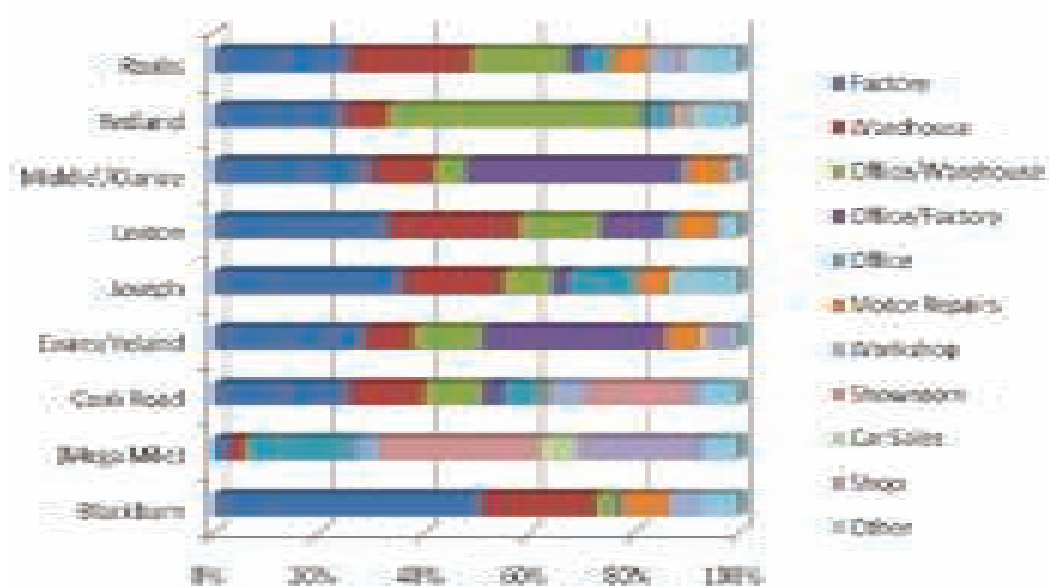


Figure 9: Predominant Building Types

Source: Whitehorse Property database



STUDY AREA BUSINESS & LAND PROFILE

A detailed review of Council property data and a business survey conducted by Council has been completed. Key statistics from this review are contained in Appendix 2 and have informed the detailed analysis for each precinct in this section of this report. The following summary however provides an overview of the findings as they relate to the study area as a whole.

Building Stock

- There are over 1,300 buildings supporting the industrial sector
- Buildings were predominantly constructed between 1970 and 1989 but nearly a third were constructed prior to 1969 as shown in Figure 7
- Floor areas are generally between 250 and 500m² with only 17% providing floor areas in excess of 1,000m² as shown in Figure 8
- At the time of the survey vacancy rates were generally low at 10% accounting for 67,683m² (7%) of total floor area.
- The predominant types (64%) of buildings are factory (29%) followed by warehouse (17%) or a mixture of office/warehouse or office factory (18%) as shown in Figure 9.
- Bulky good activities dominate frontages to main roads

Land Stock

- Land in the precincts is predominantly zoned either Industrial 1 (54%) or Industrial 3 (31%) and distributed across the precincts as shown in Figure 10.

Figure 10: Land Zoning

Source: Whitehorse Property database

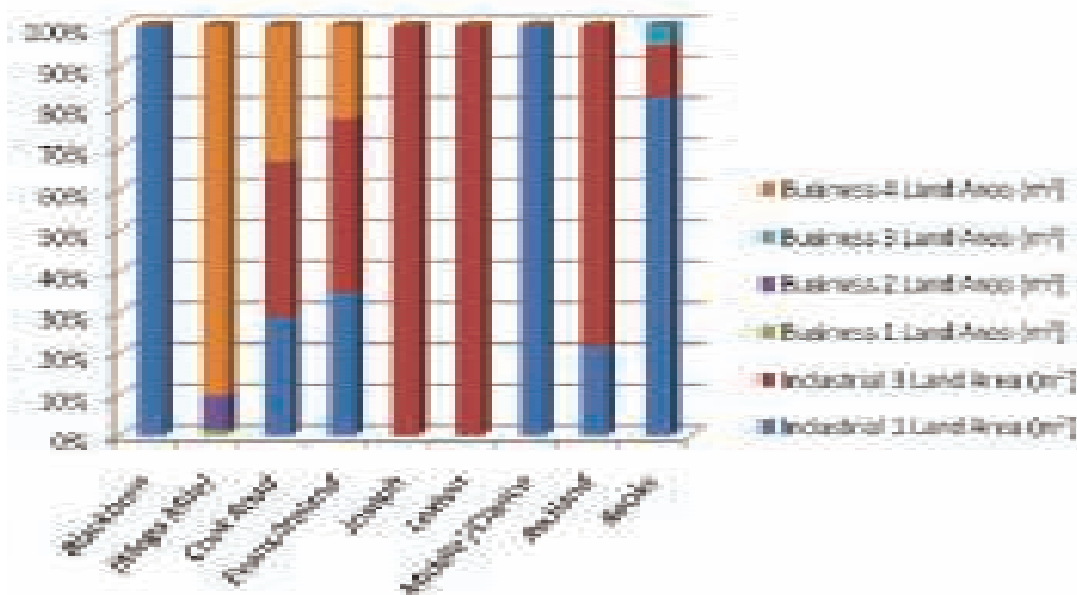


Figure 11: Lot Sizes

Source: Whitehorse Property database

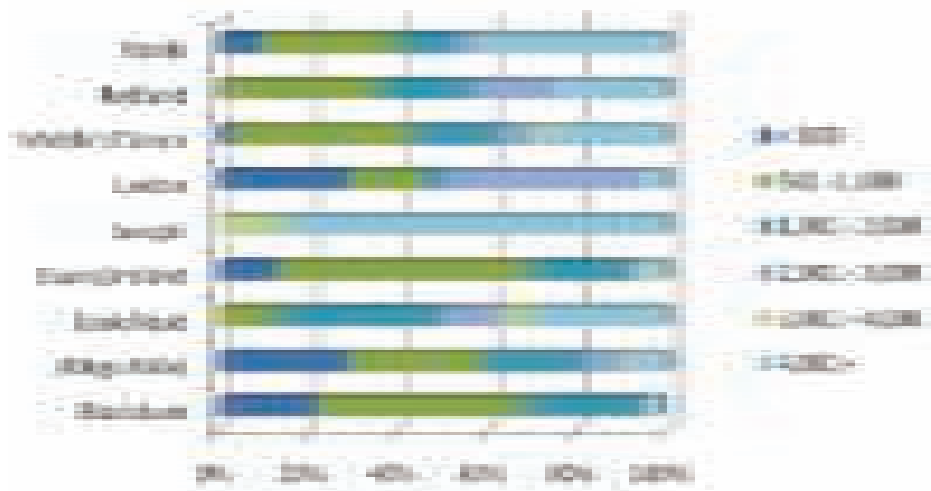


Figure 12: Vacant Land

Source: Whitehorse Property database

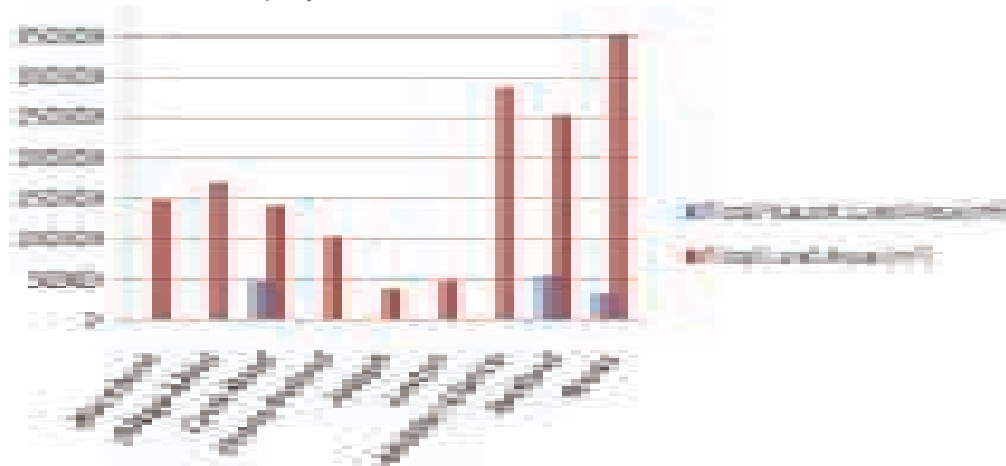
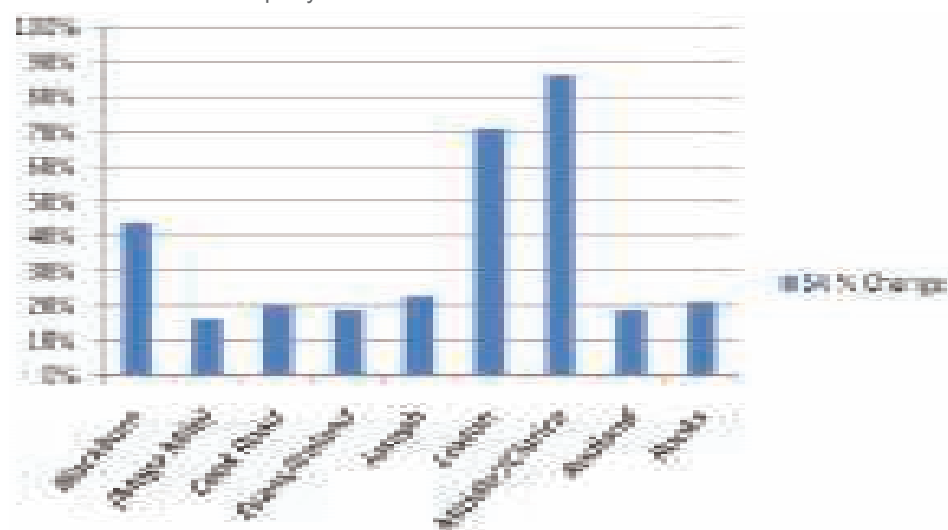


Figure 13: Site Value Increase 2006-2008

Source: Whitehorse Property database



- Combined office/manufacturing (Business 3) and bulky goods/manufacturing (Business 4) zones account for only 15% of land in the precincts
- Lot sizes are predominantly between 501 and 1,000m² (38%) or 1,001m² and 2,000m² (23%) as shown in Figure 11
- 509 land parcels provide 1,340 rateable properties
- There is a total of 125,809m² of vacant land over 7 lots as shown in Figure 12
- Land prices have increased steadily and average \$636,630
- While land price increases average 22% there has been exceptional growth in the Middleborough/Clarice, Lexton, and Blackburn Industrial Precincts at 86%, 71% and 44% respectively over a two year period as shown in Figure 13
- The capital improved value of a property is \$1,229,831 (average growth of 15%) as shown in Figure 14.

Figure 14: Average Capital Improved Value 2008 - 2010

Source: Whitehorse Property database

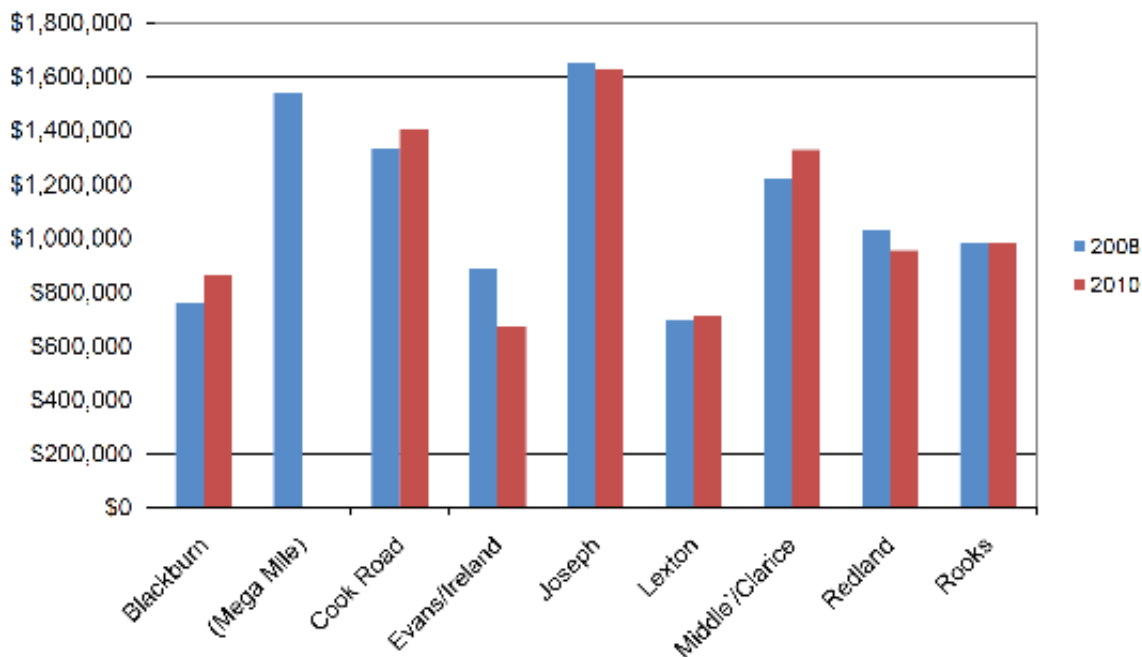


Figure 15: Surveyed Workforce Profile

Source: Whitehorse Property database

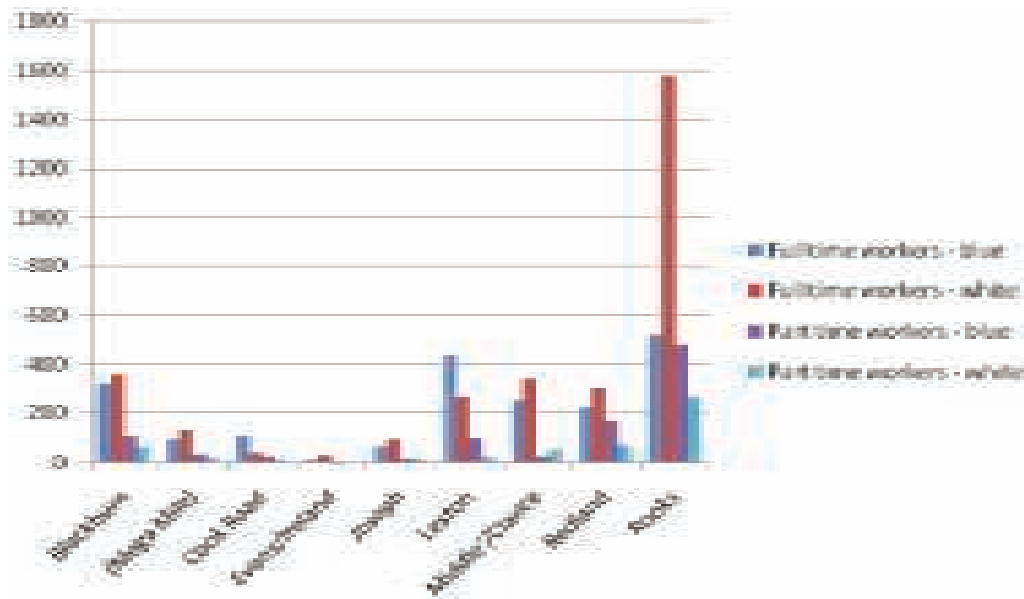


Figure 16: Locational Influences

Source: City of Whitehorse Survey

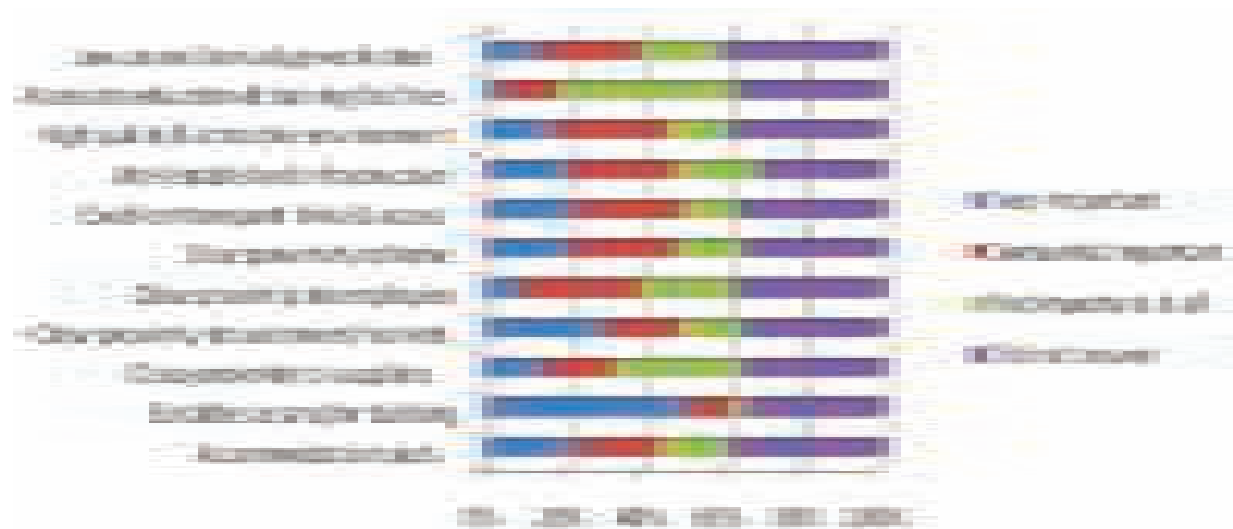
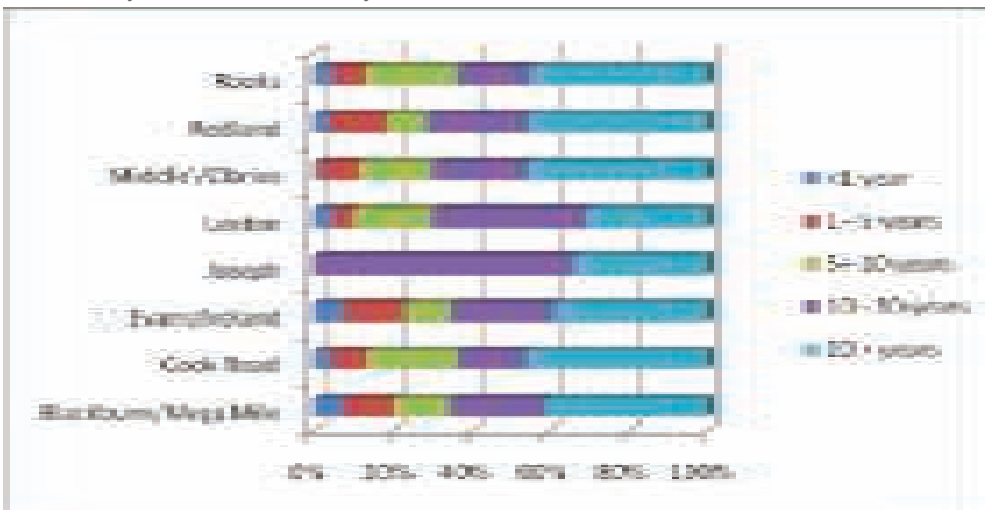


Figure 17: Period of Business Operation

Source: City of Whitehorse Survey

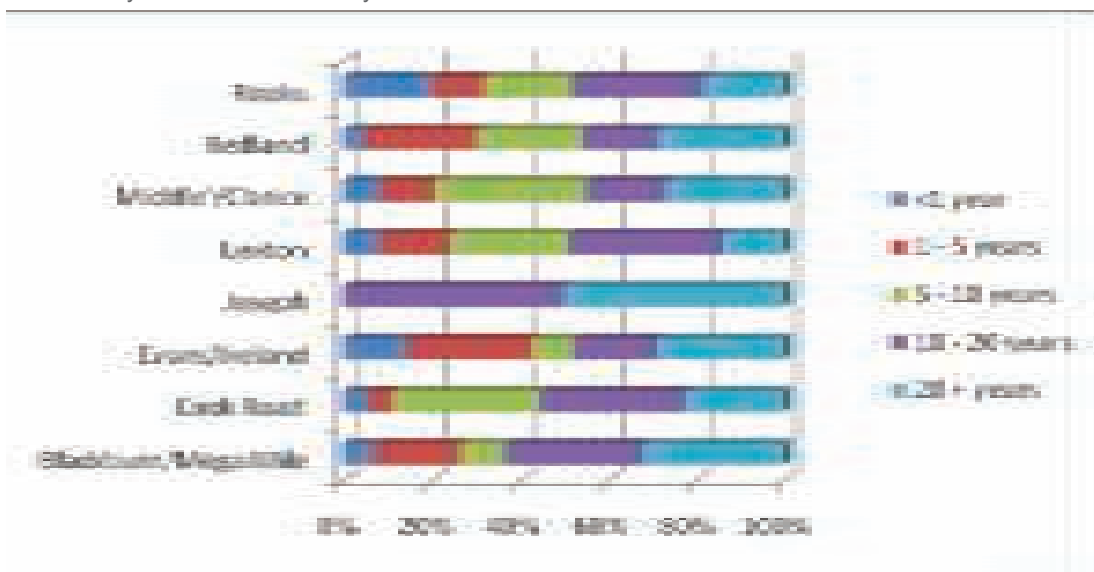


Business Activity

- Of the 1,069⁴ businesses recorded within the precincts 35% completed the survey and generally reflected the City’s industry mix
- Businesses completing the survey accounted for 3,844 jobs or 28% of the total industrial workforce as recorded by the ABS Census Working Population Profile
- The surveyed workforce is dominated (41%) by full time white collar jobs. Part time workers (both white and blue collar) account for 19% of the workforce as generally shown in Figure 15.
- The most important locational factor is a suitable size and/or building and the least important location factor is good access to a wide range of education and training facilities as shown in Figure 16.
- Most businesses (63%) have been operating for more than 10 years as shown in Figure 17.
- Most businesses (35%) have operated in Whitehorse for more than 10 years as shown in Figure 18.
- While businesses move around they generally do this within Whitehorse and few businesses are thinking of relocating at all (74% indicating no intention to move)
- Most surveyed businesses only operate in local & regional markets.

Figure 18: Period of Operation in Whitehorse

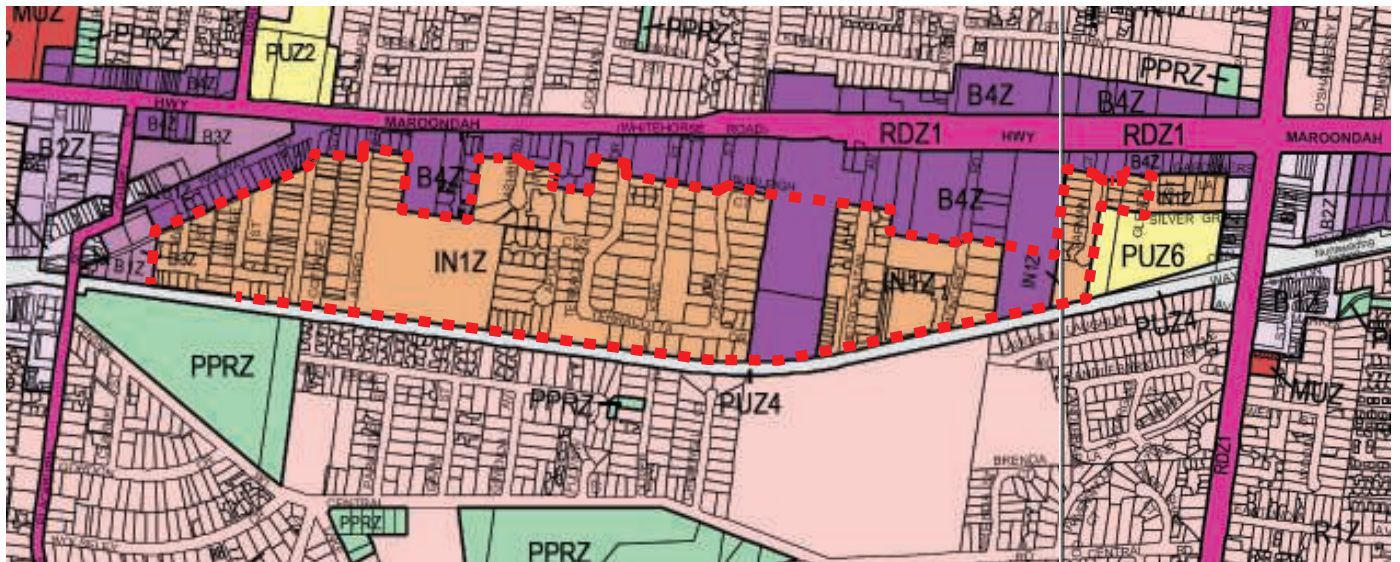
Source: City of Whitehorse Survey



4 This represents 1,365 less businesses (or only 56% of) those recorded by the ABS 2008 Census

Figure 19: Precinct 1 - Aerial, Zoning, Site Analysis (June 2009)

Google aerial image taken Feb 2006:



Disclaimer:

The following precinct analysis was based on survey and aerial data available at the time of preparing this document. Vacancies and development sites will inevitably change with time.

PRECINCT I – BLACKBURN (MEGA MILE)

BLACKBURN		
ZONING	Industrial 4 and Business 4 Zone	
TOTAL LAND AREA	28.8ha	
PREDOMINANT BUILDING TYPES	Factory / Warehouse	
	2010	2008
NO OF VACANT PREMISES		28
TOTAL NUMBER OF RATEABLE PROPERTIES	247	
TOTAL GROSS LEASEABLE FLOOR SPACE	176,598sqm	143,047sqm
TOTAL SITE VALUE	\$121,196,000	\$127,319,200
AVERAGE CAPITAL IMPROVEMENT	\$775,178	\$758.852

Refer Figure 19: Precinct 1 - Aerial, Zoning, Site Analysis (June 2009)

Planning Provisions

- Zones: Industrial 1 Zone to provide for the manufacturing industry and Business 4 Zone (part of the Mega Mile) to provide for a mix of bulky goods and manufacturing.
- Overlays: Site specific Heritage Overlays: HOI60 88 Whitehorse Road, HOI56 16 Station Street, HO67 9-15 Queen Street and HO68 95-97 Railroad, 91-93 Railroad, and vegetation protection at 11 A Railway Road, 5 Queen Street
- Relevant policies/strategies: Nunawading Mega Mile Major Activity Centre Structure Plan and Blackburn Station Shopping Centre (Clause 22.12). Although these policies and strategies make no direct reference to this precinct they establish a strong foundation for the Mega Mile and Blackburn activity centres as important economic nodes.

Land Use & Activity

- The 149,000m² of land behind Whitehorse Road is comprised predominantly of factory (51%) and warehouse (22%) activities enabled through the Industrial 1 Zone, while the 152,757m² of land (part of the Mega Mile) with adjoining frontage to Whitehorse Road is predominantly showroom, shop and office activities enabled through the Business 4 zone.
- It is the second largest industrial precinct in Whitehorse with 235 rateable industrial properties. 248 rateable bulky goods, Business 1 and 2 zoned properties (Mega Mile) adjoin the precinct.
- Interestingly there is little furniture manufacturing occurring in the industrial area with predominant activities being repair and maintenance (largely automotive related), machinery and equipment wholesaling and non-food retailing. The remaining businesses provide a range of light industrial uses such as manufacture of domestic items and wholesaling. Building supplies and furniture retailing account for the majority of retailing activities on Whitehorse Road.
- Eight businesses have been identified as having relocated from the industrial precinct prior to 2006 to a range of outer eastern locations. This low figure reflects the generally strong connection with local households and business (local markets) which would be weakened as a result of relocating

Built Form & Visual Amenity

- The bulky goods area dominates the frontage to Whitehorse Road which limits the exposure and profile of the industrial precinct.
- Both the age and style of industrial premises varies widely across the precinct. Although generally clean and tidy, a number present an opportunity for renewal.
- Limited landscaping has been provided
- Signage is generally unobtrusive.

Public Realm & Sense of Place

- Although the public realm and sense of place within the precinct is very limited it does benefit from its close proximity to the Mega Mile and Blackburn Shopping Centre. This provides access to retailing, personal services, cafes and restaurants otherwise unavailable within the precinct
- The precinct is also in close proximity to the Nunawading community centre (Silver Grove) and Morton Park

Movement & Accessibility

- At the regional level the precinct is well served by major arterial roads (if limited somewhat by traffic volumes in Springvale and Whitehorse Road) and good access to EastLink mostly likely via the Eastern Freeway.
- Road access into the precinct is limited as properties are accessible only from Whitehorse Road and roads culminate at the railway line.
- Internally roads are generally of suitable width to enable heavy vehicle movements however off street parking availability across the area varies and where it is low, congestion and conflict arises between industrial and bulky goods uses.
- A contiguous footpath is provided throughout the precinct.
- Area is accessible by public transport (Blackburn and Nunawading stations) but way finding is poor.
- As with all industrial precincts, bicycle movement is problematic when mixed with intensive heavy vehicle movement, so while not provided this is less of a concern for this precinct.

Property Dynamics

- Although more valuable, bulky goods land has not experienced the same growth in value as industrial land has.
- The average industrial site values is \$469,490, up 44% on 2006 and values range from \$86,000 to \$2,851,000
- The average bulky goods site value is \$1,039,355 up 16% on 2006 and values range from \$7,000 to \$18,134,000 (Mega Mile figures – encompass any properties zoned Business 1 & 2).
- The average industrial capital improved value is \$758,852 up 17% on 2006 and values range from \$134,000 to \$4,943,000
- The average bulky goods capital improved value is \$1,541,028 up 11% on 2006 and values range from \$26,000 to \$19,628,000 (Mega Mile figures – encompass any properties zoned Business 1 & 2).
- The high underlying land value in the precincts and new office development in the Blackburn activity centre reflect the demand for business premises in this area and indicates that the precinct is capable of attracting higher value added businesses
- This capacity is enhanced by the precincts position between Blackburn and the Mega Mile activity centres with access to range of goods and services and public transport commonly demanded by higher value added businesses, and in turn support the activities of the centres through increase employment levels

- The pressure felt by the precinct's industrial properties adjoining such a successful bulky goods precinct (Mega Mile) will ease as a result of the economic downturn. Bulky goods sector investors are seeing more sustainable levels of growth in household spending, financiers reassessing their exposure to the sector, weakening in rents and rising vacancies. In the short term (1-3 yrs) industrial uses will not be priced out of the market. As the economy returns to strength (3-5yrs) this pressure will return. Without a strong policy to reduce bulky goods creep into this precinct property prices will rise again based on a higher use premise

Development Opportunities & Positioning

- Market sentiment and commercial property requirements for this precinct should be monitored to ensure long term investment is maintained relative to other prominent precincts.
- There are no existing vacant land parcels however 50% of the premises within the precinct were constructed between 1970 and 1989 and further 28% were constructed between 1950 and 1969 signaling that a number of properties may be ready for redevelopment in the medium term.
- Redevelopment is most likely to occur on sites of approximately 1,000 to 1,500 sqm or larger while smaller sites, which are more sensitive to increasing property and construction prices are more likely to experience renovation as a more cost effective approach.
- A cluster of older properties near the Blackburn activity centre in particular could be rezoned to Business 3 to encourage investment and redevelopment in the medium term for integrated office and manufacturing activities which will provide for higher value industrial activities.
- The 4,400m² site at 20 Varman Court currently occupied by a concrete batching plant (Boral) should be reviewed as a key long term redevelopment site opportunity. This site could attract a mix of contemporary office/warehouse formats to suit the requirements of future owner-occupiers and small and medium investors.
- Marketing strategies for business attraction should focus on industries associated with the domestic market, whether serving local or regional needs, building on the value proposition of the Mega Mile.
- The area adjoining the north side of Silver Grove is proposed to be changed to the Mixed Use Zone under the Megamile Structure Plan. This proposal will allow for some an increase in height in this area.

2011 Review

- The site inspection undertaken in February 2011 indicated many of the premises that were vacant in 2009 have since been occupied. Although, a similar number of other premises have become vacant. As identified in the 2009 report this precinct identifies one key site, the existing Boral site located at Varman Ct. (Refer Figure 20)
- The amenity of the Blackburn precinct has opportunities for improvement through increased street planting and redevelopment of existing buildings. A number of the buildings are beginning to appear tired and investment should be encouraged.
- The layout of the precinct does not provide for linkages in between each street. Better linkages with the Business 4 Zoned land fronting Whitehorse Road should be encouraged.
- Ajoining a vacant property on Terracotta Drive is a site that is currently used for the storage of various kinds of machinery. Although not technically vacant this site is underutilised.
- Although there has been an increase in the number of rateable properties within the Blackburn precinct, an increase of 33,551sqm in the gross leasable floor area and an increase in the CIV, the site values have decreased. A percentage change of -4.81% has occurred since 2008. Given the age of the properties, their smaller size and the development of new buildings of a similar nature within other precincts, a higher level of competition may exist. This may have had an impact on the rental values and site values of Blackburn precinct.
- The average site value in 2010 for Blackburn precinct is \$490,672.

Figure 20: Precinct 1 - Site Analysis Feb 2011



PRECINCT 2 – COOK ROAD

COOK ROAD		
ZONING	Industrial 3 Zone, Business 4 Zone and Industrial 1 Zone	
TOTAL LAND AREA	16.1ha	
PREDOMINANT BUILDING TYPES	Factory / Showroom	
	2010	2008
NO OF VACANT PREMISES		13
TOTAL NUMBER OF RATEABLE PROPERTIES	51	71
TOTAL GROSS LEASEABLE FLOOR SPACE	63,440sqm	72,866sqm
TOTAL SITE VALUE	\$42,981,000	\$43,242,100
AVERAGE CAPITAL IMPROVEMENT	\$1,236,310	\$1,336,000

Refer Figure 21 - Precinct 2 Aerial, Zoning, Site Analysis (June 2009)

Planning Provisions

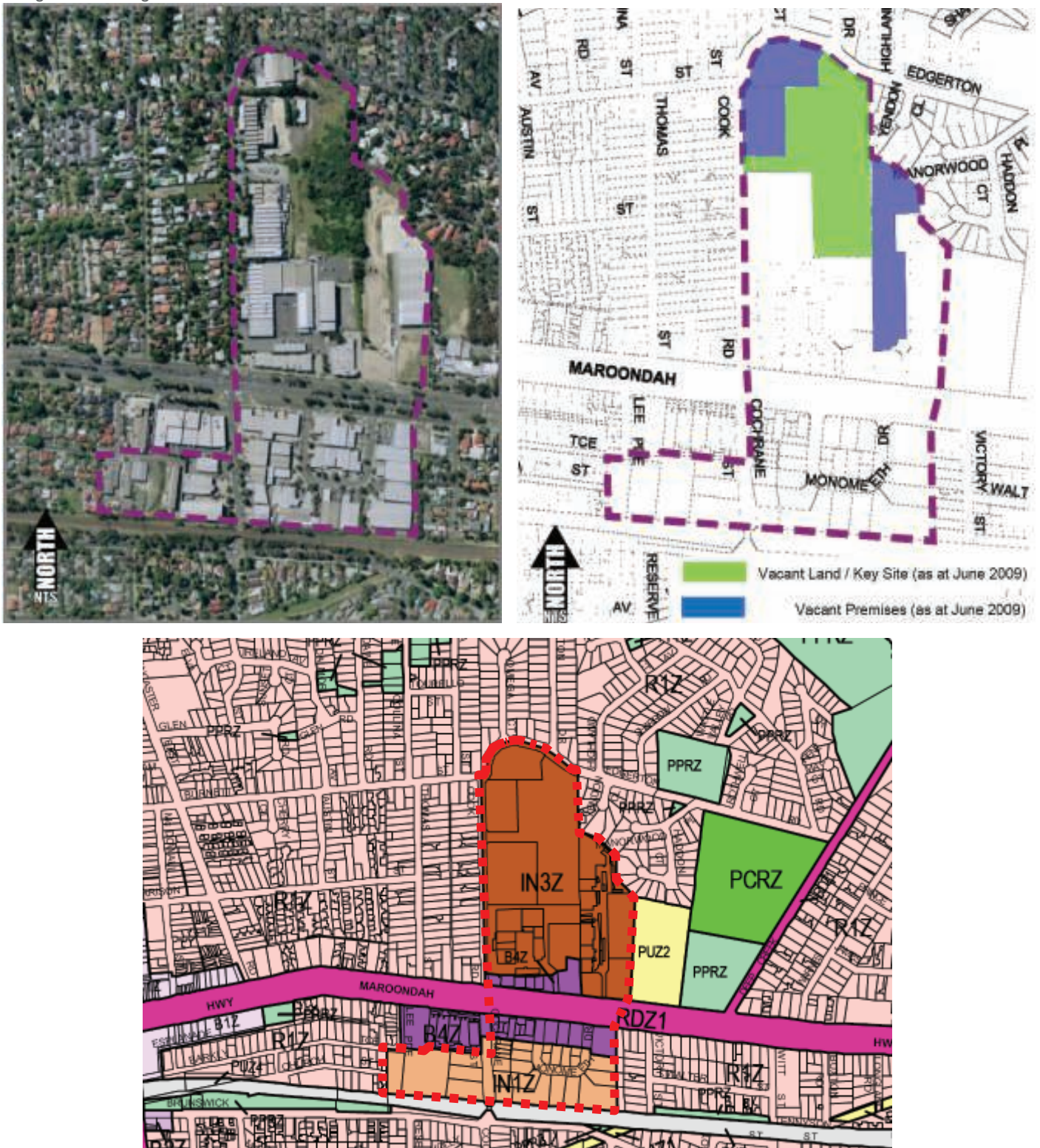
- Zones: Business 4 Zone to provide for a mix of bulky goods and manufacturing along Whitehorse Road, Industrial 1 Zone to provide for the manufacturing industry south of Whitehorse Road, and Industrial 3 Zone to provide for industries and associated uses compatible with the nearby residential area.
- Overlays: none applicable
- Local policies/strategies: none

Land Use & Activity

- The total land area of this industrial precinct is 141,195m² and includes 69 rateable properties over two precincts split by Whitehorse Road
- Comprises 30 lots the majority of which are either between 1,000 to 2,000m² (37%) or exceed 4,000m² (30%). All smaller lots are found in the southern precinct.
- Provides 69 buildings with a total floorspace of 72,887m². Floor areas are diverse however, a large proportion are between 500 to 1,000m² (26%) and 1,000 to 2,000m² (28%) setting the precinct apart from many of the other precincts which offer predominantly small floor areas.
- Vacancy rates are currently comparatively high at 18% (generally under 10%).
- The predominant building uses are factory/factory office (29%) warehouse/warehouse office (25%) or showroom (19%).
- There are currently 58 businesses in the precinct largely comprising of manufacturing (29%).
- Those businesses completing the survey provided 289 jobs the majority of which are full time (80%) white collar positions (47%).
- Businesses indicated that the size and suitability of the building was the most influential factor when choosing to locate within the precinct.
The least influential factor affecting the decision to locate their business to the precinct was access to a wide range of training and educational facilities.
- Most businesses have been operating for more than 20 years but have moved around Whitehorse.
- Unlike other precincts, interstate and international markets have some significance to businesses in the precinct. Combined with the larger floor areas available within the precinct this suggests that the precinct provides a valuable hub for well established businesses that have started to outgrow local and regional markets and need to expand.

Figure 21: Precinct 2 - Aerial, Zoning, Site Analysis (June 2009)

Google aerial image taken Feb 2006:



Built Form & Visual Amenity

- As with the Blackburn precinct the bulky goods activities along Whitehorse Road greatly limits the exposure and profile of the industrial activity.
- With the exception of the new development at 621 Whitehorse Road there is no cohesion between the architecture of buildings.
- Industrial buildings are a mixture of brick and concrete tilt slab that are 1-2 stories in height.
- Limited landscaping has been provided.
- Signage is generally unobtrusive.

Public Realm & Sense of Place

- Offers no space for the public realm (services or parks) and therefore has little sense of place beyond its industrial purpose.
- There no activity centres in suitable walking distance (greater than 400m) so there is no access to retailing, personal services, cafes and restaurants other than by car.
- The southern precinct could be improved by greater attention to private landscape maintenance.

Movement & Accessibility

- Limited access to public transport: Bus routes 270 (Edgerton Road) and 684 (the Healesville/Alexandra bus via Whitehorse Road), approx 700m to Heatherdale station to the east or 1km to Mitcham station to the west.
- At the regional level the precinct is well served by major arterial roads and reasonable access to EastLink via Canterbury Road/Whitehorse Road.
- Road access into the southern precinct is largely via service roads and via Cook Road and the service road in the northern precinct. The northern precinct would benefit greatly by separating future industrial development from Cook or Edgerton Roads to establish wider roads free of mature overhanging trees.
- A contiguous footpath is provided throughout the precinct.
- As with all industrial precincts, bicycle movement is problematic when mixed with intensive heavy vehicle movement, so while not provided within the precinct this is less of a concern for this precinct as one which can attract activities with larger floor areas and therefore typically associated with large heavy vehicles.

Property Dynamics

- The average industrial site values is \$869,113, up 20% on 2006 (a relatively small increase compared to other precincts) and values range from \$122,000 to \$3,855,000.
- The average industrial capital improved value is \$1,336,000 up 16% on 2006 (a typical increase compared to other precincts) and values range from \$201,000 to \$4,544,000 (similar to Blackburn).
- The high underlying land value in the precinct reflect the demand for business premises in this area and indicates that the precinct is capable of attracting higher value added businesses and a greater intensity of development.
- Some of this capacity is constrained by the precincts relative isolation from activity centres which prevents access to range of goods and services and public transport commonly demanded by higher value added businesses. However the very large land parcels provide a relatively unique opportunity for this precinct to provide a differentiated building offer to other precincts.

Figure 22: Precinct 2 - Site Analysis Feb 2011



Development Opportunities & Positioning

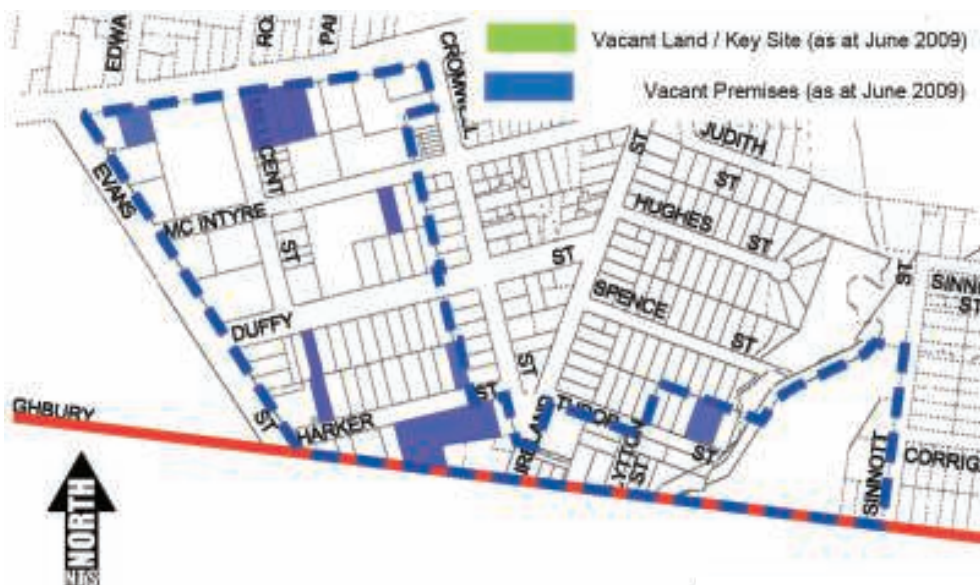
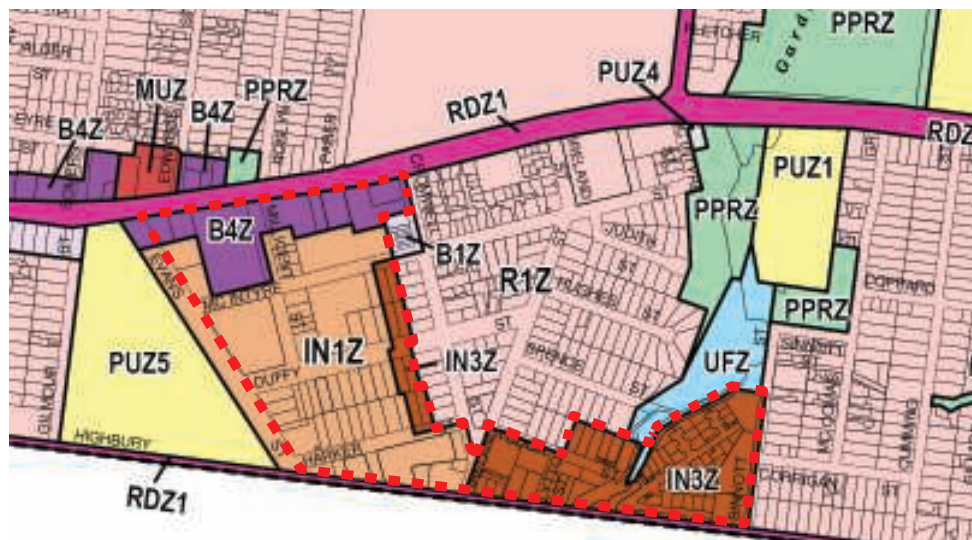
- Land north of Whitehorse Road is surrounded by residential activity and adjoins Antonio Park Primary School whereas land to the south of Whitehorse is less constrained as a strip between the Belgrave Lilydale rail line and Whitehorse Road and only adjoining residential properties to the east and west.
- Land to the north contains 3 significant land parcels that are currently vacant 48,048m² and a number of premises that appear underutilised. All of these sites could be sensitively redeveloped as modern office/warehouse units. Such development would provide a valuable opportunity for existing businesses that have out grown an office warehouse facility in Whitehorse to expand within the municipality.
- There are currently no development opportunities to the south and 65% of buildings are aged between 1970 and 1989 indicating that they are unlikely to be redeveloped in the short to medium term. Only a small proportion (22%) are aged between 1950 and 1969. This precinct is likely to continue to accommodate a variety of small business activities.

2011 Update

- Since the first draft of this report, the Cook Road precinct has experience considerable development growth with one of the vacant premises identified in 2009 now fully occupied and providing a high quality commercial environment. Further to this two planning permits have been granted for properties on Cook Road. 25-39 Cook Road remains vacant, with development underway at 23 Cook Road. Despite the take up of development, a key site still remains for development with access from Cook Road. The opportunity exists for the development of this vacant site to link with the remainder of the Cook Road precinct to the east.
- The recent development at 621 Whitehorse Road exhibits high quality design and landscaping, and provides a good opportunity to continue such design through the precinct. The design of the development at 621 Whitehorse Road has also maintained the opportunity for linkages with adjoining sites.
- Since the original version of the report a number of sites have been cleared, in preparation of developments already approved, or those in the pipeline. This has likely resulted in a reduction in the gross leasable floor area of the precinct.
- Site value has decreased by a percentage change of -0.6%. This is a minimal change and is likely to be a result of the cleaning of a couple of sites in preparation of development that is yet to commence.
- The average site value for Cook Road precinct is \$842,764.

Figure 23: Precinct 3 - Aerial, Zoning, Site Analysis (June 2009)

Google aerial image taken Feb 2006:



PRECINCT 3 – EVANS/IRELAND STREETS

EVANS / IRELAND STREETS		
ZONING	Industrial 1 Zone, Industrial 3 Zone and Business 4 Zone	
TOTAL LAND AREA	10.7ha	
PREDOMINANT BUILDING TYPES	Office / Factory	
	2010	2008
NO OF VACANT PREMISES		2
TOTAL NUMBER OF RATEABLE PROPERTIES	143	117
TOTAL GROSS LEASEABLE FLOOR SPACE	77,201sqm	94,513sqm
TOTAL SITE VALUE	\$45,305,000	\$46,400,000
AVERAGE CAPITAL IMPROVEMENT	\$612,127	\$890,361

Refer Figure 23: Precinct 3 - Aerial, Zoning, Site Analysis (June 2009)

Planning Provisions

- Zones: B4Z to provide for a mix of bulky goods and manufacturing along Burwood Highway (21,712m²), IN1Z to provide for the manufacturing industry (33,747m²) and IN3Z to provide for industries and associated uses compatible with the nearby residential area (40,814m²).
- The precinct adjoins an Urban Floodway Zone to the east and a Public Use Zone (cemetery) to the west and further industrial land (IN1Z) to the south located with the City of Monash. Notably this industrial land includes a DDO which applies to all industrial 1 and Business 2, 3, 4 zones in Monash.
- Local policies/strategies: no specific local policies however part of the precinct (bounded by Evans, McIntyre and Cromwell Streets) is included in the Burwood Village Neighbourhood Activity Centre Framework. The plan notes that residential development will be inappropriate and that existing zones should be retained. Greater building heights could be accommodated given the slope of the land Design provisions are recommended as part of a new DDO and that the existing DDO4 be removed. Car parking is encouraged to be at the rear of properties – this should perhaps only relate to properties facing Burwood highway.

Land Use & Activity

- The total land area of this precinct is 102,905m² which accommodates 122 rateable properties and 103 businesses.
- The majority of lots are between 500 to 1,000m² (56%) or between 1,001 to 2,000m² (24%).
- The precinct's 117 buildings provide a total floorspace of 94,735m². Floor areas are diverse however, a large proportion are less than 250m² (30%) between 500 to 1,000m² (30%) or 1,000 to 2,000m² (8%) reflecting the typically small floor areas of industrial activity in Whitehorse.
- Vacancy rates are currently average for Whitehorse at 9%.
- The predominant building uses are factory (29%) factory office (35%) or office/warehouse (13%).
- The business mix is characterised largely by motor vehicle retail and repair businesses (30% relating to the strong vehicle dealership presence on Burwood Highway), followed by manufacturing (27%), construction services (14%) and business services (14%). The precinct has also attracted a limited number of alternative businesses such as professional, scientific and technical services, telecommunications services and motion picture sound recording services.
- Those businesses completing the survey provided 189 jobs - predominantly blue collar full time positions (73%). Their most influential locational factor was the size and suitability of the building and the least influential was good access to a wide range of training and educational facilities. Most businesses have been operating for more than 20 years (38%) but have moved around Whitehorse. Interstate and international markets are virtually none existent with business in this area.

Built Form & Visual Amenity

- As with the Blackburn and Cook precincts the bulky goods activities along Whitehorse Road greatly limits the exposure and profile of the industrial activity. Main road exposure for industrial activity is limited to Highbury Road.
- With the exception of the new development at 127 Highbury Road there is no cohesion between the architecture of buildings and setbacks vary.
- Buildings are predominantly brick or concrete tilt slab that are 1-2 stories in height.
- Limited landscaping has been provided
- Signage is generally unobtrusive
- Residential areas abut properties at the eastern end of McIntyre, Duffy, Harker and Tudor (north side) Streets and are located opposite properties in Cromwell, Ireland and Tudor (south side) Streets.

Public Realm & Sense of Place

- Like Blackburn although the precinct itself offers no space for the public realm (services or parks) it has good connections to the adjoining Burwood Village neighbourhood centre. This provides important access to retailing, personal services, cafes and restaurants. For many businesses, services provided by the centre are located at a greater distance than 400m, which is considered greater than the general suitable walking distance. Way finding to the centre is not provided.
- Similarly connections to the Gardiners Creek trail provide recreational opportunities
- Presentation to Gardiners Creek and local history park could be improved.

Movement & Accessibility

- Tram route 75 runs along Burwood Highway
- Smart Bus Route 700 runs along Warrigal Road which connects Box Hill to Mordialloc and Bus Route 766 links Burwood Village with Box Hill and Surrey Hills railway stations. There are no buses along Highbury Road
- The area around Burwood Highway is quite congested and includes significant traffic generated by surrounding schools, the shopping centre and significant through traffic. Consequently Highbury Road provides important access to businesses in the precinct. Overall through traffic access allows for easy circulation around the precinct
- While contiguous footpaths are provided the pedestrian environment along Burwood Highway is quite unpleasant and distances to the shopping centre are such that employees are likely to drive to the centre for goods and services.

Property Dynamics

- The average industrial site values is \$483,902, up 19% on 2006 (a relatively small increase compared to other precincts) and values range from \$141,000 to \$5,996,000.
- The average industrial capital improved value is \$890,361 up 8% on 2006 (a lower increase compared to other precincts) and values range from \$92,000-\$7,323,000 (reflecting the higher value bulky goods properties along Burwood Highway).
- The high underlying land value in the precinct reflects the demand for business premises in this area and indicates that the precinct is capable of attracting higher value added businesses and a greater intensity of development if deemed appropriate.

Development Opportunities & Positioning

- The precinct has been very successful in attracting businesses that service other local businesses and the residential population and it is expected that this precinct will continue to attract these businesses. As such the precinct fulfills an important role in supplying land for manufacturing activities of typically lower value such as service industry (e.g. car repairs and storage)
- The challenge for this precinct is to improve amenity in terms of streetscape design and reducing parking conflicts. Some direction is provided in the Burwood Village neighbourhood Activity Centre Framework Plan and will guide development on Burwood Highway in particular.
- Although improvements in building design and parking could be achieved through redevelopment, a significant level of redevelopment could increase property values and force businesses to other industrial areas, changing the role of this precinct. If the current conditions are maintained, renovation and redevelopment will occur over time while maintaining a suitable business mix. This is not to say that appropriate design standards and parking requirements for new development proposal should not be in place.
- Future development activity along Burwood Highway is likely to be constrained as major arterial road and tram route which includes barrier treatments. Further direction is provided in the Burwood Village neighbourhood Activity Centre Framework Plan (Area 4).
- There are a number of large sites with older buildings (45% constructed between 1950 and 1969) and low scale development that offer redevelopment opportunities that will need to be carefully managed in light of the suggested positioning.
- Residential properties 1, 3, 5 and 7 Tudor Street experience a particularly low level of amenity in this narrow and intensely developed street. As the primary function in this street is industrial activity this may present an opportunity for rezoning.

2011 Update

- A number of sites were identified in the original report as being vacant. A significant number of these sites have since been developed and occupied. Of significance is the new Audi development at the corner of Millicent Street and Burwood Highway, along with the Reece plumbing redevelopment between Burwood Highway and McIntyre (refer Figure 24)
- This precinct now appears to have a high occupancy level. Further there appears to be an increase in the number of rateable properties from 2008 to 2010. The vacant site identified in Duffy Street appears to have been prepared for development, although council records have not identified an approved permit application.
- The vacant premise identified on Highbury St is newly developed and is approximately 50% occupied. A reason for this may relate to the environment the site facilitates, with very little landscaping to soften the appearance of the concrete construction and pavement.
- New developments suffer from a lack of landscaping, which has contributed to a poor urban environment. Landscaping generally throughout the precinct should be improved, particularly along Evans Street.
- An underutilised site has been identified at Duffy Street. It is currently being used for the storage of machinery and equipment.
- The site value across the whole precinct has decreased by a percentage change of -2.36%.
- The average site value for Evans / Ireland Street in 2010 is \$316,818.

Figure 24: Precinct 3 - Site Analysis Feb 2011



PRECINCT 4 – JOSEPH STREET

JOSEPH STREET		
ZONING	Industrial 3 Zone	
TOTAL LAND AREA	79.9ha	
PREDOMINANT BUILDING TYPES	Factory	
	2010	2008
NO OF VACANT PREMISES		2
TOTAL NUMBER OF RATEABLE PROPERTIES	30	30
TOTAL GROSS LEASEABLE FLOOR SPACE	42,649sqm	41,759sqm
TOTAL SITE VALUE	\$26,741,000	\$25,862,000
AVERAGE CAPITAL IMPROVEMENT	\$1,356,194	\$1,655,000

Refer Figure 25: Precinct 4 - Aerial, Zoning, Site Analysis (June 2009)

Planning Provisions

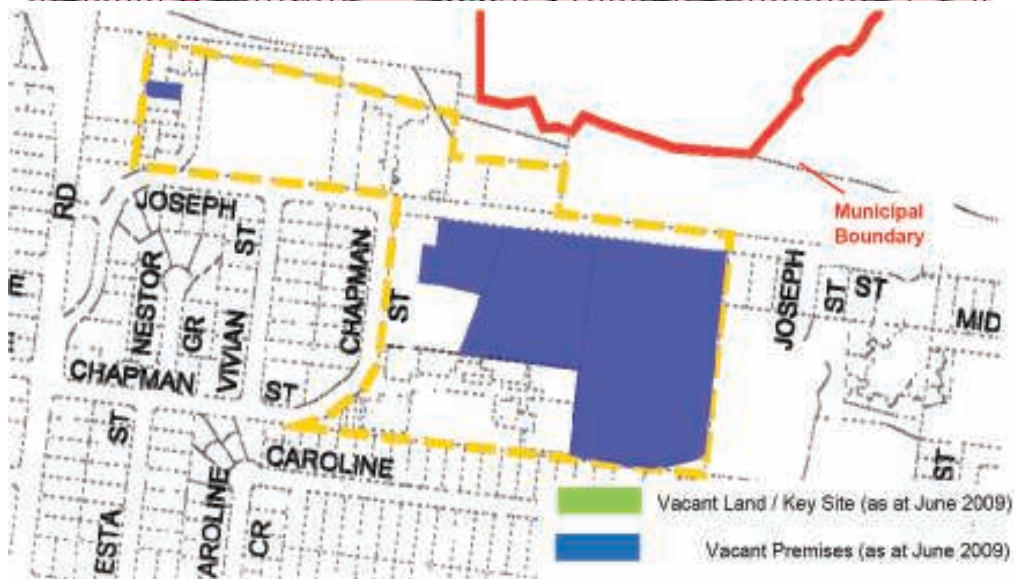
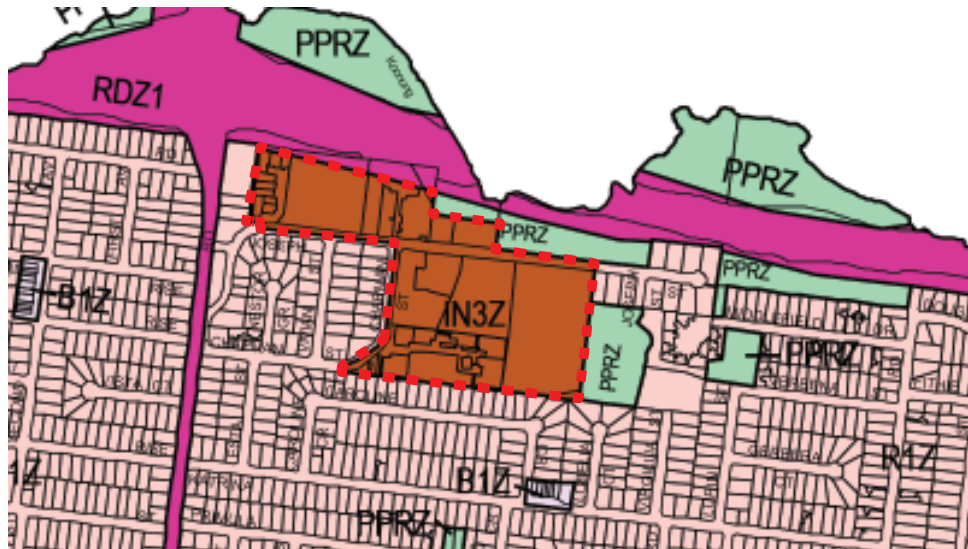
- Zones: IN3Z to provide for industries and associated uses compatible with the nearby residential area (39,427m²).
- Overlays: none.
- No specific local policies or strategies.

Land Use & Activity

- As the smallest industrial precinct the total land area of this precinct is 39,427m² which accommodates 31 rateable properties and 35 businesses.
- Unusually the majority of lots exceed 4,000m² (86%) as subdivision has been limited with only 7 lots.
- The precincts 31 buildings provide a total floorspace of 41,760m². Floor areas are quite diverse however the majority provide areas that are either less than 250m² (35%), between 251 to 500m² (23%) or over 2,000m² (23%). This mixture reflects the purpose built nature of premises such as the former Hewlett Packard site but the predominant size of industrial buildings in Whitehorse.
- Vacancy rates for the precinct are low for Whitehorse at 6%.
- The predominant building uses are factory (35%) or office/warehouse (29%).
- The business mix is characterised largely by wholesaling (45%) and other store based retailing (20%).
- Those businesses completing the survey provided 44 jobs and the majority of which are full time white collar positions.
- Their most influential locational factors were the size and suitability of the building, proximity to customers and markets and accommodation costs. The least influential was good access to a wide range of training and educational facilities, proximity to suppliers and close proximity to home.
- Most businesses have been operating between 10 to 20 years (29%) and many have been in the same location for that time. While international markets are virtually none existent, interstate markets are somewhat important for 43% of businesses.

Figure 25: Precinct 4 - Aerial, Zoning, Site Analysis (June 2009)

Google aerial image taken Feb 2006:



Built Form & Visual Amenity

- High quality built form largely constructed from brick or of concrete tilt slab construction.
- Very well maintained private landscape areas and high presence of mature trees within the streetscape.
- Signage is unobtrusive.
- Addressing the Freeway are large high blank walls which are only visible from the bike path due to heavily treed landscape along the Freeway.

Public Realm & Sense of Place

- While the precinct offers strong connections to open space areas (Joseph Street Reserve and Koonung Creek trail) there is no provision of retailing, personal services, cafes and restaurants greatly limiting the public realm and creating little sense of place beyond its industrial purpose. Although Kerrmuir is a strong neighbourhood shopping centre, it is located approximately 1.5km south of the precinct.
- The public realm is greatly enhanced by the high attention to private landscape areas within the precinct and there is limited on street parking.

Movement & Accessibility

- Limited access to public transport: Bus routes 278, 279 and 303 are available in Middleborough Road, and Laburnum station is approximately 2.3km to the south.
- At the regional traffic level the precinct is well served by major arterial roads and excellent access to the Eastern Freeway however road access into the precinct is via residential streets. This constrains heavy vehicle movements.
- A contiguous footpath is provided throughout the precinct and there is access to the regional bike trails.

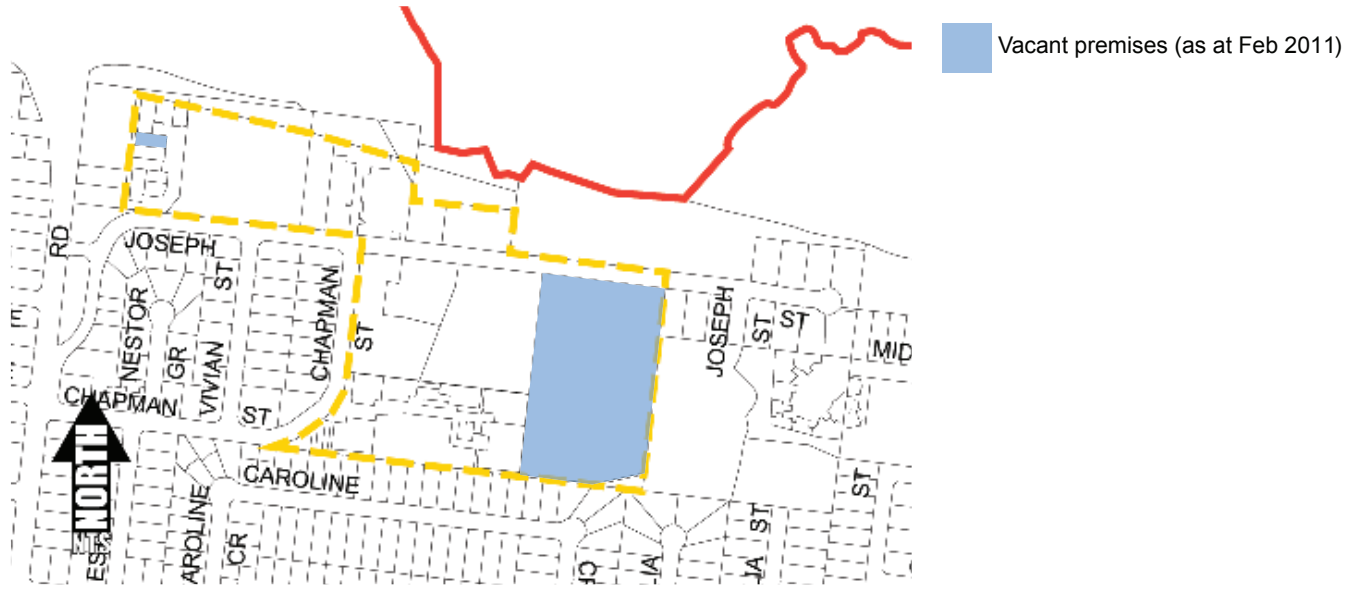
Property Dynamics

- The average industrial site value is \$834,258, up 23% on 2006 (a relatively small increase compared to other precincts) and values range from \$40,000 to \$8,763,000.
- The average industrial capital improved value is \$1,655,000 up 15% on 2006 (an average increase compared to other precincts) and values range from \$71,000- \$14,368,000
- As with all Whitehorse industrial properties the high underlying land value in the precinct reflects the demand for business premises in this area and indicates that the precinct is capable of attracting higher value added businesses and a greater intensity of development if deemed appropriate.

Development Opportunities & Positioning

- 71% of buildings in the precinct were constructed between 1970 and 1989 highlighting that there is unlikely to be any significant redevelopment of the precinct in the short to medium term with perhaps the notable exception of the Hewlett Packard site given its purpose built nature. The departure of Hewlett Packard represents approximately 25% of the total land area of the precinct.
- The precinct is somewhat isolated and does not meet the locational requirements of corporate businesses such as Hewlett Packard. However, its access to the Eastern Freeway may attract business owner/operators.
- It is likely that the smaller businesses will remain in this precinct as the buildings are high quality.

Figure 26: Precinct 4 - Site Analysis Feb 2011

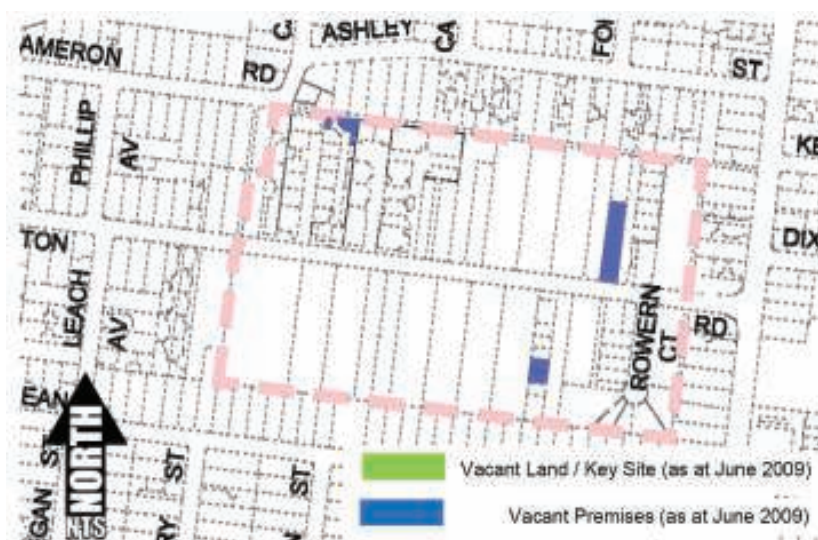
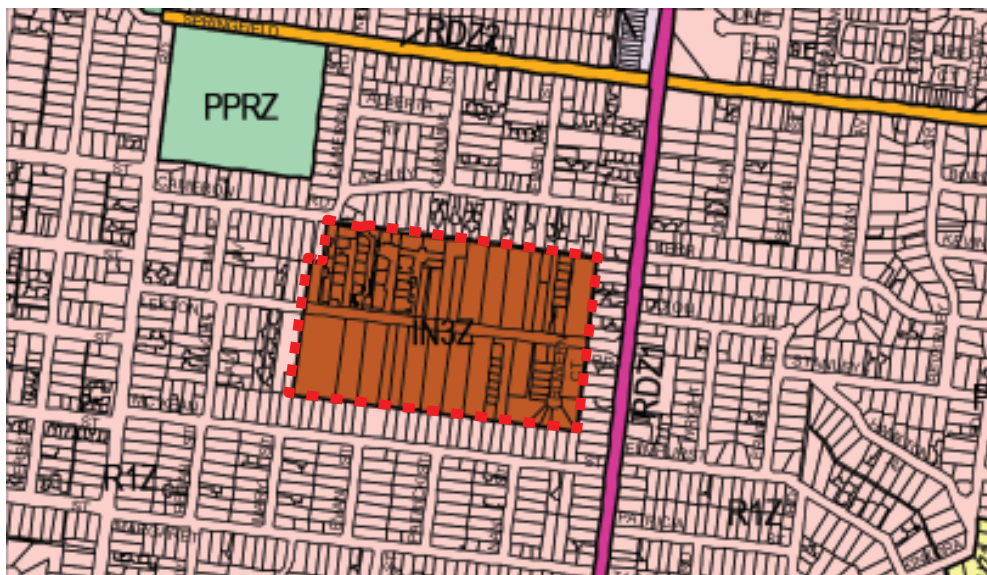


2011 Update

- Although the former Hewlett Packard site remains vacant, other sites identified as being vacant in the 2009 report have since been occupied (Refer Figure 26).
- The former Hewlett Packard site presents a great redevelopment opportunity and may warrant additional investigation given the length of time such a significant site has been underutilised. The surrounding residential development may provide the opportunity for a more sensitive use to be considered such as a training facility etc. The site has great access to the reserve adjoining to the east and may provide the opportunity for alternate access to be provided through to residential areas to the south.
- The precinct operates well and has a high occupancy level, potentially due to the high quality environment. The precinct has consistent urban design elements including street trees, signage and building design.
- Despite the vacancy of Hewlett Packard, all financial attributes of the precinct have increased from 2008, including gross leasable floor space, total site value and Average Capital Improvement value.
- The site value of the precinct has increase a percentage change of 3.40%.
- The average site value for Joseph Street precinct for 2010 is \$891,366.

Figure 27: Precinct 5 - Aerial, Zoning, Site Analysis (June 2009)

Google aerial image taken Feb 2006:



PRECINCT 5 – LEXTON ROAD

LEXTON ROAD		
ZONING	Industrial 1 Zone	
TOTAL LAND AREA	91.9ha	
PREDOMINANT BUILDING TYPES	Factory / Warehouse	
	2010	2008
NO OF VACANT PREMISES		5
TOTAL NUMBER OF RATEABLE PROPERTIES	91	96
TOTAL GROSS LEASEABLE FLOOR SPACE	56, 681sqm	60,341sqm
TOTAL SITE VALUE	\$35,673,000	\$36,295,000
AVERAGE CAPITAL IMPROVEMENT	\$614,670	\$694,354

Refer Figure 27: Precinct 5 - Aerial, Zoning, Site Analysis (June 2009)

Planning Provisions

- Zones: IN3Z to provide for industries and associated uses compatible with the nearby residential area (96,760m²).
- Overlays: none
- No specific local policies or strategies.

Land Use & Activity

- As the second smallest industrial precinct the total land area of this precinct is 48, 380m² which accommodates 96 rateable properties and 86 businesses.
- The majority of lots are between 2,001 and 3,00m² (41%) and a further 27% are less than 500m²
- The precincts 96 buildings provide a total floorspace of 10,992m². Floor areas are somewhat diverse however the majority provide areas between 251 to 500m² (55%).
- Vacancy rate in the precinct is low for Whitehorse at 5%.
- The predominant building uses are factory (33%) or warehouse (25%).
- The business mix is broad with repair and maintenance (25%) and manufacturing (22%) strongly represented.
- Those businesses completing the survey provided 199 jobs, with the majority engaged in full time work evenly split between blue and white collar positions. None of the locational factors stood out as being particularly influential in this group. Most businesses have been operating between 10 to 20 years (39%). Many have been in the same location for that time and intend to remain. International and interstate markets are largely irrelevant to this precinct.

Built Form & Visual Amenity

- All properties adjoin residentially zoned land however those north of Lexton Road and adjoining the residential properties fronting Middleborough Road are separated by a laneway.
- There is no cohesion between the architecture of buildings and setbacks vary along Lexton Road.
- The gateway to the precinct from Middleborough Road is poor providing two unsealed gravel car parks
- Buildings are predominantly brick or concrete tilt slab that are 1-2 storeys in height.
- Limited private landscaping has been provided.
- Signage is generally unobtrusive

Public Realm & Sense of Place

- Like Blackburn and Evans/Ireland the precinct offers no space for the public realm (services or parks) although it has a connection to the nearby Kerrimuir neighbourhood centre. This provides important access to retailing, personal services, and cafes approximately 500m to the north of the precinct. Way finding to the centre is not provided.
- Similarly connections are afforded to Springfield Park for recreational opportunities but again there is no way finding.

Movement & Accessibility

- Public transport is available as follows: Bus routes 278, 279 and 303 are available in Middleborough Road, and Laburnum station is approximately 1km to the south.
- At the regional traffic level the precinct is well served by major arterial roads and excellent access to the Eastern Freeway 1.5km to the north via Middleborough Road.
- Access into the precinct is provided at Middleborough Road however Lexton Road is a local traffic street that runs through the precinct and is a no through road at the point where it meets the residential area thereby preventing access into the precinct from the west.
- A contiguous footpath is provided throughout the precinct.

Property Dynamics

- The average industrial site value is \$385,854, up 71% on 2006 (a very high increase compared to other precincts) and values range from \$47,000 to \$2,504,000.
- The average industrial capital improved value is \$694,354 up 11% on 2006 (an average increase compared to other precincts) and values range from \$78,000 - \$6,795,000.
- As with all Whitehorse industrial properties the high underlying land value in the precinct reflects the demand for business premises in this area and indicates that the precinct is capable of attracting higher value added businesses and a greater intensity of development if deemed appropriate.

Development Opportunities & Positioning

- The strength of the precinct is the supply of medium size industrial properties and the access to the Eastern Freeway.
- Approximately two thirds of properties are of medium size and one third of the properties have been subdivided and developed. It is suspected that the majority of warehouses actually include an office (unlike as suggested by the rates classifications).
- Maintaining the limited supply of medium sized properties for the Whitehorse industrial market as a point of difference and avoiding excessive subdivision is likely to maintain the long term function of the precinct.
- The entrance to the precinct could be greatly enhanced through formalization of the two car parks. Redevelopment of these sites for industrial purposes is problematic.

2011 updates

- Very little of Lexton Road was vacant back in 2009 and this appears to still be the case. Some of the vacant premises from 2009 are now occupied (Refer Figure 28).
- Consideration should be given to including the two sites with frontage to Middleborough Road in the precinct to create gateway sites to the precinct. They are currently well utilised for car parking, but warrant improvements to their appearance.
- Further linkages between properties should be improved, many of the multiple unit developments have the opportunity to provide pedestrian linkages instead of the existing cyclone barrier fencing.
- Site values have decreased slightly within the precinct with a percentage change of -1.71%, although this is minimal and is probably a reflection of the age of the properties, with new similar properties being developed elsewhere in the municipality creating competition and choice.
- The average site value for Lexton Road for 2010 is \$392,010.

Figure 28: Precinct 5 - Site Analysis Feb 2011

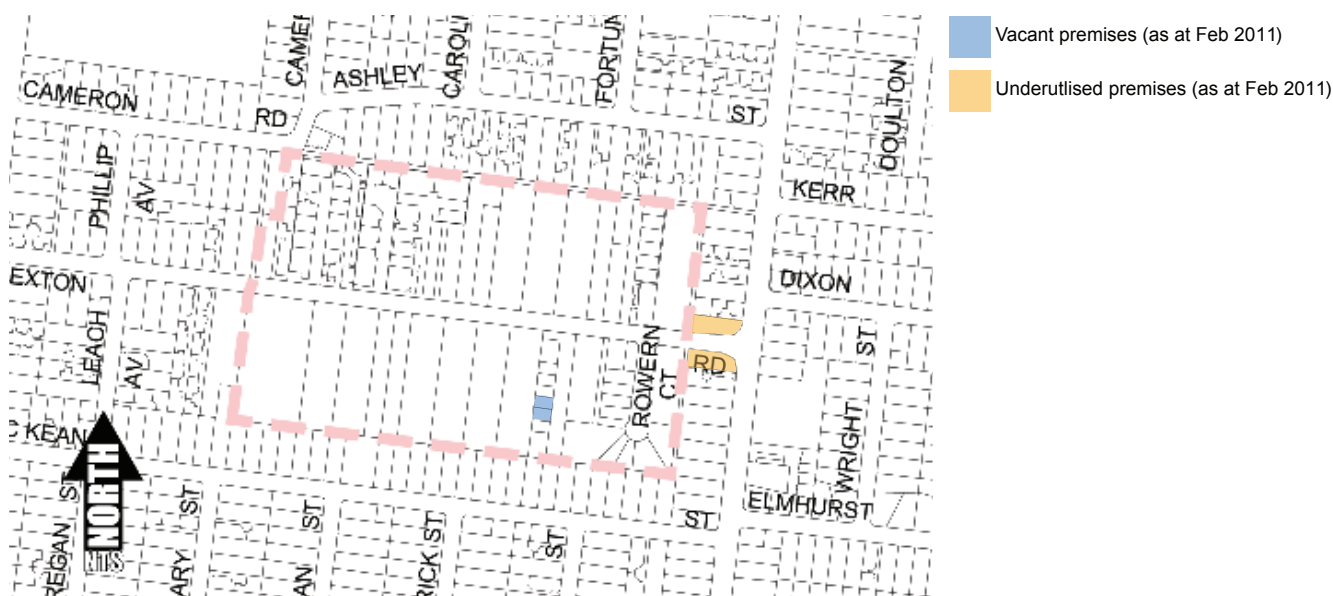
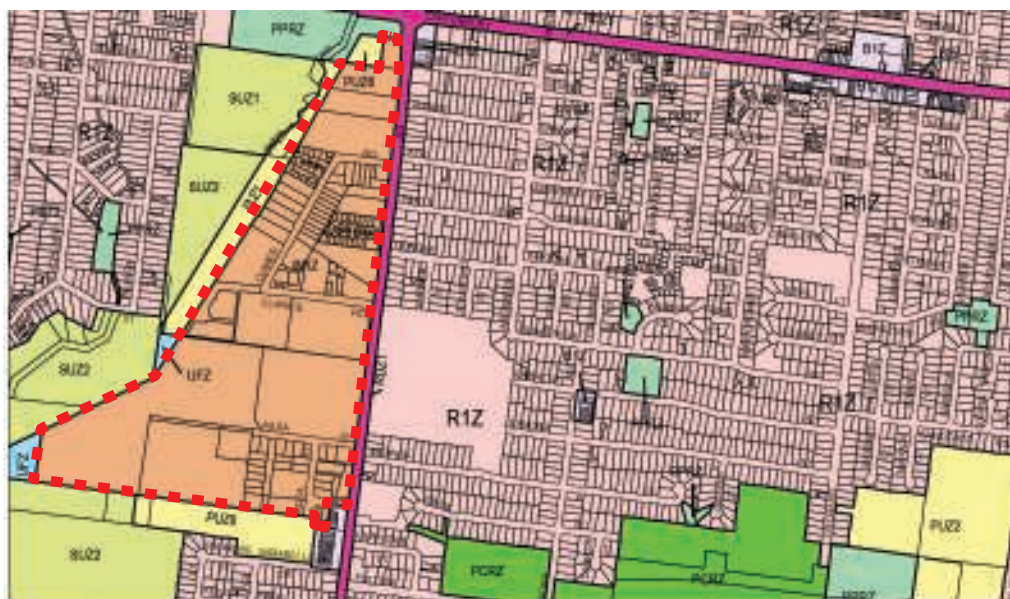
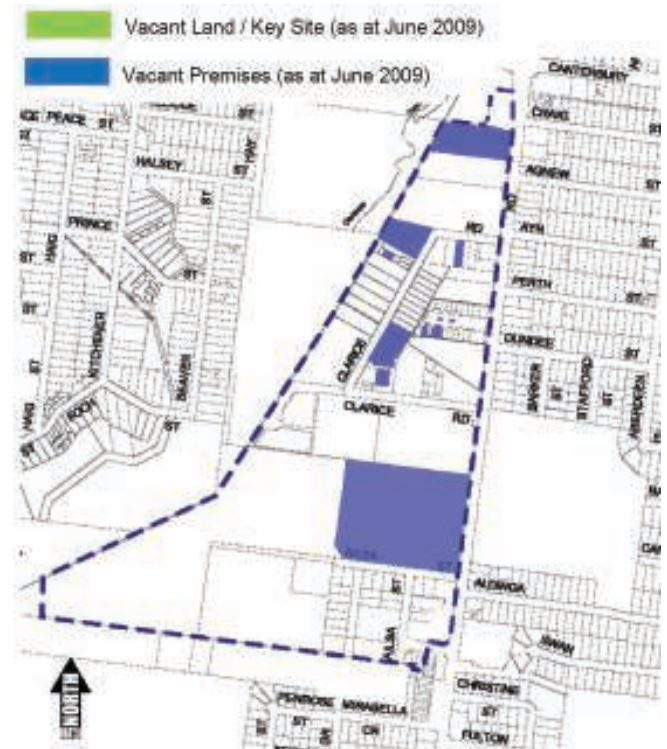


Figure 29: Precinct 6 - Aerial, Zoning, Site Analysis (June 2009)

Google aerial image taken Feb 2006:



PRECINCT 6 – MIDDLEBOROUGH / CLARICE ROAD

MIDDLEBOROUGH / CLARICE ROAD		
ZONING	Industrial 1 Zone	
TOTAL LAND AREA	35.1ha	
PREDOMINANT BUILDING TYPES	Factory / Warehouse	
	2010	2008
NO OF VACANT PREMISES		31
TOTAL NUMBER OF RATEABLE PROPERTIES	125	127
TOTAL GROSS LEASEABLE FLOOR SPACE	179,173sqm	169,431sqm
TOTAL SITE VALUE	\$96,944,000	\$97,063,700
AVERAGE CAPITAL IMPROVEMENT	\$1,178,418	\$1,220,244

Refer Figure 29: Precinct 6 - Aerial, Zoning, Site Analysis (June 2009)

Planning Provisions

- Zones: IN1Z to provide for the manufacturing industry (287, 123m²).
- Overlays: None.
- The precinct adjoins two small Urban Floodway Zones and Land Subject to Inundation Overlay area along its western boundary, as well public use zones for Local Government and Service and Utility purposes.
- No specific local policies or strategies apply.

Land Use & Activity

- The total land area of this precinct is 287, 123m² which accommodates 128 rateable properties and 137 businesses.
- Like Evans/Ireland the majority of lots are between 500 to 1,000m² (40%) or between 1,001 to 2,000m² (20%).
- The precincts 127 buildings provide a total floorspace of 178,224m². Floor areas are predominantly less than 250m² (30%) or between 251m² and 500m² (45%) reflecting the typically small floor areas of industrial activity in Whitehorse.
- The precinct's vacancy rate is currently high for Whitehorse at 24%.
- The predominant building uses are office/factory (41%) or factory (30%).
- The business mix is diverse with repair and maintenance businesses (16%), wholesaling (16%) and manufacturing (16%) being well represented.
- There are however other industry sectors in this precinct not represented in the smaller precincts being: professional, scientific and technical services, internet service providers, web search portals and data processing services, motion picture and sound recording activities, and computer system design and related services. Of the nine businesses that have been identified as moving out of this precinct between 2003 and 2006 these have largely been wholesalers and six have relocated within Whitehorse
- Those businesses completing the survey provided 831 jobs and while the majority of jobs are full time unlike other precincts are predominantly blue collar positions (62%). Their most influential locational factor was the size and suitability of the building and the least influential was good access to a wide range of training and educational facilities. Most businesses have been operating for more than 20 years (39%) or 10 to 19 years (22%) but have moved around Whitehorse. Interstate and international markets are not important with business in this area.

Built Form & Visual Amenity

- Unlike many other precincts in Whitehorse this precinct does not directly adjoin a residential area. Middleborough Road acts as a buffer between the precinct and the residential area to the east.
- This is the only industrial precinct in Whitehorse that has direct exposure to a major road (predominantly supporting the large lots in the precinct) and smaller lots are located behind.
- As with most precincts there is no cohesion between the architecture within the precinct.
- While buildings are predominantly new (48%) a further 38% were constructed between 1950 and 1979.
- Presentation of built form to Gardiners Creek could be greatly improved.

Public Realm & Sense of Place

- Like Blackburn, Evans/Ireland and Lexton although the precinct itself offers no space for the public realm (services or parks) it has a connection to a nearby neighbourhood centre located on the southern edge of the precinct and is only 800m from Burwood Heights Major Activity Centre and Burwood Square. This provides important (albeit limited for the time being) access to retailing, personal services, and cafes. Way finding is not provided within the precinct or to nearby activity centres.
- Need improvements to the connections to Wembley Park, RHL Sparks Park and the Gardiners Creek Trail reserve for recreational purposes. Again there is a need for appropriate way finding.

Movement & Accessibility

- Public transport is very limited being served by Bus routes 733 in Middleborough Road, and 767 in Canterbury Road. The nearest station is Laburnum located approximately 1.5km to the north.
- At the regional traffic level the precinct is well served by major arterial roads and with good access to the Eastern Freeway approximately 4km to the north via Middleborough Road.
- Vehicle access into the precinct is provided from Middleborough Road.
- A contiguous footpath is provided throughout the precinct and regional bike trail adjoins the site along Gardiners Creek.

Property Dynamics

- The average industrial site values is \$762,289 up 86% on 2006 (a very high increase compared to other precincts) and values range from \$27,400 to \$19,581,000.
- The average industrial capital improved value is \$1,220,244 up 8% on 2006 (a relatively low increase compared to other precincts) and values range from \$95,000- \$52,219,000.
- As with all Whitehorse industrial properties the high underlying land value in the precinct reflects the demand for business premises in this area and indicates that the precinct is capable of attracting higher value added businesses and a greater intensity of development if deemed appropriate. This evidenced by new developments at 21 and 29-31 Clarice Road.

Development Opportunities & Positioning

- The precinct has potential for integrated mixed use developments on large sites consisting of office suites, office warehouse units and office/factory units of varying sized.
- Large sites in this precinct have significant development potential as modern office/industrial parks with quality building design, internal road networks, landscaping and on-site parking.
- There will be pressure for rezoning land fronting Middleborough Road for alternative uses such as showrooms, trade supplies and bulky goods retailing as demonstrated by the approval of the office/showroom development at 249 Middleborough Road. Any further erosion of the precinct in this manner should be avoided as the precinct is capable of attracting high value added businesses that can support a modern office/industrial form.

2011 Update

- A considerable opportunity exists for the redevelopment of the site on the corner of Ailsa Street and Middleborough Road. We understand that an application has been lodged and is now subject to appeal. Further, many of the vacant premises identified during 2009 have now been occupied, and planning permit applications lodged for new developments. Commercial confidence in this precinct is therefore evident. (Refer Figure 30)
- The precinct has established street trees, although general improvement is warranted. New developments have been well landscaped and designed.
- Total gross leasable floor area has increased, although the site value has decreased slightly, with a percentage change of -1.38%.
- The average site value for the Middleborough / Claire Road precinct for 2010 is \$765,792.

Figure 30: Precinct 6 - Site Analysis Feb 2011

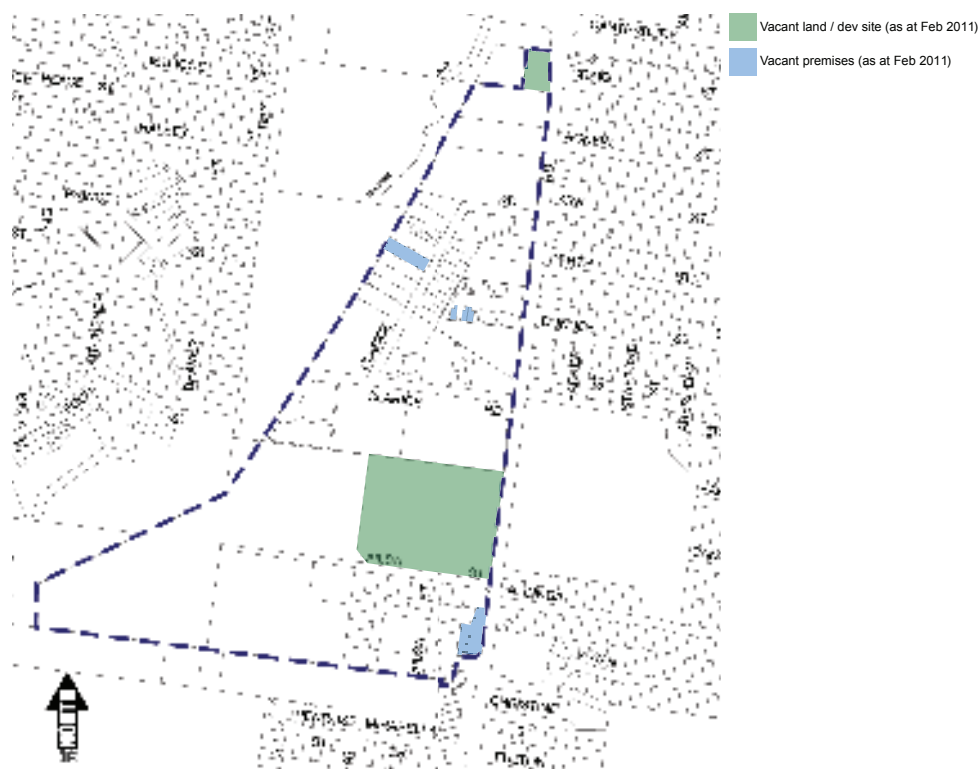
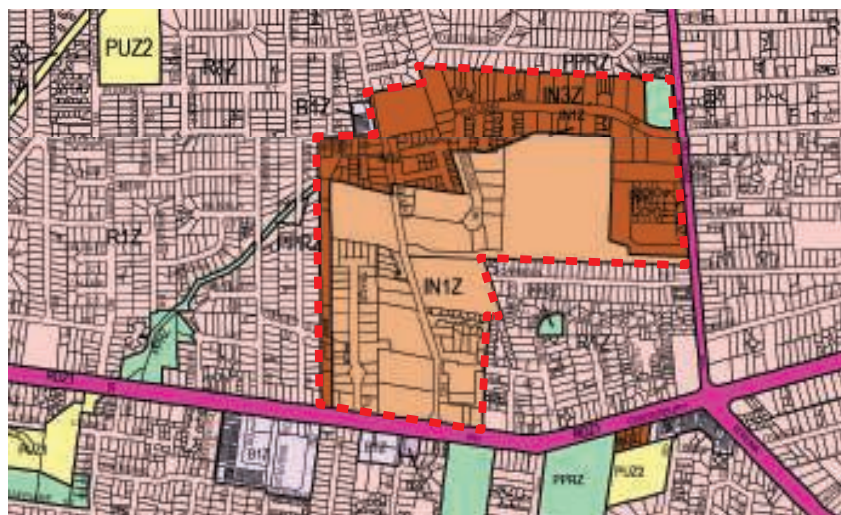


Figure 31: Precinct 7 - Aerial, Zoning, Site Analysis (June 2009)

Google aerial image taken Feb 2006:



PRECINCT 7– REDLAND ESTATE

REDLAND ESTATE			
ZONING	Industrial 1 Zone and Industrial 3 Zone		
TOTAL LAND AREA	41.3ha		
PREDOMINANT BUILDING TYPES	Factory / Office Warehouse		
		2010	2008
NO OF VACANT PREMISES		31	
TOTAL NUMBER OF RATEABLE PROPERTIES	245	86	
TOTAL GROSS LEASEABLE FLOOR SPACE	156,693sqm	51,441sqm	
TOTAL SITE VALUE	\$123,444,000	\$115,113,800	
AVERAGE CAPITAL IMPROVEMENT	\$954,731	\$1,029,729	

Refer Figure 31: Precinct 7 - Aerial, Zoning, Site Analysis (June 2009)

Planning Provisions

- Zones: IN3Z to provide for industries and associated uses compatible with the nearby residential area (197,431m²) and IN1Z to provide for the manufacturing industry (55,798m²).
- Overlays: Heritage Overlay (HO5) applies to part of 656 Mitcham Road, Special Building Overlay (SBO) applies to the Beech Street properties, and a Design and Development Overlay (DDO4) applies to the small shopping centre adjoining the precinct in Rooks Road.
- Local Policy Clause 22.09 Rooks Road Industrial Area applies in part (generally the Redland Drive Area) to this precinct. The basis of the policy is to manage the interface with abutting residential areas through adequate landscaping and to manage non local traffic away from residential streets (although acknowledging the function of Rooks Road as a north/south link between Canterbury and Whitehorse Roads). Specific setbacks are provided (which would benefit the wider precinct). This policy would be more appropriately translated into a Design and Development Overlay providing a strong framework for the long term development and redevelopment of the precinct.

Land Use & Activity

- The total land area of this precinct is 253, 229m² making it the third largest precinct in Whitehorse (and only marginally smaller than Middleborough/Clarice precinct).
- The precinct accommodates 215 rateable properties and 258 businesses (almost as many businesses as the largest precinct, Rooks Road).
- The range of lots sizes is quite diverse however the majority of lots are between 501 and 1,000m² (35%) or 4,001m²+ (25%) offering opportunities for both medium and large businesses.
- The precincts 194 buildings provide a total floorspace of 135,872m². Floor areas are generally under 1,00m² and fairly evenly split amongst those between those <250m² (24%), 251 to 500m² (31%) and 501 to 1,000m² (28%).
- The vacancy rate is reasonably high for Whitehorse at 16% (the average being 9%)
- The predominant building uses are office/warehouse (48%) focused heavily around Redland Drive, and factory (25%).
- Despite its higher value and sought after location the business mix is still quite broad (rather than high value only). It includes, repair and maintenance, manufacturing, and wholesaling with a limited number of professional, scientific and technical services.

- Those businesses completing the survey provide 679 jobs, with the majority engaged in full time work and largely in white collar positions (57%).
- Those locational factors of most influence were the size/suitable premises and high quality attractive environment. Those of least influence were proximity to suppliers or educational/training facilities.
- Most businesses have been operating either between 10 to 20 years (25%) or 20 years+ (42%). As with most businesses surveyed many have been in Whitehorse for most of their operation and intend to remain in Whitehorse.
- Unlike other precincts local markets are not very important, instead, regional, Victorian and interstate markets take on more importance. International remain largely irrelevant to this precinct.

Built Form & Visual Amenity

The precinct comprises four quite distinct areas characterised as follows:

Redland Drive

- Wide tree lined street
- Underground power lines
- Quality private landscaping
- Modern architecture that is predominantly concrete tilt slab 1-2 stories in height, enhanced with glazing to the frontage, and 1-2 storey buildings. High degree of architectural cohesion
- New building on the corner of Mitcham Road and Redland Drive will provide a strong entry statement to the area.
- Limited on-street parking occurring
- Advertising is unobtrusive
- While the northern side of the precinct directly abuts a residential area a large vegetation buffer ensures that this interface is sensitively managed. Residential properties to the south have established mature tree plantings within their boundaries

Trade Place/Azalea Street

- Wide tree lined street
- Underground power lines (Trade Place)
- Minimal setbacks and private landscaping
- Predominantly modern architecture but lacks the visual cohesion of Redland Drive due to varying setbacks and less attention given to frontages – “box like” structures, concrete tilt slab constructions, generally 1-2 stories in height.
- Advertising is unobtrusive
- High degree of on-street parking
- Interface of properties in Azalea Street with residential properties facing Betula Avenue is poor in and would have benefited from connection with Trade Place as a more suitable access point. However properties 49, 51 and 59-61 Betula Avenue are accessed via residential land which while interrupting the rhythm of the residential character of the street is unobtrusive.

Beech Street

- Narrow tree lined residential street
- Above ground power lines
- Absence of private landscaping areas and frontages used for car parking
- Older industrial area providing smaller units predominantly of brick construction and single storey
- Interface with residential area is poor
- Advertising is unobtrusive

Rooks Road

- As a secondary arterial road, it is a narrow tree lined street (no on-street parking allowed and no consistency in species of street trees).
- Area undergoing significant transition from large older purpose built premises (mixture of colour bond and brick) to new concrete tilt slab developments for small and medium tenancies.
- Setbacks and landscaping vary significantly
- One large site is occupied by a place of assembly but presents as an industrial form
- Advertising is largely unobtrusive however the use of large real estate style boards for advertising is common and visually detracts from the area.
- The interface of this precinct with adjoining residential properties is largely managed through the use of blank walls and an absence of any parking, storage or loading bay areas.

Public Realm & Sense of Place

- As with all precincts there is little sense of place beyond that of the function of the precinct for industrial activity. Each premises is a destination in its own right.
- As with other precincts although the precinct itself offers no space for the public realm (services or parks) it does enjoy close proximity to a number of nearby activity centres that are within suitable walking distances to the precinct. These include Brentford Square (200m south), Rangeview (200m north) and a small centre on the northern boundary of the precinct. This provides important access to retailing, personal services, and cafes.
- Again way finding to these centres is not provided in the precinct.
- Similarly recreational opportunities are available in nearby Stevens Reserve and Vermont Recreation Reserve.

Movement & Accessibility

- Public transport is somewhat limited being served by Bus routes 736 Rooks Road, 738 and 765 Mitcham and Canterbury Roads. The nearest stations are Nunawading and Mitcham located to the north approximately 1.4km to Rooks Road and Redland Drive respectively.
- At the regional traffic level the precinct is well served by major arterial roads and access to EastLink via Canterbury Road is approximately 2.5km to the east.
- A contiguous footpath is provided throughout the precinct however linkages for pedestrian or vehicles within the precinct are not provided.
- Access into Betula Avenue, Beech and Azalea Streets is via residential streets which could cause conflict between residential and industrial traffic. These streets are also narrow which may cause difficulties with.
- Access to Trade Place, Rooks Road and Redlands Drive are from major arterial roads. Generally these streets are wider and or free of off street parking thereby accommodating heavy vehicle movements.

Property Dynamics

- The average industrial site values are \$481,233 up 19% on 2006 (an average increase compared to other precincts) and values range from \$12, 000 to \$10,212,000.
- The average industrial capital improved value is \$1,029,726 up 16% on 2006 (again an average increase compared to other precincts). Values range from \$12,000 to \$10,212,000.
- As with all Whitehorse industrial properties the high underlying land value in the precinct reflects the demand for business premises in this area and indicates that the precinct is capable of attracting higher value added businesses and a greater intensity of development if deemed appropriate.

Development Opportunities & Positioning

- The precinct has potential for integrated mixed use developments on large sites consisting of office suites, office warehouse units and office/factory units of varying sizes. Large sites in this precinct have significant development potential as modern office/industrial parks with quality building design, internal road networks, landscaping and on-site parking.
- High underlying land values and high rental demand will be a disincentive for the amalgamation and redevelopment of small properties.
- Existing industrial 1 and 3 zoning has not appeared to deter investment in new development however rezoning some areas to an alternative business zoning use could attract new forms of investment and assist in improving the appearance and amenity of the precinct outside of Redland Drive. The inclusion of a small convenience precinct that incorporates commercial activities that complement and service the needs of businesses and employees in the Precinct, and located centrally between the Rooks Road and Redlands Drive properties, would greatly enhance the business amenity of the precinct. This is an approach being adopted more widely across Melbourne for larger industrial precincts and is already established in Knox.
- The use of sites for purposes other than industrial activities (such as places of assembly) should be strongly discouraged to ensure the integrity of the precinct and preparation of precinct structure plan for this precinct is highly desirable.

Redland Drive

- The provision of a high amenity business environment provides a strategic advantage for this area. As a planned industrial area it is a highly sought after location
- A number of large land parcels are yet to be developed at the end of this court and provide a built connection with Rooks Road. This will enable additional development in Rooks Road while contributing no further to the number of vehicle movements on this busy road. Provision should however be provided for pedestrian access to enable linkages through the precinct
- Discussions with the landowner and operator of 656 Mitcham Road should be held to determine the long term use of this site with a view to its ultimate integration with Redland Drive as a continuous circular drive.

Trade Place

- Only one parcel remains vacant in this area (address 10A Azalea Street but access to Trade Place). This site appears encumbered by drainage infrastructure and currently serves as an informal access and park area.

Beech Street

- No vacant site however as this area contains some of the oldest properties and the poorest interface redevelopment of these properties should be supported. Discussions with the landowner of 162 Rooks Road should be entered into to facilitate the establishment of a common property area that would enable these properties to access Rooks Road rather than Beech Street.

Rooks Road

- Currently no vacant sites. Any future redevelopment would benefit greatly from stronger urban design guidelines to encourage greater cohesion within the streetscape, particularly with respect to street setbacks.

2011 Review

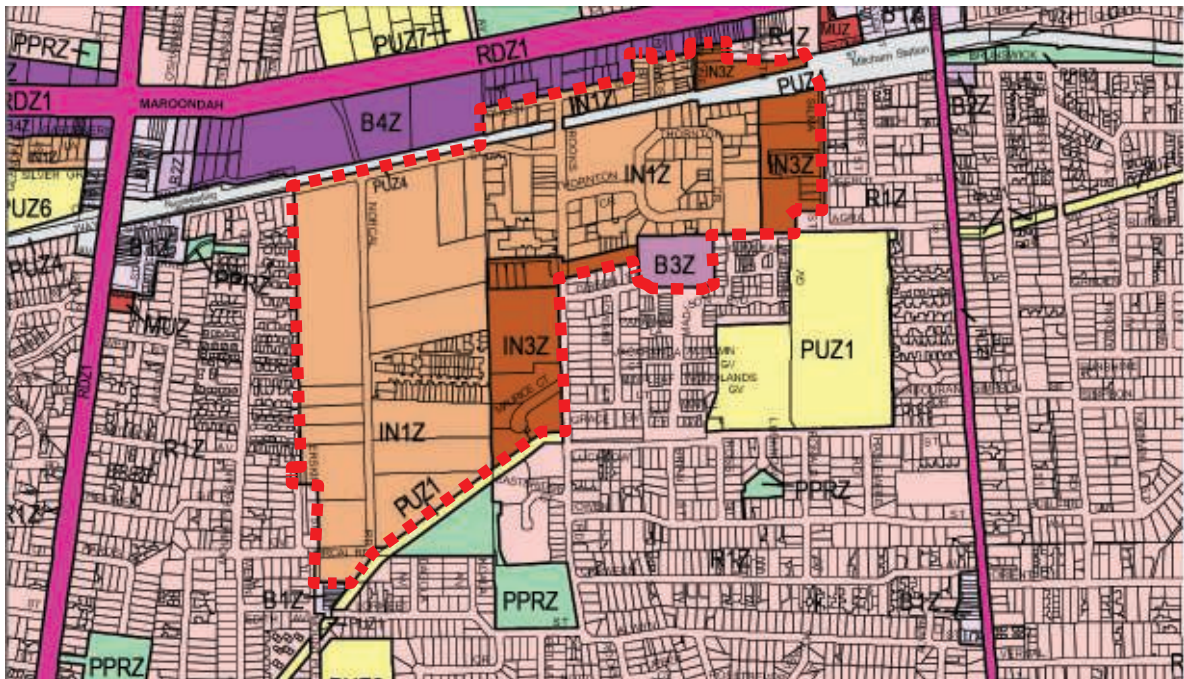
- Redland Estate has had considerable development activity since 2008. This is evident in the majority of the vacant premises previously identified now being occupied. In addition a number of new developments have been completed or are currently under construction, including the development at 630 Mitcham Road which provides an impressive gateway to the precinct. (Refer Figure 32)
- Despite the level of development and redevelopment occurring, there are still development sites within the precinct, namely the existing CSR site which given its considerable size, provides a redevelopment opportunity.
- Further evidence of the growth in the Redland precinct is the significant increase of over 100,000sqm of gross leasable floor area since 2008. An increase in site value of a percentage change of 7.24% has also resulted between 2008 and 2010.
- A high quality urban environment is reflected within precinct. Extensive and established landscaping is evident, along with high quality built form and wide roads. The existing quality environment has been continued in newer developments within the site.
- The underutilised site located adjoining the CSR site is currently used for storage of caravans, buses and equipment and could provide the opportunity to be joined with the CSR site should redevelopment occur.
- The average site value for the Redlands estate in 2010 is \$503,853.

Figure 32: Precinct 7 - Site Analysis Feb 2011



Figure 33: Precinct 8 - Aerial, Zoning, Site Analysis (June 2009)

Google aerial image taken Feb 2006:



PRECINCT 8– ROOKS ROAD

ROOKS ROAD		
ZONING	Industrial 1 Zone, Industrial 3 Zone and Business 3 Zone	
TOTAL LAND AREA	49.5ha	
PREDOMINANT BUILDING TYPES	Factory / Warehouse	
	2010	2008
NO OF VACANT PREMISES		12
TOTAL NUMBER OF RATEABLE PROPERTIES	252	315
TOTAL GROSS LEASEABLE FLOOR SPACE	207,844sqm	243, 990sqm
TOTAL SITE VALUE	\$124,884,000	\$122,313,000
AVERAGE CAPITAL IMPROVEMENT	\$863,053	\$980,154

Refer Figure 33: Precinct 8 - Aerial, Zoning, Site Analysis (June 2009)

Planning Provisions

- Zones: INIZ to provide for the manufacturing industry (334,351m²), IN3Z to provide for industries and associated uses compatible with the nearby residential area (58,827m²).
- Overlays: Heritage Overlay (HO78) applies to 58-74 Station Street defined as the smokestack and 2m surrounding the smokestack, Vegetation Protection Overlay (VPO3) applies to 15-17 Maurice Court, (VPO1) applies to 24 Simla Street.
- Local Policy Clause 22.09 Rooks Road Industrial Area applies in part (generally the Maurice Court Area) to this precinct. The basis of the policy is to manage the interface with abutting residential areas through adequate landscaping and to manage non local traffic away from residential streets (although acknowledging the function of Rooks Road as a north/south link between Canterbury and Whitehorse Roads). Specific setbacks are provided (which would benefit the wider precinct). This policy would be more appropriately translated into a Design and Development Overlay.
- A Structure Plan has also been developed for the Nunawading/Megamile Major Activity Centre and Mitcham Neighbourhood Activity Centre. The industrial land north of the railway line has been considered as part of the Mitcham Neighbourhood Activity Centre and the fragmentation of this land from the Rooks Road industrial precinct warrant such an approach. The Nunawading Structure Plan has included the Daniel Robertson Brickworks as a strategic site appropriate for residential/office development (a transitional area). This site would be more appropriately addressed within the context of the Rooks Road industrial precinct. The use of this site for park and residential purposes is not in keeping with State Policy.

Land Use & Activity

- This is the largest industrial precinct in Whitehorse providing a total land area of 393,178m². The precinct accommodates 320 rateable properties and 230 businesses - the largest number of businesses of any of the precincts.
- The range of lots sizes is quite diverse. The majority of lots are over 4,001m²+ (44%) or between 501 and 1,000m² (33%).
- The precincts 187 buildings provide a total floorspace of 159,559m². Floor areas are generally under 1,000m² and are fairly evenly split amongst those between <250m² (21%), 251 to 500m² (33%) and 501 to 1,000m² (28%).

- The vacancy rate is average for Whitehorse at 10%.
- The predominant building uses are warehouse or office/warehouse (56%) and factory (20%).
- Being the largest precinct, Rooks Road has the most diverse business mix. The majority of businesses are manufacturing, wholesale, construction and repair and maintenance activities. There is a limited proportion of businesses in alternative sectors such as professional, scientific and technical services, motion picture and sound recording activities, and computer system design and related services.
- Those businesses completing the survey provide 764 jobs, with the majority engaged in full time work and fairly evenly split between blue and white collar positions.
- Those locational factors of most influence were the size/suitable premises and close proximity to customers. Those of least influence were proximity to suppliers, proximity to suitably qualified employees, and educational/training facilities.
- Most businesses have been operating 20 years+ (40%). As with most businesses surveyed many have been in Whitehorse for most of their operation and had clearly moved around within Whitehorse. 74% indicated that they were not thinking of relocating.
- Like businesses in the Blackburn and Cook precincts, they indicated that the most important markets were local, regional and State. The importance of Interstate and international markets were significantly low.

Built Form & Visual Amenity

The precinct comprises three distinct areas:

Norcal Road/Station Street

- Mixture of buildings in styles and ages but dominated by large lots such as the brickworks, Telstra and Holeproof and high quality redevelopment such as 56 Norcal Road
- The Daniel Robertson Brickworks factory is a dominant form in the area and reinforces the industrial character of the area. The factory's tall chimney is very distinctive and is considered to have historical and aesthetic value.
- Parking is generally contained off-street but on-street parking can and is provided.
- Properties on the western side of Norcal Road abut a residential area characterised by relatively high densities and separated by mature landscape buffers contained within the industrial properties.

Rooks Road

- Mixture of buildings in styles and ages and includes high quality redevelopment such as Maurice Court.
- There is no architectural cohesion and setbacks vary.
- Parking is contained off-street on the western side of Rooks Road. On-street parking is provided for on the eastern side
- Street trees on the western side of Rooks Road obscure much of the precinct opposite the residential area.

Thornton Crescent/Simla Street

- Mixture of building styles and ages, comparatively older area within the precinct. No architectural cohesion but well maintained
- Limited private landscaping
- Parking is generally contained off street
- Residential land abuts the buildings in the south and the east and generally buffers are provided in form of mature landscaping within residential properties.
- Advertising signage is unobtrusive (in all areas)

Public Realm & Sense of Place

- As with all precincts there is little sense of place beyond that of the function of the precinct for industrial activity. Each premise is a destination in its own right.
- Although the precinct offers little in the public realm it does enjoy relatively close proximity to the Nunawading and Mitcham activity centres, 400m west of Norcal Road and 300m north east of Simla Street. This provides important access to retailing, personal services, and cafes for some businesses but is unlikely to serve the needs of businesses located more centrally in the precinct. Again way finding to these centres is not provided in the precinct.
- Similarly recreational opportunities are available in nearby Charles Rooks Reserve (adjoining the precinct to the south) and Walker Park (200m north of the precinct).

Movement & Accessibility

- Good access to public transport being centrally located to Mitcham and Nunawading stations. Bus routes 270, 303, 307, 736, 738, 740 and 765 can all be accessed from Mitcham station and route 738 can be accessed to the station from Rooks Road.
- Access to the precinct is via Rooks Road from either Whitehorse or Canterbury Roads. Rooks Road does not cater well for heavy vehicle movements.
- At the regional traffic level the precinct is well served by major arterial roads. Access to EastLink is not possible via Whitehorse Road forcing traffic to travel north via Springvale Road (unlikely given congestion at the Whitehorse and Springvale Road intersection) or south via Canterbury Road (more likely but through a residential area between the Rooks Road and Redlands precincts).
- A contiguous footpath is provided throughout the precinct but again linkages throughout the areas within the precinct is limited.

Property Dynamics

- The average industrial site values are \$528,989 up 21% on 2006 (an average increase compared to other precincts) and values range from \$1, 000 to \$5,192,000.
- The average industrial capital improved value is \$980,154 up 15% on 2006 (again an average increase compared to other precincts). According to council's rates database values range from as low as \$1,000 and up to \$20,833,000 highlighting enormous variation.
- As with all Whitehorse industrial properties the high underlying land value in the precinct reflects the demand for business premises in this area and indicates that the precinct is capable of attracting higher value added businesses and a greater intensity of development if deemed appropriate.

Development Opportunities & Positioning

- Rooks Road has attracted a significant amount of business investment and the level of business activity will continue to support the relatively high underlying values.
- A majority of businesses that are attracted to this precinct will continue to be those that provide products and services to local businesses and the residential population. This will result in little change in the current development patterns.
- High underlying land values and high rental demand will be a disincentive for the amalgamation and redevelopment of small properties in areas such as Thornton Crescent.

- Existing industrial 1 and 3 zoning has not appeared to deter investment in new development. However, rezoning some areas to an alternative business zoning could attract new forms of investment and assist in improving the appearance and amenity of the precinct based around high value add manufacturing. With its associated higher office floor area higher value add operations (particularly large operations) cannot always be facilitated under the industrial zones. A business 3 zone or even a mixed use zone could provide more opportunity for office based development on the Daniel Robertson Brickworks site in line with the Structure Plan without diminishing the role of the land for industrial purposes as a maximum floor area can be applied to the relevant schedule.
- Traffic congestion has been a result of the success of the precinct and incremental development that has taken place over time. It is unlikely that this will improve as the trend for future redevelopment of sites is likely to consist of higher density development.
- The challenge for this precinct is improving the existing streetscape and reducing traffic and parking conflicts. This will likely to be achieved through incremental changes on a site by site basis through implementing appropriate parking ratios and identifying improvements in public spaces through improvements to landscaping and design in conjunction with the redevelopment of sites.
- Being the largest precinct in Whitehorse, there is a requirement to maintain the strength of this precinct which is its business diversity. This can be achieved by ensuring there is an adequate distribution of appropriately zoned land to enable the businesses that service the local market to maintain their presence.

Norcal Road/Station Street

- 51-79 Norcal Road has been issued with a planning permit for the development of 51 warehouses.
- A number of large land parcels are likely to present for redevelopment in the medium term (including the Holeproof and Daniel Robertson sites). Discussions with the landowners and operators should be held to determine the long term use of these sites.

Rooks Road

- There are no vacant sites and redevelopment will be incremental. Any future redevelopment would benefit greatly from stronger urban design guidelines to encourage greater cohesion within the streetscape, particularly with respect to street setbacks.

Thornton Crescent/Simla Street

- 20 Trade Place has been issued with a permit to construct three office/warehouses.
- There are no vacant sites and redevelopment will be incremental.

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- As a result of Holeproof moving its business off shore, its former site at the corner of Norcal Road and Station Street remains vacant. Further to this a number of the key development sites are still present.
- Many of the vacant sites have been developed since the 2008. (Refer Figure 34)
- The recent investments within the sites have seen an increase in the site value, reflecting a percentage change of 2.10%
- This precinct continues to provide redevelopment opportunities and given that a number of the sites with development potential are located along Norcal Road, a consistent built form and urban environment should be aspired.
- The site located at the southern end of Norcal Road identified as underutilised is a considerable size and is used as a depot for a bus line company. Given the two sites adjoining this site are vacant the opportunity may present to undertake a considerable redevelopment.
- The average site value for Rook precinct in 2010 is \$495,571.

Figure 34: Precinct 8 - Site Analysis Feb 2011



OVERVIEW OF URBAN DESIGN MATTERS

ISSUES

The Whitehorse Industrial Precincts have mixed built form and landscape character and are often small precincts which abut residential areas. In general, their interface with the public realm is typically well maintained with minimal issues often associated with industrial precincts of indiscriminate parking, unkept landscaping, signage overload, litter and graffiti. However, as with industrial precincts elsewhere vehicle repair and servicing workshops (mechanics) are often present and generate one of the highest level of impact upon the streetscapes with indiscriminate parking and limited if any landscaping provided to their frontages. A number of the precincts are showing signs of their age with the building stock looking aged and the landscaping past its peak.

Four main urban design issues are common across the precincts:

- Lack of address / presence / visible entry to main roads,
- Lack of a cohesive built form, urban and landscape design approach within each precinct,
- Integration with and linkages to surrounding activity centres, open spaces and other community facilities, and
- Consistent and appropriate interface with abutting residential areas interface

Given that most of the industrial precincts are already developed with limited large redevelopment or undeveloped sites the following approaches may be undertaken as precinct upgrades retrofits.

RECOMMENDATIONS

Address

Apart from assisting with way finding legibility providing a suitable “gateway” to each industrial precinct, gateway or entry treatments also “celebrates” these precincts role in providing employment and other economic and social benefits.

“Gateway” / Entry treatments could entail a structural Element that is consistent for all the precincts but which can include elements which highlight components or industries which may be unique to each precinct. The entry statements may developed as a public art initiative and where space allows be accompanied by landscaping.

Built Form and Landscape Design

Most of the precincts are currently developed and opportunity for amending the built form is restricted to the small remaining undeveloped sites. The greatest opportunity for creating cohesion is within the building frontages and road easements where landscape treatments can be upgraded to provide a unifying element which improves the precincts visual amenity. Whilst space is limited the provision of trees which compliment the scale of buildings should be encouraged. Cues may be taken from shopping precincts such as the Mega Mile which has seen the progressive undergrounding or aerial bundling of power lines of power along with, pavement, street furniture and planting improvements.

In areas of limited width the use of fastigiated form trees and climbing structures as used in a number of the shopping precincts may be included to provide additional greenery that compliments the overall municipalities “leafy” streetscape character.

The general moderate use of signage, recessive colors on building facades and limited fencing to frontages should also be maintained and encouraged to provide an uncluttered public realm.

Integration and Linkages

As part of providing a quality working environment, recognition of the precincts role in supporting activity centres and promotion of travel by means other than cars to and from work the linkages of each precinct to public transport, pathways and surrounding community facilities and destination should be improved. These improvements should address gaps in linkages / pathways, adequate provision of bus stops and the installation of directional signage to assist in providing clear visual cues and information.

Linkages of the precincts with surrounding areas should where applicable address the rail line and main roads which currently present a major barrier to pedestrian and cycle movements to the precincts. Use of the rail easement for linkages over or under these barriers should be explored and implemented wherever feasible.

Residential Interface

As a number of these precincts abut residential areas typical interface issues arise such as noise, light spill and back of house storage and vistas. Noise may be addressed by built form treatments, noise level restrictions and hour of operation measures. A number of areas have used landscape buffers which include screen plantings to address issues of light spill and viewing back of house. A consistent approach should be adopted to all new development to implement appropriate landscape buffers and to progressively continue them as existing areas are upgraded and renewed.

Restrictions of storage around buildings should also be reviewed and implemented to ensure the visual amenity of the streetscape and to residents who have views into these developments (e.g. rear of house) is improved.

CONSULTATION

PUBLIC AUTHORITIES AND AGENCIES

EPA

Discussions with the EPA confirm as follows:

- None of the industrial precincts (or land within them) are listed on the EPA's Priority Site Register (Priority Sites are sites for which EPA has issued a Cleanup Notice pursuant to section 62A, or a Pollution Abatement Notice pursuant to section 31A or 31B (relevant to land and/or groundwater) of the Environment Protection Act 1970. Typically these are sites where pollution of land and/or groundwater presents a potential risk to human health or to the environment).
- There are three areas listed in the Redlands precinct that have been issued with a certificate or statement of environmental audit. The addresses for these are:
 - 159-171 Rooks Road
 - 170-180 Rooks Road
 - 608-656 Mitcham Road
- There are not many environmental programs or initiatives currently being run by the EPA for industrial areas as their role is limited to a statutory function only. However there is a Green Workplace scheme being rolled out currently in Nunawading.

Melbourne Water

Discussions with Melbourne Water confirm as follows:

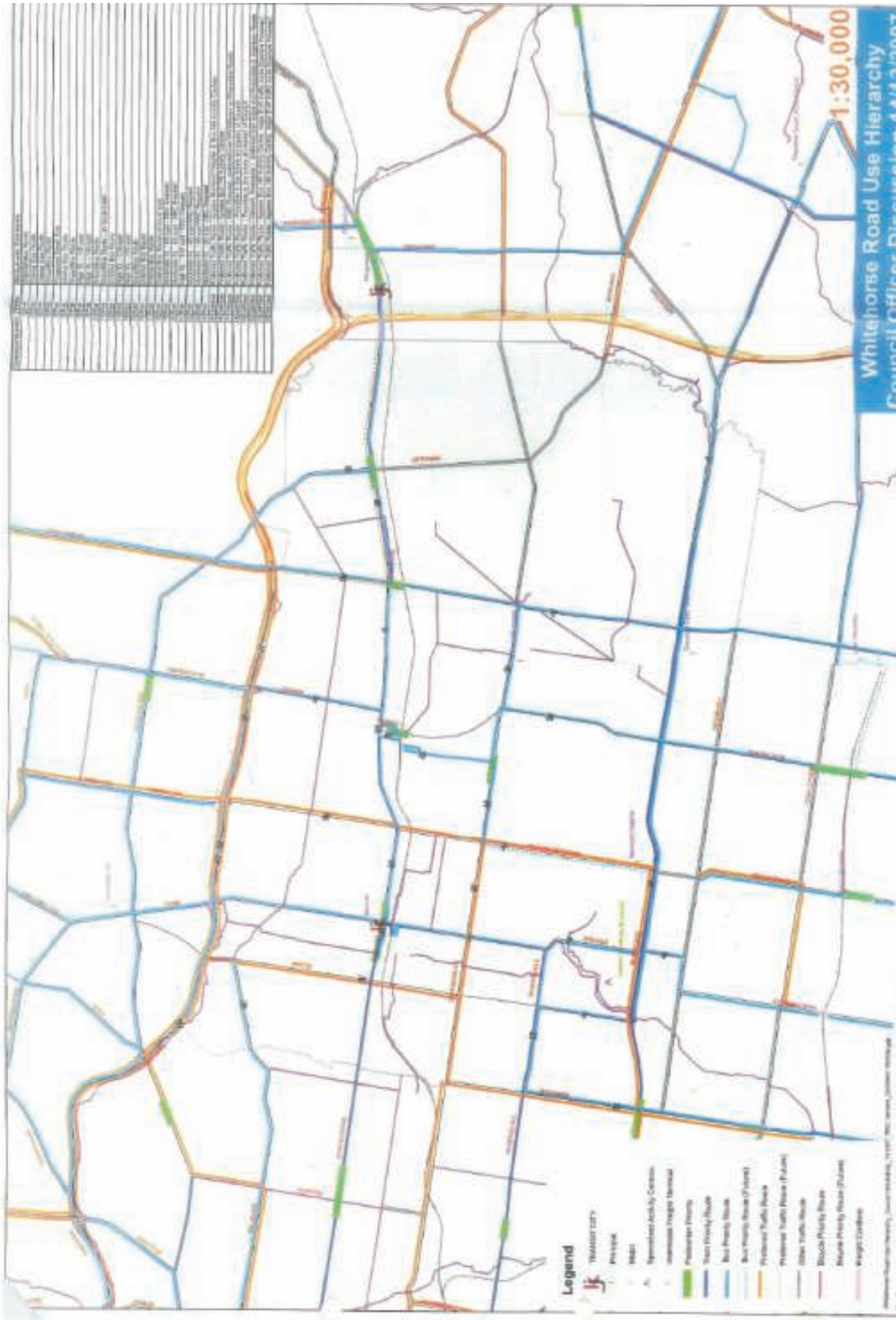
- There are no flooding issues associated with the following precincts:
 - Blackburn
 - Rooks
 - Lexton
 - Cook
- There are however flooding issues associated with:
 - Middleborough/Clarice (Gardiners Creek area)
 - Redlands
 - Joseph (Koonung Creek area)
 - Evans/Ireland (Gardiners Creek area)

As such Melbourne Water has requested involvement in preliminary development proposals of any works in these precincts. It is noted that the planning overlay controls (either Urban Floodway Zone or Land Subject to Inundation Overlay) that would normally trigger such involvement only apply to very small areas within some of these precincts.

- There are currently two Redevelopment Drainage Schemes (RDS's) that affect the following precincts:
 - Blackburn RDS – Blackburn, Rooks, Redlands
 - Box Hill North RDS – Lexton
- There are also a number of Melbourne Water mains in the vicinity of the Cook Road Industrial Estate. Melbourne Water should therefore also be involved in any design around these water mains

Melbourne Water will provide more detailed information as part of any future precinct structure plans or development proposals. As such only preliminary advice could be provided at this stage.

Figure 35: Proposed Road Use Hierarchy



VicRoads

Discussions with VicRoads identified that a key strategic piece of work currently in development is a proposed Road Use Hierarchy. Refer Figure35.

At the time of drafting of this report this proposed hierarchy had yet to be presented to Council for discussion however it clearly highlights intent by VicRoads to add a more strategic approach to the ongoing management of the major and secondary arterial road network that provides clearer directions about the priority to be given to pedestrians, trams, buses, bicycle, freight and traffic. In summary it proposes the following for each precinct:

PRECINCT	ACCESS ROAD	PROPOSED PRIORITY
Blackburn	Whitehorse Road	Bus
Cook	Whitehorse Road	Bus & Future Traffic
Evans/Ireland	Highbury Road Burwood Highway	None Traffic & Tram
Joseph	Middleborough Road	Traffic
Lexton	Middleborough Road	Traffic
Middleborough/Clarice	Middleborough Road	Traffic & Future Bus
Redland	Mitvham Road Springvale Road	None Bus
Rooks	Mitcham Road Canterbury Road	None None

What this means for the network is that while roads will appear very similar, when a decision arises in relation to users, a priority will be given to those as listed. Having regard to changes in demand and services these priorities could still change but in no way compromise the needs of the industrial precincts.

Based on this proposed approach and the standards more generally applied by VicRoads, they provided more specific comments on each of the precincts as follows:

- Blackburn – no further access points will be considered to Whitehorse Road
- Cook – any future access to service land north of Whitehorse Road would ideally use the service road or be located no less than 200m north of the Whitehorse and Cook Road intersection.
- Evans/Ireland – no new access points will be considered to Burwood Highway however Highbury Road has less limitations. The Evans Street and Highbury Road intersection was acknowledged as problematic having regard to the camber/rise of the roads
- Joseph - Having regard to the potential intensification of the traffic generated from a redeveloped HP site, VicRoads requested involvement in the preparation of any future site redevelopment guidelines. As Middleborough Road is prioritized for traffic additional traffic signals would not be encouraged and preference would be given to low traffic generating uses to avoid this requirement.
- Lexton – similarly, traffic signaling sequences would not be altered in favour of Lexton Road traffic so greater intensification of uses would be problematic.
- Middleborough/Clarice – no further access points will be considered to Middleborough Road. Any future development of large sites in the south of the precinct should be encouraged to use Ailsa Street to access the existing signaled intersection.
- Redland – As there are no priorities for users on this section of Mitcham or Canterbury Road further access points to these roads could be considered. Connections to the Bicycle Priority route would be supported. VicRoads would however like to be involved in the preparation of any future precinct structure plan process and any proposals to address the Rooks and Canterbury Road intersection.
- Rooks – No specific comments at this stage but would like to be involved in any future precinct structure plan process and any proposals to address the Rooks and Whitehorse Road intersection.

It is important to note that the State Government has recently put in place a freight network strategy for Victoria – Freight Futures. While the freight transport and logistics sector is only a very small part of the local economy (1.5%) the wider sector is critical to Whitehorse manufacturing in particular. Ensuring freight transport and logistics have access to, and are able to operate on, a sustainable and efficient freight network is critical to both ensuring access to goods and services in a timely and cost effective manner and maintaining Melbourne’s liveability.

Fundamental to the network will be the creation of a Principal Freight Network supported by designated Freight Activity Centres (FAC’s) as shown in Figure 36.

Figure 36: Proposed Freight Activity Centres



Source: Freight Futures, p26

As part of this network a more sustainable pattern of metropolitan freight flows is envisaged as shown below, moving away from a centralised Port of Melbourne system where non-port related freight activities are progressively located to more suitable locations away from the port. (Refer Figure 37)

Such change will be supported by a Metropolitan Freight Terminal Network (MFTN) as shown in Figure 38.

While the domestic road based freight task across Australia is expected to double during the period 2000 to 2020 it is clear that the patterns associated with this movement will be facilitated in a very different manner to the past. Accompanying this change is the introduction of new performance based standards for Higher Productivity Vehicles (HPV or 'SMART' trucks) vehicles and network classification guidelines for roads. These changes need to be undertaken in collaboration with Council and the transport industry. Greater dialogue on this issue with the Whitehorse industrial sector to increase awareness and implement change will be required.

United Energy

In discussion with United Energy it was confirmed that United Energy Distribution (UED) has assets (poles and wires) close to all of the industrial precincts which are/can be utilised.

Based on their latest information the UED assets supporting Blackburn, Lexton, Redland, Joseph and Evans/Ireland industrial precincts are currently highly utilised and may not have sufficient capacity to support any increases to demand. It is likely that for these areas augmentation may be necessary. United Energy is happy to discuss and assess the need for augmentation once further information on the timing, staging and demand of development is known.

For the remaining precincts it is likely that the UED assets have spare capacity to accommodate growth in demand.

Figure 37: Proposed Metropolitan Freight Flows

Source: Freight Futures, p34



Figure 38: Proposed Metropolitan Freight Terminal Network

Source: Freight Futures, p36



INDUSTRIAL PRECINCT LANDOWNERS AND MANAGERS

Discussions with five local real estate agents identified that the three most important factors for businesses locating in the industrial precincts are:

1. Access - to the Eastern Freeway and EastLink.
2. Location - within the Melbourne market.
3. Lifestyle - Many owners of businesses in the area live locally and want to work nearby.

While EastLink has added to the attractiveness of Whitehorse's access attribute it was not considered to have had a significant impact on investment patterns or the types of businesses looking to locate in the municipality. Unlike other municipalities like Dandenong and to a lesser degree Knox and Frankston where large tracts of land have been released as a result of the construction of EastLink, Whitehorse's industrial sector has not been able to experience such growth.

Whitehorse industrial stock is viewed as tightly held and remains in limited supply. Consequently despite the downturn in the economy vacancy rates are still low and properties are highly sought after. As the economy declines, increasingly land owners are being forced to consider lower rents and to provide incentives such as rent free or rent reduced periods.

While demand is high for older style properties increasingly established businesses moving from older rented premises are seeking new owner/occupier premises that can provide:

1. Floor areas between 300 and 500m², up to a maximum of 1,000m²
2. Floor spaces that accommodate 20% office
3. Higher ceiling heights (up to 9m)

Consequently older buildings, while still in demand, are less attractive to the market overall and generally achieve significantly lower rentals. This may have the effect of forcing sale and/or renewal of properties and future development needs to not only accommodate higher ceiling levels but needs to be subdivided to enable individual business ownership. In order to attract such investment the planning framework needs to facilitate these requirements.

Those businesses seeking larger floor areas (2,000m²+) are currently forced to locate to Maroondah, Knox and Monash, highlighting an opportunity to add some larger floor areas to the supply in order to retain businesses that are outgrowing the existing Whitehorse building offer.

The need to manage the interface between industrial areas and adjoining residential areas was acknowledged but not seen as a constraint to attracting suitable businesses. Industrial operations in Whitehorse were generally viewed by the group as quiet and therefore able to facilitate the needs of adjoining residents. Noisy operations (primarily viewed across the group as motor mechanics and repair operations) are actively discouraged from interface locations.

There are high levels of interest from church and community organisations seeking premises around 1,000m² and able to accommodate high levels of parking. These operations are unable to compete with commercial rents in retail precincts and consequently directly compete with the industrial sector for suitable premises. Having regard to the limited supply of industrial stock available this trend needs to be carefully managed. Any future industrial policy needs to be quite explicit as to where suitable locations may be considered and ideally would be focused on industrial land on major roads attached to major activity centres.

The area of greatest assistance sought to facilitate investment across the group was the planning approval process. The length of the decision making process was of particular concern.

RECOMMENDED STRATEGY

ECONOMIC DEVELOPMENT MEASURES

Vision and Market Niches

The vision is for industrial precincts in Whitehorse to:

- Continue to evolve as important locations of economic activity that benefit from a unique location in Melbourne's industrial land supply and which contribute significantly to Whitehorse's economic diversity and value.
- Recognise and continue to support the operation of existing industries and the high level of demand for industrial land in Whitehorse, and avoid the encroachment of residential and other sensitive uses that could undermine the long term viability of Whitehorse's industrial precincts
- Reinforce the roles of each precinct as hubs of advanced manufacturing, production support and regional services and provide flexibility for a wider range employment generating uses.

It is evident from this review that there is little differentiation between the precincts and that they are all currently fulfilling a local and regional function that enjoys little competition from surrounding industrial precincts in the wider eastern region. This lack of competition is positive in so far as it creates a high demand for industrial land and premises within Whitehorse and creates a niche, albeit for all precincts, for industrial activity. However high demand also generates increasing land values which places significant pressure on industrial land to attract higher value businesses. This will make it increasingly difficult in the longer term for lower value businesses to stay within the market.

Further differentiation between the precincts could be achieved by further developing the following niches:

Rooks Road, Middleborough Road/Clarice Road, and Blackburn Precincts – expand on the role these precincts have already started to develop in relation to manufacturing activities associated with high added value (e.g. advanced manufacturing) across a diversity of floor areas.

Redlands Estate Precinct – expand on the role this precinct also has in relation to high value added manufacturing industry but associated with predominantly with small floor areas (500 to 1,000m²)

Evans/Ireland Streets and Lexton Road Precincts – retain and expand the role these precincts play in relation to servicing the needs of local households and businesses in the form of manufacturing associated with regional services.

Cook Road and Joseph Street Precincts – taking advantage of their close proximity to EastLink and the Eastern Freeway and as the few remaining areas of large lots in single ownership these precincts could be developed to meet a market niche for businesses requiring large and medium floor areas (2,000m²+) associated with production support.

These roles are summarised in Table 7.

Table 7: Precinct Market Niches

PRECINCT	ROLE/NICHE	INDICATIVE ACTIVITY
Rooks Middleborough/Clarice Blackburn	Advanced Manufacturing	<ul style="list-style-type: none"> specialised industrial machinery and equipment manufacturing and repairs, medical equipment and services plastics and polymer product design and manufacturing food manufacturing construction and safety equipment utility and telecommunications equipment and service
Redlands	Advanced Manufacturing	<ul style="list-style-type: none"> industrial machinery and software design environmental management systems and services architectural and building design services engineering and precision equipment design services
Evans/Ireland Lexton	Regional Services	<ul style="list-style-type: none"> industrial machinery and equipment sales and service industrial and domestic climate control systems(air conditioning/heating) sales and service automotive repairs and service domestic appliance servicing and repairs building, plumbing and landscaping services industrial and domestic cleaning services
Cook Joseph (Mega Mile)	Production Support	<ul style="list-style-type: none"> small and medium size distribution companies product assembly (products requiring assembly and distribution, appliances, computer and electronic equipment, heating cooling and ventilation systems) wholesale supplies and servicing (coffee machines, vending machines, retail supplies and packaging)

Land and Building Supply

Much of the attraction to Whitehorse for businesses is related to the building stock that is available. Development, redevelopment and renovation of industrial premises is therefore a key driver for attracting and retaining businesses and key actions will therefore be:

- Managing the supply of land across the precincts to meet a range of needs in terms of land size (as opposed to land use) as a point of differentiation:

PRECINCT	LAND NEED
Rooks Middleborough/Clarice Blackburn	Diverse mix
Redlands	Small sites
Evans/Ireland Lexton	Diverse mix
Cook Joseph (Mega Mile)	Medium to large sites

- Careful monitoring of development activity, land values and rental costs across the precincts in order to measure change and supply.
- Leadership in the development of a proactive development framework that supports the development of vacant sites and redevelopment of existing sites.

- Regular communication with landowners and operators of key strategic sites shown in green on each precincts map and summarised as:

PRECINCT	KEY SITES
Redland Estate	CSR, 656 Mitcham Road, Mitcham 187-201 Rooks Road, Vermont 157 Rooks Road, Vermont
Joseph	Former Hewlett Packard, 21-41 Joseph Street, Blackburn North
Blackburn	Boral Concrete, 20 Varman Court, Nunawading
Middleborough/Clarice	SCA Consumer, Ailsa Street, Box Hill South 249 Middleborough Road,
Evans & Ireland	7, Sinnott St, Burwood
Cook Road	613 Whitehorse Road, Mitcham 23 Cook Road, Mitcham 623-629 Whitehorse Road, Mitcham
Rooks Road	Daniel Robertson Brickworks, 58-74 Station Street, Nunawading Holeproof, 1 Norcal Road, Nunawading 51-53 Norcal Road, Nunawading
Lexton	Cnr Lexton and Middleborough Roads, Blackburn North

- Marketing of key development and redevelopment opportunities as they arise and as appropriate
- Implementation of communications strategy for encouraging the renovation of older premises.

Marketing

Other influences attracting industrial businesses to Whitehorse principally related to proximity to customers/markets and suitably qualified employees, excellent transport links and access. These are all investment attributes that can be marketed using:

- An industrial sector specific prospectus; and
- Supported through Council's business website.

These existing materials should be reviewed to ensure that they highlight these attributes to the industrial sector.

Business Growth

A number of key attributes of existing businesses could also be more proactively pursued to ensure greater success and likelihood of growth. These could include direct marketing campaigns to business that completed the survey and facilitating information evenings with respect to:

- Business succession planning (many businesses have been operation for more than 20 years); and
- Greater assistance in identifying new markets and increasing competitiveness through :
 - business planning
 - accelerating innovation
 - exporting evenings/workshop
 - build skills by strengthening links to education and training
 - achieve environmentally sustainable manufacturing and pursue environmentally sustainable practices to build goodwill and, boost competitiveness
- Collaborating in relation freight transport issues

These strategies will build upon the State Governments agenda for manufacturing which also seek to champion manufacturing to increase the recruitment and retention of talent and lift community and financial sector support; create high-performance workplaces; and attract investment in research and development.

URBAN DESIGN MEASURES

Public Realm

It is evident that there is a great deal that could be done to improve the public realm within the industrial precincts and this will be particularly necessary in those precincts identified for an Advanced Manufacturing niche. A key action is therefore the need to prepare urban design guidelines that provide for:

- Improvements to gateways
- Greater attention to street planting
- The provision of way finding signage and visual clues to services and facilities
- Improved pedestrian and open space linkages

Precincts identified as having an Advanced Manufacturing potential, which would benefit from urban design enhancement should have tailored guidelines.

Private Realm

In the private realm greater attention to guiding development at residential interfaces and to siting to street frontages is required. This should support the development of design guidelines and should be applied consistently across all industrial precincts. An underlying aim of these guidelines should be to lift the environmental sustainability of the precincts particularly in relation to:

- Infrastructure services, development opportunities, landscaping and drainage
- Pursuing and promoting the principles of industrial ecology (whereby the output of one productive process can be efficiently utilised as an input for another) wherever practical.

Overall the aims of the urban design guidelines should be to:

- Facilitate the economic and orderly development of the employment/industrial land for the purpose of employment generating development whilst maintaining the ability to provide flexibility in the range of lot sizes to meet market demand
- Incorporate quality development where businesses enjoy high levels of accessibility by customers and are supported by an attractive public domain that is both pedestrian friendly and efficient.
- Ensure a positive visual, environmental and management relationship with the adjoining residential areas;
- Ensure Ecologically Sustainable Development principles are integrated into developments particularly with respect to techniques for conserving consumption of energy and water in all buildings and the control of noise and emissions;
- Ensure Water Sensitive Urban Design principles are integrated into the built and landscape elements of the development;
- Enable the provision of a high quality innovative and integrated industrial area particularly in terms of built form and landscaping;
- Provide areas of landscaped public domain that are compatible with the built environment and to ensure that the landscape design guidelines are implemented to a high standard;

- Provide public domain and vegetation/drainage corridors that are interconnected with a high level of well-lit pedestrian and cycle access routes and that link into the surrounding environment.
- Create well connected and legible street networks
- Provide an effective traffic network within the industrial area and connections to the arterial road system and transport links; and
- Promote the on-site collection and re-use of stormwater.

PLANNING MEASURES

Development Framework

The development framework for industrial activity in Whitehorse needs to be revisited and based on an approach of facilitating and supporting a vital industrial sector rather than singularly from a residential amenity perspective. The transition of industrial areas to higher value industrial activity will result in more attractive, higher quality development and is given to cause less impact than traditional activities.

To achieve this transition however it must be supported by a clear policy direction and guided through the application of Design Guidelines and possible policy changes summarised as follows.

Local Planning Policy

- Strengthen Clause 21.07 to reflect the industrial vision and objectives
- Prepare a new Clause 22 Policy - Industrial Development and Design, incorporating the design and development guidelines derived from the Urban Design Guidelines prepared for all precincts.
- Preparation of a Precinct Structure Plan for the Rooks and Cook precincts as those precincts with the most potential for new land use and development.

Alternative Zones

- Within the context of the new Industrial Policy consider the application of the Business 3 zone to Cook Road (north side) and parts of Blackburn adjoining the Blackburn Activity Centre
- A small residential area adjoining the Evans/Ireland precinct at Tudor Street warrants further investigation as the most appropriate zone for this land. The area is intensely developed for industrial activities and is a very narrow street. In the longer term the three affected residential properties may be more appropriately zone industrial.

Alternative Overlays

- Based on new policy and urban design guidelines, consideration should be given to potential overlay's in the future as required.

ACTION PLAN

An implementation action plan for all recommendations is provided as follows;

ACTION	TASKS	IMPLEMENTATION	CITY OF WHITEHORSE LEAD (AND SUPPORTING) UNITS	ESTIMATED TIMEFRAMES TO COMPLETE COMMENCEMENT
1. Market Niche	Agree vision and identified supporting market niches	City of Whitehorse, landowners and businesses	Economic Development	2-3 months
2. Urban Design Measures	<p>Prepare Urban Design Guidelines which apply to all precincts addressing:</p> <p>Public realm in relation to:</p> <p>Gateways, Street planting, Way finding to facilities and services, Connections to pedestrian and open space linkages, Connections to freight networks and public transport</p> <p>Private realm in relation to specifications for:</p> <p>Lots sizes, Quality development in terms of built form and landscaping, Residential interfaces, Ecological sustainability. Water sensitive design</p>	City of Whitehorse, landowners and business operators	Urban Design	2 months per precinct

ACTION	TASKS	IMPLEMENTATION	CITY OF WHITEHORSE LEAD (AND SUPPORTING) UNITS	ESTIMATED TIMEFRAMES TO COMPLETE COMMENCEMENT
3. Planning Measures	Revise Clause 21.07 - Economic Development, to incorporate recommendations of the Industrial Strategy, including referencing the Industrial Strategy in this Clause, and triggering a newly created Clause 22 Policy.	City of Whitehorse, relevant state authorities, landowners, and business operators	Strategic Planning (Economic Development)	1 month
	Develop a new Clause 22 Policy - Industrial Development and Design, incorporating the design and development guidelines derived from the Urban Design Guidelines prepared for all precincts.		Strategic Planning (Urban Design)	1 month
	Prepare Precinct Structure Plans for Rooks and Cook Road precincts being those precincts where significant change and future investment has been identified.		Strategic Planning (Economic Development)	2 months (dependent on MSS review cycle)
	Prepare the necessary Planning Scheme Amendments to introduce the above into the Whithorse Planning Scheme.		Strategic Planning (Economic Development, Urban Design)	6-12 months
4. Traffic Management	Establish a working group to collaborate on the implementation of the Metropolitan Freight Network and SMART truck initiatives	City of Whitehorse, Department of Transport, and business operators	Traffic Engineers, (Strategic Planning)	Ongoing

ACTION	TASKS	IMPLEMENTATION	CITY OF WHITEHORSE LEAD (AND SUPPORTING) UNITS	ESTIMATED TIMEFRAMES TO COMPLETE COMMENCEMENT
5. Marketing & Communications	Review existing marketing collateral to reflect industrial vision and market niches and promote local industrial competitive advantages	City of Whitehorse, Invest Victoria, landowners and property managers	Economic Development	1 month - ongoing
	Develop a specific prospectus for industrial activity and investment opportunities		Economic Development	2 months
	Maintain and regularly review the business database established via the survey for:		Economic Development	i. 2 weeks ongoing ii. 2 weeks ongoing iii. 1 month and monitor
	i. General communications to the industrial sector			
	ii. Targeted communications to Key Site Landowners			
	iii. Targeted communications to landowners of building stock aged <1969 within precincts identified for advanced manufacturing			
	Establish a database of property managers for targeted communications in relation to market niches and desired business activity			Economic Development
Collaborate with Invest Victoria in relation to investment for Key Sites			Economic Development	1 - 2weeks and establish work program with IV - ongoing
6. Investment Attraction	Prepare specific guidelines for all key sites	City of Whitehorse, landowners	Economic Development	2 months – based on program with IV
	Encourage the refurbishment of older building stock in Rooks, Middleborough, Blackburn and Redlands to strengthen the attractiveness of these precincts as advanced manufacturing hubs		Economic Development (Urban Design)	6-12 months

ACTION	TASKS	IMPLEMENTATION	CITY OF WHITEHORSE LEAD (AND SUPPORTING) UNITS	ESTIMATED TIMEFRAMES TO COMPLETE COMMENCEMENT
7. Business Growth	<p>Develop and implement an industrial sector information and training program to facilitate identifying new markets and increasing competitiveness focused on:</p> <ul style="list-style-type: none"> i. Business planning and Succession planning ii. Innovation iii. Exporting iv. Strengthening links between educators and employers v. Environmentally sustainable practices 	<p>City of Whitehorse, Victorian Business Centre, Box Hill Institute, Whitehorse Business Group, and local businesses</p>	<p>Economic Development (Sustainability)</p>	<p>6-12 months ongoing</p>
	<p>In partnership with the Whitehorse Business Group (WBG) review opportunities for greater links with the South East Melbourne Manufacturers Alliance (SEMMA) and more specifically to identify opportunities for pursuing and promoting the principles of industrial ecology.</p>		<p>CEO/Senior Council staff (Economic Development, Urban Design, Sustainability)</p>	<p>1 week ongoing</p>
8. Monitoring	<p>Maintain and regularly update property data in relation to:</p> <ul style="list-style-type: none"> i. Vacant premises and land ii. Leases and sales iii. Development approvals iv. Land values 	<p>City of Whitehorse</p>	<p>Economic Development (Valuer)</p>	<p>2 weeks ongoing</p>

Since the completion of the first version of this report in 2009, the City of Whitehorse has undertaken a number of the recommendations, specifically relating to economic development programs. The following is a list of projects and actions that have been or are currently being undertaken by Council:

- A market niche and activities have been identified for each precinct. Precinct Visions are being developed.
- A business survey in relation to marketing and communications has been conducted.
- A prospectus for industrial activity and investment opportunities has been completed and linked with an economic profiler and MSE investment attraction prospectus.
- Industrial precincts: database has been updated and its maintenance is ongoing.
- Targeted communications have been undertaken with regard to Council improvement works, business programs and services.
- Investment attraction information from Invest Victoria has been acquired in relation to key site opportunities and availabilities.
- Through D2B Newsletter, eBulleins, Wbiz, website etc promotion of the opportunities and benefits of refurbishment of existing aged buildings is being undertaken. This is linked in with the urban design team maintaining and improving the attractiveness of the precincts.
- Encouraging business growth by providing access to training programs and services, government departments, education facilities and networking associations.
- Promotion of Council's business, environmental and sustainability programs.
- Improved communications from Council to businesses and investors.

Appendix I – Vacant Land & Premises Details 2008

EVANS/IRELAND INDUSTRIAL PRECINCT

NOS	ADDRESS	SUBURB	POSTCODE	RATES STATUS	CONSTRUCTED	FLOOR AREA	LAND AREA	SURVEY NOTES
VACANT PREMISES								
114-116	Burwood Hwy	Burwood	3125	Office	2003	708.00	1,301.00	
128-134	Burwood Hwy	Burwood	3125	Car Sales Yard	2007	4,406.00	3,640.00	
1	Harker Street	Burwood	3125	Warehouse	1977	539.00	767.81	
18	Harker Street	Burwood	3125	Office/Warehouse	1989	775.00		
19	Harker Street	Burwood	3125	Warehouse	1980	800.00	789.18	For Lease
22	McIntyre Street	Burwood	3125	Warehouse	1983	499.00	766.42	
1	Millicent Street	Burwood	3125	Office/Warehouse	1953	799.00	883.66	
17	Tudor Street	Burwood	3125	Factory	1965	1,161.00	1,400.00	
4\6	Duffy Street	Burwood	3125	Office/Warehouse	1952	260.00		
						9,947.00		

LEXTON ROAD INDUSTRIAL PRECINCT

NOS	ADDRESS	SUBURB	POSTCODE	RATES STATUS	CONSTRUCTED	FLOOR AREA	LAND AREA	SURVEY NOTES
VACANT PREMISES								
8\31-35	Lexton Road	Box Hill North	3129	Factory	2003	210.00	0	
5\58	Lexton Road	Box Hill North	3129	Warehouse	2006	202.00	0	
6\58	Lexton Road	Box Hill North	3129	Warehouse	2006	202.00	0	
77A	Lexton Road	Box Hill North	3129	Utilities	2006	684.00	0	
						1,298.00		

JOSEPH STREET INDUSTRIAL PRECINCT

NOS	ADDRESS	SUBURB	POSTCODE	RATES STATUS	CONSTRUCTED	FLOOR AREA	LAND AREA	SURVEY NOTES
VACANT PREMISES								
6\2-4	Joseph Street	Blackburn North	3130	Warehouse	1989	327.00	0	
31-41	Joseph Street	Blackburn North	3130	Office/Factory	1970	11,564.00	30,532.00	For Sale
21-23	Joseph Street	Blackburn North	3130	Office/Warehouse	2003	2,410.00	3,111.00	For Sale
						14,301.00		

MIDDLEBOROUGH/CLARICE ROADS INDUSTRIAL PRECINCT

NOS	ADDRESS	SUBURB	POSTCODE	RATES STATUS	CONSTRUCTED	FLOOR AREA	LAND AREA	SURVEY NOTES
VACANT PREMISES								
8A	Clarice Road	Box Hill South	3128	Vacant Industrial Land	0	-	-	
3\10	Clarice Road	Box Hill South	3128	Warehouse	2002	179.00	-	
5\10	Clarice Road	Box Hill South	3128	Warehouse	2002	255.00	-	
6\10	Clarice Road	Box Hill South	3128	Warehouse	2002	194.00	-	
12	Clarice Road	Box Hill South	3128	Factory	1987	612.00	812.00	
4\27	Clarice Road	Box Hill South	3128	Warehouse	1995	98.00	-	
5\27	Clarice Road	Box Hill South	3128	Factory	1995	179.00	-	
4\29-31	Clarice Road	Box Hill South	3128	Factory/Warehouse	2007	364.00		For Sale
7\29-31	Clarice Road	Box Hill South	3128	Factory/Warehouse	2007	234.00		For Sale
8\29-31	Clarice Road	Box Hill South	3128	Factory/Warehouse	2007	223.00		For Sale
9\29-31	Clarice Road	Box Hill South	3128	Factory/Warehouse	2007	291.00		For Sale
10\29-31	Clarice Road	Box Hill South	3128	Factory/Warehouse	2007	232.00		For Sale
11\29-31	Clarice Road	Box Hill South	3128	Factory/Warehouse	2007	244.00		For Sale
12\29-31	Clarice Road	Box Hill South	3128	Factory/Warehouse	2007	313.00		For Sale
38	Clarice Road	Box Hill South	3128	Factory	1963	442.00	597.00	For Sale
7\277-289	Middleborough Road	Box Hill South	3128	Factory	1997	229.00	-	For Lease
8\277-289	Middleborough Road	Box Hill South	3128	Office/Factory	1997	240.00	-	
11\277-289	Middleborough Road	Box Hill South	3128	Factory	1997	202.00	-	
321-325	Middleborough Road	Box Hill South	3128	Timber Yard/Trade Supplies	1954	3,415.00	8,090.84	
199	Middleborough Road	Box Hill South	3128	N/A		-	-	For Lease
205	Middleborough Road	Box Hill South	3128	Warehouse	1971	1,143.00	-	For Lease
2\205	Middleborough Road	Box Hill South	3128	Office/Warehouse	1971	2,681.00	-	For Lease

MIDDLEBOROUGH/CLARICE ROADS INDUSTRIAL PRECINCT

NOS	ADDRESS	SUBURB	POSTCODE	RATES STATUS	CONSTRUCTED	FLOOR AREA	LAND AREA	SURVEY NOTES
VACANT PREMISES								
6	Ailsa Street	Box Hill South	3128	Factory/ Warehouse	0	-	792.57	
						11,767.00		
VACANT LAND								
249	Middleborough Road	Box Hill South	3128	Factory	1954	24,131.00	40,353.00	

BLACKBURN INDUSTRIAL PRECINCT (EXC. MEGA MILE)

NOS	ADDRESS	SUBURB	POSTCODE	RATES STATUS	CONSTRUCTED	FLOOR AREA	LAND AREA	SURVEY NOTES
VACANT PREMISES								
13A	Ceylon Street	Nunawading	3130	Factory	1989	450.00	-	
13B	Ceylon Street	Nunawading	3130	Warehouse	1988	450.00	-	
16	King Street	Blackburn	3130	Shop	1987	87.80	400.00	
8	King Street	Blackburn	3130	Factory	1950	274.10	-	For Lease
15	Terra Cotta Dr	Blackburn	3130	Warehouse	1988	751.00	938.00	
20	Terra Cotta Dr	Blackburn	3130	Warehouse	1979	483.10	743.00	
22	Terra Cotta Dr	Blackburn	3130	Factory	1976	550.00	736.00	For Lease
23	Terra Cotta Dr	Blackburn	3130	Factory	1975	484.90	731.00	For Lease
24	Terra Cotta Dr	Blackburn	3130	Warehouse	1973	511.00	736.00	For Lease
23	Moncrief Rd	Nunawading	3131	Factory	1974	1,014.50	1,721.00	For Lease
25	Moncrief Rd	Nunawading	3131	Factory	1973	1,150.00	1,801.00	For Lease
2A	Varman Court	Nunawading	3131	Factory	1970	595.00	-	For Lease
2	Varman Court	Nunawading	3131	Factory	1985	595.00	-	For Lease
1	Varman Court	Nunawading	3131	Factory	2005	323.30	-	
4	Varman Court	Nunawading	3131	Factory	1955	551.20	695.00	
7	Varman Court	Nunawading	3131	Warehouse	1964	323.00	-	
10	Cottage Street	Blackburn	3130	Factory	2004	563.00	687.00	

BLACKBURN INDUSTRIAL PRECINCT (EXC. MEGA MILE)

NOS	ADDRESS	SUBURB	POSTCODE	RATES STATUS	CONSTRUCTED	FLOOR AREA	LAND AREA	SURVEY NOTES
VACANT PREMISES								
25	Cottage Street	Blackburn	3130	Hardstand / Storage Yard	1972	-	-	
38	Terra Cotta Dr	Blackburn	3131	Hardstand / Storage Yard	1967	-	873.00	
15-17	Metropolitan Ave	Nunawading	3131	Factory	1987	789.70	1,128.00	
19	Metropolitan Ave	Nunawading	3131	Gymnasium/ Health Club	1985	970.80	1,128.00	
38	Metropolitan Ave	Nunawading	3131	Factory	1967	281.00	-	
4\11	Mary Street	Blackburn	3130	Warehouse	1995	260.00	-	
5\11	Mary Street	Blackburn	3130	Warehouse	2001	310.00	-	
6\11	Mary Street	Blackburn	3130	Warehouse	1997	267.60	-	
12	Terra Cotta Dr	Blackburn	3130	Factory	1990	465.00	758.00	
44	Alfred St	Blackburn	3130	Factory	1965	90.00	0	For Sale
						12,591.00		

REDLAND INDUSTRIAL PRECINCT

NOS	ADDRESS	SUBURB	POSTCODE	RATES STATUS	CONSTRUCTED	FLOOR AREA	LAND AREA	SURVEY NOTES
VACANT PREMISES								
3	Azalea St	Vermont	3133	N/A				
12	Azalea St	Vermont	3133	N/A				For Lease
7	Redland Drive	Mitcham	3132	Office / Warehouse	2003	909.00	2,177.00	For Sale
4\21-25	Redland Drive	Mitcham	3132	Office / Warehouse	1998	530.00	-	For Lease
5\21-25	Redland Drive	Mitcham	3132	Office / Warehouse	1999	130.00	-	For Lease
28	Redland Drive	Mitcham	3132	N/A				For Sale
29	Redland Drive	Mitcham	3132	N/A				For Sale
7\137-145	Rooks Rd	Nunawading	3131	Office / Warehouse	2001	546.00	-	
9\137-145	Rooks Rd	Nunawading	3131	Office / Warehouse	2001	1,392.00	-	
15\137-145	Rooks Rd	Nunawading	3131	Office / Warehouse	2001	178.00	-	
16\137-145	Rooks Rd	Nunawading	3131	Office / Warehouse	2001	178.00	-	
18\137-145	Rooks Rd	Nunawading	3131	Office / Warehouse	2001	295.00	-	

REDLAND INDUSTRIAL PRECINCT

NOS	ADDRESS	SUBURB	POSTCODE	RATES STATUS	CONSTRUCTED	FLOOR AREA	LAND AREA	SURVEY NOTES
VACANT PREMISES								
27\137-145	Rooks Rd	Nunawading	3131	Office / Warehouse	2001	376.00	-	
30\137-145	Rooks Rd	Nunawading	3131	Office / Warehouse	2001	157.00	-	
Lot C 147	Rooks Rd	Nunawading	3131	N/A				
157A	Rooks Rd	Nunawading	3131	N/A				
3\162	Rooks Rd	Nunawading	3131	Warehouse	1999	270.00	-	
2\170-180	Rooks Rd	Nunawading	3131	Office / Warehouse	1999	1,085.00	-	
7\170-180	Rooks Rd	Vermont	3133	Vacant land	2007	1,182.00	-	
8\170-180	Rooks Rd	Vermont	3133	Vacant land	2007	1,830.00	-	
173-181	Rooks Rd	Vermont	3133	N/A				
7\173-181	Rooks Rd	Vermont	3133	Office / Warehouse	2000	266.00	-	
9\173-181	Rooks Rd	Vermont	3133	Office / Warehouse	2000	694.00	-	
10\173-181	Rooks Rd	Vermont	3133	N/A				
183-185	Rooks Rd	Vermont	3133	Workshop	1960	621.00	1,113.00	
3\187-201	Rooks Rd	Vermont	3133	Factory	1990	655.00	-	
5\187-201	Rooks Rd	Vermont	3133	Factory	1990	870.00	-	
6\187-201	Rooks Rd	Vermont	3133	Factory	1990	4,824.00	-	
7\187-201	Rooks Rd	Vermont	3133	Factory	1990	1,486.00	-	
8\187-201	Rooks Rd	Vermont	3133	N/A				
190-192	Rooks Rd	Vermont	3133	Factory	1964	870.00	2,782.20	
10A	Trade Place	Vermont	3133	N/A				
7-9	Trade Place	Vermont	3133	Office / Warehouse	2001	1,003.00	2,533.00	
24	Trade Place	Vermont	3133	Office / Warehouse	0	-	665.00	For Lease
25	Trade Place	Vermont	3133	N/A	0	-	1,065.00	
630	Mitcham Road	Vermont	3133	N/A	0	-	50,893.00	
2	Redland Drive	Mitcham	3132	N/A	0	-	2,470.00	
						20,347.00		
VACANT LAND								
159-171	Rooks Rd	Vermont	3133	Vacant land	0	-	4,459.00	

ROOKS ROAD INDUSTRIAL PRECINCT

NOS	ADDRESS	SUBURB	POSTCODE	RATES STATUS	CONSTRUCTED	FLOOR AREA	LAND AREA	SURVEY NOTES
VACANT PREMISES								
92	Mount Pleasant Rd	Nunawading	3131	N/A				
101	Mount Pleasant Rd	Nunawading	3131	N/A				
12\41-49	Norcal Road	Nunawading	3131	Warehouse	1994	355.00	-	
19\41-49	Norcal Road	Nunawading	3131	Warehouse	1994	365.00	-	
25\41-49	Norcal Road	Nunawading	3131	Factory	1994	153.00	-	
33\41-49	Norcal Road	Nunawading	3131	Office/ Warehouse	1994	874.00	-	
51\41-49	Norcal Road	Nunawading	3131	Factory	1997	238.00	-	For Lease
5\56	Norcal Road	Nunawading	3131	N/A				
2\10-12	Thornton Crescent	Mitcham	3132	Factory	1972	451.00	-	
23	Thornton Crescent	Mitcham	3132	Garage/ Motor Vehicle Repairs	1971	334.00	596.00	For Lease
2\24	Thornton Crescent	Mitcham	3132	Factory	1970	225.00	-	
						2,995.00		
VACANT LAND								
53	Norcal Road	Nunawading	3131		0	-	15,280.00	
51	Norcal Road	Nunawading	3131		0	-	16,210.00	
26-28	Rooks Road	Nunawading	3131		0	-	1,369.40	
34-42	Rooks Road	Nunawading	3131	VACANT	0	-	-	
							32,859.40	

COOK ROAD INDUSTRIAL PRECINCT

NOS	ADDRESS	SUBURB	POSTCODE	RATES STATUS	CONSTRUCTED	FLOOR AREA	LAND AREA	SURVEY NOTES
VACANT PREMISES								
37	Church St	Mitcham	3132	N/A				For Sale
38	Church St	Mitcham	3132	N/A				For Sale
23	Cook Road	Mitcham	3132	Factory	1950	3,249.00	7,020.00	
						3,249.00		
VACANT LAND								
2\621	Whitehorse Road	Mitcham	3132	VACANT LAND	0	-	4,404.00	
3\621	Whitehorse Road	Mitcham	3132	VACANT LAND	0	-	12,314.00	
3\613	Whitehorse Road	Mitcham	3132	VACANT LAND	0	-	31,330.00	
							48,048.00	

Appendix 2 – Council Property Data and Business Survey Analysis

TABLE A: Buildings and Land Use

STUDY AREA PROPERTY PROFILE	BLACKBURN	(MEGA MILE)	COOK ROAD	EVANS / IRELAND	JOSEPH	LEXTON	MIDDLE'/CLARICE	REDLAND	ROOKS	TOTAL
NOS. BUILDINGS	235	248	69	117	31	96	127	194	187	1,304
AGE										
> 1949	3%	1%	1%	6%	3%	0%	0%	1%	0%	2%
1950 - 1969	28%	37%	20%	45%	20%	46%	38%	6%	10%	27%
1970 - 1989	50%	40%	64%	42%	71%	30%	14%	12%	24%	34%
1990 - 2009	19%	22%	15%	7%	6%	24%	48%	81%	66%	37%
FLOOR AREA										
Total	143,048	157,961	72,887	94,735	41,760	10,992	178,224	135,872	159,559	995,038
<250m ²	6%	44%	10%	30%	35%	17%	30%	24%	21%	26%
251 to 500m ²	49%	23%	17%	27%	23%	55%	45%	31%	33%	34%
501 to 1,000m ²	36%	15%	26%	30%	10%	13%	11%	28%	28%	23%
1,001 to 2,000m ²	6%	9%	28%	8%	10%	8%	5%	9%	7%	8%
2,001 +	3%	9%	19%	5%	23%	7%	8%	9%	7%	8%
NOS. VACANT BUILDINGS	29	0	13	11	2	5	31	31	32	125
NOS. RATEABLE PROPERTIES	235	248	72	122	31	96	128	215	320	1,335
VACANCY RATE	12%	N/A	18%	9%	6%	5%	24%	16%	10%	9%
USE										
Factory	51%	3%	25%	29%	35%	33%	30%	25%	20%	29%
Warehouse	22%	3%	14%	9%	19%	25%	12%	8%	19%	17%
Office/Warehouse	4%	1%	11%	13%	10%	16%	6%	48%	37%	13%
Office/Factory	1%	0%	4%	35%	3%	12%	41%	1%	2%	5%
Office	1%	21%	8%	0%	13%	2%	1%	4%	3%	7%
Motor Repairs	9%	0%	1%	7%	6%	8%	9%	1%	5%	5%
Workshop	6%	4%	7%	0%	0%	1%	1%	2%	5%	4%
Showroom	0%	31%	19%	0%	0%	0%	0%	1%	5%	7%
Car Sales	0%	7%	0%	1%	0%	0%	0%	1%	1%	2%
Shop	0%	24%	3%	5%	0%	0%	0%	1%	1%	6%
Other	7%	7%	7%	1%	13%	3%	1%	8%	3%	7%
INDUSTRIAL 1 LAND AREA (M²)	149,030	0	40,795	33,747	0	0	287,123	55,798	334,351	830,346
INDUSTRIAL 3 LAND AREA (M²)	0	0	53,906	40,814	39,427	96,760	0	197,431	58,827	468,271
BUSINESS 1 LAND AREA (M²)	0	2,593	0	0	0	0	0	0	0	2,593
BUSINESS 2 LAND AREA (M²)	0	14,277	0	0	0	0	0	0	0	14,277
BUSINESS 3 LAND AREA (M²)	0	0	0	0	0	0	0	0	0	14,700
BUSINESS 4 LAND AREA (M²)	0	152,757	46,494	21,712	0	0	0	0	0	220,963
										1,551,150

Source: City of Whitehorse Property Database

TABLE B – Property Land Size and Values

STUDY AREA PROPERTY PROFILE	BLACKBURN	(MEGA MILE)	COOK ROAD	EVANS/IRELAND	JOSEPH	LEXTON	MIDDLE'/CLARICE	REDLAND	ROOKS	TOTAL
NOS. OF LOTS	134	86	30	72	7	22	30	66	60	507
AREA M²										
< 500	22%	29%	0%	13%	0%	27%	3%	1%	10%	16%
501 - 1,000	46%	30%	13%	56%	0%	14%	40%	35%	33%	38%
1,001 - 2,000	27%	23%	37%	24%	0%	5%	20%	21%	15%	23%
2,001 - 3,000	1%	8%	13%	1%	0%	41%	7%	18%	8%	8%
3,001 - 4,000	1%	2%	7%	3%	14%	0%	3%	0%	0%	2%
4,001+	4%	8%	30%	4%	86%	5%	27%	25%	44%	13%
NOS. VACANT LOTS	0	0	3	0	0	0	2	6	4	15
TOTAL VACANT LAND AREA (M²)	0	0	48,048	0	0	0	40,353	4,549	32,859	125,809
TOTAL LAND AREA (M²)	149,030	169,627	141,195	102,905	39,427	48,380	287,123	253,229	351,344	1,082,408
DIFFERENCE	\$25,827,200	\$37,766,000	\$12,980,000	\$8,995,000	\$7,463,000	\$7,498,000	\$11,903,200	\$35,957,000	\$26,993,000	\$175,382,400
	17%	11%	16%	8%	15%	11%	8%	16%	15%	
AVERAGE	\$758,852	\$1,541,028	\$1,336,000	\$890,361	\$1,655,000	\$694,354	\$1,220,244	\$1,029,726	\$980,154	\$1,082,498
MEAN CIV	\$593,000	\$982,000	\$1,127,000	\$560,000	\$491,000	\$409,000	\$420,000	\$849,000	\$813,000	
RANGE	\$134,000 to \$4,943,000	\$26,000 to \$19,628,000	\$201,000 to \$4,544,000	\$92,000 to \$7,323,000	\$71,000 to \$14,368,000	\$78,000 to \$6,795,000	\$95,000 to \$52,219,000	\$12,000 to \$10,212,000	\$1,000 to \$20,833,000	
TOTAL SV 2006	\$76,683,000	\$221,726,000	\$52,010,000	\$48,062,000	\$19,994,000	\$10,676,000	\$13,630,000	\$84,049,800	\$78,413,100	
TOTAL SV 2008	\$110,330,220	\$257,760,000	\$62,576,100	\$59,036,000	\$25,862,000	\$37,042,000	\$97,573,000	\$103,465,000	\$99,450,000	\$853,094,320
DIFFERENCE	\$33,647,220	\$36,034,000	\$10,566,100	\$10,974,000	\$5,868,000	\$26,366,000	\$83,943,000	\$19,415,200	\$21,036,900	\$247,850,420
	44%	16%	20%	19%	23%	71%	86%	19%	21%	
AVERAGE	\$469,490	\$1,039,355	\$869,113	\$483,902	\$834,258	\$385,854	\$762,289	\$481,233	\$528,989	
MEAN SV	\$375,000	\$530,000	\$613,000	\$325,000	\$271,000	\$225,000	\$170,400	\$386,000	\$426,000	
RANGE	\$86,000 to \$2,851,000	\$7,000 to \$18,134,000	\$122,000 to \$3,855,000	\$41,000 to \$5,996,000	\$40,000 to \$8,763,000	\$47,000 to \$2,504,000	\$27,400 to \$19,581,000	\$12,000 to \$10,212,000	\$1,000 to \$5,192,000	

Source: City of Whitehorse Property Database

TABLE C – Business Employment and Sector Profile

STUDY AREA BUSINESS PROFILE (SURVEY RESULTS)		BLACKBURN/ MEGA MILE	COOK ROAD	EVANS/ IRELAND	JOSEPH	LEXTON	MIDDLE/ CLARICE	REDLAND	ROOKS	TOTAL	AVERAGE RESPONSE
NOS. BUSINESSES	Recorded in Precinct	213	58	103	35	86	137	207	230	1,069	
NOS. BUSINESSES	Completed Survey	85	24	32	7	41	69	53	68	379	35%
EMPLOYMENT	Full time workers - blue	320	96	109	12	64	437	256	225	519	14%
	Full time workers - white	359	135	40	31	98	269	343	301	1,576	41%
	Full time total	679	231	149	43	162	706	599	526	3,095	81%
	Part time workers - blue	110	34	27	1	18	100	27	167	484	13%
	Part time workers - white	60	24	13	0	19	25	53	71	265	7%
	Part time workers total	170	58	40	1	37	125	80	238	749	19%
	Total workers	849	289	189	44	199	831	679	764	3,844	
INDUSTRY SECTORS:											
MANUFACTURING											
	Food Product Manufacturing	2		2			2	2		8	28%
	Pulp, paper & converted paper product manufacturing						1			1	
	Polymer product & rubber product manufacturing		1			1	1			3	
	Transport equipment manufacturing	1							1	2	
	Wood product manufacturing	2	1			5	2	1	1	12	
	Primary metal & metal product manufacturing	2	1	2		1	1		1	8	
	Printing (including the reproduction of recorded media)	5				3	1		3	12	
	Machinery & equipment manufacturing	5				1	2	1	2	11	
	Basic chemical & chemical product manufacturing						1		1	2	
	Furniture & other manufacturing		1	1			1	1	1	5	
	Textile, leather clothing & footwear manufacturing	1				2	1		2	6	
	Fabricated metal product manufacturing	2	3	1	1	1	3	2	1	14	
WHOLESALE	Basic material wholesaling	1	1			2	1		3	8	24%
	Machinery & equipment wholesaling	3				1	2	1	1	8	
	Motor vehicle & motor vehicle parts wholesaling	2	2			3	2	3		12	
	Grocery, liquor & tobacco product wholesaling	1				1	1		1	4	
	Commission based wholesaling	9								9	
	Other goods wholesaling	1	4	1	2	2	6	10	6	32	
TRANSPORT & STORAGE	Road transport	2	1						2	5	4%
	Postal and courier pick-up and delivery services			1					1	2	
	Transport support services	2								2	
	Warehousing and storage services	1							1	2	
CONSTRUCTION	Building construction	3	3	2	1		1	1	1	12	8%
	Heavy and civil engineering construction	1						1		2	
	Construction services	5		1				1	3	10	
RETAIL	Motor vehicle & motor vehicle parts retailing	13	2	4	2	12	9	3	8	53	29%
	Fuel retailing			1		1				2	
	Food retailing		1				5		1	7	
	Other store-based retailing	4		3	1		7	4	4	23	
	Non-store retailing & retail commission-based buying and/or selling						3			3	
BUSINESS SERVICES	Professional, scientific & technical services	2		2		1		1	5	11	7%
	Computer systems design & related services	1		1				3	1	6	
	Building cleaning, pest control and other support services							1		1	
	Rental & hiring services							1		1	
	Property operators & real estate services	1								1	

Source: City of Whitehorse Survey

TABLE D – Business Location Factors

STUDY AREA BUSINESS PROFILE (SURVEY RESULTS) ⁵		BLACKBURN/ MEGA MILE	COOK ROAD	EVANS/ IRELAND	JOSEPH	LEXTON	MIDDLE/ CLARICE	REDLAND	ROOKS	AVERAGE RESPONSE	
LOCATION FACTORS	Accommodation costs	Very important	22%	38%	17%	43%	20%	13%	13%	19%	23%
		Somewhat important	20%	29%	21%	29%	7%	20%	15%	29%	21%
		Not important at all	33%	13%	7%	29%	5%	10%	17%	29%	18%
	Suitable size and/or building	Very important	58%	75%	32%	86%	22%	36%	46%	57%	51%
		Somewhat important	24%	4%	14%	0%	7%	10%	4%	23%	11%
		Not important at all	4%	4%	0%	14%	2%	3%	2%	3%	4%
	Close proximity to suppliers	Very important	16%	21%	7%	29%	7%	10%	4%	14%	14%
		Somewhat important	27%	17%	11%	29%	5%	14%	15%	25%	18%
		Not important at all	36%	38%	25%	43%	22%	24%	31%	41%	33%
	Close proximity to customers/markets	Very important	31%	38%	21%	71%	17%	16%	15%	33%	30%
		Somewhat important	26%	21%	14%	14%	10%	23%	17%	29%	19%
		Not important at all	25%	21%	11%	14%	7%	9%	19%	20%	16%
	Close proximity to suitable qualified employees	Very important	15%	13%	4%	0%	7%	10%	6%	9%	8%
		Somewhat important	25%	46%	25%	71%	17%	16%	22%	28%	31%
		Not important at all	39%	17%	18%	29%	10%	21%	20%	41%	24%
	Close proximity to home	Very important	26%	29%	11%	29%	10%	23%	19%	22%	21%
		Somewhat important	33%	46%	21%	29%	20%	17%	20%	33%	27%
		Not important at all	25%	4%	11%	43%	5%	7%	13%	26%	17%
	Excellent transport links and access	Very important	34%	33%	11%	29%	17%	20%	9%	26%	22%
		Somewhat important	29%	33%	21%	57%	2%	13%	30%	35%	28%
		Not important at all	15%	13%	11%	14%	15%	16%	11%	20%	14%
	Well established infrastructure	Very important	27%	42%	0%	43%	12%	13%	9%	22%	21%
		Somewhat important	38%	25%	29%	29%	10%	26%	26%	38%	27%
		Not important at all	12%	13%	14%	29%	12%	10%	13%	19%	15%
	High quality and attractive environment	Very important	24%	29%	0%	14%	7%	11%	26%	25%	17%
		Somewhat important	34%	29%	21%	57%	15%	21%	17%	39%	29%
		Not important at all	18%	13%	21%	29%	12%	13%	9%	17%	16%
	Good access to wide range of education & training facilities		7%	4%	0%	0%	7%	3%	6%	7%	4%
		Very important	20%	13%	7%	14%	5%	16%	9%	28%	14%
		Somewhat important	49%	58%	36%	86%	22%	29%	33%	45%	45%
	Low council annual general rates	Very important	19%	13%	0%	29%	5%	9%	7%	25%	13%
		Somewhat important	31%	25%	25%	43%	15%	26%	19%	29%	26%
		Not important at all	27%	38%	18%	14%	10%	13%	20%	28%	21%

STUDY AREA BUSINESS PROFILE (SURVEY RESULTS) ⁵		BLACKBURN/ MEGA MILE	COOK ROAD	EVANS/ IRELAND	JOSEPH	LEXTON	MIDDLE/ CLARICE	REDLAND	ROOKS	AVERAGE RESPONSE
RELOCATION	Thinking of relocating									
	Short term next 12 months	0%	4%	4%	0%	0%	0%	0%	0%	23%
	Medium term (1 to 5 years)	6%	4%	11%	14%	0%	10%	4%	7%	21%
	Long term (5+ years)	6%	4%	4%	0%	2%	3%	6%	7%	18%
	Not at all	60%	79%	29%	86%	34%	41%	46%	74%	51%

Source: City of Whitehorse Survey

TABLE E: Years of Operation

STUDY AREA BUSINESS PROFILE (SURVEY RESULTS)		BLACKBURN/MEGA MILE	COOK ROAD	EVANS/IRELAND	JOSEPH	LEXTON	MIDDLE'/CLARICE	REDLAND	ROOKS	AVERAGE RESPONSE		
YEARS OF OPERATION	In total	<1 year	7.1%	4.2%	6.3%	0%	4.9%	1.4%	3.8%	4.4%	4	
		1 - 5 Years	11.8%	8.3%	12.5%	0%	4.9%	8.7%	13.2%	7.4%	8.4	
		5 - 10 Years	12.9%	20.8%	9.4%	0%	19.5%	15.9%	9.4%	20.6%	13.6	
		10 - 20 Years	23.5%	16.7%	21.9%	28.3%	39%	21.7%	24.5%	17.6%	24.2	
		20 + Years	37.6%	41.7%	31.3%	14.3%	29.3%	39.1%	41.5%	39.7%	34.3	
		Number of Respondents	7.1%	8.3%	18.8%	57.1%	2.4%	13%	7.5%	10.3%	15.6	
		In current location	<1 year	12.9%	25%	15.6%	0%	9.8%	8.7%	13.2%	19.1%	13
			1 - 5 Years	21.2%	4.2%	25%	28.6%	17.1%	15.9%	28.3%	14.7%	19.4
			5 - 10 Years	17.6%	25%	6.3%	0%	24.4%	31.9%	24.5%	16.2%	18.2
			10 - 20 Years	20%	29.2%	15.6%	42.9%	31.7%	14.5%	18.9%	19.1%	24
			20 + Years	12.9%	0%	15.6%	0%	9.8%	17.4%	11.3%	5.9%	9.1
			Number of Respondents	15.3%	16.7%	21.9%	28.6%	7.3%	44.6%	3.8%	25%	16.3
		In Whitehorse	<1 year	4.7%	4.2%	9.4%	0%	7.3%	5.8%	3.8%	14.7%	6.2
			1 - 5 Years	14.1%	4.2%	18.8%	0%	14.6%	8.7%	22.6%	8.8%	11.5
			5 - 10 Years	7.1%	25%	6.3%	0%	24.4%	24.6%	20.8%	14.7%	15.4
			10 - 20 Years	22.4%	25%	12.5%	14.3%	31.7%	13%	15.1%	22.1%	19.5
			20 + Years	22.4%	16.7%	18.8%	14.3%	12.2%	18.8%	24.5%	13.2%	17.6
			Number of Respondents	29.4%	25%	34.4%	71.4%	9.8%	29%	13.2%	26.5%	29.8

Source: City of Whitehorse Survey

Percentages do not include those survey respondents that did not answer and do not therefore always add up to 100%

TABLE F: Business Markets

STUDY AREA BUSINESS PROFILE (SURVEY RESULTS)			BLACKBURN/ MEGA MILE	COOK ROAD	EVANS/IRELAND	JOSEPH	LEXTON	MIDDLE'/ CLARICE	REDLAND	ROOKS	AVERAGE RESPONSE
MARKETS	Local (within 5 km)	Very important	21%	25%	7%	29%	17%	11%	9%	26%	18%
		Important	11%	17%	4%	0%	5%	9%	6%	13%	8%
		Somewhat Important	16%	21%	14%	29%	2%	20%	11%	20%	17%
		Not at all	15%	17%	18%	29%	10%	9%	20%	19%	17%
	Local (5-10km)	Very important	16%	25%	0%	29%	12%	7%	7%	20%	15%
		Important	18%	21%	18%	14%	5%	19%	9%	22%	16%
		Somewhat Important	18%	25%	4%	14%	5%	19%	15%	22%	15%
		Not at all	13%	13%	21%	29%	12%	4%	17%	16%	16%
	Regional (east & south Melbourne)	Very important	12%	21%	11%	29%	10%	10%	6%	14%	14%
		Important	22%	17%	7%	14%	5%	19%	13%	28%	16%
		Somewhat Important	16%	25%	14%	14%	7%	11%	17%	20%	16%
		Not at all	15%	13%	7%	29%	12%	7%	9%	19%	14%
	Regional (wider metropolitan Melbourne)	Very important	12%	13%	11%	29%	7%	10%	17%	14%	14%
		Important	18%	21%	7%	29%	2%	11%	20%	22%	16%
		Somewhat Important	20%	38%	11%	14%	5%	14%	11%	25%	17%
		Not at all	15%	8%	11%	29%	15%	13%	7%	19%	15%
	Victoria	Very important	13%	29%	7%	14%	17%	13%	13%	16%	15%
		Important	22%	29%	4%	14%	10%	11%	20%	28%	17%
		Somewhat Important	15%	17%	18%	14%	5%	10%	7%	19%	13%
		Not at all	16%	8%	11%	43%	5%	19%	11%	20%	17%
Interstate	Very important	13%	25%	4%	0%	10%	10%	9%	16%	11%	
	Important	13%	13%	7%	0%	7%	11%	19%	16%	11%	
	Somewhat Important	15%	21%	18%	43%	7%	9%	9%	19%	18%	
	Not at all	26%	25%	14%	43%	12%	21%	15%	32%	24%	
International (export)	Very important	5%	8%	0%	0%	2%	4%	2%	4%	3%	
	Important	8%	4%	0%	0%	0%	3%	2%	10%	3%	
	Somewhat Important	11%	17%	0%	0%	5%	9%	11%	13%	8%	
	Not at all	40%	46%	39%	86%	22%	31%	31%	49%	43%	

Source: City of Whitehorse Survey

Appendix 3 - Glossary of Terms

Exports – is the total value of goods and services produced by industry sectors in Whitehorse which are sold to consumers, businesses, and governments based outside the Whitehorse boundaries.

Regional Imports – is the total value of intermediate goods and services which are imported into Whitehorse.

Local Expenditure – is the total value of intermediate goods and services purchased by industry sectors within Whitehorse.

Local Sales – is the total value of goods and services produced in Whitehorse which are sold to local industry sectors as input into production and for value-adding.

Output – is the gross revenue generated by businesses and organisations in Whitehorse.

Value Added – is the total value that is added by industry sectors in Whitehorse to intermediate inputs.

Wages and Salaries – is the total value of wages and salaries paid to employees who work in Whitehorse.

Gross Regional Product (GRP) - is the total value of final goods and services produced in the region over the period of one year. GRP can be measured by adding up all forms of final expenditure

- consumption by households
- consumption by governments
- additions or increases to assets (minus disposals)
- exports (minus imports)