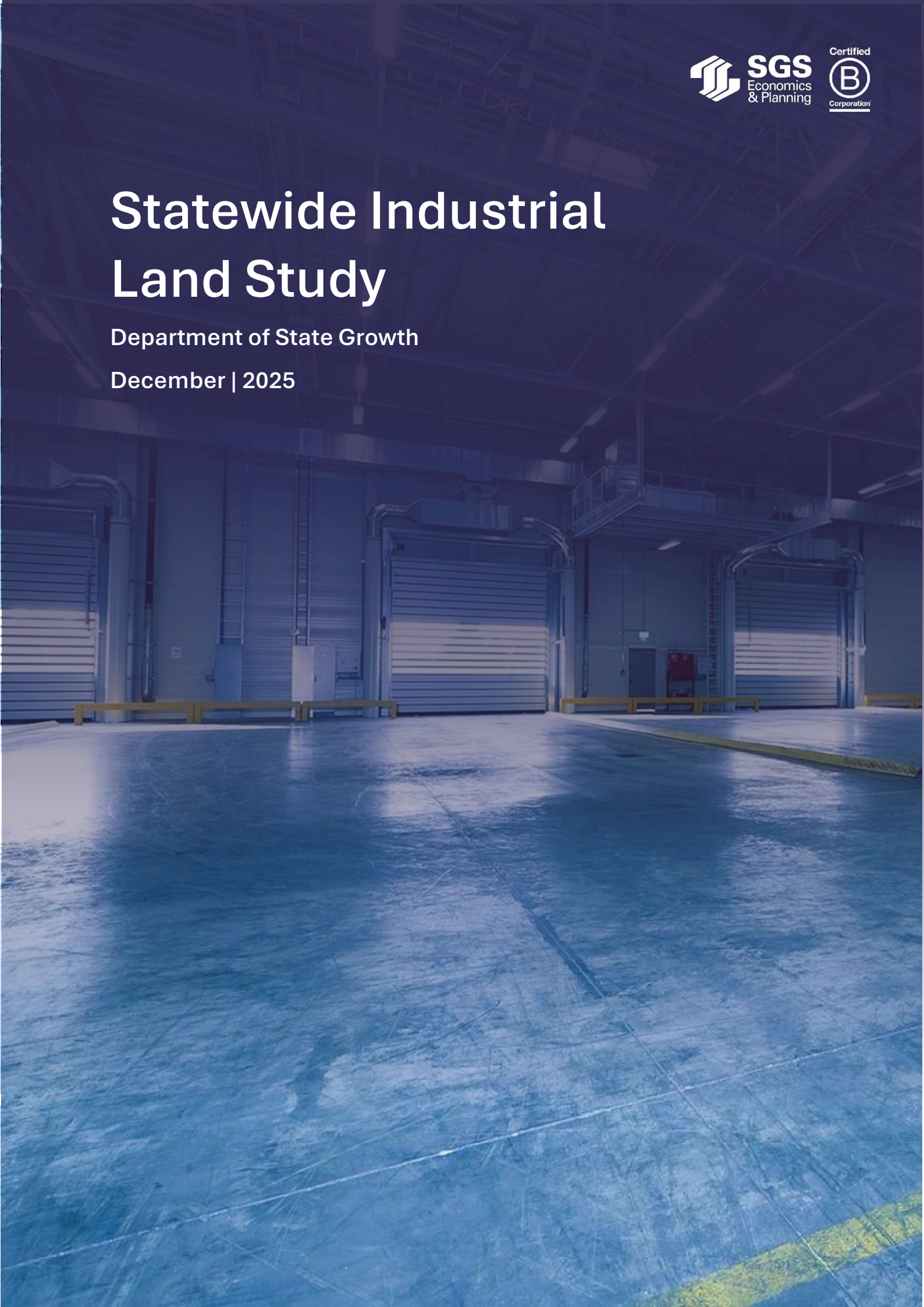

Statewide Industrial Land Study

Department of State Growth

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OFFICES IN CANBERRA, HOBART, MELBOURNE, AND SYDNEY ON THE COUNTRY OF THE NGAMBRI/NGUNNAWAL/NGARIGO, MUWININA/PALAWA, WURUNDJERI, AND GADIGAL PEOPLES.

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Executive summary

Introduction

SGS was engaged by the Department of State Growth (The Department) to deliver a Statewide Industrial Land Study. The study was supported by Era Advisory, who undertook stakeholder engagement with industrial businesses operating in three major industrial precincts across Tasmania.

The key objective of the study is to provide advice on future industrial land requirements across Tasmania. It is a key input into the Tasmanian Government's review of the state's three existing regional land use strategies.

The scope of the study includes:

- An overview of Tasmania's freight system and existing industrial areas
- Trends and drivers related to industrial lands
- Supply and demand analysis for industrial lands
- Future industrial use opportunities
- Identification of regionally significant industrial precincts, and
- Case studies of the Glenorchy, Prince of Wales Bay and Bell Bay industrial precincts.

Context

- Industrial lands in Tasmania are shaped by trends and drivers, including the re-emergence of manufacturing in developed countries, major projects and investments, industry specialisations, and the idea of industrial precincts. In addition, macro trends such as industry 4.0, advanced manufacturing, climate change and the circular economy, agricultural transformation, and changing retail and consumer preferences will influence future industrial use, development and land requirements.
- Key state, regional and precinct level policies and plans highlight the importance of efficient freight networks, including between major ports, population centres and major industrial precincts and sites, and identifying future opportunities for the use of industrial lands, such as the potential for advanced manufacturing (including renewables) and defence.

Regionally significant industrial precincts

- Regionally Significant Industrial Precincts (RSIP), are strategically located precincts (by road, rail or port) that support a concentration of industrial activities, including specialist industries such as export-oriented industries, transport and warehousing, incorporate a significant cluster of occupied

and/or vacant industrial-zoned land, and generate a significant level of freight activity, with well-developed supply chains.

- Across the Southern, Northern and Cradle Coast regions, there are 13 regionally significant industrial precincts – Brighton Hub, Cambridge, Glenorchy, Prince of Wales Bay, TRANSLink, Bell Bay, Valley Central, Launceston, Burnie, Devonport Airport, Burnie Airport, Smithton, and Zeehan.
- Each precinct differs in its comparative advantages, with some aligned to general growth in industrial activities, while others suit specific industries. Many have specialised workforces in local service industries and export-oriented industries.

Supply and demand-side analysis

- From 2011 to 2021, Tasmania has seen a transition from traditional manufacturing to construction, transport, and logistics-based employment. This presents opportunities to reposition ageing industrial estates, as well as precinct planning and infrastructure investment to support expansion in sectors experiencing higher job growth.
- Over the past 14 years, the Northern region had the highest number of industrial-zoned lots taken up (121), followed by Southern Tasmania (106) and the Cradle Coast (63). Large lots[1] accounted for the majority of land taken up at over 1.6 million square metres of a total 2.2 million square metres.
- There are 424 suitable vacant industrial lots across Tasmania, covering over 1,532 hectares of developable land.
- Southern Tasmania contains the highest number of available lots (159), followed by Cradle Coast (155) and Northern Tasmania (110). The majority of developable land is concentrated in large lots (1,470 hectares across 176 lots).
- Over the next 20 years, Tasmania is projected to require 394–468 hectares of additional industrial land, depending on the development intensity assumed:
  - The highest growth is expected in the Southern Region, particularly within Greater Hobart, which accounts for 242 hectares of land demand under a high growth scenario.
  - In the Northern Region, growth will be highest in Launceston (38 ha) and Northern Midlands (40 ha).
  - In Cradle Coast, projected land demand is more modest at 63–75 hectares, driven primarily by growth in Devonport (20 ha), Burnie (15 ha), Latrobe (18 ha), and Central Coast (11 ha).
- While there is a forecast statewide surplus of between 389 and 462 hectares of industrial-zoned land over the next 20 years, this masks significant regional and local shortfalls. For example,:
  - In the Southern Region, Glenorchy (-55 ha), Hobart (-18 ha), Kingborough (-17.3 ha) and Sorell (-14.4 ha) face significant shortfalls, particularly under a high growth scenario. Greater Hobart has a surplus of only 13 hectares under a high growth scenario.

[1] Lot size is an important consideration in planning for industrial activities. The Study assessed suitable vacant lots by region and lot size (i.e. extra small – <500 sqm, small – 500-2,000 sqm, medium – 2,000-5,000 sqm, large – >5,000 sqm).

- The Northern Region contains the largest regional surplus at 174–158 hectares. This surplus is heavily represented by Meander Valley (80 ha), Dorset (39 ha), and Northern Midlands (30.6 ha). Launceston is facing a shortfall of between 13.5–19.4 hectares.
- Cradle Coast has a forecast surplus of 230–242 hectares, particularly located in Waratah-Wynyard (149 ha) and Circular Head (76.5 ha). Burnie, Latrobe, and Central Coast all show shortfalls of up to 10 hectares.

Strategic observations – Statewide

Analysis across Tasmania's southern, northern, and Cradle Coast regions highlights a series of consistent challenges affecting the availability, suitability, and servicing of industrial land. These challenges underscore the need for a strategic, statewide approach to planning for industrial land, while recognising that specific pressures and priorities vary across regions and precincts. These include:

- *Shortfall of adequate industrial land in some local government areas and precincts, particularly in the Southern Region and Launceston.*
  - Tasmania has an overall surplus of industrial land; however this supply is not evenly distributed. Much of the usable land sits in outer-urban or rural LGAs, while many urbanised or strategically located councils face shortfalls. Key local government areas such as Glenorchy, Hobart, Kingborough and Launceston are projected to experience undersupply within the next decade.
  - The functional availability of land by lot size, location, and infrastructure readiness varies. The concentration of total land area in a limited number of large lots suggests that industrial growth is highly dependent on the activation and servicing of a few key sites.
- *Qualitative mismatch around lot size and type of uses.*
  - Across all three regions, there is growing demand for larger lots (typically over 4,000 square metres) suited to warehousing, logistics, and low-density industrial activities. However, the majority of subdivided lots are small to medium (500-5,000 sqm) that are less attractive to these users.
- *Infrastructure servicing and provisioning.*
  - Inadequate wastewater treatment, power supply, and design considerations are limiting the development potential of otherwise strategically located land. Infrastructure constraints are particularly noted in the Brighton Hub and Cambridge precincts in the south, TRANSLink and Valley Central in the north, and Burnie, Smithton, and Zeehan in the Cradle Coast region.
  - Information on industrial precincts and land should be clear and accessible to investors, and include infrastructure and service availability and timing to address any constraints, planning processes and provisions, relationship to supply chains and access to workforce.

Future planning for industrial land needs to be carefully planned across both RSIPs and local service industries. Key considerations include the following:

- Clearly identifying the circumstances under which RSIPs should be developed noting -
  - Some are aligned to supporting general growth in industrial activities, while the expansion of others relies on more targeted uses and future opportunities.

    - All require moderate to significant infrastructure and services upgrades, which need to be carefully considered against industrial land supply and demand, and supply chain outcomes.
- Avoiding an over-supply of industrial land, particularly noting the cost of unlocking precincts.
- Ensuring there is an appropriate supply of local industrial land to meet local needs.

The following strategic observations have also been made:

- ***Incorporate RSIPs into RLUS:*** RSIPs should be acknowledged in each of the respective strategies, with consistent definitions, noting the role of other industrial lands across the various local governments. This will be done through the varying Regional Land Use Strategy (RLUS) processes currently underway.
- ***Develop structure plans, focusing on key RSIPs (Bell Bay, Brighton, TRANSLink, Cambridge):*** A program of updated master planning and structure planning should be undertaken across all RSIPs to establish a clear strategic intent for each precinct and guide future subdivision, servicing, and land release.
- ***Undertake detailed planning for Glenorchy:*** Glenorchy remains an attractive and often preferred locations for industrial businesses. There is a need to plan for the future of the Glenorchy RSIP as a major industrial and employment lands centre situated within a broader area of urban renewal. This includes identifying key industrial sub-precincts within the RSIP, better understanding the composition of businesses and related operations, and supporting new industrial opportunities, including advanced manufacturing and lower-impact industrial activities. Continual monitoring and review is required.
- ***Develop infrastructure contribution framework for industrial areas:*** Precinct-based contributions could include both financial levies and in-kind contributions, such as developers constructing key trunk infrastructure assets under works-in-kind agreements. This approach would help address the current disincentive for early-stage developers to proceed with industrial land activation, encourage sequencing of development, and support infrastructure agencies in forecasting and programming upgrades. It would also align with broader government efforts to encourage regionally balanced growth and job creation outside major metropolitan centres.
- ***Monitor industrial land demand and supply***: Monitoring is required to understand the actual take-up of vacant industrial land and the rezoning of land to or from industrial. This data could be collected on a bi-annual basis, or at least once every five years.

Provide transparent information for precincts regarding infrastructure and services: Ensure capacity of infrastructure is well-reported to support investment decisions. This information could be provided through the development of a regular report providing information on matters such as headroom, infrastructure capacity and planned infrastructure upgrades, and/or be facilitated through the Department of State Growth to ensure access to contemporary information and to manage matters of commercial confidentiality. While more accessible public information will support decision-making, developers will still need to contact service providers directly for project-specific advice.

Strategic observations – Southern Region

Regionally significant industrial precincts in the Southern Region

Precinct	
Brighton Hub	There are opportunities to protect and stage remaining land for expansion, introduce buffer requirements, and encourage land uses aligned with intermodal hub. The precinct is a key overflow area for Greater Hobart.
Cambridge	A precinct structure plan would help to guide lot reconfiguration, buffer management, and infrastructure staging. There is significant market interest, but it is constrained by ad hoc development.
Glenorchy	The limited supply of land unlocks opportunities to explore urban renewal or vertical industrial formats. The Northern Transit Corridor development could support mixed-use and light industrial.
Prince of Wales Bay	The state-significant precinct should continue as a heavy industrial zone and ensure businesses that need it have waterfront access. Amenity could also be improved for interface management. It is unlikely additional infrastructure will be required in the short term.

Locally significant industrial land in the Southern Region by LGA

LGA	
Brighton	There are opportunities to provide some locally significant land (less than 4,000 sqm) especially in areas with interfaces close to residential areas like Cove Hill.
Central Highland	The are opportunities to identify industrial land near Bothwell to support the ongoing structure planning process, as well as support renewable energy solutions across the LGA.
Clarence	The location of Hobart International Airport and Cambridge Airport can be leveraged to provide opportunities for small occupiers and niche industrial uses.
Derwent Valley	Consider future uses at Boyer for which there are locational advantages, including access to rail and a need for significant attenuation distances. Support locally-significant industrial land through refined structure planning.
Glamorgan-Spring Bay	There are opportunities to maintain small industrial land provisions while ensuring alignment with agricultural and environmental constraints.
Glenorchy	There is potential to make better use of existing industrial land and support suitable businesses to grow and thrive alongside other uses.
Hobart	Recommendations from the North Hobart Neighbourhood Plan involving the rezoning of light industrial areas to urban mixed-use could be implemented. There will be a need to balance the transition while retaining essential employment uses.

LGA	
Huon Valley	Relocation of the council depot to Glen Huon Road could be facilitated. As part of broader regional coordination, there are opportunities for future industrial land allocations.
Kingborough	There could also be collaboration with neighbouring councils to address shared and local industrial land needs as well as long-term growth potential.
Sorell	Long-term wastewater solutions (e.g., Penna plant expansion) could help to address industrial land shortages. There are also opportunities to prioritise retention of employment land in Dodges Ferry, balancing rural-industrial uses with servicing challenges.
Southern Midlands	Industrial land needs near Bagdad to align with future regional growth strategies could be assessed. Opportunities for renewable energy solutions (wind and solar farms), and renewable energy businesses and industrial precincts near renewable energy generation facilities could be supported. Non-productive farming land may also be suitable in parts of the Southern Midlands.
Tasman	Industrial needs could be incorporated into structure planning for Nubeena and Murdunna to ensure alignment with broader regional objectives. There could be a marine industrial area including a commercial slip yard, in the Nubeena - White Beach area, to provide services to the aquaculture, tourist charter boat and recreational fishing industries.

Strategic observations - Northern Region

Regionally significant industrial precincts in the Northern Region

Precinct	
TRANSLink	There are opportunities to continue staged development, and review lot configurations and the interface with airport. Progress detailed planning for future expansion of the industrial estate and a potential road-rail intermodal hub.
Bell Bay	There is sufficient land, and there are opportunities to continue coordination with hydrogen and energy sectors.
Valley Central	Subdivision of existing large lots could be supported to meet demand, and rural buffers be maintained. A partnership with landowners to enable communication of business needs could also be supported.
Launceston	As some precincts are almost full, renewal and reconfiguration opportunities across all industrial land in Launceston should be considered. Develop a long-term strategy to manage land supply and guide future expansion.

Locally significant industrial land in the Northern Region by LGA

LGA	
Break O'Day	There are opportunities to investigate the potential for light industrial rezoning in Scamander and Beaumaris to support population growth. In Fingal, flood constraints to unlock any industrial land opportunities should be addressed, while in St Helens, local industrial capacity should be maintained while balancing residential interfaces.
Dorset	Council-owned land near Northeast Park (Ringarooma Road) could be rezoned for smaller industries and local enterprises. Collaboration with Simplot on potential intensification of existing facilities is another opportunity.
Flinders	There are opportunities to evaluate industrial opportunities at the Flinders Airport precinct, including a possible abattoir and construction materials uses. Service coordination (for example, wastewater and power) could be improved to support local industry expansions.
George Town	To identify demands for locally significant industrial land, engagement with local occupiers should continue, particularly in the George Town Industrial Precinct. Existing heavy industry should be balanced, with opportunities for light industrial and service-based uses.
Launceston	Intensification of industrial uses in established estates (for example, Invermay and Inveresk) could be investigated to accommodate business expansions, noting that flooding constraints exist. Older precincts should also be maintained and supported by upgraded infrastructure, ensuring they remain viable for local industries.
Meander Valley	A specialised precinct near Oaks Road for large-lot resource-related industries, such as grain distribution and processing could be explored. Deloraine should continue to be supported as an established precinct, while parts of Prospect Vale could be transitioned to a commercial or mixed-use area. This could be achieved by protecting the Galvaniser and other key industrial occupiers from encroachment of sensitive uses.
Northern Midlands	Adequate provision of locally significant industrial land outside TRANSLink should be ensured, focusing on Longford and Campbell Town. There could be coordination with regional partners to align servicing and infrastructure for future industrial expansions.
West Tamar	Considering TasWater constraints, there are opportunities to expand or rationalise the Legana Industrial Area and Exeter to optimise industrial land use. A strategic study for Exeter could also be undertaken to determine the best approach for large-lot industrial parcels and potential residential interfaces.

Strategic observations - North West Region

Regionally significant industrial precincts in the North West Region

Precinct	
Burnie	As the precinct is nearly full, new land should be identified if expansion is needed.
Devonport Airport	It should be promoted as a long-term expansion area for logistics, ensuring it is compatible with airport operations.
Burnie Airport	It could be developed as a logistics and storage hub but will require servicing.
Smithton	With sufficient land currently available, demand should be monitored.
Zeehan	As a strategic reserve, no urgent planning is required.

Locally significant industrial land in the North West Region by LGA

LGA	
Burnie	There could be opportunities for expanded industrial land in South Burnie, and East Cam for local industries that support businesses, and potentially a supply chain for renewable energy projects and larger-scale industries. Land fragmentation issues should be acknowledged and addressed.
Central Coast	There is potential to support industrial expansion in East Ulverstone and explore council-owned land at Maskells Road for industrial development, and ensure land supply meets local business demand.
Circular Head	A structured approach to industrial zoning should be developed to avoid ad-hoc development, affordable start-up spaces should be identified, and economic diversification beyond agriculture encouraged.
Devonport	Opportunities to improve connectivity between industrial land, the seaport, and transport corridors should be identified.
Kentish	There are opportunities to identify industrial land in Railton to support the supply chain of cement and quarry operations. In Sheffield, light industrial land could be expanded to accommodate local business and supply chain industries.
King Island	Servicing and infrastructure for light industrial land could be improved, particularly for small service industries and storage, and greater advocating for better freight access to reduce business costs.
Latrobe	There are opportunities to explore the expansion of Bellfield Industrial Precinct to accommodate industrial growth, subject to the feasibility of any required infrastructure upgrades. Shearwater/Port Sorell industrial precinct should be supported for local service industries.
West Coast	Support opportunities for local service industries across Queenstown, Strahan and Zeehan.

1. Introduction

Context for the study

The Tasmanian Government, in partnership with local government, is undertaking a detailed review of Tasmania's three regional land use strategies (RLUS) -

- Cradle Coast Regional Land Use Planning Strategy 2010-2030
- Northern Tasmania Regional Land Use Strategy
- Southern Tasmania Regional Land Use Strategy 2010-2035

A key input into the review is a contemporary study into industrial land demand and supply across Tasmania.

SGS Economics and Planning was engaged by the Department of State Growth (the Department) to deliver a Statewide Industrial Land Study (the Study). The scope of the Study includes analysis of Tasmania's freight system, demand and supply for industrial land, existing industrial areas, infrastructure and service considerations, and future industrial use opportunities. The Study includes case studies of the Glenorchy, Prince of Wales Bay and Bell Bay industrial precincts.

The Study has involved extensive engagement with local government, infrastructure and service providers and business, supported by a robust evidence base.

Study outline

The following sections of this study are summarised below.

Section 2 (Context) provides an overview of key strategic documents alongside the macroeconomic trends and drivers.

Section 3 (Precinct profiles) defines and introduces the regionally significant industrial precincts, which are a focus of this study. Further work is shown in Appendix B.

Section 4 (Supply-side analysis) and (Demand-side analysis) delivers the baseline analysis of supply and demand, precinct profiles, and a Business-as-Usual demand analysis of projected future demand based on economic and trends analysis.

Section 5-7 (Synthesis and observations) delivers observations of the strategic opportunities of existing precincts and any future precincts, along with a hierarchy or network framework of industrial land in Tasmania. This brings together the preceding work, plus the work of the technical appendices, to deliver statewide and precinct-specific observations. It also includes a summary of overarching directions for locally significant industrial land in each of the council areas of Tasmania.

Work undertaken by Era Advisory on opportunities and constraints at three major precincts is also summarised within this report.

The report has been aided by several technical appendices, including:

- Appendix A: Freight data, which analysis total movement
- Appendix B: Precinct profiles
- Appendix C: Suitability analysis, which provides a spatial overview
- Appendix D: Water, sewer and power infrastructure audit

2. Context

2.1 Strategic policy and plans

The Study is informed by key state, regional and precinct level policies and plans.

Table 1: Policy review

Source	Summary	Supply-side considerations	Demand-side considerations
Burnie to Hobart Freight Corridor Strategy 2017	Outlines a long-term approach to freight planning and investment along the Burnie to Hobart Freight Corridor. The Corridor carries the highest volumes of freight across Tasmania's land transport network, and connects all major population, industrial and export centres.	▪ All Tasmania's major industry sectors rely on the Corridor as part of their supply chains. Around 70% of freight trips use the Corridor for at least part of the journey. Many of Tasmania's major industrial areas and freight generators are located within 15km of the Corridor or at key feeder routes. ▪ The majority of freight carried on the Corridor is moved by road- 79% in 2014-15, compared to 21% by rail. ▪ The rail network is generally used to transport bulk commodities over long distances. The task is dominated by cement, zinc, paper and newsprint. ▪ Burnie and Devonport Ports are Tasmania's largest container ports. Both also carry a significant bulk freight task. ▪ The Glenorchy industrial area is a high-volume industrial centre, catering to around 10% of the southern region's freight task. It contains large freight generators, including	▪ The Corridor is projected to be the fastest growing section of Tasmania's land transport freight network, carrying 35% more freight by 2034-35, compared to 2014-15 volumes. The Bass Highway between Devonport and Illawarra Main Road carries the highest freight volumes of any Corridor segment, and is projected to increase in volume in 2034-35. The Brooker Highway is projected to undergo the highest rate of growth, increasing 46% from 2014-15 volumes. ▪ Freight growth is forecast to be highest on road– an increase of 36% compared to 10% on rail. This reflects expected growth in commodities that largely use road such as agriculture, construction and consumer goods.

		Cadbury, Nyrstar and Impact Fertilisers. The Glenorchy industrial area and Brighton Hub totals 28% of the southern freight task.	
Tasmanian Advanced Manufacturing Action Plan 2028	A framework that the Tasmanian Government will undertake to provide support to the state's advanced manufacturing sectors growth and capability. Priority action plan includes: ▪ Establish an Annual Advanced Manufacturing Peaks Event to identify industry training quality requirements to be then shared with the relevant sector education and training providers. ▪ Industry to continue supporting current TAE trainers and those wishing to become TAE Trainers; also continue supporting Return to Industry for TAE Trainers to ensure personnel with the TAE qualifications, remain current and competent in their trade. ▪ Coordinate brand initiatives to promote the advanced manufacturing sector as a whole to the broader community to enhance career awareness and recruitment.	▪ Manufacturing is the fifth largest industry in Tasmania by Gross State Product generating $1.8 billion in 2018-19. Manufacturing is an important contributor in both metropolitan and regional areas. Hobart and the south east contributed 42%, Launceston and the north east 34% and the north west and west 24% of total GSP. In 2018-19 the largest manufacturing subsector was food product manufacturing. ▪ Renewables: Tasmania is aiming to be a net exporter of renewables by 2026 with a focus on innovation and will double renewable energy production by 2040. There are opportunities for Tasmanian manufacturers to use the state's growing renewable energy resources to differentiate their business and products to access new markets.	▪ Digital and smart technologies: Technology will have critical role in product and service design along with production and downstream processes. With all aspects of manufacturing undergoing transformation, increasing the skills of the advanced manufacturing workforce is a key dependency. Developing a skilled workforce with STEM skills is recognised as critical for the sector to be responsive and succeed in the modern economy. ▪ Industry 4.0: increasing industry understanding and take up of industry 4.0 so business growth is not constrained. The government will work with industry to close capability gaps, including overall investment in research and development, new technology application, problem solving, design, prototypes, commercialisation and marketing. ▪ Advanced manufacturing: recognised as a key sector and manufacturers are supported to participate in relevant trade events and programs that build capability. ▪ Defence: The Government have been working with industry to grow the state's profile and access contract opportunities. Tasmania is aiming to contribute towards the Australian Government's $270 billion domestic defence spend. Increasingly more Tasmanian companies are looking towards

	▪ Encourage employers to engage with programs supporting greater workforce diversity. ▪ Share insights and tools on how to support family friendly work policies and services that improve the ability of people with caring responsibilities to participate in the advanced manufacturing workforce. ▪ Establish an advanced manufacturing sector work experience and placement program with supporting resources. ▪ In collaboration with the Regional Jobs Hubs Network, RTOs and Employers, explore the piloting and assessment of outcomes of a job pool that comprises graduates from pre-employment programs. ▪ Enhance industry workforce development capacity.		defence as a viable market for their products and capability.
Bell Bay Industrial Precinct Development Plan 2017	An integrated framework to guide the sustainable development and management of industrial activities and supporting infrastructure networks within the Bell Bay Industrial Precinct.	▪ The Bell Bay Precinct provides accessible land with good buffer distances from residential and other sensitive uses. ▪ There is currently 2,091 hectares of vacant industrial land at Bell Bay. 14 sites are within the heavy industrial area, and 11 vacant parcels are at the nearby George Town light industrial area.	▪ In the business as usual and decline scenarios, no further industrial land is required at Bell Bay. It was found that there will be an oversupply and the industrial land may have alternate better uses. In total, the oversupply of suitable, vacant land around 200 ha.

		▪ The precinct is suitable for heavy manufacturing, light manufacturing, food processing, transport and warehousing, and local trade services. The precinct is largely development ready but lacking diversity in industries. ▪ There are future opportunities to capitalise on port infrastructure, capacity for a wastewater treatment system to receive additional flows and for expansion of system, a future rail siding, and to improve rail and road volumes. It is understood that much of the vacant land is difficult to utilise. For example, major private landholders have significant land holdings set aside as expansion or buffer areas. Similarly, for public land, it is generally accepted that 30% of port land is already utilised.	▪ The analysis of vacant land suggests that there is a shortfall of small to medium lots that would be demanded under the Precinct Growth scenario. ▪ Identified growth industries include the expansion of existing, as well as new industries including advanced manufacturing, rare earth smelting, industries relating to sustainability and the growth of the global green economy, rural processing of non-perishable goods, downstream processing, industrial ecology, further mineral processing, forestry, maritime related industries, information, communications and technology firms. ▪ As these industries make locational decisions based on compatibility with existing activities, a key direction of the Development Plan is the creation of four sub-precincts: - Bell Bay Sub-Precinct- will remain focussed on heavy industrial. - Longreach Sub-Precinct- focussed on emerging industries that have lower emissions and off site impacts, such as resource processing and data storage. Lot sizes required are generally small to medium. - Future Industrial Sub-Precinct- intended to ensure that future industrial activity is focused in the other two sub-precincts. - Light Industrial Sub-Precinct- maintains the current extent of the Light Industrial Zone.

State Planning Provisions	The State Planning Provisions provide a consistent set of planning rules for 23 generic zones and 16 codes. The State Planning Provisions came into effect on 2 March 2017 as part of the Tasmanian Planning Scheme but have no practical effect until a Local Provisions Schedule is in effect in a municipal area. The Local Provisions Schedule has taken effect in most Tasmanian LGAs.	There are two main industrial land use zones: ▪ Light Industrial Zone ▪ General Industrial Zone Both zones permit a broad range of industrial uses, though the range of permissible land uses differs slightly.	Several other land use zones permit some industrial land uses (e.g. industry, warehouse), subject to Council discretion. For example, in the Rural Zone, permitted or discretionary land uses include; extractive industry, manufacturing and processing, resource processing, recycling and waste disposal, and transport depot and distribution uses.
Tasmanian Integrated Freight Strategy	The Tasmanian Integrated Freight Strategy provides a coordinated, demand-driven planning and investment framework for Tasmania's freight system. The Strategy focuses on four key areas: ▪ Supporting competition and service choice across Bass Strait and beyond ▪ Efficient freight gateways ▪ High-standard, responsive land freight connections ▪ Delivering a single, integrated freight system.	▪ Tasmania's freight network is across road, rail, sea and air ports, which provide access to agricultural and resource areas, major export ports, industrial precincts and population centres. ▪ The freight network is owned, managed and funded by multiple stakeholders, including governments, government business enterprises and the private sector. ▪ Continued investment in the network improves freight efficiency, safety and access.	▪ Almost 99% of Tasmania's freight by volume is moved across Bass Strait by surface transport. ▪ Interstate container shipping is particularly important for Tasmania's freight system, with most of Tasmania's container trade with domestic markets. ▪ Around 2/3 of total port volumes are bulk freight, with the remaining being containers. ▪ In 2021-22, Tasmania's total estimated freight task was 24.2 million tonnes. ▪ Freight is mostly carried via road, carrying 21.2 million tonnes (75% net tonne kilometres), compared to 3 million tonnes (25% net tonne kilometres) for rail.
Princes of Wales Bay Marine and Innovation Masterplan		▪ The precinct includes the 30-ha Bender Drive Area which is largely zoned as general industrial. It also contains the Gepp Parade	▪ Unlike Hobart Port which has a focus on the tourism sector, the Princes of Wales Bay

		Area and the Negara Crescent, which are 14 ha and 10 ha in size respectively and have light industrial uses. ▪ The precinct is close to the Derwent Park industrial area and several industrial businesses.	precinct has a clear focus on maritime industrial uses.
State Road Corridor Plans	The Department of State Growth is preparing corridor strategies for major state roads in Tasmania to identify: ▪ Corridor-specific objectives and the performance of transport infrastructure in meeting these objectives. ▪ Key transport demands likely to be placed on the corridor over the next 10-20 years. ▪ Short, medium and long term priorities and actions to manage the corridor. Priority improvement projects are progressed for design and construction as funding is made available for the respective corridor.	Corridor strategies relevant to significant industrial precincts include: ▪ *Bass Highway – Wynyard to Marrawah Corridor Strategy – February 2020* ▪ *Bass Highway – Launceston to Devonport Corridor Strategy – April 2023* ▪ *Bass Highway – Cooee to Wynyard Planning Study – May 2019* ▪ *East Tamar Highway – Launceston to Bell Bay Corridor Strategy, January 2025* ▪ *Brighton to Cambridge Freight Route Study (underway).*	▪ Traffic and freight volumes are highest on the State Road Network, particularly on the National Network and Category 1-3 roads. ▪ The strategies consider forecast traffic volumes and population growth, changes in residential development, industry and economic activity, and public and active transport needs.
Tasmanian Planning Policies	A planning instrument to help provide greater consistency for land use planning. The 7 Tasmanian Planning Policies guide Regional Land Use Strategies and the Tasmanian Planning Scheme.	▪ Strategically identify and protect land suitable for industrial purposes for future generations. ▪ Provide at least 15 years supply of industrial land within urban growth boundaries, or within close proximity to settlements.	▪ The existing and future industrial needs of Tasmania should be met. ▪ Existing and future industrial land to be protected from incompatible uses that would constrain industrial uses.

		▪ Industrial land reliant on particular resources or provision of infrastructure may be located away from settlements. ▪ Industrial land and land surrounding industrial estates should be protected from incompatible use and development. Freight infrastructure and industrial and distribution centres should also be identified and protected. ▪ Co-location of similar industries in strategic industrial precincts is encouraged.	▪ Industrial, freight and intermodal developments are to be in areas with good access to existing, high-volume freight networks.

Source: SGS Economics & Planning, 2024, Department of State Growth, 2025

2.2 Trends and drivers in Tasmania

Industrial activities and land use planning

Industrial activities refer to uses involved in producing and delivering goods and services. They support daily activities, services and needs, and make significant contributions to the economy. The scale and impact of industrial activities vary significantly, from very large-scale manufacturing plants occupying many hectares of land, to freight forwarders, and local bodyworks.

By their nature, industrial activities generate externalities – noise, emissions, light, odours – which need to be considered in relation to adjacent and other land uses. For this reason, industrial uses attract specific planning scheme zones and standards that seek to manage these impacts, including buffer areas, controls around operating hours, transport and traffic movements, and conditions related to design and amenity, and minimising emissions.

Industrial precincts are concentrations of industrial activities, where businesses cluster and develop strengths and specialisations, while enjoying benefits of shared resources, efficiencies and lower costs. Industrial precincts should be well-located in relation to major freight networks.

There is a shortage of serviced industrial land throughout Australia. In delivering more industrial land, infrastructure and service needs must be accommodated for, particularly for medium to large sites, which have higher demand for resources like water, electricity, and access to transport.

Industrial precincts are often misunderstood, and suffer from connotations of being dirty, noisy and low value areas. In modern economies and developed cities such as Tasmania, however, this is far from the truth. Industrial and employment precincts provide a myriad of activities that in aggregate, offer significant economic contributions to the economy. Yet the value of these precincts remains under-appreciated. While on a land value or per capita perspective, industrial lands and industrial jobs may be less productive than jobs and land in CBDs, they are critical enablers of downstream value and exports. It is important that industrial lands are protected.

Re-emergence of manufacturing in developed countries

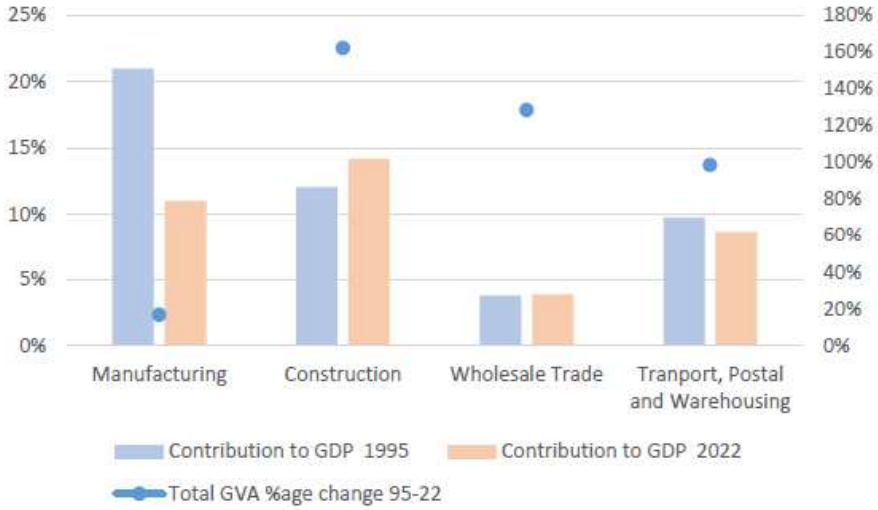
Manufacturing is undergoing a historic transformation across the industrialised world. Responding to the same issues driving the industry policy shift towards onshoring manufacturing to reduce supply chain risk, many advanced nations, including Australia, are re-investing in manufacturing. Often, this comes after decades of declining support and declining national capability.

COVID-19 exposed the fragile nature of global supply chains. Such pressures impact the production and distribution of goods between Australia and trade partners. A few commentators, particularly around the height of the pandemic, suggested that Australia should ‘re-shore’ its manufacturing capabilities to safeguard against similar threats in the future. In Australia, the Commonwealth Government’s commitment to manufacture clean energy technologies, and the National Reconstruction Fund, are examples of the manufacturing resurgence occurring in Australia.

Figure 1 shows the contribution of various industrial land uses to national GDP in 1995 and 2022. The manufacturing industry's share of GDP, which exceeded 20% in 1995, declined to just over 10% by

2022. In contrast, the construction industry experienced growth in its GDP contribution over the same period.

Figure 1: Industrial land uses contribution to national GDP 1995 & 2022



Source: SGS Economics & Planning, 2022.

The industrial environment

In 2021/22, the manufacturing industry in Tasmania contributed over $2 billion to Tasmania's GSP. The manufacturing industry employed nearly 20,000 people directly and had turnover of approximately $8.3 billion (Table 2).

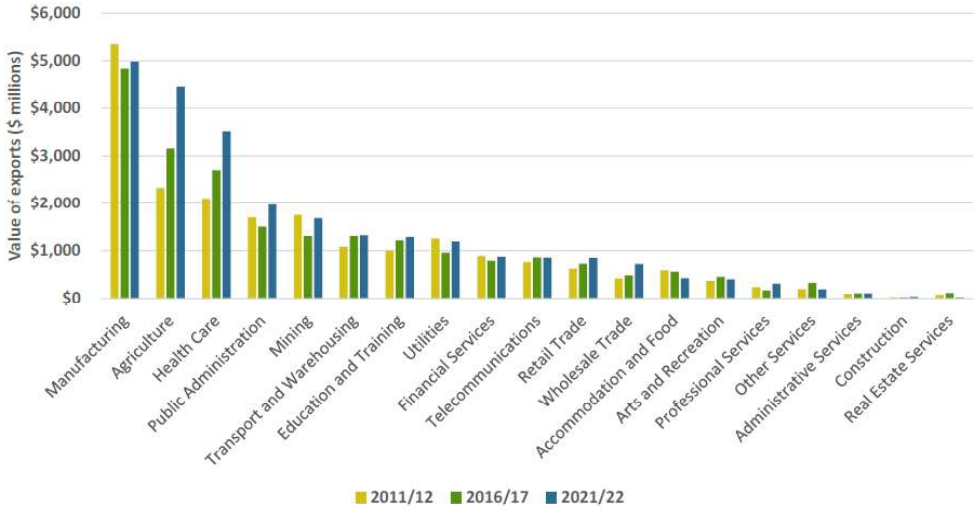
Table 2: Direct impacts of manufacturing to Tasmania- 2021/22

Direct impacts	2018/19	2021/22
Gross Value Added ($ million)	$1,878	$2,017
Employment	18,000	19,800
Turnover ($ million)	$7,318	$8,281

Source: ABS National Accounts and SGS Economics & Planning (2023)

Figure 2 below shows exports by industry group since 2011/12, providing a snapshot of how the major export industries have developed over the past decade. Exports represent the value of goods and services that leave Tasmania for consumption outside of the Tasmanian economy, generated by businesses within Tasmania. The manufacturing industry demonstrates an inherently higher export propensity than services, indicating that they are easier to sell in the global market. This means that Tasmania can manufacture goods at a higher level than that demanded by the state's population and sell the surplus, which grows the economy. The manufacturing industry is the largest export industry in Tasmania in terms of export value; however Agriculture has grown its role in the export market significantly over the last decade and has nearly caught up to Manufacturing.

Figure 2: Tasmanian exports by industry group (ranked by 2021/22 size)[2]



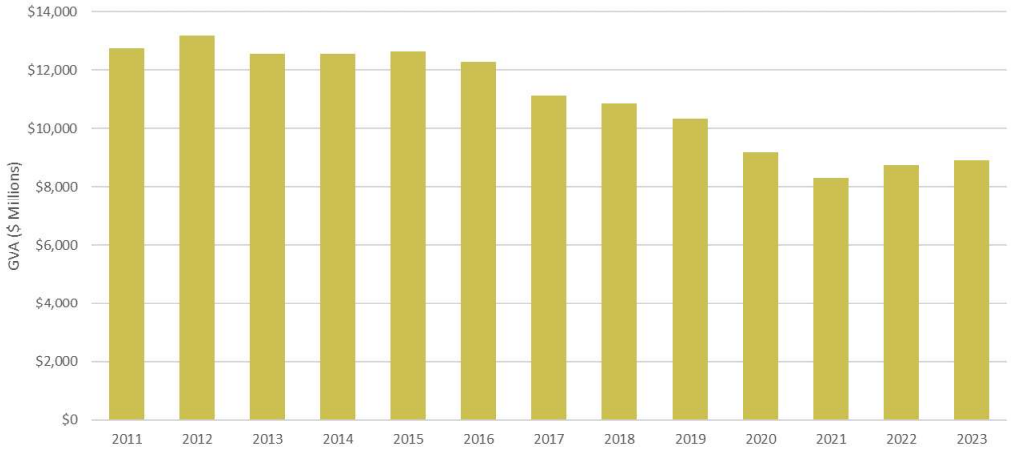
Source: National Institute of Economic and Industry Research (NIEIR) (2022). Compiled by economy.id. All figures adjusted for inflation. Figure by SGS Economics and Planning (2023).

GVA is rarely taken into account in evaluating industrial land 'value' but is a fundamentally important point when considering the role and function of industrial precincts in the future of Tasmania's economy.

In line with the rest of Australia,[3] the Gross Value Added (GVA) of industrial uses typically located on industrial zoned land has been declining, as evident in Figure 3. However, new major projects in Tasmania will likely see GVA in these industries increase in the future.

[2] Exports here include those goods sold to both the interstate and international markets.
[3] https://www.ibisworld.com/australia/industry-trends/fastest-declining-industries/

Figure 3: Industrial land uses GVA 2011-2023, Tasmania[4]



Source: SGS Economics & Planning, 2024

The table below identifies major projects currently underway or in the planning phase in Tasmania. A number of renewable energy projects, mostly wind farms, have also been established or are in the development pipeline. Some of these projects may be considering bringing assembly processing facilities onshore in Tasmania. As such, these facilities would require appropriately zoned industrial land in the right locations. Appropriate industrial land will also be required for the ongoing maintenance and operations of the facilities.

Table 3: Major projects summary

Project	Description	Region	Industry
Marinus	Proposed undersea and underground electricity and telecommunications interconnector between North West Tasmania and the Latrobe Valley in Victoria. The project will connect Tasmania's renewable energy to the mainland, and enable Tasmania to import renewable energy, such as solar and wind, while reserving its hydro and storing extra energy.	Burnie and Central Coast LGAs	Renewable energy
Battery of the Nation	A series of Hydro Tasmania projects that are investigating and building Tasmania's capacity as a hydro 'battery'. This will unlock Tasmania's full renewable energy potential to support a resilient future energy market.	Lake Cethana is the preferred pumped hydro site to progress to investment-ready stage. Also, investigating the potential redevelopment	Renewable energy, Hydropower

[4] Industrial land uses include the industries of: Mining, Construction, Manufacturing, Transport, postal and warehousing, and Electricity, gas, water and waste services.

Project	Description	Region	Industry
		of the Tarraleah hydropower scheme.[5]	
North East Wind	Large-scale onshore wind project in north-east Tasmania, proposed by ACEN Australia. Includes up to 210 turbines across two clusters (Waterhouse and Rushy Lagoon)[6]. Will power approx. 500,000 homes and support green hydrogen development.	Dorset municipality (Waterhouse & Rushy Lagoon)	Renewable energy, Wind
SunCable (AAPowerLink)	Australia-Asia PowerLink: Massive solar and battery project in NT's Barkly region. Plans include 20 GW solar farm and up to 42 GWh storage, with HVDC transmission to Darwin and Singapore. This includes a potential subsea cable manufacturing in Tasmania, slated for Bell Bay.	Northern Territory (generation); Bell Bay, TAS (manufacturing)	Renewable energy, Solar & Storage
Renewable Energy Zones (REZs)[7]	REZs have been identified for high-quality resource areas. In 2022, Australian Energy Market Operator identified three candidate REZ and one Offshore Wind Zone in Tasmania.	The North West is the first REZ region to be explored	Renewable energy
Port capacity expansion projects[8]	Significant upgrades and expansion of port and intermodal activities are underway or planned for the ports of: ▪ **Devonport (QuayLink).** Total project completion in 2027- Devonport's freight capacity will increase by 40% with an additional 160,000 passengers visiting every year. ▪ **Hobart (Macquarie Wharf).** In planning phase- Will support Antarctic scientific research, and enabling growth in key trade areas such as bulk export (forestry), containers and tourism. For industrial lands, this includes an expanded log and container storage facility to support increased throughput of export logs and containers.	Affects the following LGAs: ▪ Devonport ▪ Hobart ▪ Burnie ▪ George Town	Freight, storage facility, imports and exports

[5] https://www.stategrowth.tas.gov.au/recfit/major_investment_projects/battery_of_the_nation
[6] https://www.planning.tas.gov.au/assessments-and-hearings/current-assessments-and-hearings/major-project-North-East-Wind-assessment-criteria
[7] https://recfit.tas.gov.au/renewables/renewable_energy_zones
[8] https://www.tasports.com.au/projects-developments

Project	Description	Region	Industry
	▪ **Burnie.** In planning phase- Construction of a dedicated bulk export terminal within 30km of major iron ore deposits, construction of bulk export infrastructure, and increasing capability to vessels with increased tonnage capacity. ▪ **Bell Bay.** In planning phase- Located within the Bell Bay Advanced Manufacturing Zone and supports the forestry, minerals processing, fuel, containers, and project cargoes industries. Offers opportunity for renewable energy. These upgrades/expansions will increase the ports' capacity to move freight (containerised and bulk) in- and out of the state, enabling further economic growth.		
Freight Capacity Upgrade Program[9,10]	Program to improve productivity, safety and efficiency for freight vehicles across the road network. Supported by $100 million in joint funding from the Australian and Tasmanian governments.	Upgrades delivered across the network, including the north, north-west and south	Freight operators particularly in the agriculture, resources and manufacturing industries

Source: SGS Economics & Planning, 2024

The Tasmanian Government is continuing to invest in Tasmania's freight system to improve freight access, efficiency and capacity. Major investment includes the Midland Highway upgrade, Bass Highway, rail revitalisation and upgrades to the East Tamar Highway.

Table 4 summarises key transport projects in the region.

Table 4: Major transport projects

Project	Description	Region	Industry
Midland Highway Action Plan[11]	Progressive upgrade of the Midland Highway to improve safety and efficiency on Tasmania's key north-south freight route.	North, South	All sectors. Freight forwarders.

9 https://www.transport.tas.gov.au/roadworks/current_projects/major_projects/freight_capacity_upgrade_program

10 https://minister.infrastructure.gov.au/c-king/media-release/100-million-program-improve-freight-access-tasmania

Project	Description	Region	Industry
	Supported by $605 million from the Australian and Tasmanian governments. Final stage, Campbell Town North to Conara expected to commence in early 2026.		
Bass Highway – Launceston to Devonport[12]	Implementation of key safety upgrade projects identified in the Bass Highway Launceston to Devonport Corridor Strategy. Projects are funded from the Tasmanian Roads Corridor program with $290M allocated to the Bass Highway between Launceston and Devonport.	North, North west	All sectors. Freight forwarders.
Rail revitalisation[13]	The program helped to raise the quality of the major lines on the Tasmanian rail network through selective 'sleepering' and track replacement. It consists of two projects - one for Tasmanian rail lines on the National Land Transport Network (the Network), and one for those off the Network (Off-Network).	Affects the LGAs of: ▪ Break O'Day ▪ Brighton ▪ Burnie ▪ Central Coast ▪ Devonport ▪ Glenorchy ▪ Kentish ▪ Meander Valley ▪ Northern Midlands ▪ Southern Midlands ▪ West Coast	
East Tamar Highway[14]	Implementation of the East Tamar Highway Corridor Strategy to improve safety, productivity and efficiency on a key freight route. $100 million committed to upgrades, between Australian and Tasmanian Governments, including extra overtaking lanes, road-widening, intersection	North	All sectors. Freight forwarders.

[13] https://investment.infrastructure.gov.au/projects/054147-14tas-pkg
[14] https://www.transport.tas.gov.au/roadworks/road_improvement_plans/east_tamar_corridor_strategy

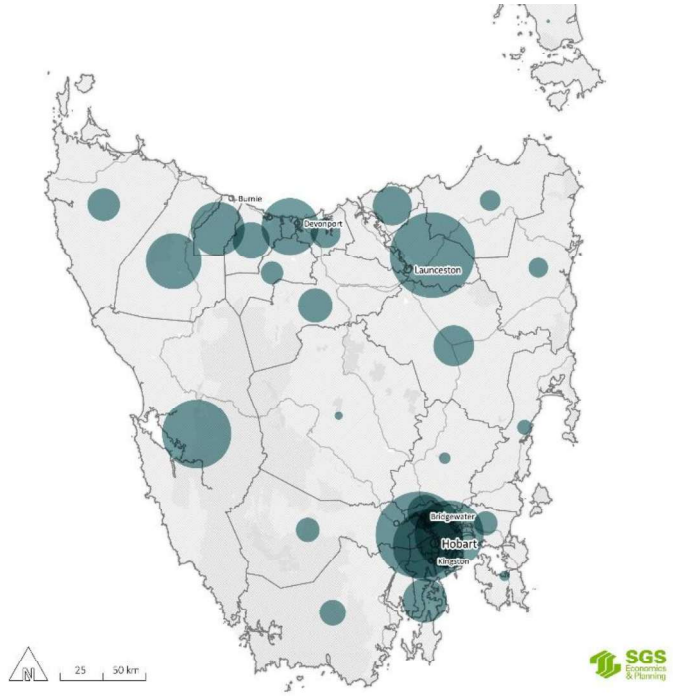
Project	Description	Region	Industry
	improvements, and duplicating sections of the highway to two lanes in each direction.		
Illawarra Main Road	Upgrades to improve safety, productivity and efficiency on a key freight route connecting the Bass and Midland Highways. Stage 2b is currently being delivered with the final stages progressing through to detailed design.	North	All sectors. Freight forwarders.

Source: SGS Economics & Planning, 2025, Department of State Growth, 2025

Industry specialisation in Tasmania

Industrial activities are an important contributor in both metropolitan and regional areas. The GVA of industry located on industrial zoned land is strongest around Hobart, Glenorchy and Launceston (Figure 4). This is to be expected given the concentration of significant export-oriented industrial businesses along the foreshore and in these LGAs. The figure below also suggests many small area local economies benefit from having industrial activities located within their boundaries.

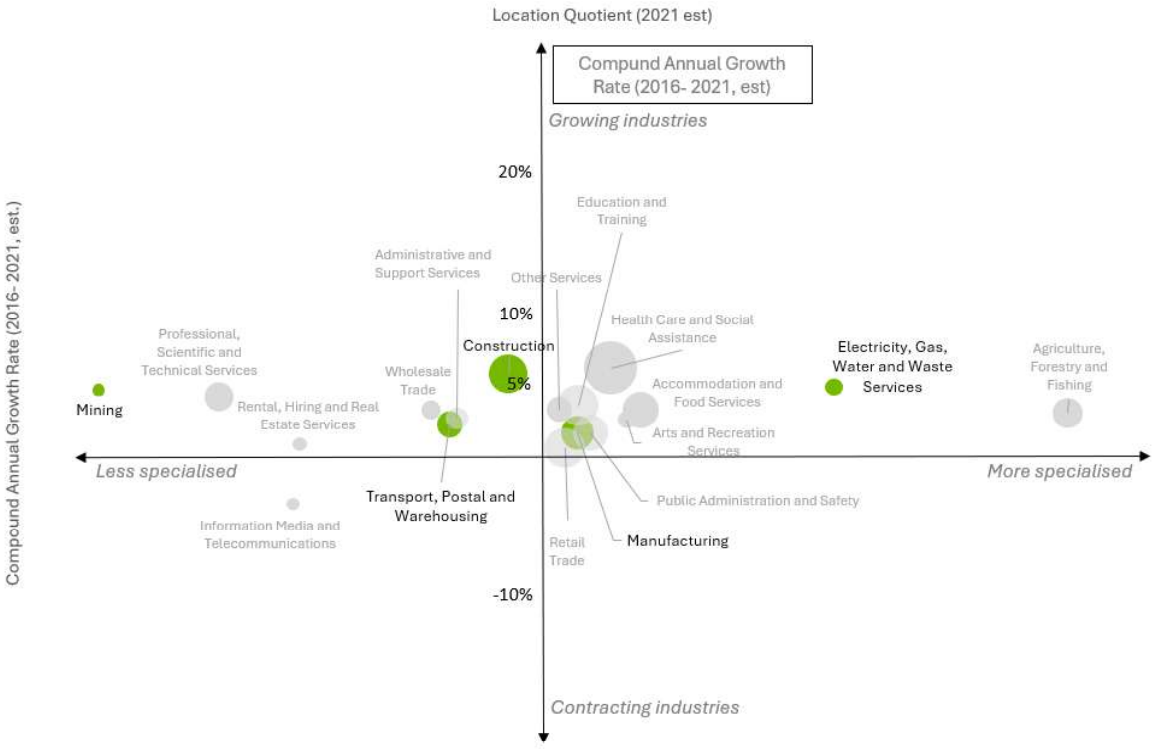
Figure 4: Industrial land uses GVA 2023, by LGA



Source: SGS Economics & Planning, 2024

In terms of relative specialisation (Location Quotient – LQ)[15] Tasmania vs Australia, Tasmania has highest LQs in the Electricity, Gas, Water and Waste Services industry (Figure 5). This is indicative of the role that this sector plays in Tasmania. It may be worthwhile nurturing and leveraging these types of businesses and industries to increase State specialisation, industry growth and productivity, such as through renewable energy production and storage, or innovation in the recycling of waste materials.

Figure 5: Tasmania Location Quotient, 2021



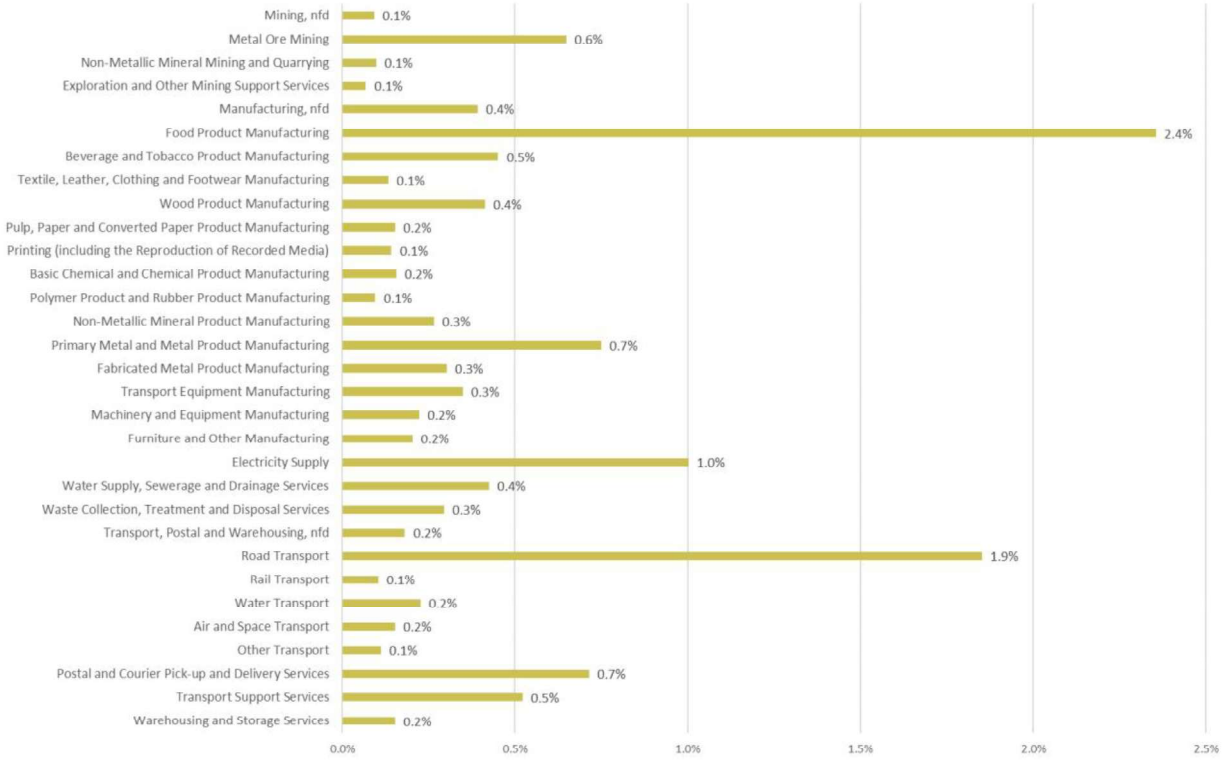
Source: SGS Economics & Planning, 2024. Based on 2021 ABS census data

Industrial employment in Tasmania makes up a small portion of employment in the state. As evident in Figure 6, industrial employment in 2021 was skewed towards Food product manufacturing, and Road transport.

However, some LGAs have high instances of industrial employment. For example, employment in Metal Ore mining represented 33% of West Coast LGAs employment, and Primary Metal and Metal Product Manufacturing represented 24% of George Town LGAs employment.

[15] Location Quotient (LQ) analysis is a measure of the relative industry specialisation of a local economy compared with a larger area. The LQ above compares Tasmania to Australia.

Figure 6: Industrial employment as a proportion of all Tasmanian jobs (2021)



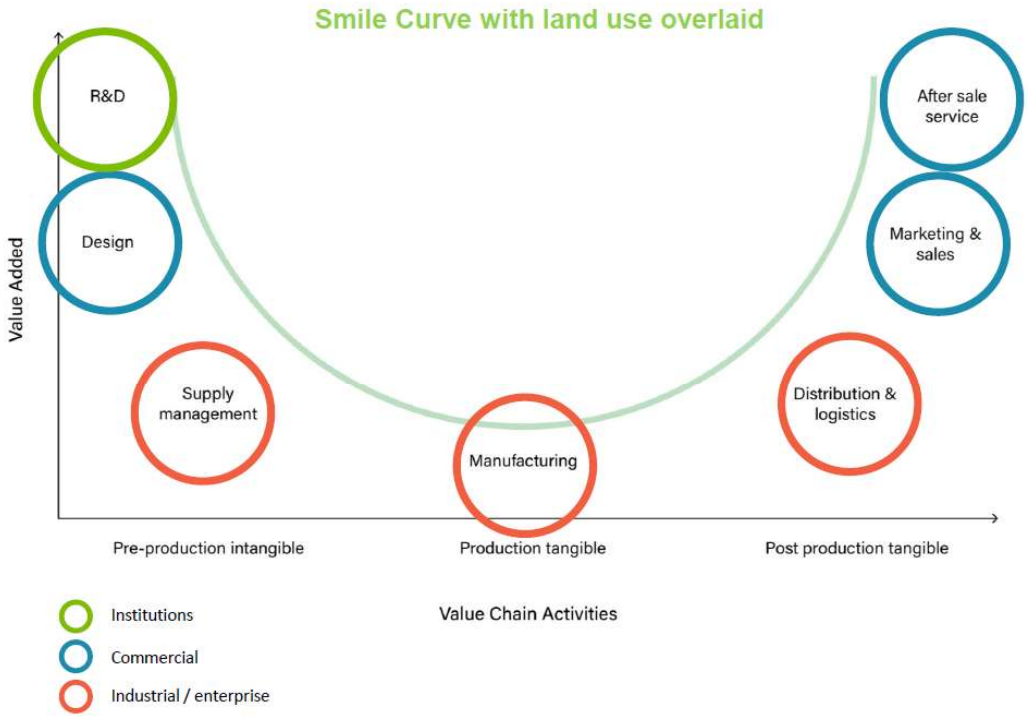
Source: SGS Economics & Planning, 2024. Based on 2021 ABS census data

Industry linkages and supply chains

Industrial lands support the movement of goods around Tasmania for processing, value-add purposes, purchasing and consumption.

Industrial precincts are where production occurs in the value chain (Figure 7), translating pre-production to post production value.

Figure 7 A local spatial consideration of value chains



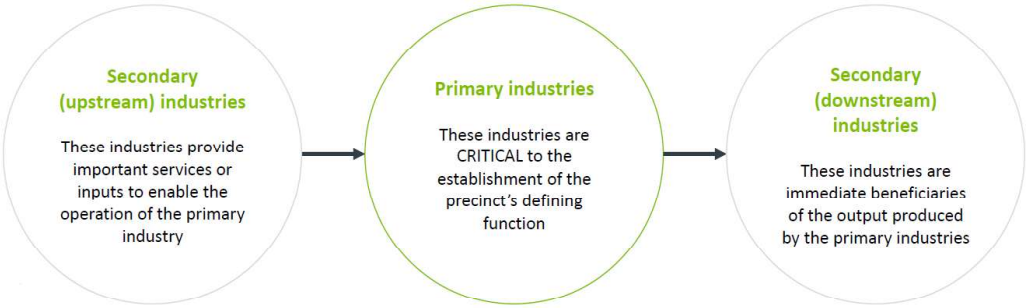
Source: Smiling Curve derived from CSIRO Futures Advanced Manufacturing: A roadmap for unlocking Future Growth Opportunities for Australia, (2016) and originally adapted from Stan Shih's 'Smiling Curve'.

There are several benefits of co-locating supply chain partners in precincts. This includes:

- Infrastructure optimisation
- Shared facilities and services
- Business collaboration
- Travel time savings
- Creation of precinct identity
- Increased employment opportunities.

Leveraging supply chain links also requires an understanding of both upstream and downstream relationships. The concept of upstream and downstream is relative to the industry in question and this reinforces the need for enterprise precincts to have a clear understanding of the target 'primary' (i.e. established or first mover) industries in order to understand their upstream and downstream trade partners. In Tasmania, the maritime cluster (Prince of Wales Bay) is a good example of co-location and collaboration to create a competitive edge. Supply chain linkages are also strong in the Glenorchy industrial precinct.

Figure 8 Illustration of upstream and downstream supply chain linkages



Source: SGS Economics and Planning, 2024

By comprehending supply chain linkages, the businesses that embody each link and the locational and operational drivers that enable them can be understood. This is the critical link when non-spatial supply chain theory translates into planning and design controls. Lot sizes, land use zoning, infrastructure requirement and land-use buffers can be taken into account through this understanding and in turn shape the form and distribution of the precinct.

All of Tasmania's major industry sectors rely on the Burnie to Hobart Freight Corridor for part of their supply chain. For some commodities and companies, including cement, agriculture, consumer goods, manufacturing and wood products, use of the Corridor is high. For most Tasmanian businesses, road is the preferred transport mode, offering greater flexibility and responsiveness within a generally competitive services delivery market. Rail tends to be suited to the point-to-point movement of high volumes of bulk freight for which travel time is not a key supply chain requirement.[16] Freight demand along the Corridor is expected to grow for all industries to 2035.

Major industrial precincts with direct access, or in proximity, to the Corridor include Glenorchy, the Brighton Hub, TRANSLink precinct and industrial land at and adjacent to Burnie Port.

In short, supply chains at a local level depend on the relationships within economic precincts and to key freight corridors and ports. The same process applies to understanding the spatial implications of both local and global supply chains, even if the end user is a local tradie or a global bio-technology company.

2.3 Changing economic roles of employment precincts and industrial zones

The future of employment precincts

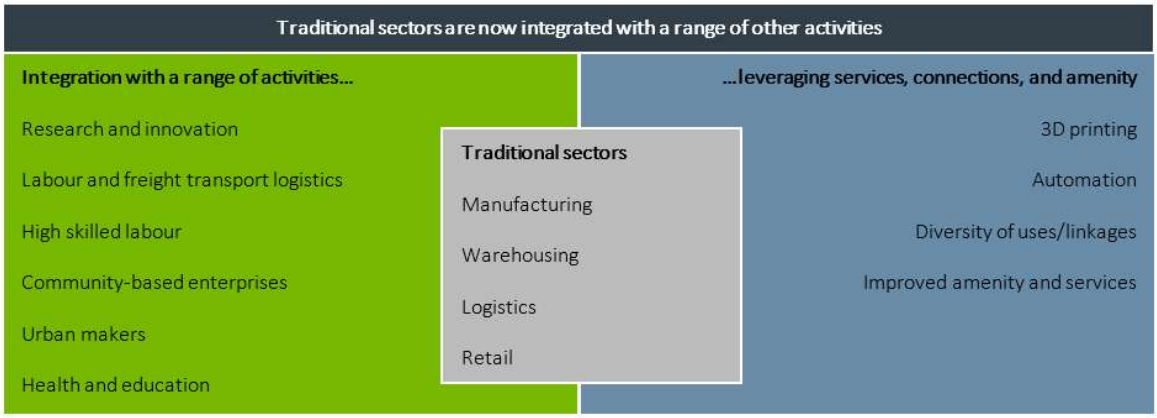
The adaptability of industrial precincts, particularly when compared with the relative inflexibility of CBDs, means that they are vital places of nurturing for emerging sectors. Disruptions to supply chains, automation, climate change, the growth of bottom-up community enterprises, and micro and small

16

https://www.stategrowth.tas.gov.au/__data/assets/pdf_file/0019/164323/Burnie_to_Hobart_Freight_Corridor_Strategy.PDF

businesses all present demands for new and flexible types of floorspace models and clusters of industry.

As the economy transitions, and the nature of work changes, enterprise corridors[17] and industrial precincts will accommodate more diverse job types than previously. This is because many traditional industrial businesses now include higher tech functions, and subsequently employ higher skilled workers. Planning for traditional sectors needs to incorporate a range of other activities that now occur within one firm. Given industrial land shortages, rising costs and geopolitical uncertainty, businesses are looking for efficiencies and flexible and adaptable spaces.



Source: SGS Economics and Planning, 2024.

While some businesses will still require very large lots, this is mostly for warehouse, freight and logistics (linked to e-commerce) where automation is a key characteristic. These uses will mostly be concentrated in outer greenfield industrial precincts.

At the same time, there are more businesses that contain both jobs in the traditional industrial sector (for example, manufacturing), coupled with more knowledge-intensive research, product development and headquarter functions, in established areas. These types of businesses are typically located in highly accessible precincts near established residential and commercial areas. Integration of a range of activities is also being seen in small- to medium-enterprises making use of smaller lots that combine office, warehouse/distribution and research and development functions on the one site or where trade businesses are leveraging this mixed use, small lot model to grow their business. They are lower impact uses with greater soundproofing, shorter operating hours, and less waste and truck movements.

Population-driven industries have been performing strongly

Tasmania has experienced an unprecedented level of population growth over the last five to seven years. Population growth in many LGAs has been tracking above previous population projections by Treasury Tasmania. This would have driven higher than previously projected spending on construction, trades, maintenance and other population-driven industries. There is a recent trend of industrial precincts oriented towards local services industries being developed and occupied at a high rate. These typically light industrial zoned areas containing small to medium sized lots like in Cambridge (Clarence)

[17] Enterprise corridor is where permissible uses include food and drink premises, bulky goods premises, business and office premises, hotel, or motel accommodation as well as light industrial uses.

have been rapidly scooped up by the market. Cheaper rent, larger lot sizes, and flexibility in built form may be attracting these businesses and industries to locate in industrially zoned land. However, anecdotally, increased land prices may be impacting new businesses from moving in and existing businesses from expanding, and making the area less attractive in general. Maintaining and increasing flexibility in built form may be a key consideration moving forward to encourage business growth and attraction.

Urban transformation and land use conflicts

There are key issues in providing new industrial land including land use conflicts, climate change, environmental challenges and industrial specific needs. Within urban areas, there are pressures associated with urban growth and the changing functionality of urban centres.

For instance, Glenorchy and Launceston have traditionally been centres of manufacturing and industrial production. Over time, many manufacturing activities have moved to outer areas or closed down, or urban areas have expanded and residential uses have located closer or adjacent to industrial sites. What remains are scattered industrial, transport and warehousing sites that have been encroached by residential and commercial uses. Particularly, it is not uncommon for potentially conflicting uses to be in close proximity to each other. For example, General Industrial zoned land adjoining residential zoned land, or residential uses within industrial zoned precincts. Some existing industrial sites are now quite constrained in terms of the future development and expansion for industrial uses.

Industrial land provides an important employment base. Proximity to established urban population centres can be a significant advantage in terms of attracting employees, particularly more highly skilled workers. In Glenorchy, in particular, there are clear supply chain advantages for many industrial businesses to locate and remain in the municipality.

Alternatively, some industrial sites may generate land value uplift when being allowed to transform in mixed use, commercial or medium density development close to transport, jobs and services. Urban development objectives, for example, to provide more housing close to key public transport corridors and activity centres, may not be able to be achieved without some conversion of industrial land.

It is important to carefully plan for the future of urban industrial land in Tasmania. This will require strategies specific to individual centres, considering

- The potential to accommodate industrial uses in other, more suitable precincts.
- Opportunities to support new types of industrial activities, generating lower impacts or which require a smaller footprint.
- Opportunities for transformative urban development, for example, along the Northern Suburbs Transit Corridor.

To drive this change, key strategic drivers like relevant infrastructure provision and coordination may be required to ensure further economic growth is enabled and not impeded.

2.4 Industrial industry trends

Industry 4.0: The Fourth 'Industrial Revolution'

Australian businesses (inclusive of manufacturing businesses in Tasmania) are on a transition towards 'Industry 4.0'; The fourth 'industrial revolution' characterised by the assertion of automation through advancing digital technology, notably from the rise of the Internet of Things and Artificial Intelligence. For Tasmania to retain and grow its reputation as global leaders in major sectors like food manufacturing, it is important for the State to transition and evolve to a smarter business ethos with more efficient systems.

The availability and access to Industry 4.0 technologies has enabled greater capabilities for manufacturing firms to achieve faster, more flexible and greater efficiency of workflows and processes. Firms in the manufacturing industry have been looking to find labour productivity gains by automating some production processes and increasing the use of data. This is transforming industrial operations and traditional industrial workforce skills, which is seeing the manufacturing industry attracting highly skilled workers.

It is recognised in various Tasmania strategies that industry 4.0 will or is already impacting manufacturing operations.[18] For example, the Tasmanian Minerals, Manufacturing and Energy Council (TMEC) provides Tasmanian resources to ensure businesses and individuals have access to relevant industry 4.0 training so transition is successful.[19]

Advanced manufacturing

Advanced manufacturing increases the capability of manufacturing by incorporating innovative technologies to improve efficiencies and adds value to multiple supply chains in other sectors. It is not specifically a sector, but a description of the operational processes that a business uses. It is therefore not about what is produced, but how it is being produced.

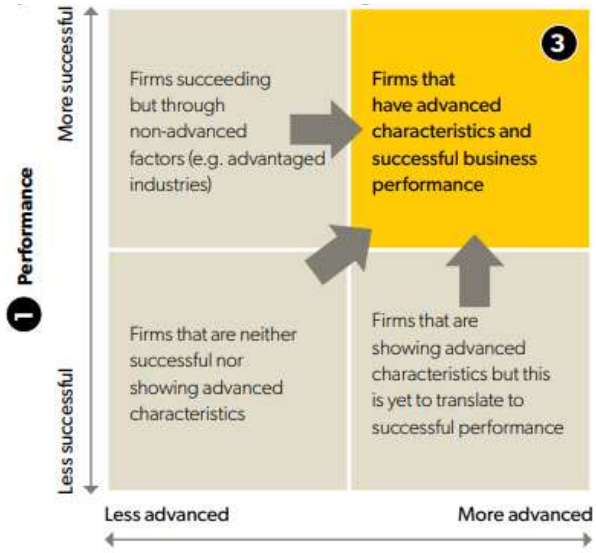
Advanced Manufacturing Growth Centre (AMGC) consider manufacturing to be 'advanced' when a business demonstrates three key aspects to their operational processes:

1. Use of advanced knowledge –e.g., using specialised skills and R&D investment to develop products with distinctive values
2. Use of advanced processes –e.g., smarter use of technology and efficient use of services
3. Application of advanced business models –e.g., increasing product value by offering more customised services and personalised products

[18] https://www.stategrowth.tas.gov.au/__data/assets/pdf_file/0011/136568/Tasmanian_Advanced_Manufacturing_Action_Plan_for_web.pdf

[19] https://tmec.com.au/learn/industry-4-0/

Figure 9: Spectrum of Australian manufacturing firms



Sources: AMGC (2018), 'Advanced Manufacturing – A New Definition for a New Era', p. 13; AMGC (2018), 'Advanced Manufacturing – A New Definition for a New Era', https://www.amgc.org.au/wp-content/uploads/2018/11/Advanced-Manufacturing-a-new-definition-for-a-new-era.pdf

Digital innovations such as 3D printing and artificial intelligence allow goods to be produced anywhere at any time, overlaying the new manufacturing value chain and accelerating the reinvention of the assembly line. What is considered as 'advanced' today will look different in the future as technology and production techniques continue to evolve -reinforcing the notion of 'sectoral maturity'.

Tasmania's advanced manufacturing industries have particular capabilities in the fields of marine and mining, mineral processing and heavy industry. This includes metal manufacturing, casting, ship-building and related maritime products, and specialised machinery manufacturing and engineering. There is potential for investment in transitioning to low-volume, high value-added advanced manufacturing activities, particularly in the defence, oil and gas industries.[20]

Advanced manufacturing in Tasmania is supported through the Tasmanian Advanced Manufacturing Action Plan 2028, funding and program opportunities, and the Advanced Manufacturing Industry Skills Compact which aims to support the advanced manufacturing workforce.

Climate change and the circular economy

There is increasing recognition of the economic risks associated with climate change, and many businesses are transitioning to the low carbon economy. Many prominent economists are seeing the transition to a low carbon economy as an opportunity Australia should be capitalising on – an opportunity to grow employment and incomes. In the long run, waste reduction, material efficiency

[20] https://www.cg.tas.gov.au/investment_opportunities/sector_opportunities/Advanced_manufacturing

and the circular economy (idea of using waste as an input in production) offers large prospects for businesses.

Tasmania is Australia's leader in renewable energy, being 100% self-sufficient in renewable electricity and the first Australian jurisdiction to achieve net zero emissions. This commitment is enhanced by legislating a new Tasmanian Renewable Energy Target to double renewable energy production and reach 200% of current electricity needs by 2040.[21]

Furthermore, the latest Clean Energy Australia report by the Clean Energy Council of Australia, highlights that Tasmania is significantly more advanced in terms of renewable energy penetration (93%) than other states, with the next closest being South Australia (73%) followed by Victoria (44%).[22]

Tasmania is well placed to benefit from the shift to renewables, specifically old industrial areas with existing infrastructure and skills including Burnie, Circular Head, Waratah-Wynyard and West Coast LGAs. Large corporations are looking towards renewable energy use and to act on ESG priorities, and customers are increasingly considering corporate responsibility as part of their purchasing decisions. For industrial land such as manufacturing, the state's manufacturers will be able to use 100% renewable energy in their manufacturing operations, which is a significant point of difference in some markets, and will be attractive to businesses that seek to benefit from the international recognition of being part of an environmentally sustainable economy.

Supply chain co-location also presents the emerging opportunity to create circular economies at a precinct level. Industrial precincts could support this model through local council's waste collection, with waste diverted from landfill to future waste recovery facilities. In turn, these can provide the industrial elements (in the form of 'new' plastics, metals, and organic compounds) to businesses within the industrial precinct. As such a system matures it can become an attractor in itself, creating new supply chains from recovered materials and attracting manufacturing and R&D facilities that benefit from localised supply chains.

An example of industrial precincts are renewable energy industrial precincts (REIPs), which are clean industry hubs that minimise the cost of renewable energy and shared manufacturing infrastructure. Not only do businesses in the clusters have access to low-cost energy that is renewable, but they can attract new businesses and a skilled workforce to support innovation and collaboration, and industries can benefit from economies of scale and efficiencies.

Tasmania already has interest in the circular economy. The Tasmanian Waste and Resource Recovery Strategy 2023-2026, includes a key objective to prioritise circularity, by supporting businesses through grants provided.[23]

[21] https://www.stategrowth.tas.gov.au/recfit/renewables/tasmanian_renewable_energy_target
[22] https://assets.cleanenergycouncil.org.au/documents/resources/reports/clean-energy-australia/Clean-Energy-Australia-2024.pdf
[23] https://wrr.tas.gov.au/Documents/Tasmanian%20Waste%20and%20Resource%20Recovery%20Strategy%202023-2026.pdf

Figure 10: Circular economy concept, as compared to the linear economy

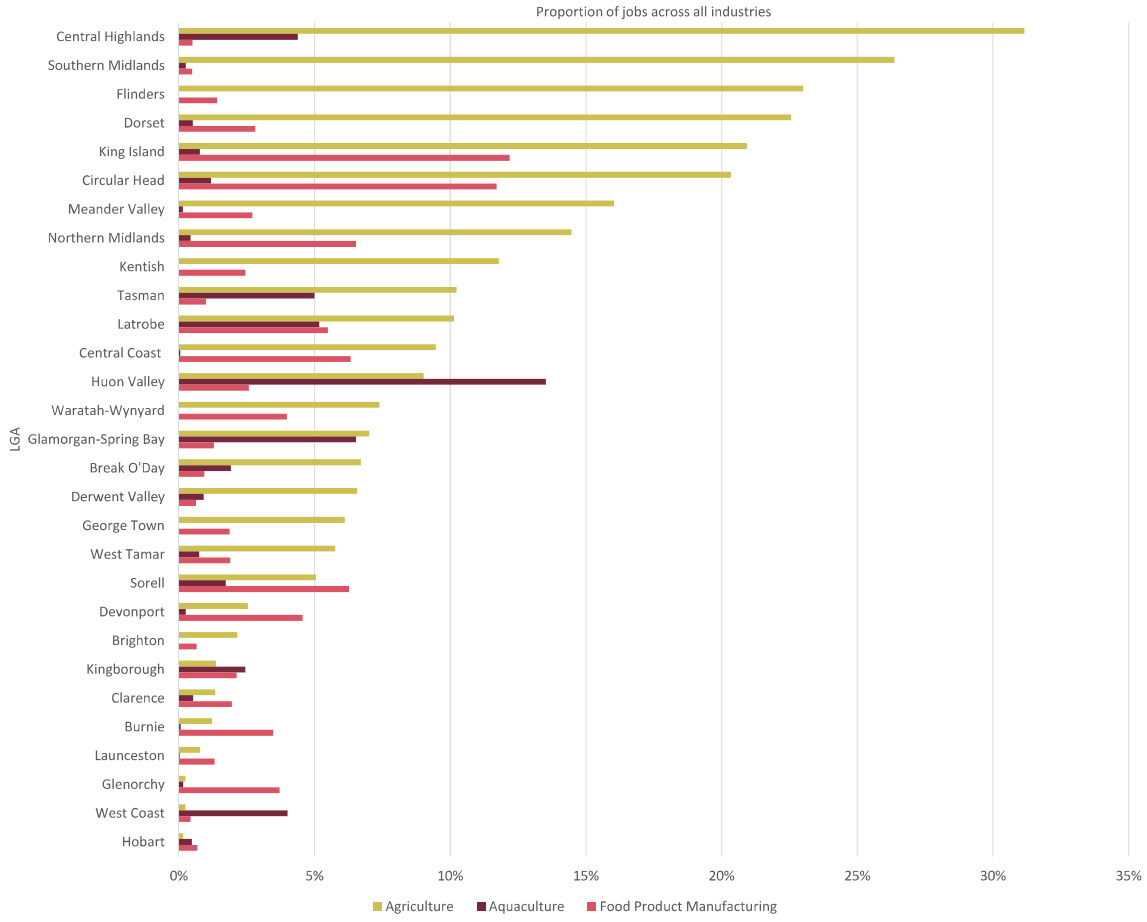
Source: LG NSW, 2017

Agricultural transformation

Another major change over the last decade is the transformation of the agricultural sector. The roll-out of the irrigation schemes in the Midlands and elsewhere, has drastically increased the productive capacity of large areas of land. As a result, there has been a move towards more intense agricultural uses, from grazing to cropping, from low to high value produce including horticulture. At the same time the changing climatic conditions are creating opportunities for some produce, especially grapes. Vineyards are now established as far down south as the Huon Valley and the Tasman peninsula.

As evident in Figure 11, LGAs which have high employment in the Agriculture industry include Central Highlands (31% of workers in the LGA), and Southern Midlands (26% of workers in the LGA). Dairy continues to be an important sub-sector in the north and north-west, while aquaculture (salmon) is now more widely established in the south.

Figure 11: Industry of employment 2021, in Agriculture, Aquaculture, and Food product manufacturing



Source: SGS Economics & Planning, 2024. Based on 2021 ABS census data.

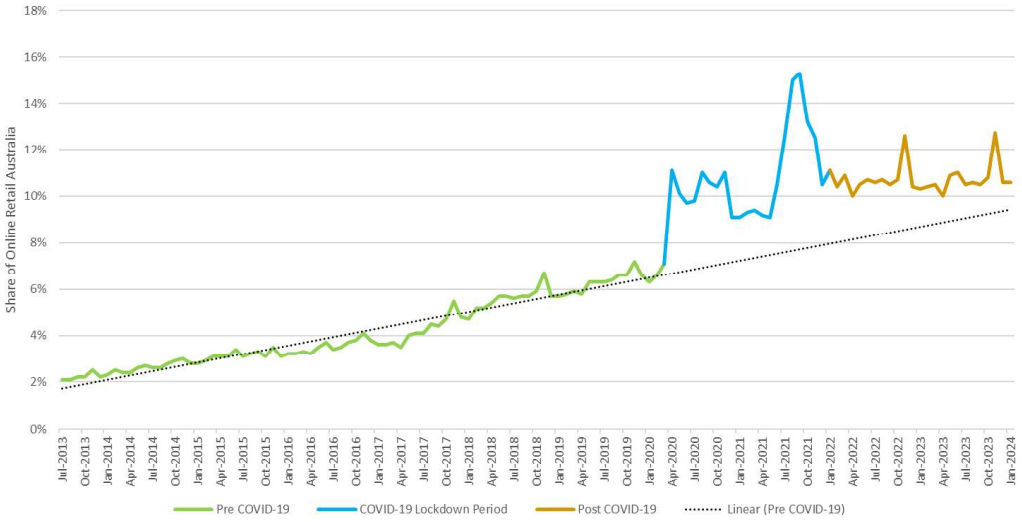
From an industrial land use perspective, it is important to be cognisant of the flow-on effects. While many rural-processing activities are well accommodated in the rural and agricultural zones, some more industrialised activities of a larger scale may be better placed in dedicated, centrally located areas, possibly in combination with logistical activities. Driven by climate change, the overall productivity of agricultural land and its export potential will likely continue to increase.

The changing nature of retail and consumer preferences

The growth of online retailing has had implications for several industries. For freight and logistics, this has increased customer expectations for faster deliveries of goods. Tasmania's year on year growth in online purchases was a 4.3% increase, compared to VIC, NSW, and ACT which experienced declines.[24]

[24] https://auspost-report.s3.ap-southeast-2.amazonaws.com/eCommerce+Industry+Report+2024+-+Trends+in+eCommerce+section.pdf

Figure 12: Share of online retail, Australia



Source: ABS, 2024. Created by SGS Economics & Planning, 2024.

With the overall increase in popularity of online retailing and e-commerce (notably following COVID-19), 'last mile' logistics has become a priority. This places an even higher value on logistics, industrial services and dispatch lands in areas close to populations.

'Last mile' delivery is the final part of a product journey from warehouse to the customer doorstep. It is often the most expensive and time-consuming part of the shipping process due to factors such as traffic congestion. All ports and industrial areas rely on a network of local government roads for last mile access. In Tasmania, some of these roads carry high freight volumes, including Bathurst-Wellington Derwent Park Road and Risdon Road.[25] The transition towards mass e-commerce engagement has also increased the need for 'reverse logistics' whereby customers return unwanted goods through localised drop-off points.

Fast and efficient transportation of goods is supported by a strong distribution network of logistics industries –including storage facilities, warehouses and transportation services. These have varying floorspace and land requirements, but are typically in strategic industrial estates on large plots of land with large floorplates (over 10,000 sqm), but could also include smaller 'last mile' logistics as noted above.

25

https://www.stategrowth.tas.gov.au/__data/assets/pdf_file/0019/164323/Burnie_to_Hobart_Freight_Corridor_Strategy.PDF

2.5 Context summary

Based on this section, several key conclusions can be drawn to consider for industrial land use planning in Tasmania.

- **There is strategic support for the development and transformation of industries in Tasmania:** from freight to manufacturing strategies, there is a focus on the role that industries have in the state. However, an updated evidence base is required to prioritise growth in the right locations.
- **There is a continued significance of manufacturing**: manufacturing is here to stay in Tasmania, however the type of manufacturing is likely to change over time with opportunities for further development, particularly in advanced manufacturing and smaller-scale enterprises. However, recognising that manufacturing is prone to shifts in the global economy and has experienced high turnover, some traditional manufacturers might not be in Tasmania in the long term.
- **There are changing requirements for industrial uses:** this includes a greater requirement for on-site storage, office floorspace, and flexible floorspace. In more established precincts, this may mean that areas will become more "employment dense", i.e., there will be more workers per square metre of floorspace.
- **There is a need to strategically plan for industrial precincts and activities:** this includes recognising the needs of existing businesses and what is required to attract new uses, balancing urban development with industrial land supply and proximity to employment and supply chains, and ensuring industrial land supply aligns with broader sectoral changes in agriculture, the circular and digital economies, and advanced manufacturing.

3. Precinct profiles

Precincts

Regionally Significant Industrial Precincts (RSIP), are strategically located precincts (by road, rail or port) that support a concentration of industrial activities, including specialist industries such as export-oriented industries, transport and warehousing, incorporate a significant cluster of occupied and/or vacant industrial-zoned land, and generate a significant level of freight activity, with well-developed supply chains. Across the three regions, 13 RSIPs have been identified, with five in the Cradle Coast region and four in the Southern and Northern regions respectively. These have been mapped in Figure 13 and Table 5.

While this study considers the demand and supply of all industrial zoned land across the state, it has a specific focus on opportunities that are of state or regional significance. It is recognised that not all RSIPs include only state-significant activities, and some locally significant precincts include regionally-significant businesses and activities. The scope of this study is limited to industrial and light-industrial zoned land, meaning that the resources sector, or particular purpose zones, may not be fully considered to the extent that industrial zoned land is. However, it is recognised that the roles and functions of the precincts are interlinked with non-industrial zones, and this has been considered more broadly throughout engagement and the observations of each precinct and council area. This includes particularly significant ports (like port Latta) which are privately owned, or mines, or existing industrial sites that have the potential to serve a renewed regionally-significant purpose. These functions, while important, will require ongoing discussion and activities outside of the scope of this study.

Important to note, for this study, 'local service industries' are those where their customer demand is driven by the local resident or business population, where things like proximity to that base is an important consideration. They tend to grow in proportion to the overall population of a given area. Regionally-significant businesses are less (but not entirely so) reliant on local population, but rather to ports, strategic road and rail, with a primarily export-oriented customer base. Individual businesses may, depending on their needs, choose to operate within or without of the RSIPs as they are defined for this study.

Figure 13: RSIP overview

Source: SGS Economics & Planning (2025)

Table 5: Precinct summary, Tasmain RSIPs

Name	Council Area	Resources/ specialised workforce?	Strategic transport linkages (road and rail)?	Significant theoretical availability of vacant industrial land?[26]
Brighton Hub	Brighton	Transport, logistics and warehousing	Midland Highway, rail network	Yes
Cambridge	City of Clarence	Construction industries, logistics/ warehousing, Antarctic industries	Tasman Highway	Yes
Prince of Wales Bay	City of Glenorchy	Maritime	Brooker Highway	No
Glenorchy	City of Glenorchy	Transport, manufacturing, logistics and warehousing, local service industries	Brooker Highway	No
TRANSLink	Northern Midlands	General industrial uses (workshops, light industry and local service industries), transport/ warehousing	Launceston Airport, Midland Highway	Yes
Bell Bay	George Town	Export oriented industries, heavy industries	East Tamar Highway	Yes
Valley Central Precinct, Westbury	Meander Valley	Gas and LNG, processing and packaging	Bass Highway, Biralee Road	Yes
Launceston	City of Launceston	Local services industries, bulky goods retailing, smaller-scale export oriented industries	Midland Highway	Yes

[26] This suggests land is development-ready and able to be purchased if there is project ready to go

Name	Council Area	Resources/ specialised workforce?	Strategic transport linkages (road and rail)?	Significant theoretical availability of vacant industrial land?[26]
Burnie	City of Burnie	Export oriented industries, transport/ warehousing, local service industries	Bass Highway	Yes
Devonport Airport	City of Devonport	Export oriented industries, transport/ warehousing	Bass Highway	No
Waratah-Wynyard	Waratah-Wynyard	Export oriented industries, transport/ warehousing, local service industries	Bass Highway	Yes
Smithton	Circular Head	Agricultural processing, rural industries	Bass Highway	Yes
Zeehan	West Coast	Aquaculture, resources processing	None	Yes

Source: SGS Economics & Planning (2025)

3.1 Precinct-specific issues through case studies

As part of the background evidence gathering for this study, Era Advisory was appointed to undertake stakeholder engagement with industrial businesses operating in Tasmania. The Case Study Report explores a series of real-world examples from select locations across Tasmania (Prince of Wales Bay, Glenorchy, and Bell Bay) to better understand the conditions, challenges and opportunities facing industrial operations and development. These insights were drawn from engagement with a mix of landowners, developers, service providers and tenants, offering a grounded perspective on how industrial land actually gets used, or doesn't.

Stakeholder engagement was undertaken via direct one-on-one interviews with representatives from key organisations in each of the three precincts. Broader engagement also occurred in Glenorchy and Prince of Wales Bay via a dedicated project webpage hosted on the 'Engage with State Growth' platform, which included an online survey. This included 117 visitors to the Engage with State Growth project webpage, 12 on-on-one interviews, and 48 responses to the online survey.

While specific survey results and notes cannot be released publicly, the findings of this work have helped to inform this study.

The key findings from the Case Study Report are summarised in Figure 14 overleaf, and emphasise the need for better structure planning, coordinated servicing, and increased transparency about infrastructure delivery timeframes to help build investor confidence.

Figure 14: Case study findings summary

Strategic role of industrial precincts	Industrial precincts play a critical role in Tasmania's economy, supporting both local and export-oriented industries. They are essential to the state's supply chains, employment base, and long-term economic resilience.
Waterfront and marine industry land	Water-accessible industrial land is finite and essential for Tasmania's marine industries. Its protection is critical to the sustainability and growth of this sector.
Precinct integrity and land use compatibility	The effectiveness of industrial precincts is reduced when incompatible land uses (e.g. retail, residential, or public-facing businesses) encroach. Fragmentation undermines industrial operations, particularly those with higher intensity operations.
Business growth capacity	Stakeholders identified the need for expansion capacity (i.e. larger footprints, extended operating hours, improved parking and infrastructure) as critical to long-term business sustainability.
Precinct collaboration and co-location benefits	Industrial co-location enables stronger supply chains, improved logistics, and collaborative relationships, particularly between large anchor firms and smaller, specialised service providers.
Public and private sector collaboration	Effective collaboration between government and industry stakeholders is essential to precinct development, infrastructure planning, and the attraction of new investment.
Labour force availability and skills	Recruitment and retention challenges are common across precincts, with some skilled roles being difficult to fill. Stakeholders invest in in-house training and support staff in obtaining TAFE and vocational qualifications. Continued development of these pathways is essential to meet skill demands across industries.
Workforce location preferences	Workers, particularly in professional roles, show a preference for precincts closer to the Hobart CBD. This forms a consideration in business decision making regarding potential relocation and expansion.
Freight and logistics efficiency	Efficient freight infrastructure, including road, rail, and port capacity, is vital to the functioning of precincts, especially those with significant import/export activity. Planned growth will place increased pressure on these systems.
Service infrastructure	Infrastructure limitations are a barrier to investment and growth. Such constraints can limit precinct viability and discourage new proponents from establishing operations.
Changing character of precincts	Some precincts are experiencing a shift from traditional industry to more service-based and public-facing uses. While this may improve local supply chain functionality, it can also increase congestion and limit industrial capacity.
Strategic planning and land tenure	There is a strong need for co-ordinated, transparent and strategic planning across industrial precincts.

Source: Era Advisory (2025)

4. Supply and demand-side analysis

4.1 Overview

Tasmania's industrial land landscape is shaped by both strong regional dynamics and shared state-level challenges. This section presents an integrated assessment of the supply and demand for industrial land across Tasmania, focusing on key spatial patterns, land availability, and future requirements. It draws on a lot-by-lot audit of vacant zoned land, employment and economic growth forecasts, and regionally significant industrial precinct profiles. Demand and supply has been categorised by size (by sqm of land area) and grouped into the following categories:

- Extra small (<500 sqm)
- Small (500-2,000 sqm)
- Medium (2,000-5,000 sqm)
- Large (>5,000 sqm)

4.2 Employment

Total employment

There are around 235,000 jobs in the Tasmanian economy. 17% of those jobs are in the Health Care and Social Assistance sector. Tasmania's three regions: Cradle Coast, Northern, and Southern, havevaried economic structures and functional roles, which results in different employment compositions. The Southern Region has the highest overall employment numbers, particularly in service-oriented industries such as Health Care and Social Assistance, Education and Training, and Public Administration and Safety. Health Care and Social Assistance is the largest single employer across the state, with the Southern Region alone accounting for more than 22,000 jobs in this sector reflecting Hobart's role as the administrative and health services hub of Tasmania.

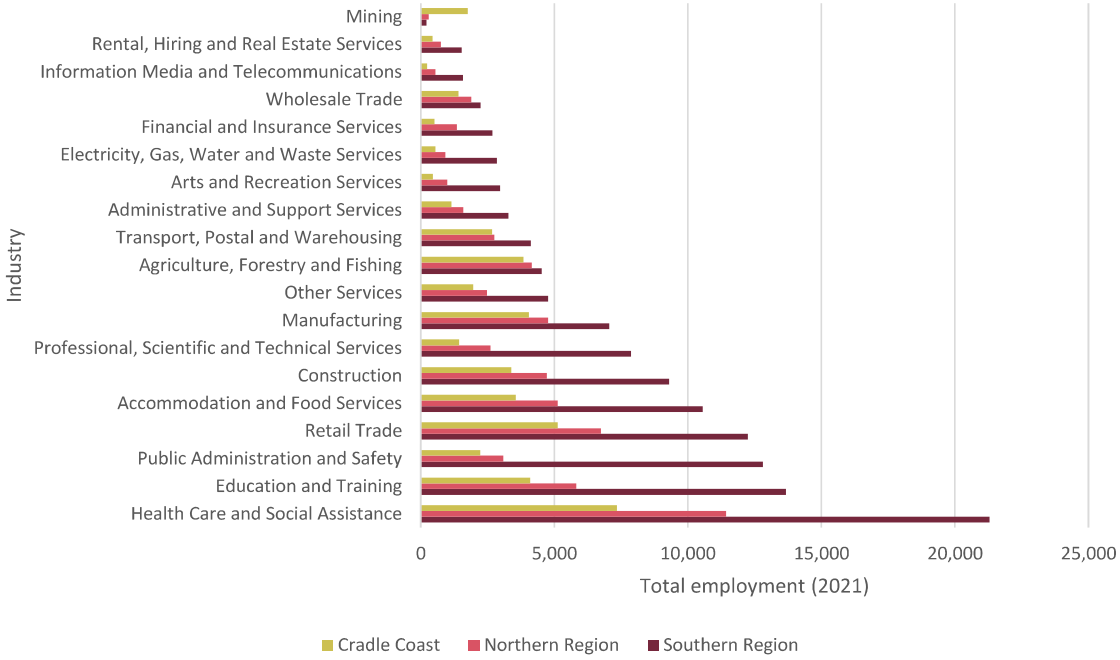
Similarly, Education and Training, and Public Administration and Safety are significantly more concentrated in the Southern Region, aligning with the location of major institutions such as the University of Tasmania, training providers, and government departments. While Retail Trade and Accommodation and Food Services show a more even distribution across the three regions, they too are skewed toward the Southern Region, underlining the region's prominence as a tourism and consumer services destination.

The Northern Region stands out for its strength in Manufacturing, with employment in this sector significantly higher than in the South or Cradle Coast. This aligns with the manufacturing base around Launceston and the broader Tamar Valley. The Northern Region also records higher employment in Construction and Professional, Scientific and Technical Services than the Cradle Coast.

The Cradle Coast Region, by contrast, reflects a more rural-industrial employment profile. It leads the state in Agriculture, Forestry and Fishing employment and shows strong relative employment in Transport, Postal and Warehousing. This is likely driven by port and logistics operations in Burnie and

Devonport. The region also accounts for the bulk of Tasmania's Mining employment, in line with resource activity in the West Coast. However, the Cradle Coast lags in service-sector employment, particularly in health, education, and professional services.

Figure 15: Change in employment by industry, 2011-2021, Tasmanian regions



Source: SGS Economics & Planning (2025)

Industrial employment

Between 2011 and 2021, Tasmania experienced major shifts in industrial employment, reflecting broader transitions in the economy toward construction, transport, and logistics-based activity and away from traditional manufacturing. Across the Cradle Coast, Northern, and Southern regions, employment in sectors tied to industrial land (including construction, wholesale trade, and transport) grew by 8,682 jobs, even as manufacturing declined by more than 1,600 jobs. Construction (+8,335 jobs) and Transport, Postal and Warehousing (+1,829 jobs) saw the largest statewide gains. Manufacturing (-1,565 jobs) and Wholesale Trade (-749 jobs) declined sharply, highlighting structural changes in industrial operations.

The Cradle Coast region experienced modest net growth in industrial employment, gaining +413 jobs overall, despite a significant loss in manufacturing (-1,003 jobs). Key trends included strong growth in construction (+827) and transport (+480) suggests a pivot toward logistics and infrastructure development. Wholesale trade (-252) and manufacturing (-1,003) both contracted, indicating a shift away from traditional industries. Local government areas with positive growth included Waratah-Wynyard (+156) and Latrobe (+345), driven by construction and transport services.

Southern Tasmania recorded +2,464 net jobs in industrial sectors, underpinned by large gains in construction (+2,590) and transport and warehousing (+700). Clarence (+1,768) and Kingborough (+662) were standout performers, reflecting the rapid population and housing growth driving

associated industrial demand. Hobart (+257) and Glenorchy (+938) also saw strong job growth, albeit with continued manufacturing decline. Some LGAs such as Derwent Valley, Huon Valley, and Sorell also experienced moderate growth, with a focus on construction-related employment.

The Northern Region saw the largest industrial job growth statewide, adding +5,805 jobs, nearly 70% of Tasmania's total industrial employment growth over the decade. The standout sector was construction, which added +4,918 jobs, particularly in Launceston (+974) and Northern Midlands (+258). Transport and logistics (+649) and electricity, gas and water services (+104) also showed growth, indicating infrastructure investment. Despite the overall growth, Launceston experienced a steep decline in manufacturing (-708), underscoring the transition in industrial land use and demand.

Manufacturing decline across almost all LGAs confirms a long-term structural shift away from traditional heavy industry, creating opportunities to reposition ageing industrial estates (especially in Burnie, Launceston, and Devonport). Rapid employment growth in construction and transport/logistics could indicate increased demand for large-format, well-connected industrial land, particularly near growth corridors, ports, and airports.

Some LGAs (e.g. Brighton, Northern Midlands) are experiencing high job growth alongside available land, highlighting opportunities for precinct planning and infrastructure investment to support expansion. LGAs such as George Town, West Tamar, and Circular Head show minimal or negative industrial employment change.

Table 6: Employment change – industrial sectors, 2011-2021, Tasmania

LGA (POW)	Mining	Manufacturing	Electricity, Gas, Water and Waste Services	Construction	Wholesale Trade	Transport, Postal and Warehousing	Total
Floorspace requirement	Small to medium	Small to medium	Small to medium	Small to medium	Medium to large	Large to extra large	
Break O'Day	-26	-5	-2	53	-12	-25	-17
Brighton	10	39	0	140	-3	323	509
Burnie	120	-554	-2	149	151	225	89
Central Coast (Tas.)	10	-60	-1	331	-106	31	205
Central Highlands (Tas.)	3	17	10	11	15	-5	51
Circular Head	16	-104	-2	-48	-12	-3	-153
Clarence	12	197	253	1,155	-56	207	1,768
Derwent Valley	6	-23	23	98	-6	30	128
Devonport	-1	-335	99	320	-214	5	-126
Dorset	5	34	12	90	-16	28	153
Flinders (Tas.)	0	-4	-3	22	-2	7	20
George Town	43	-58	-14	41	-11	-42	-41
Glamorgan-Spring Bay	-5	10	-3	49	6	0	57
Glenorchy	15	-48	169	683	-73	192	938
Hobart	8	-46	297	437	-393	-46	257
Huon Valley	-1	137	8	151	-18	9	286
Kentish	13	26	-1	59	-10	15	102
King Island	2	-32	7	4	0	-1	-20

LGA (POW)	Mining	Manufacturing	Electricity, Gas, Water and Waste Services	Construction	Wholesale Trade	Transport, Postal and Warehousing	Total
Floorspace requirement	Small to medium	Small to medium	Small to medium	Small to medium	Medium to large	Large to extra large	
Kingborough	5	123	-2	455	12	69	662
Latrobe (Tas.)	23	96	3	45	11	167	345
Launceston	32	-708	163	974	-269	411	603
Meander Valley	21	-78	-27	208	-23	34	135
Northern Midlands	24	44	15	258	229	173	743
Sorell	2	61	8	177	19	12	279
Southern Midlands	-3	17	0	78	-4	-2	86
Tasman	1	8	3	5	-6	6	17
Waratah-Wynyard	178	-6	9	4	-48	19	156
West Coast	-105	-66	2	-33	-24	21	-205
West Tamar	-96	-18	17	58	-60	8	-91
Cradle Coast	**254**	**-1,003**	**107**	**827**	**-252**	**480**	**413**
Southern Region	**-137**	**-636**	**463**	**2,590**	**-516**	**700**	**2,464**
Northern Region	**41**	**74**	**104**	**4,918**	**19**	**649**	**5,805**
Tasmania	**158**	**-1,565**	**674**	**8,335**	**-749**	**1,829**	**8,682**

Source: SGS Economics & Planning (2025)

4.3 Take up

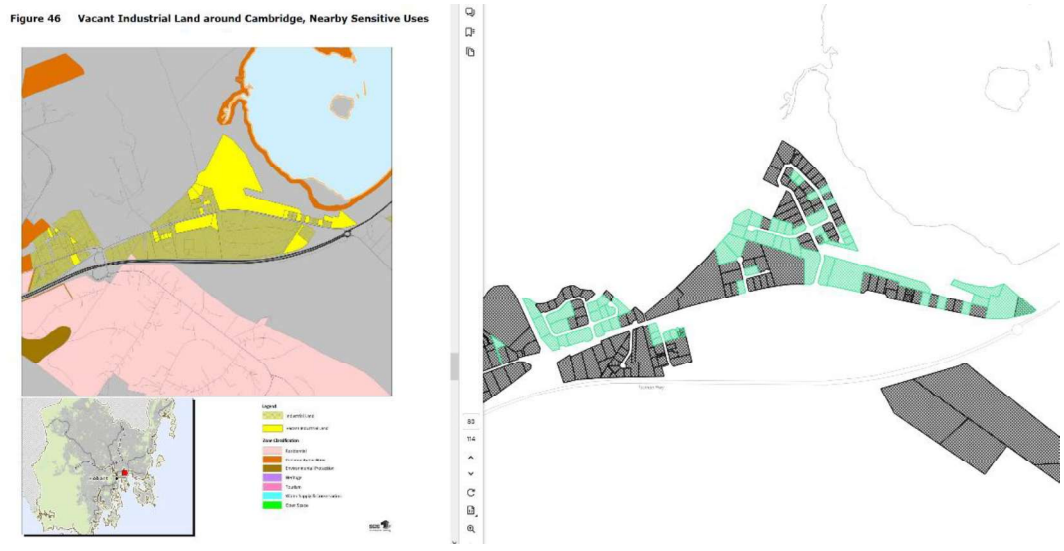
Method

As noted, we now have the benefit of a region-wide assessment of vacant, industrial-zoned land from 2011 that can be used as a comparison tool. To understand what land was "taken up", SGS used the following data sources for checking:

- The 2011 assessment (to ensure that no land is double counted)
- Tasmania's Valuer General spatial dataset
- Tasmania's theLIST dataset
- Geoscape building footprints
- Google Maps Streetview comparison from 2007-2022 from various angles
- Where needed, physical visits to sites to audit (Cambridge), strategic planning documents, or advice from State Growth / or councils

The demand analysis does not include big box retail as it is not industrial use. We do recognise that sometimes; these uses inadvertently occupy industrial land. There will still be demand for big-box stores, but this should typically be accommodated outside of industrial precincts.

Figure 16: comparison of 2011 study (left) to current take-up in GIS workspace (right)



Source: SGS Economics & Planning (2025)

Sites that have been developed since 2011 were considered to be "taken-up".

Results

290 parcels of land have been taken up across Tasmania since the last assessment, amounting to over 2.07 million square metres of land (or approximately 207 hectares). These parcels were taken up unevenly across the Cradle Coast, Northern, and Southern regions. These are shown in the tables below.

There is a range of suitable vacant lots by region and lot size category showing in Table 7, ranging from extra small (XS) to large (L). The Northern region had the highest number of lots taken up overall (121), followed by Southern Tasmania (106) and the Cradle Coast (63). While extra small parcels were rarely taken up, medium sized lots were taken up across all three regions.

- Northern Tasmania has the highest take up with 54 medium lots and 41 large lots taken up.
- Southern Tasmania's take-up has the highest proportion of small lots (59), particularly in Clarence, but had moderate take-up of medium and large lots across Kingborough and Brighton.
- The Cradle Coast region, despite having fewer total lots taken up, included several large sites, including at Devonport.

Table 7: Take up, number of lots, Tasmania

Area	XS	S	M	L	Total
Cradle Coast	**1**	**18**	**31**	**13**	**63**
Burnie			4	2	6
Central Coast (Tas.)		4	6	2	12
Circular Head				1	1
Devonport		5	13	4	22
Latrobe (Tas.)		7	3	1	11
Waratah-Wynyard	1	2	4	2	9
West Coast			1	1	2
Northern Tasmania		**26**	**54**	**41**	**121**
Break O'Day		5	5	1	11
Dorset				1	1
George Town		1	2	2	5
Launceston		11	26	18	55
Meander Valley		3	2	8	13
Northern Midlands		2	12	11	25
West Tamar		4	7		11
Southern Tasmania		**14**	**59**	**33**	**106**
Brighton		1	10	6	17
Clarence		8	39	22	69
Kingborough		5	10	5	20
Tasmania	**1**	**58**	**144**	**87**	**290**

Source: SGS Economics & Planning (2025)

The corresponding land area of these lots taken up in square metres are shown in Table 8. The total land area taken up across Tasmania is approximately 2.2 million square metres. Large lots accounted for over 1.6 million square metres of this total. While small and medium lots are more numerous, large parcels contribute the vast majority of total space.

- The Cradle Coast region had a taken up land area of 543,000 sqm, particularly in Circular Head and Devonport.
- Northern Tasmania had around 970,000 sqm, with the largest take-up in Launceston and George Town
- Southern Tasmania had 676,000 sqm of taken up land, with the most significant take up in Clarence and Kingborough.

Table 8: Take up, land area (sqm), Tasmania

Area	XS	S	M	L	Total
Cradle Coast	**100**	**28,937**	**98,959**	**414,925**	**542,921**
Burnie			12,422	21,113	33,535
Central Coast (Tas.)		6,680	21,799	38,716	67,195
Circular Head				201,368	201,368
Devonport		8,310	36,279	69,698	114,288
Latrobe (Tas.)		11,952	8,848	8,344	29,144
Waratah-Wynyard	100	1,995	15,975	32,527	50,596
West Coast			3,635	43,160	46,795
Northern Tasmania		**37,674**	**186,781**	**746,129**	**970,583**
Break O'Day		10,849	15,384	31,403	57,636
Dorset				8,041	8,041
George Town		1,918	6,865	146,102	154,885
Launceston		15,760	89,785	335,651	441,196
Meander Valley		3,123	5,205	110,082	118,409
Northern Midlands		2,153	47,507	114,851	164,511
West Tamar		3,871	22,035		25,906
Southern Tasmania		**22,685**	**188,303**	**464,588**	**675,575**
Brighton		1,659	38,167	76,439	116,264
Clarence		12,945	118,943	295,150	427,038
Kingborough		8,081	31,194	92,999	132,273
Tasmania	**100**	**89,296**	**474,042**	**1,625,642**	**2,189,080**

Source: SGS Economics & Planning (2025)

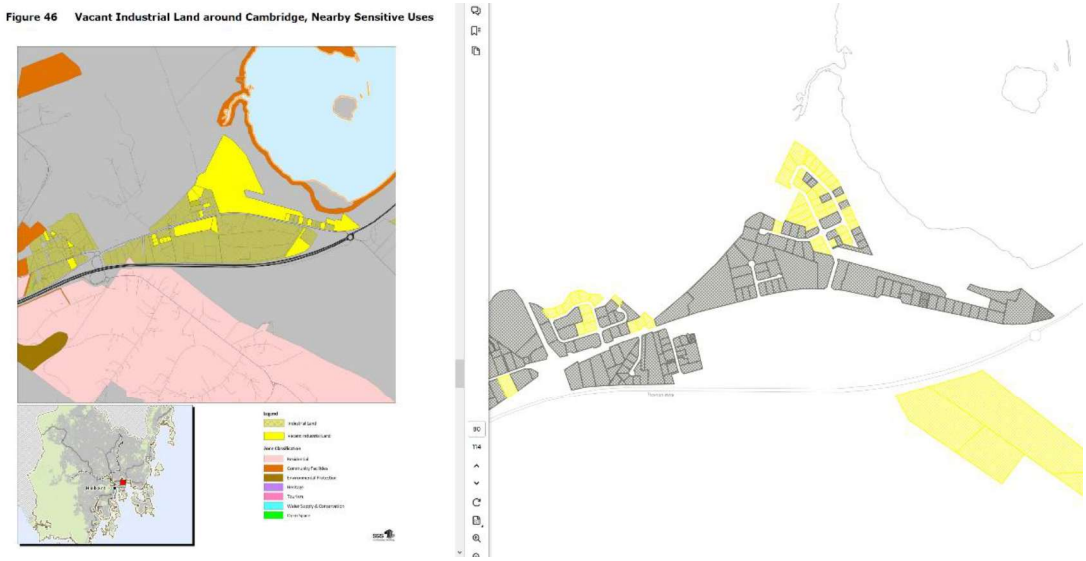
4.4 Total capacity (suitable vacant land)

Method

This document shows the results of an update to the previous land studies completed from 2011-2013. At the time, they included a comprehensive assessment of vacant industrial-zoned land by LGA. Since then, there has been additional development and new industrial land added and some areas rezoned. A comprehensive assessment allowed us to use the 2011 study as a starting point. It was used as a benchmark as we audited new cadastral layers from the LIST and other sources as part of a desktop review. The major components of the method are summarised in the following steps:

- Step 1: Determine "take-up" since 2011
- Step 2: Assess current vacant lots in 2024
- Step 3: Project forward demand in the next 20 years
- Step 4: Compare demand to capacity
- Step 5: Consider opportunities for LGAs and Regionally Significant Industrial Precincts (RSIPs)

Figure 17: Comparison of 2011 study (left) to vacant lots in GIS workspace (right)



Source: SGS Economics & Planning (2025)

Results

A total of 424 suitable vacant industrial lots remain across Tasmania, spanning just over 15.3 million square metres (or 1,532 hectares) of developable land. This land has been filtered based on slope and proximity to sensitive land uses, meaning the figures reflect only land considered both available and suitable for industrial development.

Since the original assessments, some land has been developed, subdivided, or rezoned to other uses. However, the current supply, particularly of large lots, remains a critical part of the state's industrial land pipeline.

Broken down by size and number of lots in Table 9 and Table 10, the Southern Tasmania contains the highest number of available lots (159), closely followed by Cradle Coast region (155) and Northern Tasmania (110). While smaller lots are spread across most regions, the majority of developable land area (96%) is concentrated in large (L) lots, underscoring their significance in meeting demand for logistics, warehousing, and low-density industry.

- In Southern Tasmania, there are 71 large lots making up 2.8 million sqm—the second-highest land area total after Northern Tasmania. Notably, Clarence and Brighton account for the majority of this supply, together contributing over 2.2 million sqm across 105 lots.
- Northern Tasmania holds 64 large lots and the highest total developable land area at 9.23 million sqm. This is largely concentrated in George Town, Dorset, and Meander Valley, where several very large parcels exist (e.g., over 5.7 million sqm in George Town alone).
- Cradle Coast shows a more even distribution, with 41 large lots spread across Devonport, Waratah-Wynyard, and Circular Head. Though it has the most individual lots, its total area (3.05 million sqm) is lower due to a higher share of small and medium-sized parcels.

Across Tasmania, extra small (XS) and small (S) lots are relatively few (only 90 in total), contributing just 0.7% of total area. These may be better suited for light industry or service-based industrial users. Medium (M) lots are more numerous (161 total), offering 504,650 sqm of developable space. Large (L) lots dominate the land area, with 176 lots accounting for over 14.7 million sqm.

Notably, some regions with large numbers of lots, such as Devonport and Launceston, have a high number of small and medium lots, which may not meet the needs of larger occupiers without consolidation or further subdivision.

Table 9: Suitable vacant land assessment, number of lots, Tasmania

Area	XS	S	M	L	Total
Cradle Coast	**8**	**49**	**57**	**41**	**155**
Burnie	4	2	2	3	11
Central Coast (Tas.)				2	2
Circular Head		1	1	7	9
Devonport		29	33	6	68
Latrobe (Tas.)		4	12	4	20
Waratah-Wynyard	2	3	8	16	29
West Coast	2	10	1	3	16
Northern Tasmania	**3**	**11**	**32**	**64**	**110**
Break O'Day		2	4	1	7
Dorset		1	6	9	16
George Town			2	11	13
Launceston	3	8	12	9	32
Meander Valley			1	5	6

Area	XS	S	M	L	Total
Northern Midlands			5	27	32
West Tamar			2	2	4
Southern Tasmania	**1**	**18**	**72**	**71**	**159**
Brighton	1	4	23	39	67
Clarence		7	41	18	66
Derwent Valley			3	2	2
Glenorchy		2	1		3
Huon Valley			3	6	9
Kingborough		1	1	3	5
Glamorgan-Spring Bay				3	3
Sorell		4			4
Tasmania	**12**	**78**	**161**	**176**	**424**

Source: SGS Economics & Planning (2025)

Table 10: Suitable vacant land assessment, land area (sqm), Tasmania

Area	XS	S	M	L	Total
Cradle Coast	**2,627**	**64,849**	**159,205**	**2,824,599**	**3,051,280**
Burnie	1,195	3,199	6,247	86,486	97,127
Central Coast (Tas.)				30,048	30,048
Circular Head		988	2,942	760,680	764,611
Devonport		42,232	91,017	193,136	326,385
Latrobe (Tas.)		6,533	33,448	38,596	78,577
Waratah-Wynyard	681	3,679	21,508	1,508,051	1,533,919
West Coast	750	8,218	4,042	207,603	220,614
Northern Tasmania	**489**	**17,803**	**104,666**	**9,110,394**	**9,233,352**
Break O'Day		3,540	14,798	39,795	58,132
Dorset		1,663	18,882	1,650,862	1,671,408
George Town			4,804	5,719,552	5,724,356
Launceston	489	12,600	38,562	131,039	182,690
Meander Valley			2,095	840,849	842,944
Northern Midlands			18,934	625,387	644,321
West Tamar			6,591	102,910	109,501
Southern Tasmania	**297**	**21,272**	**240,778**	**2,795,718**	**3,058,065**
Brighton	297	3,614	93,603	882,330	979,844

Area	XS	S	M	L	Total
Clarence		12,559	118,584	1,334,957	1,466,099
Derwent Valley			11,248	19,292	30,540
Glenorchy		1,198	3,936		5,134
Huon Valley			9,133	297,594	306,727
Kingborough		1,199	4,275	193,214	198,689
Glamorgan-Spring Bay				68,331	68,331
Sorell		2,700			2,700
Tasmania	**3,412**	**103,924**	**504,650**	**14,730,712**	**15,342,697**

Source: SGS Economics & Planning (2025)

While Tasmania appears to have a reasonable supply of industrial lots overall, the functional availability of land by size, location, and infrastructure readiness varies, which remains a key consideration. The overwhelming concentration of total land area in a limited number of large lots suggests that industrial growth is highly dependent on the activation and servicing of a few key sites. Strategic planning should therefore prioritise:

- Ensuring key large lots are development-ready, particularly in high-demand areas such as TRANSLink, Brighton and Clarence.
- Reviewing and possibly reconfiguring smaller or fragmented lots in urban settings to meet future warehousing and logistics needs.
- Coordinating infrastructure investment (water, sewerage, road, and energy) to ensure priority precincts are capable of supporting anticipated growth sectors.

4.5 Demand

Method

This analysis used past employment trends, combined with take-up, to project a reasonable range of growth options from which to undertake strategic planning. The method included compiling a list of all sectors considered to be industrial.

Converting jobs to floorspace or land is a fraught exercise. “Off the shelf” ratios of employment to land can be highly inaccurate as they do not account for place-based industrial development. Additionally, an extra “industrial” jobs do not account for jobs that may be captured in other commercial zones. For instance, the “Heavy and Civil Engineering Construction” may include office workers and those on site. To combat these uncertainties, the analysis used place-based data gathered from the vacant land and take up audit.

We compared industrial jobs change to an average industrial land take up over a ten-year period. From this, we determined a high and low scenario that can represent a likely range in outcomes for future demand. “High land to job ratio”, in this case, is the most land-hungry, with more low-density

warehousing style lots. “Low” is where manufacturing activities are more likely and where buildings are clustered closer together.

As noted, a range of floorspace demand outcomes can be estimated by applying the agreed high and low land to job ratios. Using both a high and low estimate accounts for variation in how future jobs in certain industries may require floorspace, combined with overall changes in space requirements for businesses. Especially local service industries are population driven. As an additional test of robustness, we benchmarked the job ratio demand estimates with population ratios. SGS advises that the “High Series” be treated as the most reasonable starting point for planning, given the acceleration of housing demand in the past few years and a need to err on the higher side.

Results

Over the next 20 years, Tasmania is projected to add approximately 16,632 industrial jobs, translating to 394–468 hectares of additional land demand, depending on the development intensity assumed. The highest growth is expected in the Southern Region, particularly within Greater Hobart, which accounts for more than half of forecast job growth (8,588 jobs) and 242 hectares of land demand under the high scenario.

- Clarence (101 ha), Glenorchy (56 ha), and Brighton (30 ha) are the three highest-demand LGAs within Greater Hobart, indicating the need for continued planning and infrastructure coordination in key industrial precincts such as Brighton Hub.
- Kingborough, Sorell, and the Derwent Valley also record modest but material demand, largely reflecting population-driven demand for service and construction-related industrial activity.

In the Northern Region, Launceston (38 ha) and Northern Midlands (40 ha) are the primary contributors to projected industrial growth, with demand also expected in West Tamar, Dorset, and Meander Valley. The north’s industrial land needs are likely to centre around the Launceston–Western Junction corridor and key precincts such as TRANSLink and Valley Central.

In the North West and Cradle Coast Region, projected land demand is more modest at 63–75 hectares, driven primarily by growth in Devonport (20 ha), Burnie (15 ha), Latrobe (18 ha), and Central Coast (11 ha). These areas will play a key role in maintaining freight and logistics functions tied to the State’s major ports and agribusiness exports.

Table 11: 20-year job forecast, demand for land (ha), by council and region, Tasmana

LGA	20 year job forecast	20-year demand (Ha) (Low land to job ratio)	20-year demand (Ha) (High land to job ratio)
Brighton	1,062	25	30
Central Highlands (Tas.)	116	3	3
Clarence	3,594	85	101
Derwent Valley	250	6	7
Glamorgan-Spring Bay	170	4	5
Glenorchy	1,974	47	56

LGA	20 year job forecast	20-year demand (Ha) (Low land to job ratio)	20-year demand (Ha) (High land to job ratio)
Hobart	638	15	18
Huon Valley	530	13	15
Kingborough	1,320	31	37
Sorell	520	12	15
Southern Midlands	174	4	5
Tasman	38	1	1
Greater Hobart	**8,588**	**204**	**242**
Southern Region	**10,386**	**246**	**292**
Break O'Day	20	0	1
Dorset	378	9	11
Flinders (Tas.)	52	1	1
George Town	0	0	0
Launceston	1,340	32	38
Meander Valley	168	4	5
Northern Midlands	1,426	34	40
West Tamar	206	5	6
Northern Region	**3,590**	**85**	**101**
Burnie	524	12	15
Central Coast (Tas.)	382	9	11
Circular Head	0	0	0
Devonport	726	17	20
Kentish	160	4	4
King Island	44	1	1
Latrobe (Tas.)	640	15	18
Waratah-Wynyard	180	4	5
West Coast	0	0	0
NW Region	**2,656**	**63**	**75**
Total	**16,632**	**394**	**468**

Source: SGS Economics & Planning (2025)

4.6 Demand vs capacity

Further analysis was done in select councils to refine overall suitable vacant industrial land. These specific refinements have been marked in Table 12 below. With these adjustments, Tasmania has an estimated 857 hectares of suitably zoned and vacant industrial land that will be compared to demand. Over the next 20 years, industrial land demand is forecast to range from 394 hectares (low land-to-job ratio) to 468 hectares (high land-to-job ratio). This suggests a headline statewide surplus of between

389 and 462 hectares. However, this apparent surplus masks significant regional and local shortfalls that will directly impact land availability and investment confidence in key precincts.

- Despite an overall surplus of between 47 to 1 hectare across the Southern Region, there is a strong imbalance between supply and demand across LGAs
- Brighton and Clarence show strong surpluses under both scenarios (up to 67.5 ha and 55.8 ha respectively), highlighting their critical role in accommodating overflow demand from other constrained areas.
- By contrast, LGAs such as Glenorchy (-55 ha), Hobart (-18 ha), Kingborough (-17.3 ha) and Sorell (-14.4 ha) face significant shortfalls, particularly under the high growth scenario.
- Greater Hobart only retains a modest surplus of 13 hectares under the high scenario, pointing to increasing regional pressure on Brighton and Clarence as supply buffers.

The Northern Region records the largest regional surplus, with 174–158 hectares of excess supply forecast over the 20-year period.

- This surplus is heavily represented by Meander Valley (80 ha), Dorset (39 ha), and Northern Midlands (30.6 ha).
- While George Town registers no future demand for local industries, it still contributes 27 hectares of supply and would be suited for larger-scale renewable projects of state significance.
- However, Launceston is a notable outlier with a shortfall of 13.5–19.4 hectares, indicating a need to assess the wider catchment of industrial land, including near the city centre or airport corridor.

The North West Region is forecast to have a surplus of 230–242 hectares, concentrated in a few key LGAs:

- Waratah-Wynyard (149 ha) and Circular Head (76.5 ha) make up much of this surplus.
- Devonport also shows a moderate surplus (12.2–15.4 ha), supporting its continued industrial function.
- However, Burnie, Latrobe, and Central Coast all show shortfalls of up to 10 ha, suggesting emerging supply constraints in more urbanised parts of the region.

Table 12: Comparison of vacant land to 20-year demand (ha) by council, Tasmania

		20-year demand (Ha)		Surplus/gap (Ha)	
LGA	Vacant land 2024 (Ha)	Low land to job ratio	High land to job ratio	Low land to job ratio	High land to job ratio
Brighton	93*	25	30	67.5	62.8
Central Highlands (Tas.)	0	3	3	-2.8	-3.3
Clarence	141*	85	101	55.8	40.0
Derwent Valley	1	6	7	-4.8	-5.9
Glamorgan-Spring Bay	7	4	5	2.8	2.1
Glenorchy	1	47	56	-46.3	-55.0

		20-year demand (Ha)		Surplus/gap (Ha)	
LGA	Vacant land 2024 (Ha)	Low land to job ratio	High land to job ratio	Low land to job ratio	High land to job ratio
Hobart	0	15	18	-15.1	-17.9
Huon Valley	31	13	15	18.1	15.8
Kingborough	20	31	37	-11.4	-17.3
Sorell	0	12	15	-12.1	-14.4
Southern Midlands	0	4	5	-4.1	-4.9
Tasman	0	1	1	-0.9	-1.1
Greater Hobart	**254**	**204**	**242**	**50**	**13**
Southern Region	**293**	**246**	**292**	**47**	**1**
Break O'Day	6	0	1	5.3	5.3
Dorset	48**	9	11	39.0	37.4
Flinders (Tas.)	0	1	1	-1.2	-1.5
George Town	27**	0	0	27.0	27.0
Launceston	18	32	38	-13.5	-19.4
Meander Valley	84	4	5	80.3	79.6
Northern Midlands	64	34	40	30.6	24.3
West Tamar	11	5	6	6.1	5.2
Northern Region	**259**	**85**	**101**	**174**	**158**
Burnie	10	12	15	-2.7	-5.0
Central Coast (Tas.)	3	9	11	-6.1	-7.7
Circular Head	76	0	0	76.5	76.5
Devonport	33	17	20	15.4	12.2
Kentish	0	4	4	-3.8	-4.5
King Island	0	1	1	-1.0	-1.2
Latrobe (Tas.)	8	15	18	-7.3	-10.1
Waratah-Wynyard	153	4	5	149.1	148.3
West Coast	22	0	0	22.1	22.1
North West Region	**305**	**63**	**75**	**242**	**230**
Total	**857**	**394**	**468**	**462**	**389**

Source: SGS Economics & Planning (2025)

* Excluding roads and other areas within large lots

** Excluding Bell Bay and Tongana

4.7 Strategic implications

The analysis conducted to date reveals the following strategic implications:

- Surplus is regionally concentrated. While Tasmania appears to have an overall industrial land surplus, the supply is not evenly distributed. Much of the usable land sits in outer-urban or rural LGAs, while many urbanised or strategically located councils face shortfalls.
- Future growth depends on a few LGAs: LGAs such as Brighton, Clarence, Meander Valley, and Northern Midlands are carrying the bulk of the state's developable industrial land. Strategic planning should ensure these LGAs remain capable of absorbing demand, through ongoing land release, servicing, and infrastructure coordination. This will, particularly for Hobart and Launceston, require regional approaches and thinking.

Urban shortfalls may constrain growth: localised shortfalls in Hobart, Glenorchy, Launceston, and Burnie may limit business growth through a lack of choice, or lead to market distortions if shortfalls are not addressed. This is particularly relevant for high-demand land uses such as logistics, construction supply, and warehousing. The current mismatch between available land and projected demand manifests in two main ways:

1. Quantitative gaps: LGAs such as Glenorchy, Hobart, and Kingborough are projected to experience significant undersupply within the next decade. These will have flow-on effects across Greater Hobart, meaning that demand will have to be met in Clarence and Brighton.
2. Qualitative mismatch: Even where land exists, it may not be the right size, location, or format. For instance, Brighton and George Town have large available tracts but lack subdivision, while Glenorchy has virtually no new industrial land but strong market interest.

While Tasmania's larger regional cities have a reasonable share of medium and large lots, many rural and peri-urban LGAs have no access to appropriately sized sites for modern warehousing, logistics, or advanced manufacturing. In many cases, land may be zoned but constrained due to slope, proximity to sensitive uses, or a lack of subdivision and servicing. While the Northern region contains the largest total land area, this is heavily concentrated in a few LGAs (e.g. George Town and Meander Valley), with many smaller LGAs having minimal or fragmented supply. Importantly, demand is not evenly spread across LGAs. Urban centres such as Glenorchy, Launceston, and Devonport show continued high latent demand with very limited land availability, while Brighton, George Town, and parts of Waratah-Wynyard and Northern Midlands have more available land but need infrastructure upgrades and more precise lot planning to attract investment.

Growth Corridors and Overflow Management

Clarence and Brighton are expected to absorb much of Greater Hobart's future demand due to capacity limitations in Glenorchy and Hobart. Similarly, the Northern Midlands and George Town may serve overflow from Launceston, while Circular Head and Waratah-Wynyard present long-term opportunities for more localised logistics and energy sectors in the North West.

5. Strategic observations – Statewide

5.1 Overview

Analysis across Tasmania's southern, northern, and Cradle Coast regions highlights a series of consistent challenges affecting the availability, suitability, and servicing of industrial land. These challenges underscore the need for a strategic, statewide approach to planning for industrial land, while recognising that specific pressures and priorities vary across regions and precincts.

Future planning for industrial land needs to be carefully planned across both RSIPs and local service industries. Key considerations include the following:

- Clearly identifying the circumstances under which RSIPs should be developed noting -
    - Some are aligned to supporting general growth in industrial activities, while the expansion of others relies on more targeted uses and future opportunities.
    - All require moderate to significant infrastructure and services upgrades, which need to be carefully considered against industrial land supply and demand, and supply chain outcomes.
- Avoiding an over-supply of industrial land, particularly noting the cost of unlocking precincts.
- Ensuring there is an appropriate supply of local industrial land to meet local needs.

This Study was undertaken to support the review of the RLUS. It is important that RSIPs are recognised within the RLUS and appropriately protected through subsequent planning controls.

The release of industrial land should be monitored to ensure sufficient land is being delivered to meet demand, and to avoid an over-supply of land into the market.

Structure plans represent an important mechanism through which to plan and develop RSIPs, addressing site-specific considerations such as lot size, current and future uses, infrastructure and services, and supply chain requirements.

The Tasmanian Government's is currently considering reforms to infrastructure strategy, governance and delivery, which may inform future infrastructure planning for key RSIPs.

There are three key challenges identified across this work:

Challenge #1: Shortfall of adequate industrial land in some local government areas and precincts, particularly in the Southern Region and Launceston

While all three regions have an overall surplus of industrial land, this land is not necessarily suitable or fit for purpose to meet forecast future or emerging needs.

The Southern Region, in particular, has only a small surplus of industrial-zoned land, with notable under-supplies in Glenorchy, Hobart, Kingborough and Sorell, ,. Similarly, while the northern region overall presents a positive land balance, Launceston faces a shortage, and much of the existing supply is not ideally located for high-growth industries like logistics. In the Cradle Coast region, Burnie, Central

Coast, Kentish, and Latrobe LGAs are projected to experience shortfalls despite an overall regional surplus.

When comparing forecast demand to vacant supply, just over half of all councils face a shortfall of industrial land. Within Greater Hobart, only Brighton and Clarence have sufficient land under a higher demand scenario RSIPs in Brighton and Clarence will be expected to be accommodate future 'overflow' demand from urban areas where expansion of industrial land is limitedly feasible.

In Launceston, which has a shortfall of industrial land and is balancing urban development objectives, it will be important to understand the future development of adjacent industrial precincts, particularly TRANSLink. In addition, there will be a need to identify sites for future industrial use to accommodate local services industries. Any rezoning must consider strategic consideration of long-term competing needs.

While Tasmania appears to have a reasonable supply of industrial lots overall, the functional availability of land by size, location, and infrastructure readiness varies, which remains a key consideration. The overwhelming concentration of total land area in a limited number of large lots suggests that industrial growth is highly dependent on the activation and servicing of a few key sites. Strategic planning should therefore prioritise ensuring key large lots are development-ready, reviewing and possibly reconfiguring smaller or fragmented lots in urban settings, and coordinating infrastructure investment to ensure that priority precincts are capable of supporting growth.

Challenge #2 Qualitative mismatch around lot size and type of uses

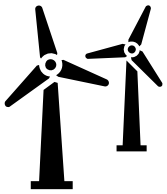
A second major issue is the qualitative mismatch between available land and market needs. Across all three regions, there is growing demand for larger lots (typically over 4,000 square metres) suited to warehousing, logistics, and low-density industrial activities. However, much of the available land consists of smaller, subdivided lots that are less attractive to these users. For example, in Brighton Hub, demand for larger logistics lots is outpacing supply, while in Launceston and Burnie, underutilised former manufacturing sites may not be readily adaptable for modern industrial needs.

Further exacerbating the overall shortfall in supply is a qualitative mismatch for the right types of industrial land in suitable locations. In some areas, like Brighton, there has anecdotally been demand for larger lots (over 4,000 sqm) to accommodate warehousing, logistics, and heavy industries, while much of the existing supply consists of smaller subdivided lots (under around 3,000 sqm).

Challenge #3: Infrastructure servicing and provisioning

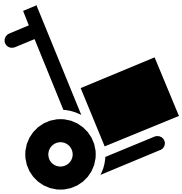
Infrastructure servicing constraints further exacerbate these issues. Inadequate wastewater treatment, power supply, and design considerations are limiting the development potential of otherwise strategically located land. Infrastructure constraints are particularly noted in the Brighton Hub and Cambridge precincts in the south, TRANSLink and Valley Central in the north, and Burnie, Smithton, and Zeehan in the Cradle Coast region. Poor servicing not only hampers new development but can deter investment altogether.

In addition, Tasmania must evolve to meet the needs of new and emerging sectors like renewable energy, data centres, and just in time logistics. These sectors all have different infrastructure requirements, as detailed below.



Renewable energy industries (which encompass everything from hydrogen production, component manufacturing, or turbine repair), often require serviced land of around 10 to 50 hectares, with proximity to strategic transport links (including road, ports, or other intermodal freight), and (if lots are not services) early coordination for high-capacity power and water infrastructure[27].

Data centres[28] may not always require large tracts of land, but they need reliable power supply, high-capacities for broadband and fibre connectivity, cooling infrastructure, and access to renewable energy sources to meet corporate sustainability commitments.



Last-mile logistics need to be well suited to population centres, intermodal ports, and transport corridors. Their space requirements vary, but they must have access and flexibility to accommodate warehousing and commercial uses. However, last-mile logistics also make sense in areas with sprawling cities and high traffic[29]. This is only beginning to emerge in Hobart and Launceston.

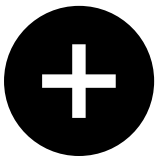
27 https://www.stategrowth.tas.gov.au/__data/assets/pdf_file/0010/493615/Renewable_Energy_Tasmania.pdf

28 https://www.energy.gov.au/business/equipment-guides/data-centres

29 https://www.transport.nsw.gov.au/system/files/media/documents/2024/Freight-and-Servicing_Last-Mile-Toolkit_Master-Document_0.pdf

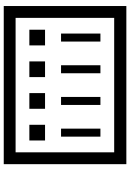
5.2 Strategic observations

To address these challenges, the following strategic observations are proposed:



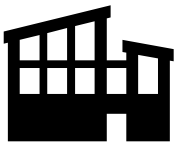
Incorporate RSIPs into RLUS

- This will be done through the varying Regional Land Use Strategy (RLUS) processes currently underway.



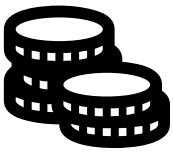
Develop structure plans, focusing on key RSIPs (Bell Bay, Brighton, TRANSLink, Cambridge)

- Coordinate with relevant councils to deliver place-based outcomes.



Undertake detailed planning for Glenorchy

- Conduct further detailed planning work to understand precinct-specific interventions.



Develop infrastructure contribution framework for industrial areas

- Track TRANSLink's progress in an infrastructure funding and consider a statewide rollout.

Monitor industrial land demand and supply

- Implement regular reviews to stay up to date on changes in the consumption of land.

Provide transparent information for precincts regarding infrastructure and services

- Ensure capacity of infrastructure is well-reported to allow for easy investment decisions.

Incorporate RSIPs into RLUS

The Tasmanian Government, in partnership with local government, is undertaking a detailed review of Tasmania's three regional land use strategies (RLUS):

- Cradle Coast Regional Land Use Planning Strategy 2010-2030
- Northern Tasmania Regional Land Use Strategy
- Southern Tasmania Regional Land Use Strategy 2010-2035

RSIPs should be acknowledged in each of the respective strategies, with consistent definitions, noting the role of other industrial lands across the various local governments. This will be done through the varying Regional Land Use Strategy (RLUS) processes currently underway.

Develop structure plans, focusing on key RSIPs (Bell Bay, Brighton, TRANSLink, Cambridge)

A program of updated master planning and structure planning should be undertaken across all RSIPs to establish a clear strategic intent for each precinct and guide future subdivision, servicing, and land release. This work should identify:

- Preferred lot size ranges based on likely end uses,
- Priority areas for consolidation or staging of land release,
- Buffers or interface treatments with sensitive uses,
- Long-term servicing and access requirements, and
- Opportunities to cluster synergistic or complementary industries.

The aim is to provide a fit-for-purpose lot structure that avoids premature fragmentation and preserves strategic opportunities—for example, ensuring intermodal freight nodes, heavy industry zones, or renewable energy precincts are not constrained by inflexible subdivision patterns.

It is recommended that the Department of State Growth work with local governments and infrastructure and service providers to:

- Lead and coordinate a structure planning program for key RSIPs,
- Develop a standardised approach to RSIP planning to ensure consistency across regions,
- Either deliver the structure plans directly or provide funding and guidance to local councils,
- Embed this work within broader regional land use and infrastructure planning frameworks.

This model is consistent with how Precinct Structure Plans (PSPs) are prepared in Victoria by the Victorian Planning Authority (VPA). In that model, the VPA coordinates structure plans for employment and residential precincts in growth areas, setting the vision for land use, infrastructure, transport, and lot configuration before rezoning occurs. This ensures industrial precincts are developed with the right infrastructure and land configurations from the outset—preventing costly retrofits, land banking, and underutilisation.

Undertake detailed planning for Glenorchy

The concentration of industrial land in the Glenorchy RSIP plays a central role in Greater Hobart's industrial and employment network, and will continue to be a significant concentration of manufacturing, construction and logistics employment in the future.

Glenorchy remains an attractive and often preferred locations for industrial businesses, with advantages including strong internal supply relationships, and proximity to established population centres, supporting access to both customers and labour, and to major freight corridors.

The Glenorchy RSIP is located adjacent to established residential areas and close to the Northern Suburbs Transit Corridor, which has been identified as a location for high-density residential development and broader urban renewal.

There is a need to plan for the future of the Glenorchy RSIP as a major industrial and employment lands centre situated within a broader area of urban renewal. This includes identifying key industrial sub-precincts within the RSIP, better understanding the composition of businesses and related operations, and supporting new industrial opportunities, including advanced manufacturing and lower-impact industrial activities.

Planning for the RSIP should consider the interface with adjacent residential and commercial development and contemporary planning controls that allow a range of different uses to co-exist in close proximity.

Continued monitoring and review of industrial land should take place in the RSIP, particularly to understand how these businesses are transitioning in their own processes and interacting with their supply chains, particularly as industrial activity and new construction increasingly concentrates on the fringes of Hobart.

Develop infrastructure contribution framework for industrial areas

Infrastructure servicing costs in industrial precincts are often front-loaded and disproportionately fall on early-stage developers or sovereign investment (i.e. Federal and State governments through grant and funding programs), particularly where trunk infrastructure upgrades are required to activate an entire precinct. To address this challenge, the state should develop a standardised but flexible infrastructure contribution mechanism tailored to high-growth industrial areas.

This mechanism could operate similarly to existing Developer Contribution Plans (DCP), that exist in other states like Victoria, particularly in growth areas with large lot sizes, longer development lead times, and highly variable infrastructure demands depending on end use. Contribution plans could be established for key precincts such as Brighton, Cambridge, or Valley Central, and would allow the fair distribution of upgrade costs across all future beneficiaries, not just early entrants.

Precinct-based contributions could include both financial levies and in-kind contributions, such as developers constructing key trunk infrastructure assets under works-in-kind agreements. To ensure equity and feasibility, the mechanism could incorporate staged charges or a reimbursement model for developers who deliver infrastructure upfront. Contributions would be linked to local servicing strategies, such as those developed with TasNetworks and TasWater, and would provide a clearer, more consistent investment environment for industrial developers.

This approach would help address the current disincentive for early-stage developers to proceed with industrial land activation, encourage sequencing of development, and support infrastructure agencies in forecasting and programming upgrades. It would also align with broader government efforts to encourage regionally balanced growth and job creation outside major metropolitan centres.

An infrastructure funding framework will be developed through the TRANSLink intermodal project, which is a significant study looking at the future development of a major industrial and intermodal area near Breadalbane. The framework will be finalised in 2026 and provides an opportunity for this framework to be applied or inform the development of funding frameworks at other regional precincts.

Monitor industrial land demand and supply

Monitoring is required to understand the actual take-up of vacant industrial land and the rezoning of land to or from industrial. These data could be collected on a bi-annual basis, or at least once every five years. The analysis of the monitoring data will demonstrate:

- How much, where, and what lot sizes are taken up and developed;
- How much land is being rezoned;
- How many businesses have relocated from precincts earmarked for redevelopment; and
- Any changes in the underlying land price of industrial land

A lower or higher than expected take-up rate of land may require a reconsideration of the timeframes for future industrial land and the identification of locally and regionally significant sites. Also, it may be possible that in the future measures will be implemented by planning authorities to support redevelopment and better or more efficient use of industrial land. As part of that, it may be possible to adjust the number and size of precincts earmarked for redevelopment. The data requirements for monitoring encompass the following:

- Uptake of vacant land by precinct (Council, RSIP), including number of parcels, land area, date of development application, type of use
- Supply of vacant and suitable industrial land by location, including umber of parcels, land area
- Rezoning of land from/into industrial by location, including number of parcels, land area, date of approval, new zoning, number of businesses relocated, and destination of relocation.
- Trends in industrial land price data including number of lots and area sold per annum, and mean and median land price per annum ($/sqm or $/ha)

Provide transparent information for precincts regarding infrastructure and services

It is important for major industrial precincts statewide to be open for ongoing investment. This requires clear and reliable data on infrastructure readiness so that investors can make informed decisions about how and where to best invest.

To date, there has been limited accessible available information about specific infrastructure and service capacity (such as power, water and trade waste), across Tasmania's RSIPs. TasWater has recently released nine master plans across Tasmania, providing information on existing services and

proposed upgrades to water and sewerage infrastructure. TasNetworks provides high level information through its annual planning reports and offers early engagement meetings with developers.

Information on infrastructure and services is key to supporting future investment within RSIPs. This information could be provided through the development of a regular report providing information on matters such as headroom, infrastructure capacity and planned infrastructure upgrades, and/or be facilitated through the Department of State Growth to ensure access to contemporary information and to manage matters of commercial confidentiality.

While more accessible public information can support early decision-making, developers will still need to contact service providers directly for project-specific advice.

5.3 Next steps for planning for the strategic intent of each RSIP

Strategically plan for suitable industrial lots in line with the strategic intent of each RSIP. The lot configurations need to preserve land for uses that depend on and thrive in inter-modal settings, proximity to maritime uses, proximity to the (air)port and major transport corridors and/or population centres.

This is achieved primarily through proactive engagement with infrastructure providers: Work collaboratively with TasWater, TasNetworks, and other service providers to prioritise infrastructure upgrades that enable future growth and attract investment.

These solutions will manifest differently in different parts of the respective regions, particularly in regionally significant precincts or across locally-significant industrial land. Importantly, while these strategies are broadly applicable, their implementation must be regionally nuanced. For example, Brighton and Clarence will increasingly need to absorb overflow industrial demand from constrained parts of Greater Hobart; Launceston requires targeted redevelopment and renewal strategies for aging industrial land; and in the Cradle Coast, there are growing opportunities to support new industries such as renewable energy manufacturing and repair. Large tracts of vacant industrial land that aren't suitable for intensive activity could be assessed to be backzoned, however this is best done at an individual council level. Councils also have a larger role to play as the relevant statutory planning authority in cases other than those that have qualified for major project or POSS status. This includes being responsible for the assessment and approval of developments, in addition to initiating any necessary rezonings.

It is important to note that all RSIPs are strategically important to the state, but the following prioritisation is informed by the following categories:

- High indicates that State Growth should prioritise intervention in the short to medium-term, and focus efforts on collaborating with councils and other agencies to facilitate the suggested outcomes.
- Medium indicates that some strategic work is necessary to realise the full potential of the RSIP, and that work should be prioritised through the medium term. Continual monitoring and review through the short term is required in collaboration with councils and other stakeholders (including infrastructure providers) and as strategic opportunities arise.

- **Low** indicates that strategic planning will likely progress at a local level, and that specific intervention from State Growth is not an immediate priority. It is encouraged that State Growth continue to engage with key stakeholders to monitor.

5.4 Summary of RSIPs – prioritisation

Table 13: Precinct summary, Tasmania RSIPs

RSIP Name	Council area	Priority level	Key observations	Specific infrastructure needs for investigation
TRANSLink	Launceston Airport, Northern Midlands	High	Continue staged development; review lot configuration and interface with airport. Continue to progress detailed planning for future expansion of the industrial estate and a potential road-rail intermodal hub.	Energy supply, wastewater and internal transport infrastructure.
Brighton Hub	Brighton	High	Protect and stage remaining land; understand potential for expansion. Introduce buffer requirements. Encourage land uses aligned with intermodal hub. Key overflow area for Greater Hobart.	Internal road upgrades, improved freight connectivity, water services.
Cambridge	City of Clarence	High	Precinct structure plan needed to guide lot reconfiguration, buffer management, and infrastructure staging. Significant market interest but constrained by ad hoc development.	Sewer and water upgrades.
Bell Bay	George Town	High	Sufficient land; continue coordination with hydrogen and energy sectors (renewables).	Energy grid upgrades, port access enhancement, access to water. Water upgrades.

RSIP Name	Council area	Priority level	Key observations	Specific infrastructure needs for investigation
Glenorchy	City of Glenorchy	High	Very limited supply; explore opportunities for urban renewal or vertical industrial formats (multi-level mixed uses). Northern Transit Corridor development to support mixed-use developments and light industrial.	Stormwater upgrades, utility upgrades in older precincts, management of local traffic impacts
Prince of Wales Bay	City of Glenorchy	Medium	This precinct is of large significance to the state. Maintain as heavy industrial zone and ensure businesses that need it have waterfront access; improve amenity for interface management. There is likely not additional infrastructure required in the short term.	Renewed and enforced planning, investigation into foreshore remediation, stormwater and access, management of local traffic impacts.
Burnie	City of Burnie	Medium	Precinct nearly full; identify new land if expansion is needed.	Flood mitigation and stormwater capacity.
Devonport Airport	City of Devonport	Medium	Promote as long-term expansion area for industrial/logistics; ensure compatibility with airport operations.	Investigation into road and runway-adjacent access, water and power upgrades.
Valley Central Precinct, Westbury	Meander Valley	Medium	Support subdivision of existing large lots to meet demand; maintain rural buffers and support a partnership with landowners to enable communication of business needs.	Road upgrades and digital infrastructure.

RSIP Name	Council area	Priority level	Key observations	Specific infrastructure needs for investigation
Launceston	City of Launceston	Low	As some precincts are almost full, renewal and reconfiguration opportunities across all industrial land in Launceston should be considered. Develop a long-term strategy to manage land supply and guide future expansion.	Traffic upgrades, water and sewer augmentation.
Waratah-Wynyard	Waratah-Wynyard	Low	Surplus land; plan for potential renewable energy and logistics investment.	Power and port-adjacent road upgrades.
Smithton	Circular Head	Low	Monitor demand; sufficient land currently available.	Improved digital and freight road infrastructure.
Zeehan	West Coast	Low	Strategic reserve; no urgent planning required.	Basic road access and utilities if reactivated

Source: SGS Economics & Planning (2025)

6. Strategic observations – Southern Region

6.1 Observations of Regionally Significant Precincts

The following table shows the key observations of relevant regionally significant industrial precincts.

Table 14: Summary of observations of RSIPs

Industrial Precinct	Key Observations
Brighton Hub	– Bolster Brighton Hub's Position as Southern Tasmania's premier intermodal logistics hub
	– Promote suitable lot-sized development, particularly ensuring land is available for businesses needing access to intermodal facilities, through structure planning and/or SAP
	– Explore and identify circular economy initiatives (Council)
	– Encourage diversification and growth of industries through adequate wastewater infrastructure provision
	– Identify and rezone land for future industrial activities, adjacent / close to the existing Brighton Hub
Cambridge	– Strengthen Cambridge as a warehousing and transport hub with a trade focus
	– Resolve water and wastewater bottlenecks to support industrial growth
	– Facilitate the right mix of light industrial uses
	– Provide more industrial zoned land
	– Support safe and efficient access for freight vehicles to the Cambridge area
Glenorchy	– Balance continued presence and strengths of the manufacturing and logistics industries while intensifying employment-dense uses.
	– Undertake further planning to balance industrial activity with urban renewal in proximity to the Northern Suburbs Transit Corridor
	– Explore last-mile logistics opportunities
	– Address potential future infrastructure upgrades (water, power, sewer)
	– Support opportunities to attract industrial uses with a reduced impact.
Prince of Wales Bay	– Reinforce Prince of Wales Bay as a key maritime and innovation hub.
	– Preserve, accommodate and enable growth of maritime industry and related uses. Avoid conflicting uses through structure planning and/or the implementation of a SAP

Industrial Precinct	Key Observations
	– Support light industrial development with appropriate zoning
	– Address infrastructure gaps impacting business growth
	– Strengthen workforce opportunities and maritime workforce development

6.2 Observations of locally significant industrial land across council areas

Locally-significant industrial land is primarily driven by overall population growth. The land itself meets the needs of local service industries. It comprises smaller occupiers across a range of uses, but examples include auto-repair stores, storage facilities, and small manufacturing workshops.

Demographic changes and trends in income and household expenditure patterns largely determine the growth of these industries and consequently, their demand for industrial land. Land use planning for local service industries should primarily take place at the local level. It is, however, important for municipalities to understand what is happening in nearby Councils and collaborate where useful. This is especially true in urbanised areas where Councils may not be able to accommodate demand within their municipality, resulting in local service industries spilling over into nearby areas. The following table provides a summary of key observations, by council area, for locally significant industrial land.

Table 15: Summary of locally-significant industrial land

LGA	Key Observations
Brighton	– Provide for some locally significant industrial land (less than 4,000 sqm), exploring areas with interfaces close to residential areas like Cove Hill.
Central Highlands	– Identify around 3 hectares of industrial land near Bothwell as part of the ongoing structure planning process. – Support opportunities for renewable energy solutions across the LGA, with colocation of industrial land with renewable energy generation.
Clarence	– Seek to capitalise on the location of the Hobart International Airport and Southern Tasmania's largest local airport, Cambridge Airport. – Provide for small occupiers that account for "overflow" demand from nearby Hobart and Glenorchy. – Identify opportunities to attract niche industrial uses.
Derwent Valley	– Consider future uses at Boyer for which there are locational advantages, including access to rail and a need for significant attenuation distances.. – Support locally-significant industrial land through refined structure planning.
Glamorgan-Spring Bay	– Maintain small industrial land provisions while ensuring alignment with agricultural and environmental constraints.

LGA	Key Observations
Glenorchy	– Seek to make better use of existing industrial land and support suitable businesses to grow and thrive alongside other uses.
Hobart	– Implement recommendations from the North Hobart Neighbourhood Plan to rezone light industrial areas to urban mixed-use. – Balance the transition while retaining essential employment uses.
Huon Valley	– Facilitate the relocation of the council depot to Glen Huon Road. – Identify opportunities for future industrial land allocations as part of broader regional coordination.
Kingborough	– Collaborate with neighbouring councils to address shared and local industrial land needs as well as long-term growth potential.
Sorell	– Address industrial land shortages through long-term wastewater solutions (e.g., Penna plant expansion). – Prioritise retention of employment land in Dodges Ferry, balancing rural-industrial uses with servicing challenges.
Southern Midlands	– Assess industrial land needs near Bagdad to align with future regional growth strategies. – Support opportunities for renewable energy solutions (wind and solar farms) and renewable energy business & industrial precincts in close proximity to renewable energy generation facilities, where suitable. – Acknowledge the potential of non-productive farming land in parts of Southern Midlands as suitable for regional or state-wide facilities that can take advantage of the area's central location, accessibility to major road and rail transport routes, and large lots
Tasman	– Incorporate industrial needs into structure planning for Nubeena and Murdunna, ensuring alignment with broader regional objectives. – Support the opportunity for a marine industrial area including a commercial slip yard, in the Nubeena - White Beach area, to provide services to the aquaculture, tourist charter boat and recreational fishing industries.
Greater Hobart	– Foster coordination between Brighton, Cambridge, Glenorchy, and Clarence to balance light and heavy industrial uses across the metropolitan area. – Address infrastructure needs to unlock land and drive growth.
Southern Region	– Ensure regional alignment between industrial land demands and servicing capacity, focusing on infrastructure upgrades and strategic growth opportunities in Brighton, Cambridge and Glenorchy.

Source: SGS Economics & Planning (2025)

Four areas of focus are identified in the Southern Region. These include the Brighton Hub in Brighton, the Cambridge area in Clarence, and two areas in Glenorchy: the main industrial corridor and the Prince of Wales Bay. These areas were selected based on having a specialised focus on export-oriented industries, strategic warehousing, and transport. They are all strategically connected by nearby road and rail connections, and in many cases have a significant portfolio of existing or vacant land compared to other precincts in the Southern Region.

Of note, while the former Norske Skog site (now known as Boyer) within the Derwent Valley Council Area is not currently classified as an RSIP for the purposes of this study, it has potential for regionally-significant activities on account of its site parameters (significant buffers and attenuation distances) and waterfront access due to the recently completed Bridgewater Bridge[30]. It will be important to regularly monitor and review take up of industrial land, particularly at Brighton and Cambridge, alongside any strategic and prioritised infrastructure, to see how this precinct could meet state-significant activities.

The subsequent sections discuss a SWOT analysis combined with a set of Strategic Principles for each regionally significant industrial precinct.

[30] https://www.bridgewaterbridge.tas.gov.au/

6.3 Brighton Hub

The following sections outline the strategic role, challenges, solutions, and responsibilities for this RSIP. The subsequent tables provide detailed SWOT analyses and Strategic Principles.

Strategic Role

Brighton Hub is Southern Tasmania's primary intermodal logistics hub, supporting freight movement between the northern ports and southern Tasmania via rail and road transport. It plays a critical role in regional supply chains, accommodating warehousing, construction, and logistics businesses.

Specific Issues & Challenges

The precinct faces several key challenges, particularly land availability constraints. While industrial lot take-up typically ranges from 3,000–7,000 sqm, there is anecdotally growing demand for larger 2–5 ha lots, especially for strategic warehousing. Additionally, a small number of landowners control much of the land, with some unwilling to sell or develop, limiting the availability of serviced industrial sites. Infrastructure constraints, particularly in water, wastewater, and power, further impact the precinct's ability to support growth. The lack of an updated structure plan has led to ad hoc development, raising concerns about the long-term efficiency of the industrial area. Moreover, freight-accessible land is at risk of being repurposed for non-industrial uses, which could undermine the precinct's logistics role.

Solutions

To address these challenges, Brighton Council and the State Government must work together to develop a strategic plan and/or new structure plan with landowners to enable larger lot subdivisions while preserving intermodal land for logistics. A new structure plan should be developed to guide future land use that prioritises freight-related industries and large-lot industrial users. Infrastructure upgrades are also necessary, particularly in water and wastewater, to ensure the precinct remains competitive. Stakeholders, including TasRail and private developers, must coordinate to optimise freight logistics and release industrial land. A proactive strategy ensuring servicing, subdivision, and strategic zoning protections will ensure Brighton Hub's role as a freight and logistics anchor in the region.

Roles & Responsibilities

- Local Government (Brighton Council) – Facilitate structure planning, engage with landowners, and advocacy for infrastructure with service providers.
- State Government– Support land planning, advocate for funding assistance for freight and servicing infrastructure.
- TasRail & Freight Operators – Collaborate with stakeholders to optimise rail logistics and ensure efficient freight movement.
- Private Developers & Landowners – Work with authorities to release industrial land, subdivide appropriately, and develop fit-for-purpose industrial spaces.

SWOT Analysis for Brighton Hub

Table 16: SWOT analysis- Brighton Hub

SWOT Components		Description
Internal	Strengths	– Strategically located intermodal hub with integrated rail and road access, enabling efficient freight movement between northern ports and southern Tasmania. – Strong transport, postal, and warehousing industries, supported by key logistics businesses (e.g., SRT Logistics, Tasfreight). – Large available lots (60% of large lots in three key sites), suitable for medium-to-large-scale industrial operations. – Proximity to main highways, railways, and within 30 minutes of the nearest airport. – Proximity to population (housing) and activity centres (Brighton). – Established infrastructure and utility access, accommodating current development levels.
	Weaknesses	– Shortfall of suitable vacant industrial land to accommodate future growth. – Limited landowner engagement; reluctance to subdivide or develop remaining land. – With suitable vacant land actually being developed, prevalence of smaller subdivided lots (3,000–7,000 sqm), despite demand for larger lots (2–5 ha) (based on take-up since last study). – Quarry site constraints, with significant attenuation zones and owner resistance to development near mining lease areas. – Environmental challenges, including bushfire-prone areas, landslip hazards, and sensitive vegetation and heritage sites. – Low prioritisation in improving landscaping and placemaking at Brighton Hub.
External	Opportunities	– Growing demand for larger lots, with increasing development applications (15–20 annually compared to 4–5 previously). – Potential for circular economy initiatives (e.g., hydrogen, recycling, new waste transfer station). – Development potential at the edges of the quarry sites and underutilised areas. – Strong growth in transport-related industries (+118% in transport jobs from 2011–2021). – Updated structure planning to ensure alignment with market demands and environmental considerations. – Completion of Bridgewater Bridge will improve accessibility and connectivity.
	Threats	– Competition from other industrial precincts with larger lot availability and better infrastructure. – Environmental and planning constraints could delay or prevent necessary development. – Over-reliance on a few key landowners and businesses for precinct activation. – Increased strain on existing infrastructure (water, sewer, power) with rapid growth.

Source: SGS Economics & Planning (2025)

Strategic Principles and observations of Brighton Hub

Table 17: Strategic Principles – Brighton Hub

Strategic Principle		Details	Required Changes	Specific Observations
	**Bolster Brighton Hub's Position as Southern Tasmania's premier intermodal logistics hub**	Leverage integration of rail and road networks to attract freight, transport, and logistics businesses.	Ensure intermodal land is protected and reserved for logistics-specific businesses.	Implement structure planning to preserve rail-adjacent land and optimise freight corridors for seamless flow.
	**Promote suitable lot-sized development, particularly ensuring land is available for businesses needing access to intermodal facilities, through structure planning and/or SAP**	Enable subdivisions catering to 2–5 ha lots; maintain a mix of lot sizes to meet varied industry demands, but primarily logistics to accommodate strategic warehousing.	Encourage subdivision of larger lots (2–5 ha) while maintaining flexibility for mixed lot sizes.	Incentivise landowners to develop larger lots through streamlined approvals and/or specific area planning, such as a new strategic or structure plan.
	**Explore and identify circular economy initiatives (Council)**	Accommodate projects like hydrogen hubs, advanced recycling facilities, and a Council waste transfer station.	Invest in waste and recycling infrastructure; support hydrogen and green energy projects.	Establish partnerships for hydrogen hubs, advanced recycling, and a modern Council waste transfer station.
	**Encourage diversification and growth of industries through adequate wastewater infrastructure provision**	Support advanced manufacturing, agribusiness, and green technologies to create a resilient and diversified economy.	Identify and attract high-growth industries such as advanced manufacturing and agribusiness.	Launch targeted investment campaigns; provide infrastructure and utility upgrades tailored to these industries, specifically to address limited wastewater capacity in this area.

Strategic Principle		Details	Required Changes	Specific Observations
	**Identify and rezone land for future industrial activities, adjacent / close to the existing Brighton Hub and scope for specific area planning**	Brighton's growth is influenced by activity across Greater Hobart- there is an expected shortfall across the region.	Balance new land with environmental constraints like bushfire risks and biodiversity; protect First Nations sites.	Investigate opportunities for new industrial land or within existing zoned areas. Consider attenuation buffer zones, topography and bushfire risk.

Source: SGS Economics & Planning (2025)

6.4 Cambridge

The following sections outline the strategic role, challenges, solutions, and responsibilities for this RSIP. The subsequent tables provide detailed SWOT analyses and Strategic Principles.

Strategic Role

Cambridge is a light industrial and logistics hub strategically positioned near Hobart International Airport, providing air freight connectivity. It serves as a key industrial location for warehousing, construction, and manufacturing businesses, but has also seen a rise in retail and hospitality uses, such as breweries, coffee roasters, and distilleries.

Specific Issues & Challenges

While this shift reflects growing demand for mixed-use industrial precincts, it has also led to competition for industrial land, raising concerns about the long-term sustainability of Cambridge's industrial function. Additionally, wastewater servicing constraints pose a major challenge, as high costs and limited capacity deter new industrial developments. Infrastructure limitations, including transport bottlenecks and fragmented land use, further impact the precinct's functionality. Many industrial buildings include a retail component but do not meet parking and access requirements, creating conflicts between different land uses. While Cambridge is predominantly a light industrial zone, there is growing demand for larger industrial lots to accommodate logistics and construction businesses. Future expansion to the north could address this, but planning and infrastructure investments will be required.

Solutions

To ensure Cambridge remains a strategic and significant industrial precinct, wastewater servicing upgrades are required to unlock development of industrial land. New planning controls should balance light industrial businesses with retail and hospitality operations, ensuring land use compatibility. The area is accessed via the Tasman Highway, a high standard Category 1 road. The state and local governments are currently undertaking a feasibility analysis examining an upgraded northern freight route. A structure plan for Cambridge will provide clarity on expansion areas, enabling targeted investment in zoning protections, infrastructure, and industrial land availability.

Roles & Responsibilities

- Clarence City Council – Drive planning reforms, support business growth, and advocate for servicing solutions.
- State Government – Assist with TasWater negotiations and finalise analysis of an upgraded northern freight route.
- TasWater – Address servicing constraints and evaluate cost-reduction measures for industrial users.
- Private Sector & Developers – Work with Council to develop mixed-use industrial spaces while ensuring essential industrial land remains available.

SWOT Analysis for Cambridge

Table 18: SWOT analysis - Cambridge

SWOT Components		Description
Internal	Strengths	– Strategic location as a transport hub linked to a Category 1 road and Hobart International Airport. – Larger, affordable lots available for development. – Presence of key industries such as construction, energy, and logistics. – Opportunity to integrate light industrial uses like breweries and distilleries.
	Weaknesses	– Residential complaints around heavy vehicle routes (e.g., Tea Tree Rd). – Pressure on land use to balance retail and industrial uses.
External	Opportunities	– Opportunity to expand industrial land use northward with infrastructure upgrades. – Strategic development linked to air transport and Brighton connections. – Introduction of specific area plans to improve logistics and transport networks. – Leverage demand for light industrial activities such as breweries & distilleries.
	Threats	– Competition with other precincts (Brighton, Rokeby) for business relocation. – Environmental constraints from proximity to Ramsar wetlands. – Increased pressure on TasWater utilities could discourage investment. – Potential need to upgrade a northern freight route, subject to demand.

Source: SGS Economics & Planning (2025)

Strategic Principles and observations of Cambridge

Table 19: Strategic Principles - Cambridge

Strategic Principle		Details	Required Changes	Specific Observations
	**Strengthen Cambridge as a warehousing and transport hub with a trade focus**	Cambridge should continue operation as a strategic logistics and transport hub while supporting retail opportunities through targeted land use planning and strategic development policies.	Address heavy vehicle access issues and improve freight routes to connect to Hobart CBD & key ports.	Finalise analysis of an upgraded northern freight route.
	**Resolve water and wastewater bottlenecks to support industrial growth**	Address the wastewater treatment capacity issues to support ongoing industrial growth and new business opportunities. This includes modelling alternative infrastructure solutions.	Ensure water treatment infrastructure supports projected industrial demand.	Coordinate with TasWater to enable upgraded infrastructure and prioritise industrial connection costs and expansions.
	**Facilitate the right mix of light industrial uses**	Actively plan for and encourage the development of light industrial activities, such as coffee roasters, breweries, distilleries, and other complementary industries. Ensure policies are in place to balance retail and light industrial use needs.	Recognise the demand for breweries, distilleries, coffee roasters, and other small-scale industries.	Establish a clear zoning policy or create specific sub-precincts for light industrial retail activities, and consider parking requirements.
	**Provide more industrial zoned land**	There will continue to be demand for industrial land in Cambridge. Explore opportunities for unlocked land in the area, either through new estates or expansion of existing areas. Take into consideration environmental constraints, such as	Address environmental constraints (creek systems and agricultural land) and ensure infrastructure readiness.	Plan and support infrastructure investments in areas across the precinct while mitigating environmental risks.

Strategic Principle		Details	Required Changes	Specific Observations
	**Support safe and efficient access for freight vehicles to the Cambridge area**	Understand the transport connectivity requirements of the Cambridge area, including road access. Improve transport linkages, such as upgrading routes like Tea Tree Rd, and strengthen freight connectivity by integrating Cambridge's light industrial and transport capacity with Brighton's heavier freight functions.	Strengthen linkages between these two industrial hubs.	Complete analysis into a new northern freight route.

Source: SGS Economics & Planning (2025)

6.5 Glenorchy

The following sections outline the strategic role, challenges, solutions, and responsibilities for this RSIP. The subsequent tables provide detailed SWOT analyses and Strategic Principles.

Strategic Role

Glenorchy serves as Greater Hobart's primary employment hub, housing a mix of industrial, manufacturing, and retail businesses. It is the Southern Region's most significant industrial precinct based on freight volumes. The Moonah-Derwent Park corridor is particularly significant, including logistics businesses that support urban distribution and servicing industries. Engagement with businesses within the Glenorchy industrial area noted that the precinct has undergone a level of transition away from traditional industrial activities towards more retail and public facing uses, including a rise in service-based (business to business) functions. Equally, businesses noted the strong supply relationships within the precinct, based on a network of local industries supporting larger industrial players, together with access to an established population base for labour.

Specific Issues & Challenges

Glenorchy's industrial landscape is changing, with some areas transitioning toward urban mixed-use development due to rising population density and shifting land demand. While this transition is necessary for urban renewal, it also poses risks to employment retention if industrial businesses relocate elsewhere. Engagement with key businesses noted that there is resistance for relocating occupiers beyond Hobart CBD. Additionally, logistics operators and industrial service providers require proximity to customers. Land shortages and high development costs make it challenging to sustain these uses, putting pressure on things like parking and congestion on the local road network. Key infrastructure constraints also impact Glenorchy's ability to adapt to its evolving role. Road and servicing upgrades are required to accommodate growth, particularly in areas undergoing land-use transition. The City Deal framework, which was meant to fund strategic urban projects, has progressed slowly, limiting the precinct's ability to implement necessary changes.

Solutions

To manage this transition effectively, Glenorchy City Council must balance industrial retention with mixed-use development, ensuring employment-rich industries remain viable. Clear planning frameworks should guide how industrial and commercial activities can co-exist. Evaluate the need for new or enhances infrastructure, particularly for transport and servicing upgrades, to support the long-term evolution of Glenorchy's industrial precincts. In road upgrades, this may mean understanding the different roles of federal, State and local government. Additionally, private developers should work alongside Council to design integrated mixed-use projects that incorporate employment-generating spaces.

Roles & Responsibilities

- Glenorchy City Council – Manage land use transition, protect industrial employment, and advocate for infrastructure investment.

- State Government – Assess funding for infrastructure and urban renewal projects, aligned with the City Deal framework
- Private Developers – Work with Council on integrated mixed-use development models.

SWOT Analysis for Glenorchy

Table 20: SWOT analysis- Glenorchy

SWOT Components		Description
Internal	Strengths	– High concentration of industrial and manufacturing land – Proximity to residential areas, serving local demand for employment – Home to key businesses across logistics and manufacturing – Strategic location as part of key transit corridors
	Weaknesses	– Highly fragmented industrial land across Montrose, Glenorchy, Moonah, and Derwent Park – Infrastructure upgrades (roads, power) needed to support industrial transitions – Uncertainty about future directions, e.g., City Deal and wider strategic planning in corridor – Need to consider transition areas while retaining employment-rich uses
External	Opportunities	– Potential for urban mixed-use development in key areas (Moonah, Derwent Park) – Opportunity to strengthen last-mile logistics network – Strategic use of infill development to maintain employment levels – Implementation of the City Deal area as part of economic revitalisation
	Threats	– Loss of employment density if industrial activities shift outwards to Cambridge or Brighton – Costs of infrastructure upgrades to facilitate transition – Population shift away to outer Hobart from traditional employment hubs, meaning a shifting labour pool – Increasing competition from other precincts (Cambridge, Brighton) for new industries and logistics

Source: SGS Economics & Planning (2025)

Strategic Principles and observations of Glenorchy

Table 21: Strategic Principles - Glenorchy

Strategic Principle		Details	Required Changes	Specific Observations
	**Balance continued presence and strengths of the manufacturing and logistics industries while intensifying employment - dense uses.**	Focus on strategic urban transitions by retaining employment-rich uses and transitioning to mixed-use areas while ensuring no net job loss. Larger occupiers with low levels of employment may want to relocate elsewhere to unlock this development.	Infrastructure planning to support mixed-use development.	Review zoning and specific area plans to ensure alignment of demand and capacity.
	**Prioritise urban mixed-use development in key areas along the transit corridor and activity centres**	Encourage the development of mixed-use areas in Moonah and Derwent Park to support last-mile logistics and population-serving industries.	Evaluate current zoning to ensure alignment with employment retention goals.	Identify underutilised industrial areas for redevelopment and introduce light industry incentives.
	**Explore last-mile logistics opportunities**	Leverage existing infrastructure and business opportunities to expand and improve last-mile logistics services.	Infrastructure upgrades and improved transportation access are needed.	Undertake transport infrastructure upgrades, such as improved roadways and freight access.
	**Address potential future infrastructure upgrades (water, power, sewer)**	Ensure necessary infrastructure improvements are prioritised to facilitate transitions and enable growth opportunities.	Planning policies need to be adjusted to balance industrial transitions.	Plan for light industry relocation pathways and support small logistics businesses in their growth, balancing water, power and waste requirements.
	**Build on the City Deal area opportunities, particularly through activation of the Northern Suburbs Transit Corridor**	Progress planning and development around the City Deal area to support strategic growth and urban renewal projects.	Housing density and affordability strategies are necessary and should consider proximity to employment.	Introduce policies to support affordable housing development close to employment hubs.

Source: SGS Economics & Planning (2025)

Prince of Wales Bay

The following sections outline the strategic role, challenges, solutions, and responsibilities for this RSIP. The subsequent tables provide detailed SWOT analyses and Strategic Principles.

Strategic Role

Prince of Wales Bay is a specialised industrial precinct with a strong focus on marine industries, including shipbuilding, boat repair, and maritime manufacturing. The precinct serves as a key industrial and defence hub, supporting advanced manufacturing and sovereign capability industries. It is also the second port of Hobart, with businesses relocating from Macquarie Wharf as the area transitions towards recreation and cruise ship facilities. The Prince of Wales Bay Marine and Innovation Master Plan outlines the precinct's long-term priorities, including expanding port infrastructure, fostering R&D, and workforce training initiatives. Engagement with key occupiers in the POW Bay finds that access to the waterfront is critical to doing business, and zoning supports this. Major employers like Incat and Nyrstar are critical to the success of smaller occupiers.

Specific Issues & Challenges

While Prince of Wales Bay is a unique industrial precinct, it faces growing pressure from non-industrial uses, particularly the encroachment of breweries, and commercial businesses. This has created interface issues, raising concerns about land-use conflicts and the displacement of core maritime industries. Additionally, infrastructure readiness remains a challenge, particularly road access and servicing capacity, which could impact the long-term industrial viability of the precinct. There is also a need to formalise Prince of Wales Bay as a marine industry and innovation precinct, ensuring future protection of maritime industries while maintaining some flexibility for complementary industrial activities. There is broad support from key occupiers in the precinct that operators with no need for marine connectivity should be located elsewhere.

Solutions

To safeguard its long-term industrial character, a SAP should protect marine industries while allowing some flexibility for light industrial businesses in adjacent areas. Infrastructure and servicing upgrades, particularly in road access and utilities, are essential to ensuring sustained industrial growth. Additionally, formal recognition of the precinct as a defence hub should be explored, reinforcing its industrial significance and strategic role in supporting sovereign capabilities. Collaboration with education providers and R&D institutions can strengthen workforce development, ensuring the precinct remains globally competitive in advanced maritime manufacturing.

Roles & Responsibilities

- Glenorchy City Council – Implement planning controls to protect industrial land, oversee infrastructure upgrades, and manage land-use integration.
- State Government (Economic Development & Infrastructure) – Support land-use protections, infrastructure investments, and industrial workforce training programs.

- Federal Government & Marine Industry – Explore formal designation of Prince of Wales Bay as a marine industry and innovation precinct, ensuring long-term viability.
- Marine Industry Stakeholders – Work with government agencies to enhance workforce skills, infrastructure, and maritime R&D capabilities.

SWOT Analysis for Prince of Wales Bay

Table 22: SWOT analysis – Prince of Wales Bay

SWOT Components		Description
Internal	Strengths	– Unique maritime industry focus with a historical shipbuilding legacy. – Strategic location as the second port of Hobart. – Opportunities for innovation, research, and workforce development within the maritime sector. – North-western area priorities outlined in the 2021 *Prince of Wales Bay Marine and Innovation Master Plan.*
	Weaknesses	– Limited infrastructure capacity around the ports. – Single vacant lot (4,000 sqm) limits opportunities for business expansion. – No industrial lots have been taken up in the last 10 years. – Interface issues creating risks to industries. – Risk of gentrification impacting traditional maritime jobs.
External	Opportunities	– Potential to declare the area a formal defence precinct to support sovereign capabilities. – Opportunities for light industrial uses to coexist with maritime industries. – R&D and workforce development linked to the priorities of the 2021 *Prince of Wales Bay Marine and Innovation Master Plan.*
	Threats	– Potential gentrification impacting industrial job opportunities. – Pressure from non-industrial uses, such as residential development, conflicting with marine industries. – Limited access to infrastructure could deter business investment.

Source: SGS Economics & Planning (2025)

Strategic Principles and observations of Prince of Wales Bay

Table 23: Strategic Principles – Prince of Wales Bay

Strategic Principle		Details	Required Changes	Specific Observations
	**Reinforce Prince of Wales Bay as a key maritime and innovation hub.**	Leverage its historical legacy as a maritime industry focus and integrate R&D and innovation opportunities.	Investment in research, training, and infrastructure.	Support workforce training programs and infrastructure upgrades to support maritime industries and innovation.
	**Preserve, accommodate and enable growth of maritime industry and related uses. Avoid conflicting uses through structure planning and/or the implementation of a SAP**	Focus on retaining and supporting businesses in manufacturing, maritime maintenance, and boat building.	Policies to manage and limit non-marine development.	Establish specific planning overlays to strictly protect the industrial zones and their critical uses.
	**Support light industrial development with appropriate zoning**	Facilitate development opportunities in light industrial areas while balancing compatibility with marine industries.	Improve zoning flexibility to accommodate mixed-use development.	Conduct formal planning studies to ensure light industrial uses coexist without undermining core maritime industries.
	**Address infrastructure gaps impacting business growth**	Upgrade transport and water infrastructure to ensure compatibility with business growth.	Evaluate and plan transport access upgrades.	Map out priority infrastructure upgrades in consultation with industry stakeholders and the Marine Master Plan.
	**Strengthen workforce opportunities and maritime workforce development**	Leverage R&D and workforce training to align with maritime innovation opportunities and masterplan objectives.	Investment in workforce development and training schemes.	Partner with local education institutions to create tailored programs for shipbuilding and maritime sectors.

Source: SGS Economics & Planning (2025)

7. Strategic observations - Northern Region

7.1 Observations of Regionally Significant Precincts

The following table shows a summary of the key observations of relevant regionally significant industrial precincts. They have been arrived at through a series of data analysis and engagement with stakeholders. Further details are provided under each relevant RSIP.

Table 24: Summary of observations of RSIPs

Industrial Precinct	Strategic Observations
TRANSLink	- Complete the business case for the expansion of TRANSLink and potential development as a major intermodal hub.
	- Resolve trade waste and servicing issues to make investment more attractive.
	- Secure a major anchor tenant.
	- Strengthen industrial land protection to prevent competing uses.
	- Promote infrastructure and service readiness for industrial users.
Bell Bay	- Expand capacity for renewable energy and hydrogen industries.
	- Upgrade transport and logistics infrastructure.
	- Address land constraints and planning barriers.
	- Strengthen industry collaboration and workforce development.
Valley Central	- Enhance infrastructure to support growing industrial uses.
	- Strengthen its role as a major food and agribusiness hub.
	- Resolve power supply limitations to attract investment.
	- Set direction of precinct with planning
	- Expand industrial zoning and land supply for large-scale industries.
Launceston	- Manage land supply and support light industrial relocation from older precincts.
	- Plan for the long-term viability of existing industrial uses and investigate future expansion.
	- Improve infrastructure and servicing to support industrial businesses.
	- Ensure zoning protections for local service industries.
	- Enhance transport connectivity across Launceston to support business operations.

Source: SGS Economics & Planning (2025)

7.2 Observations of locally significant industrial land across council areas

Locally-significant industrial land is primarily driven by overall population growth. The land itself meets the needs of local service industries. It comprises smaller occupiers across a range of uses, but examples include auto-repair stores, storage facilities, and small manufacturing workshops.

Demographic changes and trends in income and household expenditure patterns largely determine the growth of these industries and consequently, their demand for industrial land. Land use planning for local service industries should primarily take place at the local level. It is however important for municipalities to understand what is happening in nearby Councils and collaborate where useful. This is especially true in urbanised areas where Councils may not be able to accommodate demand within their municipality, resulting in local service industries spilling over into nearby areas. The following table provides a summary of key observations, by council area, for locally significant industrial land.

Table 25: Summary of locally-significant industrial land

LGA	Key Observations
Break O'Day	– Investigate the potential for light industrial rezoning in Scamander and Beaumaris to support population growth. – Address flood constraints in Fingal to unlock any industrial land opportunities. – Maintain local industrial capacity in St Helens while balancing residential interfaces.
Dorset	– Rezone Council-owned land near Northeast Park (Ringarooma Road) for smaller industries and local enterprises. – Collaborate with Simplot on potential intensification of existing facilities.
Flinders (Tas.)	– Evaluate industrial opportunities at the Flinders Airport precinct, including possible abattoir and construction materials uses. – Improve service coordination (for example, wastewater and power) to support local industry expansions.
George Town	– Continue engagement with local occupiers to identify demands for locally significant industrial land, particularly in the George Town Industrial Precinct. – Balance existing heavy industry with opportunities for light industrial and service-based uses.
Launceston	– Investigate the appropriate intensification of industrial uses in established estates (for example, Invermay and Inveresk) to accommodate business expansion, noting flooding constraints. – Explore alternative sites appropriate for industrial uses. – Maintain and upgrade infrastructure to support older precincts, ensuring they remain viable for local industries.
Meander Valley	– Explore a specialised precinct near Oaks Road for large-lot resource-related industries, such as grain distribution and processing. – Continue supporting Deloraine's role as an established precinct.

LGA	Key Observations
	– Transition parts of Prospect Vale to a commercial or mixed-use area, reflecting its current business profile and residential conflicts. Balance this by protecting the Galvaniser and other key industrial occupiers from encroachment of sensitive uses.
Northern Midlands	– Ensure adequate provision of locally significant industrial land outside TRANSLink, focusing on Longford and Campbell Town. – Coordinate with regional partners to align servicing and infrastructure for future industrial expansions.
West Tamar	– Expand or rationalise the Legana Industrial Area and Exeter to optimise industrial land use, considering TasWater constraints. – Undertake a strategic study for Exeter to determine the best approach for large-lot industrial parcels and potential residential interfaces.
Region	– Maintain a coordinated approach across Northern LGAs to address local industrial land needs, focusing on infrastructure readiness and servicing capacity. – Facilitate regional collaboration to ensure balanced industrial growth and avoid duplication of effort.

Source: SGS Economics & Planning (2025)

Four areas of focus are identified in the Northern Region. These include TRANSLink, Bell Bay, Valley Central and Launceston. These areas were selected based on having a specialised focus on export-oriented industries, strategic warehousing, and transport. They are all strategically connected by nearby road and rail connections, and in many cases have a significant portfolio of existing or vacant land compared to other precincts in the Northern Region.

The subsequent sections discuss a SWOT analysis combined with a set of Strategic Principles for each regionally significant industrial precinct.

7.3 TRANSLink

The following sections outline the strategic role, challenges, solutions, and responsibilities for this RSIP. The subsequent tables provide detailed SWOT analyses and Strategic Principles.

Strategic Role

TRANSLink is envisioned as a major intermodal hub in Northern Tasmania, capitalising on proximity to Launceston Airport, the Midland Highway, and potential road-rail-air connectivity. This makes it an ideal location for logistics and freight-based industries, aiming to alleviate congestion in Launceston by accommodating key transport operators.

Specific Issues & Challenges

Despite its potential, TRANSLink faces infrastructure bottlenecks, particularly in wastewater servicing and power supply, which may deter some industrial investment options. Some industrial lots are also held by landowners unwilling to sell or develop, limiting available land. In addition, attracting a major anchor tenant to the site is key to establishing a level of freight demand to support investment, and to encouraging other businesses to relocate. The major challenge is the potential development of an intermodal rail hub.[31]

Solutions

The potential development of an intermodal rail hub. Master planning and business case work will determine feasibility, while incentivising an anchor tenant, including the potential relocation of an existing freight forwarder from its current inner-city location. Stakeholders should coordinate land release and infrastructure upgrades to reinforce TRANSLink's role as a high-capacity freight hub. Addressing these challenges requires collaboration with TasRail, Launceston Airport, key land owners, TasWater and TasNetworks to develop intermodal facilities, enhance servicing capacity, release land and streamline approvals.

Roles & Responsibilities

- Local Government – Assessments and approvals, facilitate planning frameworks, manage structure planning, and advocate for servicing upgrades. Local Government has a strong supporting role to play particularly in terms of assessment and approvals processes and initiating rezonings.
- State Government – Provide funding support for infrastructure (and advocate for federal funding), facilitate stakeholders, support attraction of an anchor tenant.
- Service Providers (Launceston Airport, TasRail, TasWater, TasNetworks) – Prioritise capacity expansions to meet growing industrial demands.

[31] Northern Midlands Council secured funding to undertake a master plan and business case in consultation with key stakeholders.

- Private Developers & Logistics Operators – Collaborate with government agencies to develop and occupy serviced industrial lots, optimizing freight efficiencies.

SWOT Analysis for TRANSLink

Table 26: SWOT analysis - TRANSLink

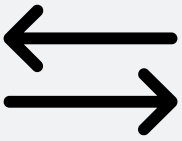
SWOT Components		Description
Internal	Strengths	– Strategic location near Launceston Airport, providing air freight connectivity. – Potential for intermodal development integrating road, rail, and air transport. – Existing industrial base with interest from investors looking to expand. – Proximity to major freight corridors supporting logistics and transport industries. – Strong demand for land from industrial users.
	Weaknesses	– Significant infrastructure challenges, including power supply constraints and wastewater servicing limitations. – Land availability within the defined precinct is limited, with some lots held by landowners unwilling to sell or develop. – Regulatory complexity and approval delays create barriers to industrial investment. – Heavy vehicle movements over local roads in Launceston due to the location of a major freight forwarder. – Lack of ready-to-develop, fully serviced land.
External	Opportunities	– Further develop TRANSLink as a major intermodal hub, integrating air, rail, and road freight. – Integrate role of TRANSLink precinct with nearby land at Launceston Airport. – Secure infrastructure investment to improve power and wastewater servicing. – Attract businesses seeking freight connectivity. – Improve transport planning by relocating inefficiently placed logistics businesses. – Position TRANSLink as Northern Tasmania's key freight and logistics hub.
	Threats	– Delays in infrastructure investment could hinder industrial growth. – Competing industrial precincts (e.g., Bell Bay, Valley Central) could attract businesses away. – Encroachment of non-industrial uses could limit future industrial expansion. – Regulatory roadblocks may discourage new industrial developments.

		– Environmental and servicing constraints could limit land usability.

Source: SGS Economics & Planning (2025)

Strategic Principles and observations of TRANSLink

Table 27: Strategic Principles – TRANSLink

Strategic Principle		Details	Required Changes	Specific Observations
	**Further develop TRANSLink as a major intermodal hub**	Capitalize on its airport proximity and potential rail connectivity to enhance freight logistics.	Improve servicing and infrastructure, particularly power and wastewater.	Secure funding for rail and road infrastructure upgrades to support freight integration.
	**Resolve trade waste and servicing issues to make investment more attractive**	Companies have struggled with wastewater and land servicing issues, deterring industrial expansion.	Work with TasWater and TasNetworks to enhance trade waste processing and energy availability.	Advocate for proactive planning to enable fast-tracked business relocations.
	**Secure a major anchor tenant**	Freight occupiers across Launceston may not be in suitable locations and could relocate to TRANSLink, freeing up suitable industrial land opportunities near the city centre.	Identify an alternative freight hub within TRANSLink.	Develop a logistics strategy to optimise freight movement across the region.
	**Strengthen industrial land protection to prevent competing uses**	Ensure that industrial land is preserved for heavy industry and logistics rather than commercial encroachment.	Implement zoning protections and structure planning for industrial use.	Review planning controls to restrict non-industrial developments within TRANSLink.

Strategic Principle		Details	Required Changes	Specific Observations
	**Promote energy and infrastructure readiness for industrial users**	Address power constraints that limit industrial investment and expansion within TRANSLink.	Secure investment in power supply upgrades and capacity expansion where needed.	Develop incentive programs for industries requiring high energy capacity, with a focus on priority areas.

Source: SGS Economics & Planning (2025)

7.4 Bell Bay

The following sections outline the strategic role, challenges, solutions, and responsibilities for this RSIP. The subsequent tables provide detailed SWOT analyses and Strategic Principles.

Strategic Role

Bell Bay is Tasmania's prime heavy industrial precinct anchored by a deep-water port, making it a prime location for (advanced) manufacturing, metal production and processing, renewable energy, and heavy industry projects. Its port access and existing power and gas infrastructure position Bell Bay as a potential leader in hydrogen production and other renewable energy initiatives.

Specific Issues & Challenges

While Bell Bay appears to have a large supply of industrial land, much of it is constrained by environmental overlays, attenuation buffer requirements, or regulatory complexities. Upfront infrastructure costs and planning approvals can deter investment, especially for new or innovative industries. There is also intense competition from mainland industrial hubs, necessitating a compelling value proposition that aligns with the strategic advantages of the precinct for businesses to locate here. Engagement with occupiers of Bell Bay indicated that certain infrastructure (port and rail) improvements could be made as current freight operations are underutilised. In addition, crucial infrastructure such as electricity is critical for upgrading Bell Bay. Access to affordable and clean energy is a strategic advantage of the precinct as well as its access to a deep port. However, workforce attraction and retention is a continued challenge for private operators in the precinct.

Solutions

Enhancing infrastructure readiness—including transport connections, water, and energy capacity—is essential for attracting large-scale investment. Streamlined regulatory processes can reduce delays and costs. This will encourage advanced manufacturing and renewable energy projects to set up in Bell Bay. Collaboration with energy providers will be key to deliver sufficient grid capacity, while streamlined zoning helps prospective investors navigate environmental constraints. There may be potential for strategically progressing upgrades to infrastructure prior to industries relocating there.

Roles & Responsibilities

- Local Government & State Government – Coordinate land-use policies, environmental approvals, and port development strategies.
- Infrastructure & Energy Providers – Ensure robust power, gas, and transport infrastructure to accommodate heavy industry an water requirements.
- Industry Stakeholders – Engage in workforce development and innovation partnerships to foster advanced manufacturing and renewables.
- Regulators & Environmental Agencies – Streamline approval processes while maintaining environmental safeguards.

SWOT Analysis for Bell Bay

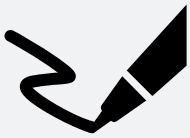
Table 28: SWOT Analysis – Bell Bay

SWOT Components		Description
Internal	Strengths	– Established deep-water port, allowing international freight and exports. – Strong infrastructure, including existing power and gas supply for industrial users, and port capacity. – Supportive community for key industrial precinct and activities with a focus on advanced manufacturing, renewable energy, and heavy industry. This includes an established network of support businesses (like BBAMZ). – Growing investment interest in hydrogen and renewable energy projects. – Large land supply compared to other industrial precincts. – Transport links connecting Bell Bay with other regional precincts.
	Weaknesses	– Perception of land oversupply, but much of it is constrained by environmental or planning restrictions and issues with tenure. – Lack of coordination between developments, which include upgrades to infrastructure (specifically power)being seen in isolation. – Need for additional infrastructure investment, particularly in transport connections. – Limited workforce availability for skilled workers, like engineers or highly-trained operators. – Complex attenuation buffer requirements for heavy industry. – Limited water treatment capacity creates a bottleneck for business growth.
External	Opportunities	– Establish Bell Bay as a national leader in renewable energy production (hydrogen, solar, wind) capitalising on Tasmania's green image. – Attract large-scale advanced manufacturing firms seeking port access. – Expand industrial land availability through targeted zoning adjustments. – Develop industry-focused workforce training programs in collaboration with education providers.
	Threats	– Competing industrial regions with perceptions of greater connectivity, particularly in mainland Australia, could attract investment away from Bell Bay. – Ongoing regulatory delays and infrastructure bottlenecks could deter new industry entrants. This includes slow responsiveness to development opportunities and a reactive approach to infrastructure (power) provision and a slower than anticipated major projects approval process. – High upfront infrastructure costs may be a barrier for new investors. – Potential environmental and planning constraints limiting industrial expansion. – Energy policy shifts affecting long-term viability of planned hydrogen investments.

Source: SGS Economics & Planning (2025)

Strategic Principles and observations of Bell Bay

Table 29: Strategic Principles – Bell Bay

Strategic Principle		Details	Required Changes	Specific Observations
	**Expand capacity for renewable energy and hydrogen industries**	Leverage Bell Bay's infrastructure to become a national leader in renewable energy industries.	Ensure land availability for large-scale industrial operations.	Coordinate with energy providers to secure grid capacity for industrial users and water providers.
	**Increase coordination around different partners**	There is a lack of coordination for the provision of power infrastructure and general approvals.	Better infrastructure planning and coordination.	State-led prioritisation and coordination of infrastructure
	**Address land constraints and planning barriers**	Ensure the effective use of available industrial land while managing environmental constraints. This will be important from a statewide perspective, rather than at a local government/structure plan level.	Improve planning frameworks to provide clarity on land use and zoning. This could be state-driven to target intended markets (like hydrogen power).	Streamline assessments to expedite approvals through clarity on zoning and attenuation distances.
	**Strengthen industry collaboration and workforce development**	Support local (both George Town and the Northern Region) training programs and partnerships with industry to address workforce shortages.	Establish training programs in maritime, hydrogen, and manufacturing industries.	Partner with education institutions to create industry-aligned workforce training.

Source: SGS Economics & Planning (2025)

7.5 Valley Central

The following sections outline the strategic role, challenges, solutions, and responsibilities for this RSIP. The subsequent tables provide detailed SWOT analyses and Strategic Principles.

Strategic Role

Valley Central has evolved into a key industrial precinct for industries including agribusiness, manufacturing (including rural processing but other uses like modular home building), and logistics. Its proximity to major freight routes and a history of successful infrastructure upgrades make it well-suited for food processing, aquaculture feed production, and distribution activities.

Specific Issues & Challenges

Despite these advantages, wastewater and power supply constraints remain significant hurdles. The regulatory framework does not readily permit upfront power infrastructure investment, and the local wastewater system may need further upgrades to accommodate growing industrial demands. High compliance costs and lengthy approval processes can also deter prospective investors. This is not unique to this precinct, but it is particularly acute for attracting new occupiers.

Solutions

Addressing infrastructure shortfalls to meet demand is paramount. By coordinating with TasWater and TasNetworks, Valley Central can secure the necessary wastewater and energy capacity to attract larger industrial users. A focused strategy on food and agribusiness—including targeted incentives and zoning protections—can help position the precinct as a major food processing hub. Building on a refined assessment of future demand, streamlined planning and regulatory approvals will further encourage business expansion.

Roles & Responsibilities

- Local Council & State Agencies – Advocate for infrastructure funding and ensure planning frameworks support agribusiness growth.
- Service Providers (TasWater, TasNetworks) – Collaborate on solutions that allow pre-investment in wastewater and power supply.
- Food & Agribusiness Firms – Invest in new facilities and expansions, leveraging improved servicing and streamlined approvals.

SWOT Analysis for Valley Central

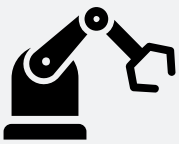
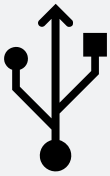
Table 30: SWOT Analysis – Valley Central

SWOT Components		Description
Internal	Strengths	– Strong industrial presence, including major agribusiness and logistics firms. – Well-connected to freight corridors, providing accessibility for distribution industries. – Existing infrastructure upgrades have facilitated industrial growth. – Favourable location for food processing and logistics industries. – Potential for further industrial land expansion.
	Weaknesses	– Wastewater and power supply constraints remain a barrier to industrial expansion. – The regulatory framework does not allow for upfront investment in power infrastructure. – Industrial land supply is becoming constrained. – Lack of overall strategy (master or structure planning) for the precinct, leading to less evidence for advocacy. – High costs associated with infrastructure upgrades needed for new businesses. – Slow government response to industrial servicing needs.
External	Opportunities	– Position Valley Central as Northern Tasmania's key food and agribusiness hub through a masterplan/structure plan. – Secure infrastructure investment to improve wastewater and power capacity. – Attract investment in advanced food processing and value-added agricultural industries. – Encourage large-scale industrial users to relocate from constrained precincts. – Strengthen freight connectivity to further integrate with Tasmania's logistics network.
	Threats	– Infrastructure constraints could deter new industrial investment. – Competition from better-serviced precincts, such as Bell Bay. – Limited workforce availability in the area may create labour shortages. – High regulatory and compliance costs may discourage new developments. – Lack of proactive planning could restrict long-term industrial growth.

Source: SGS Economics & Planning (2025)

Strategic Principles and observations of Valley Central

Table 31: Strategic Principles – Valley Central

Strategic Principle		Details	Required Changes	Specific Observations
	**Enhance infrastructure to support growing industrial uses**	Address critical infrastructure issues such as power and wastewater limitations.	Work with regulators to adjust policies that limit pre-investment in power infrastructure.	Secure funding for wastewater system upgrades to accommodate large users.
	**Strengthen its role as a major food and agribusiness hub**	Build on existing industries like Ridley's Aquafeed and LNG processing to attract complementary industries.	Support infrastructure upgrades tailored to food processing industries.	Develop investment attraction incentives for agribusiness firms.
	**Resolve power supply limitations to attract investment**	Address TasNetworks' limitations on front-loading power supply for industrial precincts.	Secure regulatory reforms to allow upfront investment in power infrastructure.	Advocate for policy changes to encourage industrial investment in energy-intensive industries.
	**Set direction of precinct with planning**	Masterplanning or structure planning would draw on an updated evidence base that will help to ensure efficient transport links to major freight corridors and industrial hubs.	Plan infrastructure, road and transport upgrades to facilitate freight movement and other precinct requirements	Complete the necessary evidence base to justify and advocate for government funding to support key industrial transport upgrades.
	**Expand industrial zoning and land supply for large-scale industries**	Ensure land availability for future large-scale manufacturing and logistics operations.	Adjust zoning and planning policies to allow for precinct expansion.	A masterplan or SAP will consider site-specific requirements and sequenced planning.

Source: SGS Economics & Planning (2025)

7.6 Launceston

The following sections outline the strategic role, challenges, solutions, and responsibilities for this RSIP. The subsequent tables provide detailed SWOT analyses and Strategic Principles.

Strategic Role

Launceston functions as a series of light industrial precincts distributed across the Launceston metropolitan area, catering to local service industries and small-scale manufacturing. Located within the Launceston area, it benefits from proximity to key road networks and an established business ecosystem that supports warehousing, distribution, and commercial services.

Specific Issues & Challenges

Parts of Launceston are nearing the end of the development cycle, particularly the Connector Park precinct, with limited vacant land remaining. Infrastructure servicing—particularly power and wastewater—is under strain, and land ownership patterns have led to slow turnover of available sites. Many businesses are now outgrowing the precinct, prompting consideration of relocation to larger, better-serviced areas.

Solutions

A long-term planning strategy is needed to manage land supply and guide future expansions. Local authorities should identify alternative sites for businesses requiring larger footprints, while preserving land for smaller-scale industries that benefit from close proximity to central Launceston. Infrastructure upgrades—in conjunction with zoning protections—can extend the precinct's viability for light industrial uses.

Roles & Responsibilities

- City of Launceston – Guide land-use planning, infrastructure advocacy, and identify relocation pathways for growing businesses.
- State Government – Provide support for infrastructure funding, ensuring an adequate supply of serviced industrial land.
- Service Providers – Address power, wastewater, and servicing of state and local roads to maintain a functional light industrial environment.
- Local Businesses & Landowners – Collaborate with authorities to optimise existing land, consider relocations, and maintain an appropriate mix of uses.

SWOT Analysis for Launceston

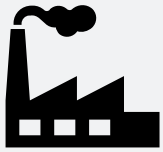
Table 32: SWOT Analysis – Launceston

SWOT Components		Description
Internal	Strengths	– Well-established series of light industrial precincts across Launceston. – Strong demand from businesses needing local service industries. – Proximity to key road networks, supporting logistics and distribution firms. – Existing business turnover creates opportunities for new industrial entrants. – Approvals recently granted for expansion of heavy industrial areas.
	Weaknesses	– Limited remaining vacant land constrains future industrial development. – Infrastructure servicing is nearing capacity, particularly in power and wastewater. – Much of the land is privately owned, limiting council control over development. – Landowners holding out for higher land prices may delay development. – Some precincts are nearing the end of their development cycle, requiring a long-term strategy for future industrial land supply.
External	Opportunities	– Transition aging industrial areas into higher-value light industrial zones. – Identify alternative industrial sites for relocation of key businesses. – Improve infrastructure to extend the precinct's viability. – Explore zoning protections to maintain light industrial land supply. – Strengthen planning controls to ensure long-term industrial land availability. – Develop a long-term strategy to manage land supply and guide future expansion.
	Threats	– Rising land costs could push businesses to relocate to other precincts. – Infrastructure bottlenecks may prevent further industrial expansion. – Commercial encroachment could reduce the availability of industrial land. – Businesses outgrowing the precinct may move to TRANSLink or Valley Central. – Slow response to land supply issues may result in long-term industrial shortages.

Source: SGS Economics & Planning (2025)

Strategic Principles and observations for Launceston

Table 33: Strategic Principles – Launceston

Strategic Principle		Details	Required Changes	Specific Observations
	**Manage land supply and support light industrial relocation from older precincts**	Ensure space for industrial relocations from legacy precincts in Launceston.	Identify alternative locations for local service industries.	Encourage businesses to transition to nearby industrial zones with better servicing.
	**Plan for the long-term viability of industrial uses**	Address the limited remaining industrial land and develop a long-term vision for the precinct.	Work with City of Launceston Council to develop a long-term strategy to manage existing and future industrial land supply.	Support long-term planning efforts to ensure appropriate industrial land supply tailored to future needs.
	**Improve infrastructure and servicing to support industrial businesses**	Address any infrastructure gaps and servicing constraints limiting industrial expansion.	Secure investment in power, water, and road infrastructure where needed.	Develop an infrastructure investment strategy tailored to industrial users.
	**Ensure zoning protections for local service industries**	Preserve industrial land for appropriate uses and prevent commercial encroachment.	Strengthen industrial zoning protections to retain key service industries.	Establish specific area planning to guide long-term industrial land use.
	**Enhance transport connectivity to support business operations**	Improve accessibility for freight and logistics businesses operating in the precinct.	Where needed, upgrade key road connections to support industrial vehicle access.	Advocate for government investment/interest in last-mile freight solutions including electric van charging and storage.

Source: SGS Economics & Planning (2025)

8. Strategic observations - North West Region

8.1 Observations of Regionally Significant Precincts

The following table shows the key observations of relevant regionally significant industrial precincts.

Table 34: Summary of observations of RSIPs

Industrial Precinct	Strategic Observations
Burnie	– Strengthen Burnie as a major industrial hub
	– Assess and improve infrastructure and servicing
	– Address land fragmentation issues
	– Protect industrial zones from non-industrial encroachment
Devonport Airport	– Maintain Devonport Airport's aviation focus
	– Explore and develop alternative logistics hubs
	– Improve connectivity between airport and other industrial precincts
	– Enhance infrastructure servicing for logistics growth
Burnie Airport	– Develop Burnie Airport as a logistics and storage hub through expansion
	– Address servicing constraints
	– Attract specialised industries
	– Improve freight and transport connectivity
Smithton	– Strengthen Smithton as a key agribusiness hub
	– Improve freight and transport networks
	– Address servicing constraints
	– Facilitate agribusiness clustering
Zeehan	– Strengthen Zeehan as a mining services hub
	– Address servicing and infrastructure constraints
	– Expand industrial land supply
	– Encourage renewable energy and industrial diversification

Source: SGS Economics & Planning (2025)

8.2 Observations of locally significant industrial land across council areas

Locally-significant industrial land is primarily driven by overall population growth. The land itself meets the needs of local service industries. It comprises smaller occupiers across a range of uses, but examples include auto-repair stores, storage facilities, and small manufacturing workshops. Demographic changes and trends in income and household expenditure patterns largely determine the growth of these industries and consequently, their demand for industrial land. Land use planning for local service industries should primarily take place at the local level. It is, however, important for municipalities to understand what is happening in nearby Councils and collaborate where useful. This is especially true in urbanised areas where Councils may not be able to accommodate demand within their municipality, resulting in local service industries spilling over into nearby areas. The following table provides a summary of key observations, by council area, for locally significant industrial land.

Table 35: Summary of locally-significant industrial land

LGA	Key Observations
Burnie	– Identify opportunities for expanded industrial land in South Burnie and East Cam for local industries that support businesses and potentially a supply chain for renewable energy projects and larger-scale industries. – Acknowledge and address land fragmentation issues for local business expansion opportunities.
Central Coast	– Support industrial expansion of the East Ulverstone Industrial Precinct across Council-owned land at 21 Maskells Road. – Ensure additional supply considers local demand.
Circular Head	– Develop a structured approach to industrial zoning to avoid ad-hoc development. – Identify affordable start-up spaces and encourage economic diversification beyond agriculture.
Devonport	– Identify opportunities to improve connectivity between industrial land, the seaport, and transport corridors.
Kentish	– Identify industrial land in Railton to support the supply chain of cement and quarry operations. – Expand light industrial land in Sheffield to accommodate local business and supply chain industries.
King Island	– Improve servicing and infrastructure for light industrial land, particularly for small service industries and storage. – Advocate for better freight access to reduce business costs.
Latrobe	– Explore expansion of Bellfield Industrial Precinct to accommodate industrial growth, subject to the feasibility of any required infrastructure upgrades. – Support Shearwater/Port Sorell industrial precinct for local service industries.
West Coast	– Support opportunities for local service industries across Queenstown, Strahan and Zeehan.

Source: SGS Economics & Planning (2025)

Five areas of focus are identified in the Cradle Coast Region. These include Burnie, Devonport Airport, Waratah Wynyard (Burnie Airport), Smithton, and Zeehan. These areas were selected based on having a specialised focus on export-oriented industries, strategic warehousing, and transport. They all are strategically connected by nearby road connections, and in many cases have a significant portfolio of existing or vacant land compared to other precincts in the Cradle Coast Region. The Port of Burnie additionally benefits from Strategic Rail Head infrastructure, while the TasRail unloading facilities in Devonport are about 7 kilometers from Devonport Airport.

The areas of focus of the regionally significant industrial precincts does not preclude other industrial occupiers (i.e., Cement Australia, Savage River/Port Latta). There are also a variety of other significant parts of the Cradle Coast economy, such as land at Spreyton and Ulverstone, which contribute to overall economic activity, but do not, compared to a precinct like Smithon, have a significant quantum of vacant industrial land available.

Devonport, specifically the Port of Devonport, while not a specific RSIP under the criteria of this study, is of regional and state significance as a major passenger and freight port. The Port is undergoing a significant upgrade of its facilities and infrastructure. The new Spirit of Tasmania vessels will provide a 40% increase in freight capacity and additional 160,000 passengers per year[32].

The subsequent sections discuss a SWOT analysis combined with a set of Strategic Principles for each regionally significant industrial precinct.

[32] https://tasports.com.au/quay-link/home

8.3 Burnie

The following sections outline the strategic role, challenges, solutions, and responsibilities for this RSIP. The subsequent tables provide detailed SWOT analyses and Strategic Principles.

Strategic Role

Burnie is one of Tasmania's key industrial and logistics hubs, playing a central role in export-oriented industries, freight movement, and large-scale manufacturing. With direct access to Tasmania's highest volume deepwater port, Burnie is a key point for bulk goods, container shipping, and logistics operations. The precinct has historically supported heavy industry, but land fragmentation, servicing constraints, and conflicting land uses present challenges for future growth.

Specific Issues & Challenges

Burnie faces several constraints that impact its long-term industrial potential. Lot fragmentation makes it difficult to secure large, contiguous industrial sites, that may be limiting high-value investments that require scale. Infrastructure constraints, particularly in sewer capacity, present further barriers to development and intensification. Proximity to commercial and residential uses add an additional layer of challenge, and threaten port-adjacent land to non-industrial uses.

Solutions

Burnie requires strategic land coordination to consolidate industrial sites, enabling larger-scale developments that align with its export and logistics strengths. An assessment infrastructure, particularly the aforementioned upgrades in sewer, stormwater capacity, are essential to unlocking new opportunities. A targeted masterplan and/or SAP should be implemented to preserve critical industrial land near the port, ensuring long-term viability.

Roles & Responsibilities

- Burnie City Council – Facilitate structure planning, land coordination, and interface management.
- State Government – Support prioritised funding for infrastructure servicing and freight network upgrades where needed.
- Port of Burnie Operators & Private Developers – Collaborate on industrial expansion and supply chain efficiencies.

SWOT Analysis for Burnie

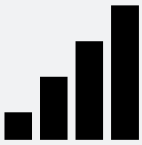
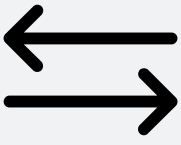
Table 36: SWOT analysis- Burnie

SWOT Components		Description
Internal	Strengths	– Port-adjacent industrial land providing direct access to Tasmania's highest volume deepwater port. – Strong freight and logistics connectivity, with road, rail, and port integration. – Established manufacturing and export industries supporting regional economic activity. – Proximity to a large labour market catchment through road connectivity.
	Weaknesses	– Land fragmentation, making it difficult to secure large, contiguous sites for major industrial investment. – Sewer and stormwater servicing constraints, limiting industrial expansion. – Proximity to commercial and residential uses, increasing the risk of land-use conflicts. – Limited availability of ready-to-develop, fully serviced industrial land.
External	Opportunities	– Consolidate industrial lots to support large-scale industrial users. – Assessment of demand and targeted infrastructure investments in water and sewer to unlock growth potential. – Potential to expand port-related industries, including logistics, warehousing, and advanced manufacturing.
	Threats	– Land-use conflicts that may result in industrial land conversion to non-industrial uses. – Infrastructure investment delays that could restrict industrial growth. – Competing industrial precincts (e.g., Devonport, Smithton) that may attract businesses away from Burnie. – Environmental constraints affecting expansion areas (such as noise, dust and other attenuation distances).

Source: SGS Economics & Planning (2025)

Strategic Principles and observations of Burnie

Table 37: Strategic Principles - Burnie

Strategic Principle		Details	Required Changes	Specific Observations
	Strengthen Burnie as a major industrial hub	Burnie's industrial connectivity is unmatched in the region. Reinforce Burnie's role as a port-oriented industrial hub, with a focus on manufacturing, logistics, and export industries.	Structure and masterplanning that considers these issues.	Ensure zoning protects port-adjacent industrial land and restricts incompatible developments.
	Assess and improve infrastructure and servicing	Assess and address sewer and stormwater constraints that hinder industrial expansion.	Further research, potential funding and upgrades	Where needed, advocate for TasWater investment in sewer capacity expansion and stormwater management improvements.
	Address land fragmentation issues	Encourage the consolidation small industrial parcels to enable large-scale investment opportunities.	Coordination with landowners and provision of incentives that encourage lot consolidation	Facilitate land assembly and subdivision strategies to create larger, investment-ready industrial sites.
	Protect industrial zones from non-industrial encroachment	Ensure long-term industrial land availability by preventing rezoning for commercial and residential uses.	Planning policy refinements outlined in masterplanning.	Strengthen zoning protections and implement buffer zones between industrial and non-industrial land uses.

Source: SGS Economics & Planning (2025)

8.4 Devonport Airport

The following sections outline the strategic role, challenges, solutions, and responsibilities for this RSIP. The subsequent tables provide detailed SWOT analyses and Strategic Principles.

Strategic Role

Devonport Airport is an important transport and logistics hub that capitalises on aviation connectivity for the Cradle Coast region. While it was previously zoned for general industrial uses, the current planning context prioritises aviation-related industries and logistics operations that align with the airport's core functions. Future industrial expansion must complement airport activities, particularly in freight, aviation support services, and transport logistics.

Specific Issues & Challenges

The re-zoning of Devonport Airport to a Particular Purpose Zone (PPZ) focuses uses to a particular type, meaning that other types of industrial occupiers will seek space elsewhere. Existing industrial land supply in the wider Devonport area is limited, with high demand for logistics and distribution facilities. However, most suitable land in the airport precinct is already leased for aviation use. An ancillary general industrial precinct nearby may be required.

Solutions

A coordinated industrial land strategy is needed to ensure freight and logistics businesses can establish themselves in alternative industrial locations. Collaboration with TasPorts, TasWater, and key industrial users is required to understand infrastructure servicing requirements unlock new industrial land with the necessary servicing infrastructure.

Roles & Responsibilities

- Latrobe Council (and nearby Devonport City Council) – Align planning policies with the airport's strategic direction.
- State Government – Evaluate the role of needed infrastructure investment in alternative industrial precincts (potentially near East Devonport).
- TasPorts & Private Developers – Coordination and engagement to align business needs with long-term strategy.

SWOT Analysis for Devonport Airport

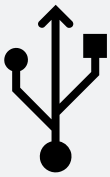
Table 38: SWOT analysis – Devonport Airport

SWOT Components		Description
Internal	Strengths	– Strategic location near Devonport's seaport and freight networks. – Strong aviation connectivity, supporting air freight and logistics industries. – Planned infrastructure investments to enhance airport operations.
	Weaknesses	– Zoning changes restrict general industrial use, limiting broad industrial land availability. – No dedicated industrial expansion plans, despite demand for logistics and transport-related businesses. – Limited water treatment capacity creates a bottleneck for business growth.
External	Opportunities	– Identify an alternative industrial hub for logistics operators around East Devonport. – Improve airport infrastructure to attract aviation-related industries. – Strengthen freight connectivity between Devonport's port, road, and air networks.
	Threats	– Limited available land within the airport precinct for new industrial uses. – Competition from other industrial precincts, such as the Bellfield precinct. – Lack of servicing infrastructure for new industrial areas.

Source: SGS Economics & Planning (2025)

Strategic Principles and observations of Devonport Airport

Table 39: Strategic Principles - Devonport Airport

Strategic Principle		Details	Required Changes	Specific Observations
	Maintain Devonport Airport's aviation focus	Ensure land use planning prioritises aviation-related industries and logistics.	Planning policy alignment, continual review of SAP and zoning	Restrict incompatible industrial uses and align zoning with aviation priorities.
	Explore and develop alternative logistics hubs	Identify alternatives to this precinct, which could include land around East Devonport, as suitable alternatives for freight and logistics businesses.	Land identification, masterplan	Support industrial rezoning and infrastructure investment in these alternative sites.
	Enhance infrastructure servicing for logistics growth	Investigate requirements for sewer, power, and road access for industrial land near Devonport.	Coordination with service providers	Collaborate with TasWater and TasPorts to ensure adequate servicing for industrial sites.

Source: SGS Economics & Planning (2025)

8.5 Burnie Airport

The following sections outline the strategic role, challenges, solutions, and responsibilities for this RSIP. The subsequent tables provide detailed SWOT analyses and Strategic Principles.

Strategic Role

Burnie Airport serves as a regional transport and logistics hub, supporting freight, storage, and mid-sized industrial businesses. The industrial land surrounding the airport has potential for specialised industries, including silica processing, alternative waste solutions, and logistics services. However, servicing constraints and land-use limitations restrict its ability to expand.

Specific Issues & Challenges

The primary constraint for Burnie Airport's industrial precinct is a potential shortfall in sewer and water servicing. The western part of the precinct is on the fringe of serviceable land, which would make upgraded industrial development costly. Land-use conflicts with adjacent non-industrial areas also create challenges, particularly for showrooms and mixed-use businesses that do not fit within the airport's strategic function.

Solutions

A targeted servicing strategy is needed to unlock new industrial land at Burnie Airport while ensuring it aligns with logistics, storage, and processing industries. Council should work with State Growth and TasWater to provide cost-effective servicing solutions, particularly for sewer, road access, and power upgrades.

Roles & Responsibilities

- Waratah-Wynyard Council – Align planning policies to support industrial and logistics-focused development.
- State Government – Support for justified funding for infrastructure upgrades to enable industrial expansion.
- Private Developers – Invest in industrial land servicing and development.

SWOT Analysis for Burnie Airport

Table 40: SWOT analysis – Burnie Airport

SWOT Components		Description
Internal	Strengths	– Proximity to Burnie's transport network, including major highways and freight routes. – Existing industrial demand from logistics, processing, and storage businesses. – Potential for larger industrial lots, supporting mid-sized industries.
	Weaknesses	– Limited sewer and water servicing, particularly in the western Somerset area. – Land-use conflicts with commercial and mixed-use developments. – High infrastructure costs for new industrial developments.
External	Opportunities	– Infrastructure investments to improve servicing for industrial land. – Potential to attract logistics and storage businesses relocating from other precincts. – Expansion of processing industries, including silica and waste solutions.
	Threats	– High servicing costs could discourage industrial investment. – Occupiers, attracted to available space, relocating to this precinct that would be better suited in precincts like Burnie Port. – Environmental constraints limiting new industrial land releases.

Source: SGS Economics & Planning (2025)

Strategic Principles and observations of Burnie Airport

Table 41: Strategic Principles – Burnie Airport

Strategic Principle		Details	Required Changes	Specific Observations
	Develop Burnie Airport as a logistics and storage hub through expansion	Position the precinct as a specialised industrial area supporting storage, logistics, and processing industries through identification of long-term land.	Masterplanning/Structure Planning/SAP	Ensure zoning supports mid-sized industrial uses, preventing non-industrial encroachment.
	Address servicing constraints	Investigate and advocate for improved sewer and water servicing to unlock industrial land potential.	Specific capacity assessments Infrastructure investment	Work with TasWater and State Growth to develop cost-effective servicing solutions.
	Attract specialised industries	Encourage businesses in processing, storage, and logistics to locate at Burnie Airport.	Industry attraction strategy	Develop investment incentives for processing and storage industries.
	Improve freight and transport connectivity	Enhance road infrastructure and transport access for businesses.	Freight study to assess if road upgrades is required.	Investigate the need for freight corridor improvements to support logistics efficiency.

Source: SGS Economics & Planning (2025)

8.6 Smithton

The following sections outline the strategic role, challenges, solutions, and responsibilities for this RSIP. The subsequent tables provide detailed SWOT analyses and Strategic Principles.

Strategic Role

Smithton is a key industrial and agribusiness hub in Tasmania, supporting food processing, agricultural supply chains, and transport industries. The precinct plays a critical role in Tasmania's dairy, meat, and horticulture sectors, with strong connections to export markets via freight and logistics networks. It also has a significant portion of vacant zoned industrial land, meaning it has flexibility to engage with strategic operators and anchors.

Specific Issues & Challenges

Smithton's primary challenge is ensuring adequate servicing and infrastructure capacity to support agribusiness expansion. Freight and transport connectivity should also be tested to understand necessary improvements to reduce costs and improve efficiency for agricultural exports. Potential land-use conflicts with surrounding residential and commercial areas need to be managed carefully.

Solutions

A coordinated master planning process, combined with a study on freight, is needed to support agribusiness growth while ensuring industrial land supply aligns with industry needs. Freight efficiency improvements should be prioritised to reduce transport costs and improve supply chain connectivity.

Roles & Responsibilities

- Circular Head Council – Facilitate structure planning and industrial land-use protections.
- State Government – Support justified and prioritised freight and infrastructure upgrades.
- Agribusiness Operators – Invest in processing and logistics facilities.

SWOT Analysis for Smithton

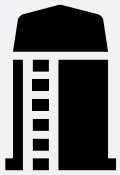
Table 42: SWOT analysis - Smithton

SWOT Components		Description
Internal	Strengths	– Key location for agribusiness and food processing. – Proximity to primary production industries, meaning connectivity for agricultural exports. – High industry demand for processing and logistics facilities.
	Weaknesses	– Freight and transport inefficiencies, increasing costs for agribusinesses. – Potential land-use conflicts with non-industrial development.
External	Opportunities	– Infrastructure investments to improve supply chain efficiency. – Potential to expand agribusiness and export industries.
	Threats	– Servicing constraints could limit industrial growth. – Competition from other agricultural processing hubs in Tasmania.

Source: SGS Economics & Planning (2025)

Strategic Principles and observations of Smithton

Table 43: Strategic Principles - Smithton

Strategic Principle		Details	Required Changes	Specific Observations
	Strengthen Smithton as a key agribusiness hub	Reinforce Smithton's role as a processing and logistics centre for agriculture, working to optimise existing industrial land opportunities	Masterplan/structure plan/SAP	Ensure zoning supports agribusiness expansion.
	Improve freight and transport networks	Address inefficiencies in agricultural supply chains.	Studies, prioritisation, road and logistics investment	Subject to more detailed studies, investigate freight requirements and need for supporting freight routes and transport infrastructure.
	Address servicing constraints	Ensure adequate power, water, and sewer capacity to match planned industrial growth.	Infrastructure studies and investment	Work with TasWater, Tasnetworks and State Growth to enhance servicing where needed.
	Facilitate agribusiness clustering	Encourage co-location of processing, storage, and logistics industries.	Industry attraction strategy, masterplan	Develop incentives for food processing and logistics companies (economic development and planning-focussed).

Source: SGS Economics & Planning (2025)

8.7 Zeehan

The following sections outline the strategic role, challenges, solutions, and responsibilities for this RSIP. The subsequent tables provide detailed SWOT analyses and Strategic Principles.

Strategic Role

Zeehan serves as a key industrial and mining services hub on Tasmania's West Coast, supporting the mining, resources, and energy industries. With significant mineral reserves in the surrounding areas, the precinct plays a vital role in Tasmania's mining supply chain. Recent interest in renewable energy development and industrial diversification highlights the need to preserve and expand industrial land supply.

Specific Issues & Challenges

Zeehan faces significant infrastructure and servicing challenges, particularly in power supply and industrial land development. Utility constraints have prevented some businesses from expanding, while land fragmentation and ownership complexities create further barriers. Additionally, access to industrial land is limited, with many areas in Crown or private ownership, making future planning difficult.

Solutions

A strategic land-use and infrastructure investment plan is required to address Zeehan's servicing constraints and unlock new industrial land for mining and energy-related industries. Collaboration between West Coast Council, State Government, and private developers will be necessary to ensure future industrial growth aligns with regional economic priorities.

Roles & Responsibilities

- West Coast Council – Facilitate industrial zoning protections and coordinate land-use planning.
- State Government – Support servicing and prioritised infrastructure investment, particularly in power and transport networks.
- Mining and Energy Industry Stakeholders – Continuous engagement with government and business community.

SWOT Analysis for Zeehan

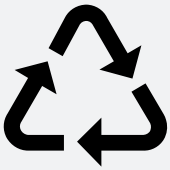
Table 44: SWOT analysis - Zeehan

SWOT Components		Description
Internal	Strengths	– Strategic location for mining and resources industries. – Existing industrial land and infrastructure supporting mining services. – Potential for diversification into renewable energy projects.
	Weaknesses	– Utility and power constraints, limiting new industrial development. – Land availability is restricted, with many areas under Crown or private ownership. – Lack of servicing infrastructure, including water and wastewater limitations.
External	Opportunities	– Expand industrial land supply to accommodate mining services and renewable energy industries. – Invest in servicing infrastructure to unlock new industrial opportunities. – Develop an industrial land strategy to guide future expansion.
	Threats	– Lack of power and utility upgrades could restrict future industrial growth. – Encroachment of non-industrial land uses, reducing available land for mining services. – Competition from other mining support hubs in Tasmania.

Source: SGS Economics & Planning (2025)

Strategic Principles and observations of Zeehan

Table 45: Strategic Principles - Zeehan

Strategic Principle		Details	Required Changes	Specific Observations
	Strengthen Zeehan as a mining services hub	Reinforce Zeehan's role as a regional centre for mining supply and services.	Masterplan/Structure Plan/SAP	Ensure zoning protections for mining-related industries.
	Address servicing and infrastructure constraints	Improve power supply and servicing to unlock new industrial development.	Infrastructure studies and investment	Work with the State Government and utility providers to justify and, where needed, upgrade power and utilities.
	Expand industrial land supply	Identify and unlock new industrial land to support growth.	Strategic land-use planning	Investigate Crown land and private land options for expansion.
	Encourage renewable energy and industrial diversification	Support emerging energy industries in the region.	Economic development strategies	Attract investment in renewable energy and resource-based industries.

Source: SGS Economics & Planning (2025)

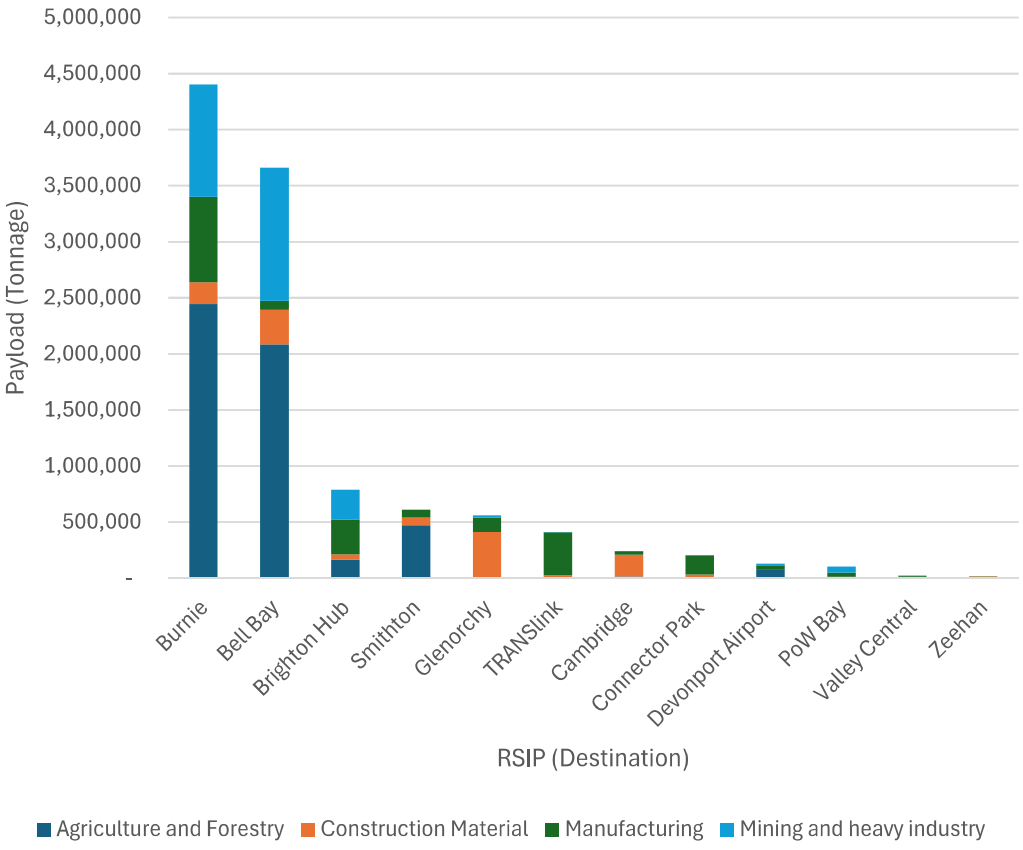
9. Appendix A – Freight data

9.1 Overview of freight volumes by RSIP

Freight movement, as in the types (categories) of freight, and overall weight, is an important indicator of industrial activity within each of Tasmania's Regionally Significant Industrial Precincts (RSIPs).

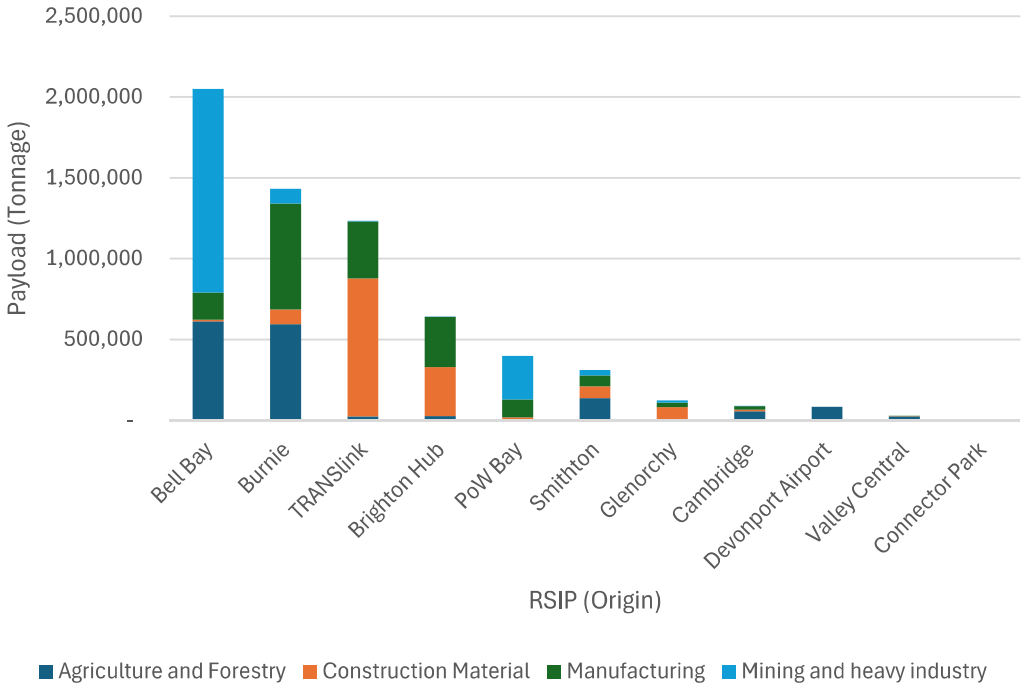
This analysis presents a summary of transport "payload", otherwise known as tonnage, volumes across categorised by both origin and destination. Using commodity data, provided by State Growth and extracted from each precinct, commodities were bundled into broader industry categories to better capture the major economic drivers of freight movement. For a concordance of these bundles, see Table 46. The charts (Figure 18 Figure 19) clearly highlight the freight specialisations of different RSIPs.

Figure 18: Payload analysis by RSIP and category, (destination) 2024



Source: SGS Economics & Planning (2025)

Figure 19: Payload analysis by RSIP and category, (origin) 2024



Source: SGS Economics & Planning (2025)

Table 46: Broad category to sub-category concordance, Tasmanian Freight Survey data

Agriculture and Forestry	Construction Material	Manufacturing	Mining and heavy industry
– Animal Feed – Cereals – Fruit and Nuts – Grain Mill Products – Live Animals – Raw Milk – Vegetables – Wool – Other Animal Products – Other Plant Products – Softwood Logs – Hardwood Logs	– Bricks Roofing Tiles and Concrete Products – Cement – Stone Sand and Clay – Premixed Concrete – Bitumen and Asphaltic Mixtures – Other Non-metallic Mineral Products	– Basic Chemicals – Fertilisers and Pesticides – Other Chemicals Rubber and Plastics Products and Explosives – Petroleum Gasses – Petroleum and Diesel – Other Petroleum and Coal Products – Pharmaceutical Products and Essential Oils – Empty Containers	– Aluminium – Basic Iron and Steel – Fabricated Metal Products – Iron Ores and Concentrates – Zinc – Metal Wastes and Scrap – Other Basic Metal Products – Other Metallic Ores – Coal and Briquettes – Other Minerals – Pulp

Agriculture and Forestry	Construction Material	Manufacturing	Mining and heavy industry
– Rough Sawn or Dressed Wood – Boards Panels and Veneer Sheets – Other Wood Products – Woodchips – Paper and Newsprint		– Furniture and Pre-fabricated Buildings – Motor Vehicles and Parts – Mixed Consumer Goods – Mixed Groceries – Other Machinery and Parts – Other Articles and Commodities – Natural Water – Mixed or Unknown Commodities – Beer Ale and Stout – Chocolates and Confectionery – Dairy Products – Fish Live Fresh or Chilled – Meat and Meat Products – Other Food – Other Prepared and Preserved Plant and Animal Products – Prepared and Preserved Fish – Prepared and Preserved Vegetables – Other Alcoholic Beverages and Mixed Alcoholic Consignments – Waste	

Source: SGS Analysis of Department of State Growth data, 2025

9.2 Observations by RSIP and key takeaways

There are distinct variations in overall movement of freight and by category depending on the precinct being considered. High-level observations are summarised below:

- Bell Bay, for instance, demonstrates extremely high volumes in Mining and Heavy Industrial categories, driven by aluminium, metal processing, and mineral exports. Forestry Products also feature strongly, reflecting the importance of woodchips and processed timber in the region's economy.
- Burnie shows a large freight payload in Construction Materials and Processed Food and Beverage, suggesting its role in both construction supply chains and food distribution.
- Smithton, on the other hand, is characterised by strong movements in Agricultural Products and Processed Food and Beverage, consistent with its role as a key agricultural production and processing hub.
- Launceston, Cambridge, and Glenorchy exhibit smaller but more diverse freight movements, typically associated with manufactured goods, consumer groceries, and some agricultural flows.
- PoW Bay stands out due to significant Mining and Heavy Industrial activity, tied to nearby mineral operations (such as Nyrstar).

Across the network, Construction Materials and Mining-related products represent the heaviest freight categories overall, but there is also a notable spread of agricultural, food, and manufactured goods moving through smaller hubs.

This diversity highlights the complexity and interdependency of Tasmania's freight network, with each precinct playing a complementary role in supporting the broader economy.

Appendix B: Precinct Profiles

9.3 Overview

This section provides a detailed profile of each Regionally Significant Industrial Precinct (RSIP) across Tasmania, capturing their strategic role in supporting regional economic development and freight movement. Each profile outlines the precinct's key characteristics, including its role and function within the industrial and logistics network, major industries and employers, changes in employment patterns, available land supply, and infrastructure provisioning.

An overview of the regionally significant sites has been provided at the precinct level, apart from the analysis of the industries, which has been reported at a Statistical Area Level 2 (SA2) level. An SA2 is a medium-sized area that considers elements needed for a community to function and typically contains a population of between 3,000 to 25,000 people. As the boundaries of the precincts and SA2s do not align, analysis of SA2s that the precinct best fits in is provided.

It should be noted that number of lots on and total area of industrial land may not equal the sum of suitable vacant lots and lots taken up. This is largely because of changes to lot boundaries or zoning, and lots being partially vacant (i.e., occupied lots that are large enough to be subdivided).

The number of jobs in each industry as a percentage of all jobs excludes inadequately described, not stated and not applicable responses to the 2021 ABS Census. In terms of sizing, lots less than 500 sqm are classified as extra small, lots between 500 and 2,000 sqm are small, lots between 2,000 and 5,000 sqm are medium, and lots at least 5,000 sqm are large.

Spatial mapping of zoning and vacant lots is also presented to illustrate development readiness and constraints. In addition to summarising existing conditions, the profiles identify planning considerations such as attenuation zones, environmental constraints, and sensitive uses. Opportunities for future development are highlighted, informed by local government planning initiatives, infrastructure upgrades, and observed trends in land uptake. Together, these precinct profiles provide insights to inform the strategic framework and observations of precincts and statewide.

9.4 Southern region

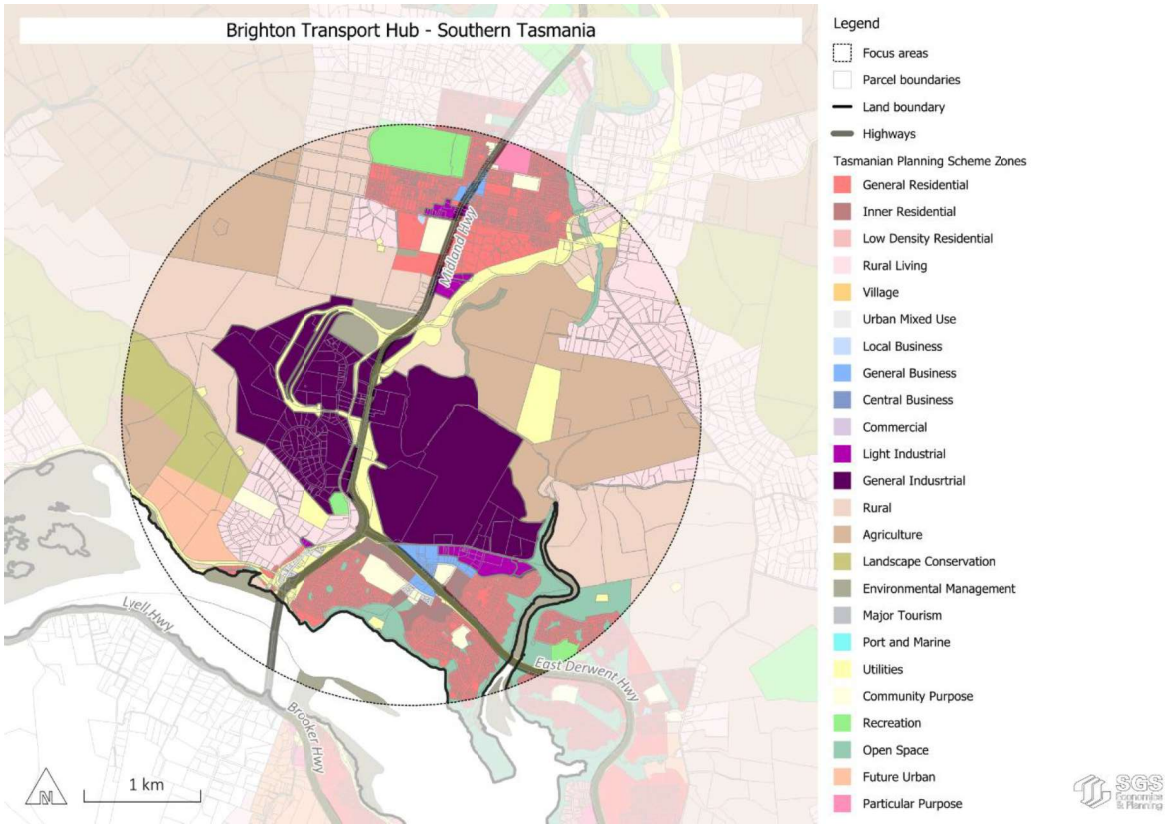
Brighton Hub

The Brighton Hub precinct is a key transport and warehousing hub, with Brighton Transport Hub (intermodal hub) and Brighton Hub (industrial estate) as state-significant employment areas anticipated to drive future growth in the region as demand for sites increase.[33] According to the 2018 Brighton Structure Plan, the intermodal hub is the only one in southern Tasmania, while the industrial estate is the largest in the Hobart region. Within the precinct, Boral Quarry is also one of the two major quarries in southern Tasmania.

Figure 20 shows the zoning of and around the industrial precinct, while Figure 21 indicates where suitable vacant lots are located. There are many suitable vacant lots and they are mostly in the western part of the precinct.

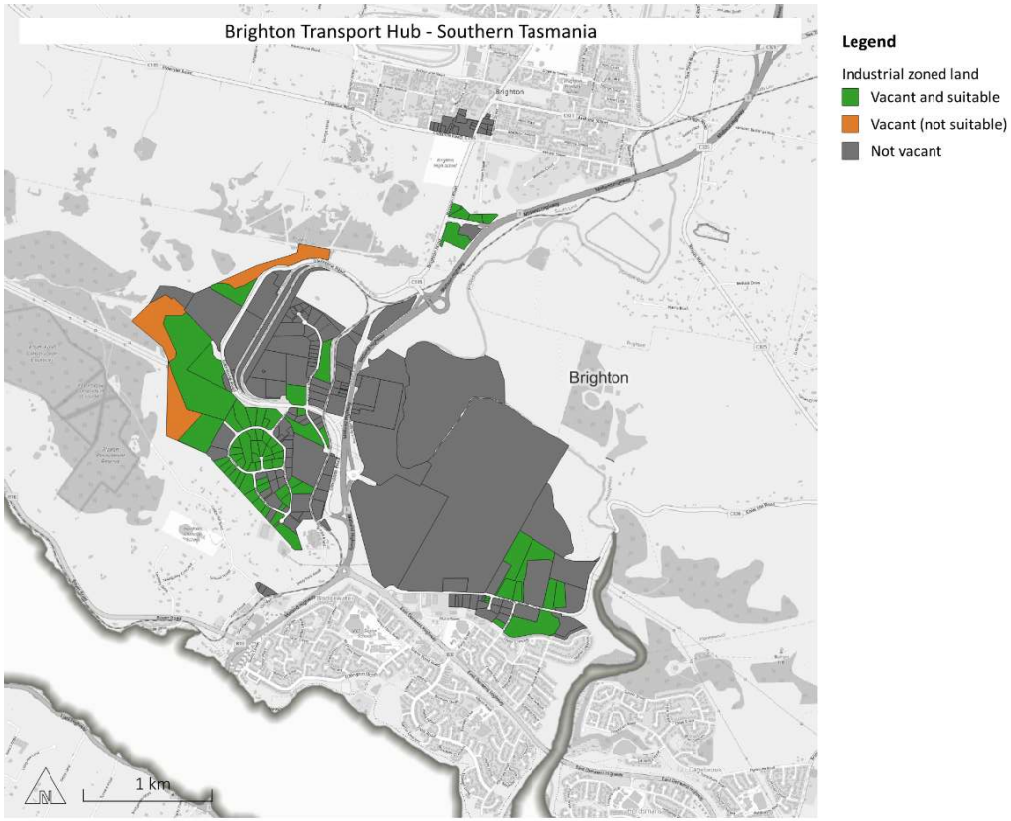
[33] https://www.brighton.tas.gov.au/wp-content/uploads/2019/05/Strategic-Plans-Brighton-Structure-Plan-%E2%80%93-Final-LR.pdf

Figure 20: Precinct overview, zoning – Brighton Hub



Source: SGS Economics & Planning (2025)

Figure 21: Precinct overview, suitable vacant lots – Brighton Hub



Source: SGS Economics & Planning (2025)

Table 47 documents the total area, number of lots and lot sizes of the industrial precinct, in addition to the main employment industries of SA2s the precinct falls within. The top three industries have not changed between 2011 and 2021.

Table 47: Summary – Brighton Hub

Character	Brighton Transport Hub is a purpose-built intermodal hub to facilitate efficient freight movement and enable opportunities for long-term growth. Rail yards were relocated from Hobart Rail Yard in Macquarie Point to address congestion and inefficiencies. The surrounding industrial area was then developed and forms what is known as the Brighton Hub precinct.
Role and function	The Brighton Hub precinct is a key transport and intermodal hub that enables freight to move between the northern ports and southern Tasmania efficiently. It achieves this through integrated rail and road access and therefore plays a key role in the transport chain. The precinct also has logistic-related functions, with imports and exports being transported to and from the precinct.
Key industries and changes in industry	Top 3 employment industries in 2021 by best fit SA2:[34] 1. Transport, Postal and Warehousing (570 jobs) (18%) 2. Retail Trade (394 jobs) (12%) 3. Education and Training (394 jobs) (12%) Between 2011 and 2021, the top 3 industries by best fit SA2 with the greatest changes in job numbers were in: 1. Transport, Postal and Warehousing (+309 jobs) (+118%) 2. Retail Trade (+165 jobs) (+72%) 3. Construction (+114 jobs) (+55%)
Businesses	Key businesses include: – Boral (Boral Concrete, Boral Quarries) – building materials supplier – Onetrak – construction equipment supplier – SRT Logistics – refrigerated transport service – Straightlink– logistics service

[34] Best fit SA2s as defined as SA2s (medium-sized statistical area of 3,000 to 25,000 people) that the precinct best fits in due to boundaries not aligning

	– Tasfreight – logistics service – Nutrien Ag Solutions – agricultural service – Polyfoam Australia Pty Ltd – manufacturer
Vacant lots by size	The available lots are mostly larger in size (medium to large lots). Of lots larger than 5,000 sqm in size, there are three sites that comprise about 60% of the large lots, being around 10.1 Ha, 13.1 Ha and 29.6 Ha. **Table A1: Vacant suitable lots in Brighton Hub** | | Vacant lots | Vacant land area (sqm) | |---|---|---| | Extra small (<500 sqm) | 1 | 297 | | Small (500-2,000 sqm) | 4 | 3,614 | | Medium (2,000-5,000 sqm) | 23 | 93,603 | | Large (>5,000 sqm) | 39 | 882,330 | | Total | 67 | 979,844 |
Take-up since last audit	Medium-sized lots have seen the greatest take-up. Many of these have been subdivided since 2011. **Table A2: Take-up of lots in Brighton Hub** | | Lots | Land area (sqm) | |---|---|---| | Extra small (<500 sqm) | 0 | 0 | | Small (500-2,000 sqm) | 1 | 1,659 | | Medium (2,000-5,000 sqm) | 10 | 38,167 | | Large (>5,000 sqm) | 6 | 76,439 | | Total | 17 | 116,264 |
Infrastructure: transport, power (incl. gas), water and sewage	Brighton Hub has excellent access to the Category 1 State Road network. The rail network runs directly through the precinct. The site also has good access to utilities.

Table A3: Infrastructure provisioning in Brighton Hub

	Transport	Power	Water	Wastewater
Current	Direct access to National Network (road and rail), access to closest airport in about 30 minutes;	No constraints identified at high-level; subject to detailed technical assessment and formal connection enquiry with TasNetworks.	May require upgrades to accommodate future development.	Able to accommodate limited to low strength, low volume liquid waste

Planning considerations	Attenuation zones: the quarry has substantial attenuation distances to ensure operation is undisturbed Specific area plans: plans are in place for truck stop upgrades and a town square (*Brighton Hub – Truck Stop Upgrades/Town Square Concept Plan*) and ephemeral events spaces, and biodiversity rehabilitation zones (*Brighton Industrial Estate – Brand and Place Strategy 2020*) Sensitive uses: largely situated with sufficient buffer from sensitive uses
Environmental constraints (natural hazards and biodiversity)	Vegetation: the precinct includes some priority vegetation and there is threatened native vegetation communities to the northwest of the site Hazards: primarily bushfire-prone and areas with landslip hazard along the Jordan River and Boral Quarry Heritage: includes a local heritage place and First Nations heritage sites with identified artefacts
Development and planning opportunities	– Opportunities to support larger-lot developments – Potential for development at the edges of the Boral Quarry site – Opportunity for updated structure planning – Extremely suitable sites for future expansion to the northwest

Source: SGS Economics & Planning

Cambridge

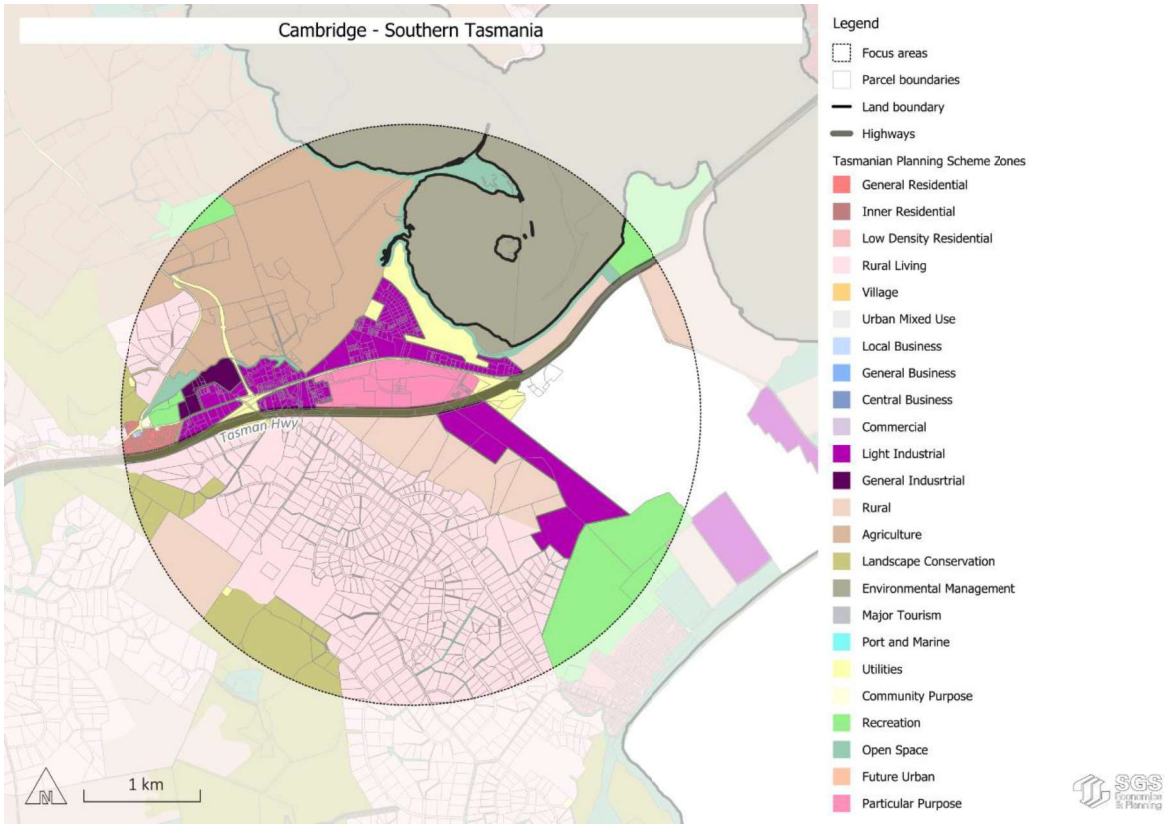
The Cambridge precinct is an industrial and transport hub that provides greater opportunities for new businesses to establish, offering larger affordable sites and access to freight corridors relative to other precincts.[35] In Clarence City Council's Economic Development Plan 2016-2021, the precinct was pictured as a productive logistics hub (including warehousing) in Cambridge that would act as a gateway for business activity linked to air transport (Hobart Airport). It would enable manufacturing and processing activities, and repair and storage and distribution facilities.[36]

Figure 22 shows the zoning of land around the industrial precinct, while Figure 23 indicates where suitable vacant lots are located. There are many suitable vacant lots and they are mostly in the northern part of the precinct and where Hobart International Business Park will be, in the south east.

[35] https://www.shapingtasmania.com.au/images/projects/2/1727065603_Greater%20Hobart%20Plan%20-%20Strategy%20for%20Growth%20and%20Change.pdf

[36] https://www.cg.tas.gov.au/__data/assets/pdf_file/0010/396433/Southern_Tasmania_Prospectus.pdf

Figure 22: Precinct overview, zoning – Cambridge



Source: SGS Economics & Planning (2025)

Figure 23: Precinct overview, suitable vacant lots – Cambridge

Source: SGS Economics & Planning (2025)

Table 48 documents the total area, number of lots and lot sizes of the industrial precinct, in addition to the main employment industries of the SA2 the precinct falls within. From 2011 and 2021, electricity, gas, water and waste services has replaced manufacturing as one of the top three industries. Table

48 provides an overview of the precinct's key employers and anchors, characteristics, and strategic positioning. The precinct includes Hobart International Business Park, a light industrial business park,[37] in addition to bulky goods retail, vehicle rentals, construction and car-related businesses.

Table 48: Activity profile

Character	The Cambridge precinct is an industrial and transport hub that provides greater opportunities for new businesses to establish, offering larger affordable sites and access to freight corridors. The precinct contains a reasonable proportion of big box retail.
Role and function	In Clarence City Council's *Economic Development Plan 2016-2021*, the precinct is pictured as a productive logistics and warehousing hub that acts as a gateway for business activity linked to air transport (Hobart International Airport). It should enable manufacturing and processing activities, and repair and storage and distribution facilities.
Key industries and changes in industry	Top 3 employment industries in 2021 by best fit SA2:[38] 1. Construction (876 jobs) (17%) 2. Electricity, Gas, Water and Waste Services (600 jobs) (12%) 3. Retail Trade (543 jobs) (10%) Between 2011 and 2021, the top 3 industries by best fit SA2 with the greatest changes in job numbers were in: 1. Construction (+491 jobs) (+128%) 2. Electricity, Gas, Water and Waste Services (+301 jobs) (+101%) 3. Transport, Postal and Warehousing (+206 jobs) (+76%)
Businesses	Key businesses include: – GADTECH (GADTECH Concrete) – ready mix concrete supplier – Zinfra – construction company

[37] https://www.hibp.com.au/

[38] Best fit SA2s as defined as SA2s (medium-sized statistical area of 3,000 to 25,000 people) that the precinct best fits in due to boundaries not aligning

	– Hydro Tasmania – energy supplier – TasNetworks – electricity company – Megavar – engineering consultant – Skretting Australia – manufacturer
Vacant lots by size	The available lots are mostly medium-sized lots. The two largest vacant lots are 458,000 sqm and 181,000 sqm in size. **Table A1: Vacant suitable lots in Cambridge** | | Vacant lots | Vacant land area (sqm) | |---|---|---| | Extra small (<500 sqm) | 0 | 0 | | Small (500-2,000 sqm) | 6 | 10,608 | | Medium (2,000-5,000 sqm) | 41 | 118,584 | | Large (>5,000 sqm) | 10 | 862,817 | | Total | 57 | 992,009 |
Take-up since last audit	Medium-sized lots have seen the greatest take-up, making up over 50% of the lots that have been taken up over this period. **Table A2: Take-up of lots in Cambridge** | | Lots | Land area (sqm) | |---|---|---| | Extra small (<500 sqm) | 0 | 0 | | Small (500-2,000 sqm) | 5 | 9,238 | | Medium (2,000-5,000 sqm) | 36 | 110,435 | | Large (>5,000 sqm) | 18 | 230,881 | | Total | 59 | 350,554 |
Infrastructure: transport, power (incl. gas), water and sewage	Cambridge is fairly well connected but heavy vehicles face limitations due to restricted access on some major roads. There are no power or water constraints noted, however wastewater infrastructure has limitations.

Table A3: Infrastructure provisioning in Cambridge

	Transport	Power	Water	Wastewater
Current	No significant difficulties notes for heavy vehicles to get to Hobart CBD, except for some height and lane width constraints at the Tasman Bridge; but a lack of noted transport connectivity to the North.	No constraints identified at high-level; subject to detailed technical assessment and formal connection enquiry with TasNetworks.	May require upgrades to accommodate future development.	Challenge with industrial activities producing wash water or with sanitation processes
Planning considerations	Attenuation zones: None noted Specific area plans: plans are in place to allow a range of industrial uses at Cranston Parade *(Cranston Parade Specific Area Plan),* and to provide for manufacturing, processing, repair, storage and distribution of goods and materials where offsite impacts are minimal *(Cambridge Industrial Estate Specific Area Plan)* Sensitive uses: some of the lots border on Environmental Protection zone; no residential uses because of its close proximity to the airport			
Environmental constraints (natural hazards and biodiversity)	Vegetation: some of the lots border on Environmental Protection zone Hazards: coastal erosion risk across most of the industrial-zoned lots Heritage: no constraints noted			
Development and planning opportunities	– Possibly an opportunity to re-think uses that are currently retail/warehouses with shopfronts as these uses often don't meet parking requirements and may be better suited to other uses – There are currently plans on Commonwealth land for an airport on 10 Ha of industrial land – Cambridge has a role to play in supporting light industrial uses (as opposed to heavy transport uses in Brighton)			

Source: SGS Economics & Planning

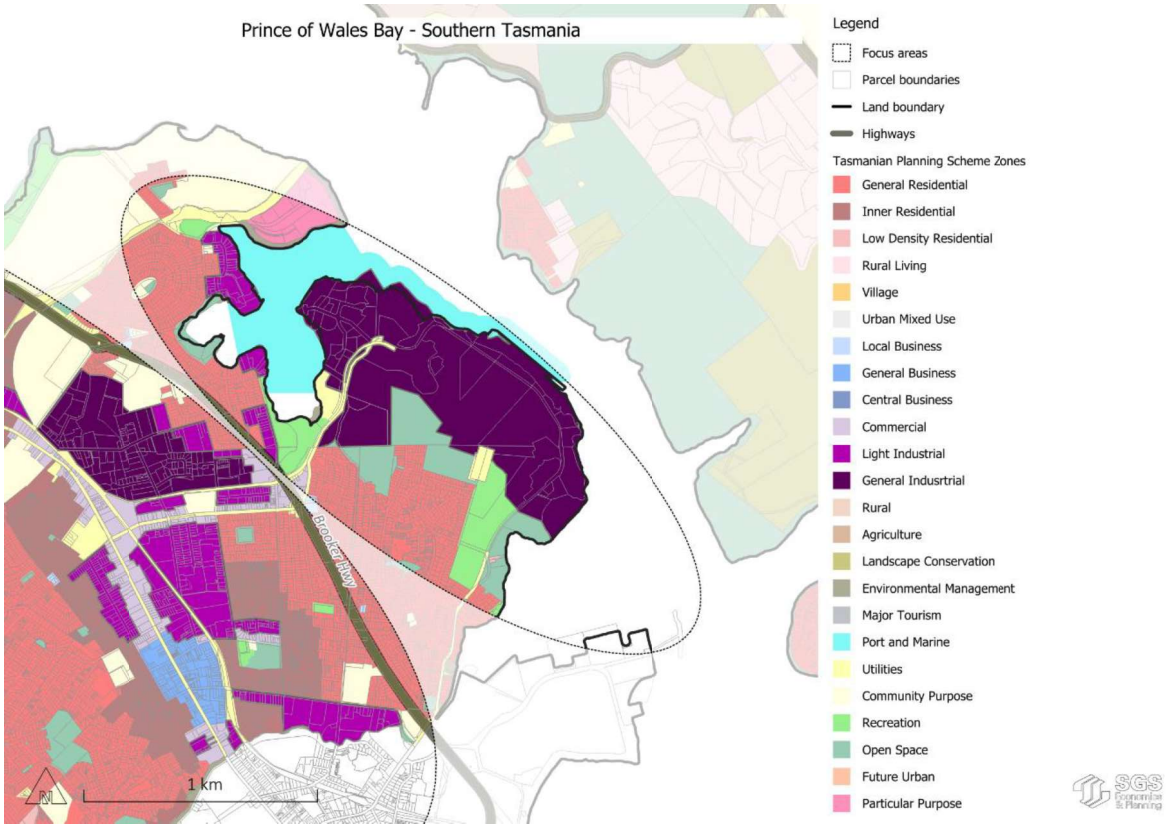
Prince of Wales Bay

The Prince of Wales Bay precinct includes industrial land across Goodwood, Derwent Park and Lutana, that has a clear focus on maritime industries (such as manufacturing, wholesale, and boat repair) and collaboration.[39] The Prince of Wales Bay Marine and Innovation Master Plan notes that the north-western half of the precinct has priorities of increasing infrastructure capacity around ports, and supporting research and development, and training and developing the workforce. However, there are concerns of the precinct gentrifying away from its maritime focus. The south-eastern half of the precinct is occupied by the Nyrstar Hobart smelter, one of the world's largest zinc smelters in production volume, which focuses on high value-added products.[40]

Figure 24Figure 22 shows the zoning of and around the industrial precinct, while Figure 25 indicates where suitable vacant lots are located. There is one suitable vacant lot.

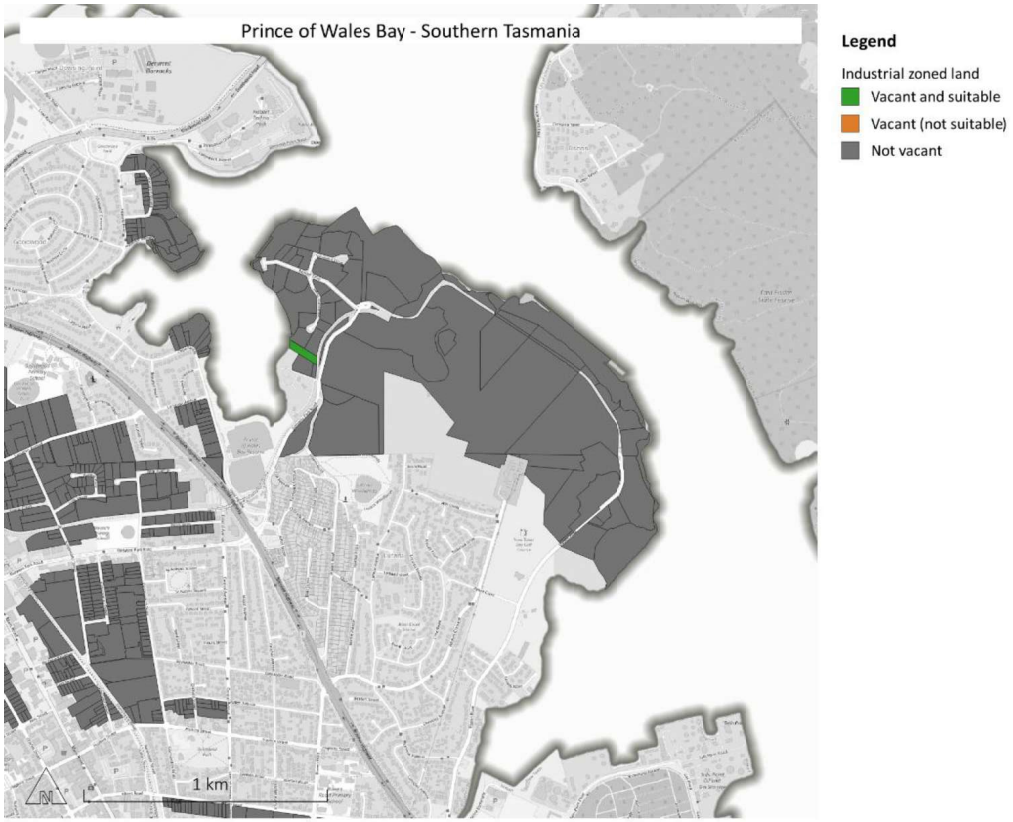
[39] https://www.gcc.tas.gov.au/wp-content/uploads/2022/01/Marine-and-Innovation-Masterplan_October-2021.pdf
[40] https://www.nyrstar.com/operations/metals-processing/nyrstar-hobart

Figure 24: Precinct overview, zoning – Prince of Wales Bay



Source: SGS Economics & Planning (2025)

Figure 25: Precinct overview, suitable vacant lots – Prince of Wales Bay



Source: SGS Economics & Planning (2025)

Table 49 documents the total area, number of lots and lot sizes of the industrial precinct, in addition to the main employment industries of the SA2 the precinct falls within. From 2011 and 2021, health care and social assistance has replaced transport, postal and warehousing as one of the top three industries. Table 49 provides an overview of the precinct's key employers and anchors, characteristics, and strategic positioning. In addition to maritime industries, the precinct includes local service industries.

Table 49: Activity profile

Character	Shipbuilding has been a significant industry since Australia's colonisation and most vessels were produced in Hobart. The second world war saw a resurgence in shipbuilding (e.g. cargo vessels) in a government shipyard in Prince of Wales Bay.[41] The Prince of Wales Bay precinct includes industrial land across Goodwood, Derwent Park and Lutana, with a continued focus on maritime industries (such as manufacturing, wholesale, and boat repair) and collaboration.
Role and function	The Prince of Wales Bay precinct is a cluster of maritime industries and as the second port of Hobart, it has seen commercial boat maintenance and repairs businesses relocate from Macquarie Wharf, which has been transitioning towards recreation and cruise facilities. There have been calls to formally declare the maritime precinct a defence precinct given the relevance to Australia's sovereign capabilities. The *Prince of Wales Bay Marine and Innovation Master Plan* notes that the north-western half of the precinct has priorities of increasing infrastructure capacity around ports, and supporting research and development, and training and developing the workforce.
Key industries and changes in industry	Top 3 employment industries in 2021 by best fit SA2:[42] 1. Manufacturing (1,457 jobs) (26%) 2. Health Care and Social Assistance (748 jobs) (13%) 3. Construction (663 jobs) (12%) Between 2011 and 2021, the top 3 industries by best fit SA2 with the greatest changes in job numbers were in: 1. Health Care and Social Assistance (+640 jobs) (+593%) 2. Manufacturing (+138 jobs) (+10%) 3. Other Services (+78 jobs) (+48%)
Businesses	Key businesses include: – NyrStar – zinc smelter – Liferaft Systems Australia – design agency – Taylor Brothers – boat dealer – CBG Systems – manufacturer

[41] https://www.stategrowth.tas.gov.au/__data/assets/pdf_file/0006/87468/TDI_brochure.pdf
[42] Best fit SA2s as defined as SA2s (medium-sized statistical area of 3,000 to 25,000 people) that the precinct best fits in due to boundaries not aligning

- PFD Food Services – food products supplier
- Impact fertiliser – fertiliser supply
- Southern Waste Solutions – waste management service

Vacant lots by size

There is only one vacant lot in the Prince of Wales Bay, which is approximately 4,000 sqm in size.

Table A1: Vacant suitable lots in Prince of Wales Bay

	Vacant lots	Vacant land area (sqm)
Extra small (<500 sqm)	0	0
Small (500-2,000 sqm)	0	0
Medium (2,000-5,000 sqm)	1	3,936
Large (>5,000 sqm)	0	0
Total	1	3,936

Take-up since last audit

No Industrial lots have been taken up since the last audit.

Infrastructure: transport, power (incl. gas), water and sewage

Prince of Wales Bay is located on the western shore of the River Derwent and is in close proximity to Hobart city. It is fairly well-serviced although may need wastewater upgrades to service future expansion.

Table A3: Infrastructure provisioning in Prince of Wales Bay

	Transport	Power	Water	Wastewater
Current	Connected to Hobart via the Brooker Highway. Local road access issues identified for some parts of the precinct	No constraints identified at high-level; subject to detailed technical assessment and formal connection enquiry with TasNetworks.	May require upgrades to accommodate future development.	Limited to low strength, low volume industrial wastewater

Planning considerations

Attenuation zones: None of note

Specific area plans: *Prince of Wales Bay Marine and Innovation Masterplan (2021)*

	Sensitive uses: some lots in the northwest border on residential uses
Environmental constraints (natural hazards and biodiversity)	Vegetation: no constraints noted Hazards: little risk of coastal erosion Heritage: one of the sites is listed on the Tasmanian Heritage Register, and there are two others in the north which are heritage places
Development and planning opportunities	– Opportunities for marine and defence industries – Increasing demand from breweries in recent years – balance local retail with primary importance of maritime industries and protecting access to the water –

Source: SGS Economics & Planning [43][44][45]

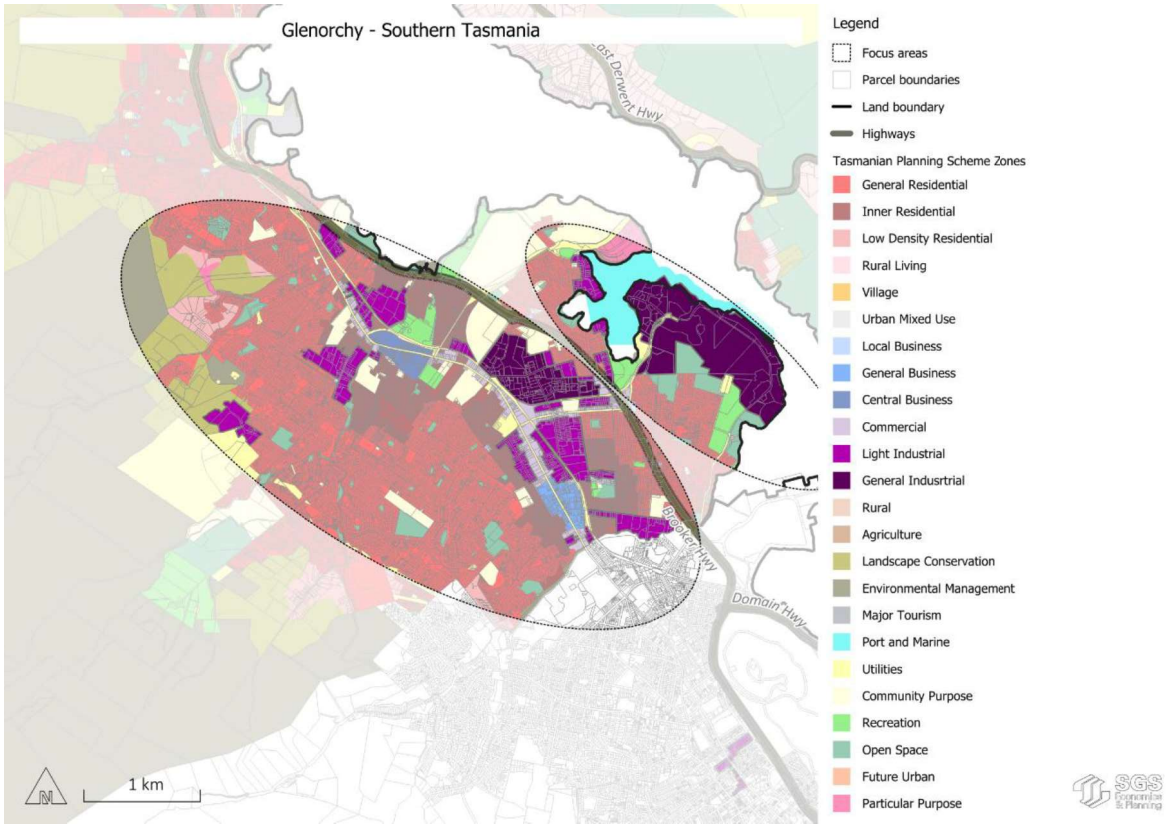
Glenorchy

The Glenorchy precinct comprises industrial land across Montrose, Glenorchy, Moonah and Derwent Park. While large in area, it is highly fragmented, and mostly bulky goods retail and local service industries.[46]

Figure 26 shows the zoning of and around the industrial precinct, while Figure 27 indicates where suitable vacant lots are located. There are two suitable vacant lots.

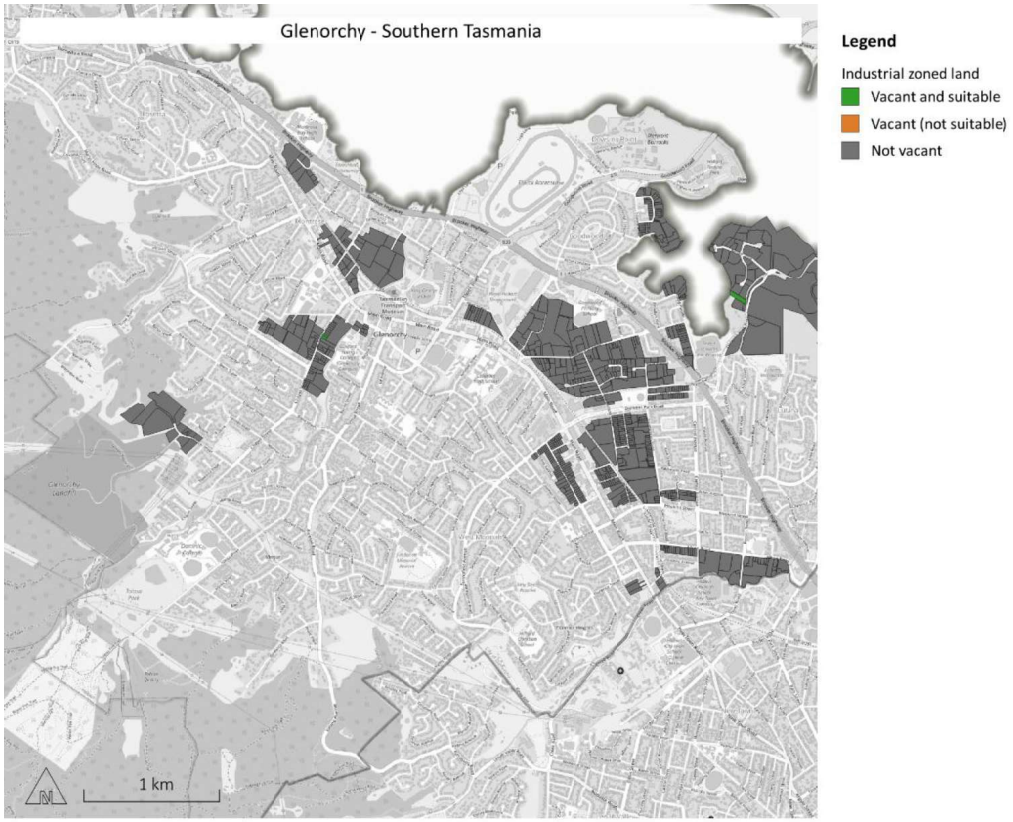
[43] https://www.gcc.tas.gov.au/wp-content/uploads/2022/01/Marine-and-Innovation-Masterplan_October-2021.pdf
[44] Glenorchy City Council Marine and Innovation Masterplan Engagement Report
[45] https://www.gcc.tas.gov.au/wp-content/uploads/2022/01/Marine-and-Innovation-Masterplan_October-2021.pdf
[46] https://www.stategrowth.tas.gov.au/__data/assets/pdf_file/0011/89156/Appendix_D_Developable_sites_analysis_report.pdf

Figure 26: Precinct overview, zoning – Glenorchy



Source: SGS Economics & Planning (2025)

Figure 27: Precinct overview, suitable vacant lots – Glenorchy



Source: SGS Economics & Planning (2025)

Table 50 documents the total area, number of lots and lot sizes of the industrial precinct, in addition to the main employment industries of the SA2s the precinct falls within. From 2011 and 2021, health care and social assistance has replaced construction as one of the top three industries. Table 50 provides an overview of the precinct's key employers and anchors, characteristics, and strategic positioning. The precinct includes an extensive range of businesses, from bulky goods retail and local service industries, to forestry, freight and logistics, construction, and manufacturing-related businesses.

Table 50: Activity profile

Character	Glenorchy was originally agricultural land focusing on orchards until industrial lands became more of a priority post war and orchards were subdivided into residential land. This has resulted in Glenorchy's high concentration of land for industrial and manufacturing uses. Whilst large in area, the Glenorchy precinct comprises of highly fragmented industrial land across Montrose, Glenorchy, Moonah and Derwent Park.
Role and function	The precinct contains a mix of bulky goods retail, logistics and local service industries and is located close to residential areas (customers), therefore playing a population-serving role.
Key industries and changes in industry	Top 3 employment industries in 2021 by best fit SA2:[47] 1. Health Care and Social Assistance (2,776 jobs) (16%) 2. Manufacturing (2,318 jobs) (13%) 3. Retail Trade (2,078 jobs) (12%) Between 2011 and 2021, the top 3 industries by best fit SA2 with the greatest changes in job numbers were in: 1. Health Care and Social Assistance (+1,600 jobs) (+136%) 2. Construction (+535 jobs) (+39%) 3. Other Services (+242 jobs) (+38%)
Businesses	Key businesses include: – TNT Express – transportation service – Blundstone Australia – manufacturer – Ian Harrington Group – construction company – FedEx Station – courier service – McKay Timber – wood product manufacturing – Superior Food Services – food products supplier – Road Runners – shipping company

[47] Best fit SA2s as defined as SA2s (medium-sized statistical area of 3,000 to 25,000 people) that the precinct best fits in due to boundaries not aligning

	– Vulcan Ullrich Aluminium – aluminium supplier
Vacant lots by size	There are two available lots in Glenorchy, these are approximately 640 sqm and 560 sqm in size. **Table A1: Vacant suitable lots in Glenorchy** | | Vacant lots | Vacant land area (sqm) | |---|---|---| | Extra small (<500 sqm) | 0 | 0 | | Small (500-2,000 sqm) | 2 | 1,198 | | Medium (2,000-5,000 sqm) | 0 | 0 | | Large (>5,000 sqm) | 0 | 0 | | Total | 2 | 1,198 |
Take-up since last audit	No Industrial lots have been taken up since the last audit.
Infrastructure: transport, power (incl. gas), water and sewage	Glenorchy has good accessibility via the Brooker Highway, but some roads leading into Hobart city have restricted access for heavy vehicles. There are no power constraints identified, but water and wastewater infrastructure may require upgrades to meet greater demand in the future. **Table A3: Infrastructure provisioning in Glenorchy** | | Transport | Power | Water | Wastewater | |---|---|---|---|---| | Current | Generally good access to the Brooker Highway, but localised constraints on local roads. But difficult for heavy vehicles to get to Hobart CBD and the port due to restricted access on major road linkages. | No constraints identified at high-level; subject to detailed technical assessment and formal connection enquiry with TasNetworks. | May require upgrades to accommodate future development | May require upgrades to accommodate future development |
Planning considerations	Attenuation zones: None of note Specific area plans: None of note Sensitive uses: lots of residential uses, particular within the Chapel Street precinct

Environmental constraints (natural hazards and biodiversity)	Vegetation: no constraints identified Hazards: risk of coastal erosion across eastern parts of the industrial precinct Heritage: heritage overlays affect some of the lots in the precinct
Development and planning opportunities	– Opportunities for more urban mixed-uses – Opportunities for last-mile logistics – Opportunities for new, lower-impact industrial businesses – Key challenge will be retaining employment-rich uses while acknowledging that some growth in industrial uses will move out to Brighton and Cambridge

Source: SGS Economics & Planning

9.5 Northern region

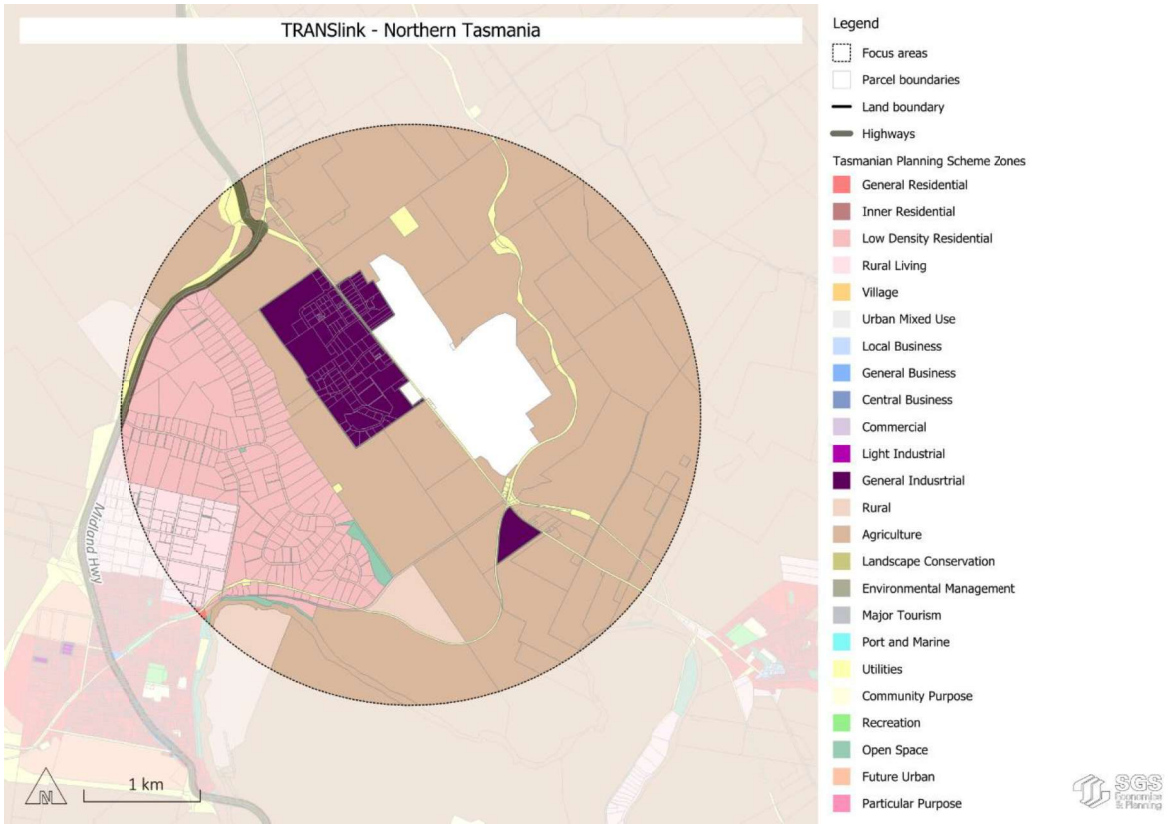
TRANSLink

TRANSLink in Western Junction is a key logistics and industrial precinct next to Launceston Airport, which has seen investments in upgrades to air freight facilities. There are opportunities for export-oriented industries like premium food production and higher value niche products, which would see demand from refrigeration, distribution and logistics facilities.[48] A major planning study is underway, investigating the expansion of the existing industrial precinct, future businesses, and supporting infrastructure upgrades and costs, including a rail spur.

Figure 28 shows the zoning of and around the industrial precinct, while Figure 29 indicates where suitable vacant lots are located. There are many suitable vacant lots, especially in the south western part of the precinct.

[48] https://www.cg.tas.gov.au/__data/assets/pdf_file/0009/396432/Launceston_Airport_Translink_Precinct_November_2019.pdf

Figure 28: Precinct overview, zoning – TRANSLink



Source: SGS Economics & Planning (2025)

Figure 29: Precinct overview, suitable vacant lots – TRANSLink

Source: SGS Economics & Planning (2025)

Table 51 documents the total area, number of lots and lot sizes of the industrial precinct, in addition to the main employment industries of the SA2 the precinct falls within. From 2011 and 2021, wholesale trade has replaced manufacturing as one of the top three industries. Table 51 provides an overview of the precinct's key employers and anchors, characteristics, and strategic positioning. The precinct includes mostly freight and logistics businesses and vehicle rentals.

Table 51: Activity profile

Character	TRANSLink in Western Junction is a key logistics and industrial precinct next to Launceston Airport with businesses in logistics, transport, warehousing, manufacturing, construction, and wholesale trade. The region is known for its premium agricultural land, horticulture and dairy.
Role and function	The precinct supports key industries such as manufacturing, agriculture and construction. There are opportunities for export-oriented industries like premium food production and higher value niche products, which would see demand for refrigeration, distribution and logistics facilities. TRANSLink is well-located in relation to the state road network for freight movements to the north, north-west and south. Extension of the rail network into the site is being investigated. The site is adjacent to the region's main airport.
Key industries and changes in industry	Top 3 employment industries in 2021 by best fit SA2:[49] 1. Transport, Postal and Warehousing (400 jobs) (15%) 2. Wholesale Trade (394 jobs) (15%) 3. Construction (361 jobs) (14%) Between 2011 and 2021, the top 3 industries by best fit SA2 with the greatest changes in job numbers were in: 1. Wholesale Trade (+290 jobs) (+279%) 2. Construction (+172 jobs) (+91%) 3. Transport, Postal and Warehousing (+138 jobs) (+53%)
Businesses	Key businesses include: – Statewide Independent Wholesalers Ltd – wholesaler – SRT Logistics – refrigerated transport service – Tasfreight – logistics service – Komatsu Forest Pty Ltd – forestry service
Vacant lots by size	The available lots are mostly large lots. The largest of these are 14.7 Ha and 13.3 Ha in size.

[49] Best fit SA2s as defined as SA2s (medium-sized statistical area of 3,000 to 25,000 people) that the precinct best fits in due to boundaries not aligning

Table A1: Vacant suitable lots in TRANSLink

	Vacant lots	Vacant land area (sqm)
Extra small (<500 sqm)	0	0
Small (500-2,000 sqm)	0	0
Medium (2,000-5,000 sqm)	3	12,528
Large (>5,000 sqm)	24	516,717
Total	27	529,245

Take-up since last audit

Medium and large lots have seen the greatest take-up across TRANSLink.

Table A2: Take-up of lots in TRANSLink

	Lots	Land area (sqm)
Extra small (<500 sqm)	0	0
Small (500-2,000 sqm)	2	2,153
Medium (2,000-5,000 sqm)	11	40,931
Large (>5,000 sqm)	12	121,427
Total	25	164,511

Infrastructure: transport, power (incl. gas), water and sewage

TRANSLink has good access to rail, road and air transport, however, will require greater investment in utilities infrastructure to support a broader range of uses.

Table A3: Infrastructure provisioning in TRANSLink

	Transport	Power	Water	Wastewater
Current	Well-connected by rail, road and air	Almost at capacity/ constrained to several sites in the precinct	May require upgrades to accommodate future development.	Limited to domestic strength and volume equivalent

Planning considerations	Attenuation zones: None of note Specific area plans: None of note Sensitive uses: no constraints noted
Environmental constraints (natural hazards and biodiversity)	Vegetation: no constraints noted Hazards: no constraints noted Heritage: heritage overlays affect one lot in the precinct
Development and planning opportunities	– Suitable sites towards the SE and around the airport – Opportunity to take advantage of the nearby railway to consider establishing an intermodal hub (rail, road, air) – Opportunities to support major uses (rather than many small-scale businesses) – Potential for current industrial uses in flood-prone areas within Launceston to relocate to TRANSLink

Source: SGS Economics & Planning

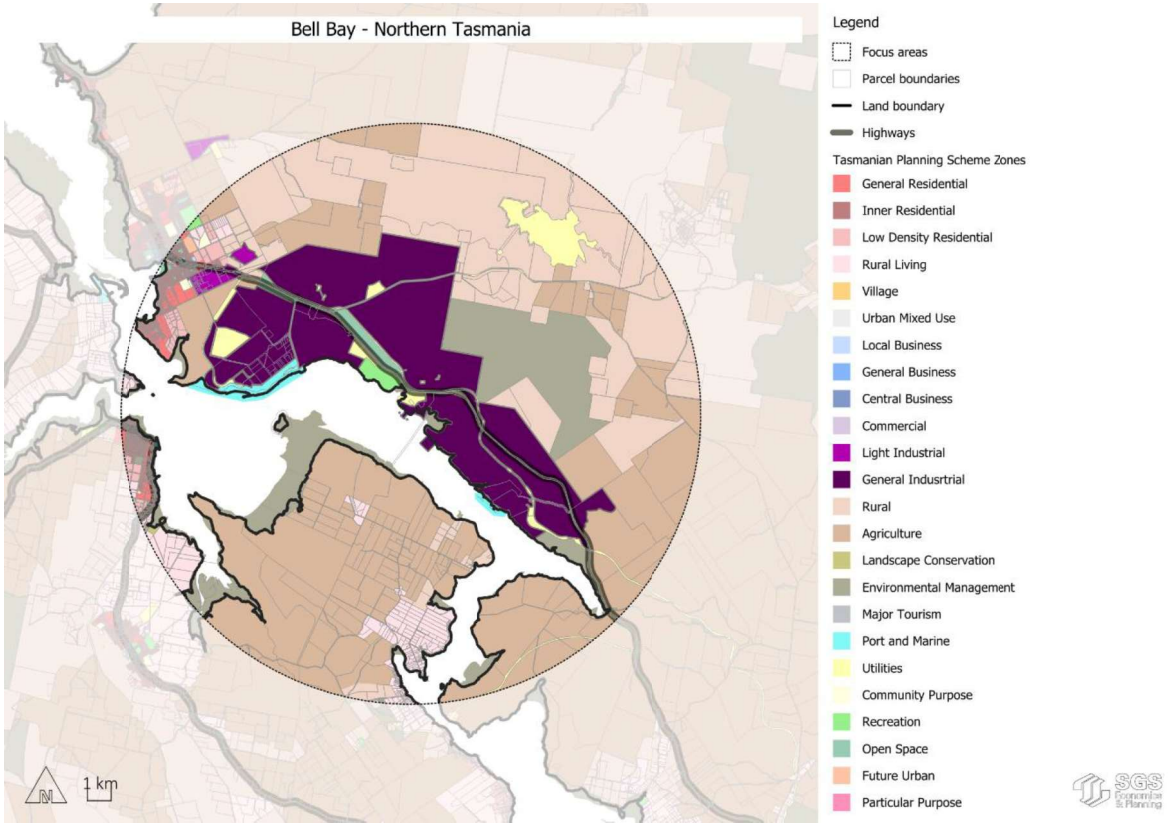
Bell Bay

The Bell Bay precinct is a key transport and logistics hub in Bell Bay. It is the state's largest heavy industrial area and is known for its advanced manufacturing skills and expertise.[50] It currently has land zoned for light industrial, general industrial, rural resources, utilities, and port and marine uses. The precinct is primarily comprised by what is known as the Bell Bay Advanced Manufacturing Zone, a green hydrogen hub, and has a vision to develop a local green hydrogen industry (green hydrogen and ammonia production), and eventually become a global leader in renewable energy.

Figure 30 shows the zoning of and around the industrial precinct, while Figure 31 indicates where suitable vacant lots are located. There are suitable vacant lots mostly in the north western part of the precinct.

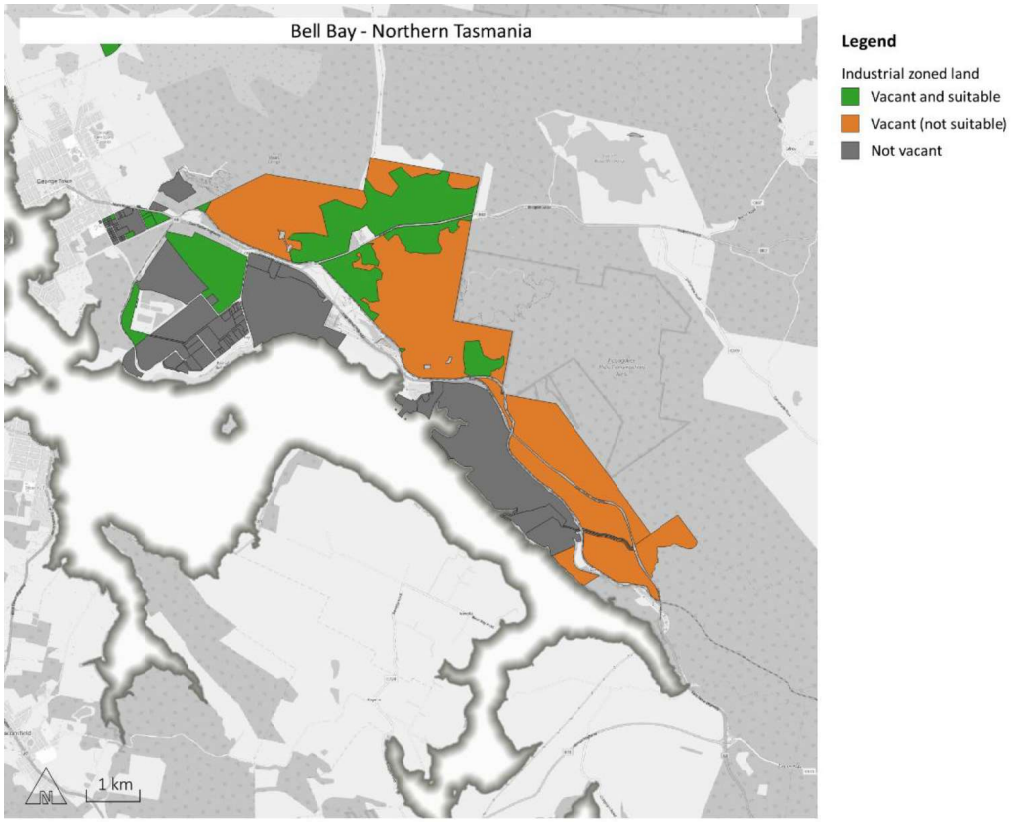
[50] https://georgetown.tas.gov.au/bell-bay-advanced-manufacturing-zone

Figure 30: Precinct overview, zoning – Bell Bay



Source: SGS Economics & Planning (2025)

Figure 31: Precinct overview, suitable vacant lots – Bell Bay



Source: SGS Economics & Planning (2025)

Table 52 documents the total area, number of lots and lot sizes of the industrial precinct, in addition to the main employment industries of the SA2 the precinct falls within. From 2011 and 2021, agriculture, forestry and fishing, and construction have replaced retail trade and transport, postal and warehousing as two of the top three industries. Table 52 provides an overview of the precinct's key employers and anchors, characteristics, and strategic positioning.

Table 52: Activity profile

Character	The Bell Bay precinct is a key transport and logistics hub in Bell Bay. It is the state's largest heavy industrial area and is known for its advanced manufacturing skills and expertise.
Role and function	The precinct is primarily comprised by what is known as the Bell Bay Advanced Manufacturing Zone, a green hydrogen hub, and has a vision to develop a local green hydrogen industry (green hydrogen and methanol production), and eventually become a global leader in renewable energy. Land is zoned for light industrial, general industrial, rural resources, utilities, and port and marine uses.
Key industries and changes in industry	Top 3 employment industries in 2021 by best fit SA2:[51] 1. Manufacturing (1,119 jobs) (41%) 2. Agriculture, Forestry and Fishing (219 jobs) (8%) 3. Construction (191 jobs) (7%) Between 2011 and 2021, the top 3 industries by best fit SA2 with the greatest changes in job numbers were in: 1. Agriculture, Forestry and Fishing (+112 jobs) (+105%) 2. Manufacturing (-89 jobs) (-7%) 3. Retail Trade (-55 jobs) (-27%)
Businesses	Key businesses include: – Timberlink Australia – wood frame supplier – Rio Tinto Alcan - Bell Bay Aluminium – manufacturer – Kymera International - Bell Bay – specialty metals and coatings manufacturer – Qube Holdings (Qube Container Terminal) – container terminal – Liberty Bell Bay – manufacturer – Motion Bell Bay – manufacturer

[51] Best fit SA2s as defined as SA2s (medium-sized statistical area of 3,000 to 25,000 people) that the precinct best fits in due to boundaries not aligning

Vacant lots by size

The available lots are mostly larger in size. The two largest vacant lots have steep slopes on part of the site which would hinder industrial uses, however the suitable area of these lots amount to 253.8 Ha and 154.0 Ha.

Table A1: Vacant suitable lots in Bell Bay

	Vacant lots	Vacant land area (sqm)
Extra small (<500 sqm)	0	0
Small (500-2,000 sqm)	0	0
Medium (2,000-5,000 sqm)	2	4,804
Large (>5,000 sqm)	10	5,600,327
Total	12	5,605,131

Take-up since last audit

Five lots have been taken up in Bell Bay since the last audit. These lots are generally medium/large in size, as are most of the sites in the area.

Table A2: Take-up of lots in Bell Bay

	Lots	Land area (sqm)
Extra small (<500 sqm)	0	0
Small (500-2,000 sqm)	1	1,918
Medium (2,000-5,000 sqm)	2	6,865
Large (>5,000 sqm)	2	146,102
Total	5	154,885

Infrastructure: transport, power (incl. gas), water and sewage

Bell Bay has fairly good access via the East Tamar Highway and to the port, and has decent access to water and wastewater utilities. However, access to power is a limitation for some industrial uses.

Table A3: Infrastructure provisioning in Bell Bay

	Transport	Power	Water	Wastewater
Current	Well-connected to the National Network via the East Tamar Highway	Insufficient power to service high-demand industries	Likely require upgrades to accommodate future development.	Suitable for wastewater with organic matter, presence of

		Bell Bay is also located at one of the only ports in Tasmania with capacity for growth in adjacent industrial areas			elevated saline or metals will exclude proposals
Planning considerations	Attenuation zones: Attenuation zones are an important consideration in Bell Bay. Specific area plans: there's a plan to provide for industrial uses that do not cause unreasonable loss of amenity to sensitive uses through noise emission *(Point Effingham Specific Area Plan)* Sensitive uses: TasPorts supports buffer zone between residential and industrial land				
Environmental constraints (natural hazards and biodiversity)	Vegetation: None noted Hazards: risk of coastal erosion to lots west of the East Tamar Highway Heritage: Aboriginal Cultural Heritage in coastal areas. Need for EPA assessment of impact for level 2 Activities (primarily industrial).				
Development and planning opportunities	– Anecdotally, there is significant demand for large-scale flat industrial land in the area, particularly given its location at a well-serviced deep sea port – Opportunity for clean energy proponents to establish in the area, to support Tasmania-based wind farms (demand for up to 40 Ha in one parcel)				

Source: SGS Economics & Planning

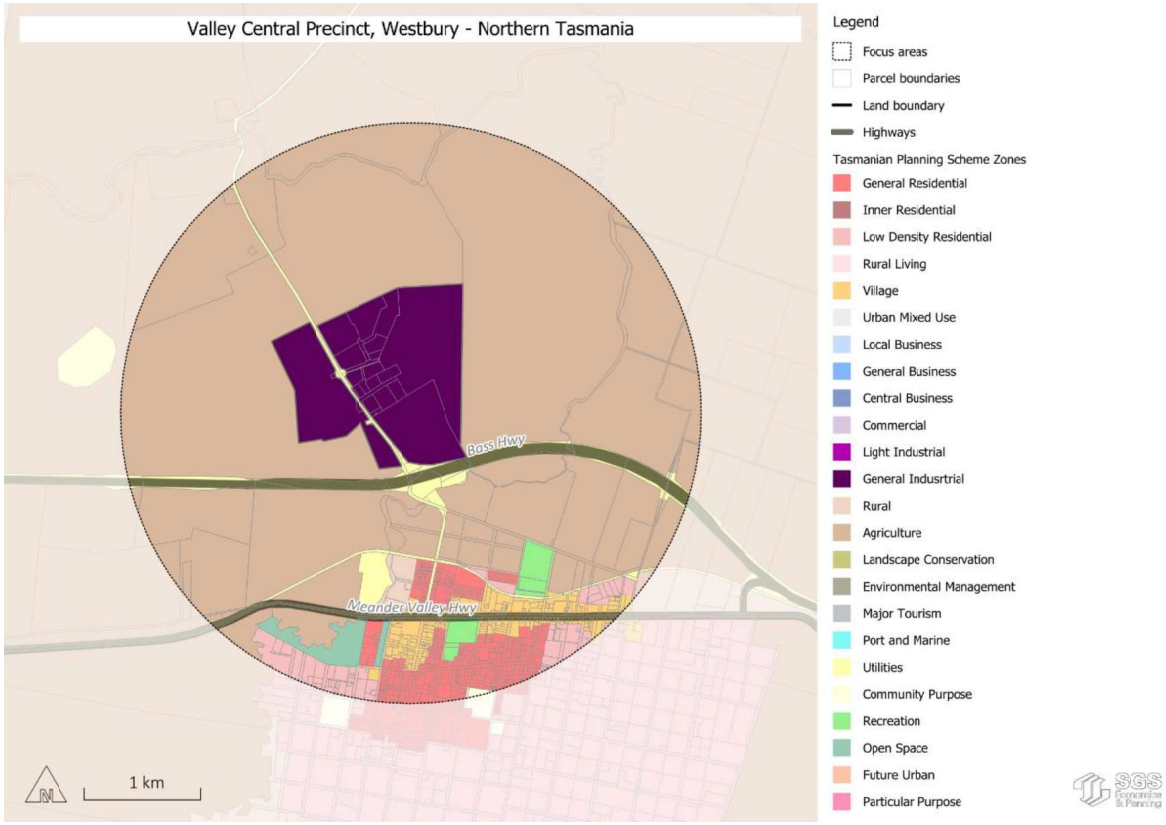
Valley Central Precinct, Westbury

Valley Central Precinct is situated in Westbury as a planned sustainable logistics-based industrial precinct leveraging the region's eco-agricultural attributes.[52] For instance, opportunities in premium food production, value-added produce, export-oriented activities, freight and logistics, and warehousing.

[52] https://www.cg.tas.gov.au/__data/assets/pdf_file/0006/508497/Valley_Central_Industrial_Precinct_November_2019.pdf

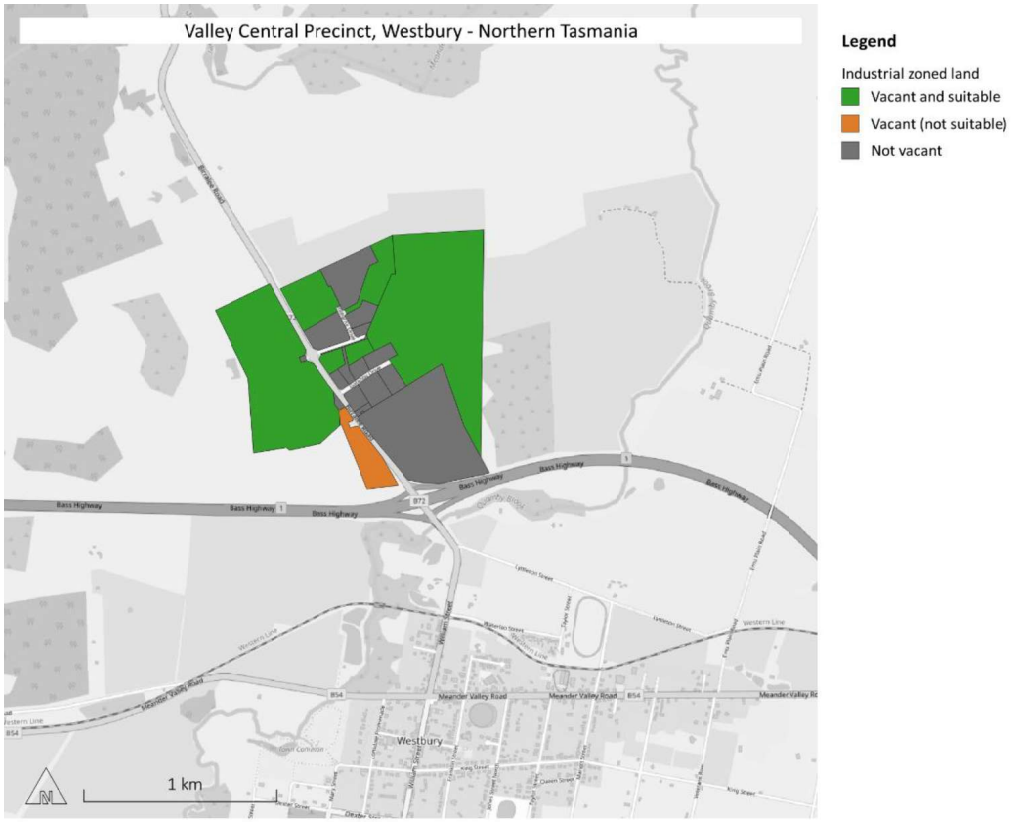
Figure 32 shows the zoning of and around the industrial precinct, while Figure 33 indicates where suitable vacant lots are located. There are a few suitable vacant lots in the eastern and western parts of the precinct.

Figure 32: Precinct overview, zoning – Valley Central Precinct, Westbury



Source: SGS Economics & Planning (2025)

Figure 33: Precinct overview, suitable vacant lots – Valley Central Precinct, Westbury



Source: SGS Economics & Planning (2025)

Table 53 documents the total area, number of lots and lot sizes of the industrial precinct, in addition to the main employment industries of the SA2 the precinct falls within. The top three industries have remained the same between 2011 and 2021. Table 53 provides an overview of the precinct's key employers and anchors, characteristics, and strategic positioning. The precinct currently includes a mix of construction, agricultural machinery manufacturing and pharmaceutical businesses.

Table 53: Activity profile

Character	Valley Central Precinct is an industrial hub north of the Westbury township, which is the local economic centre. The region is known for its fertile agricultural land.
Role and function	Valley Central Precinct is situated in Westbury as a planned sustainable logistics-based industrial precinct leveraging the region's eco-agricultural attributes. For instance, opportunities in premium food production, value-added produce, export-oriented activities, freight and logistics, and warehousing.
Key industries and changes in industry	Top 3 employment industries in 2021 by best fit SA2:[53] 1. Agriculture, Forestry and Fishing (257 jobs) (22%) 2. Manufacturing (200 jobs) (17%) 3. Construction (179 jobs) (15%) Between 2011 and 2021, the top 3 industries by best fit SA2 with the greatest changes in job numbers were in: 1. Construction (+55 jobs) (+44%) 2. Agriculture, Forestry and Fishing (+46 jobs) (+22%) 3. Health Care and Social Assistance (+34 jobs) (+148%)
Businesses	Key businesses include: – Extractas Bioscience – pharmaceutical company – Tasbuilt Homes – home builder – Delmade – agricultural machinery manufacturer – Stromen – plastics product manufacturer
Vacant lots by size	The available lots are all large lots. The individual lots are 41.7 ha, 30.5 Ha, 9.5 Ha, 1.2 ha and 1. Ha in size.

[53] Best fit SA2s as defined as SA2s (medium-sized statistical area of 3,000 to 25,000 people) that the precinct best fits in due to boundaries not aligning

Table A1: Vacant suitable lots in Valley Central Precinct

	Vacant lots	Vacant land area (sqm)
Extra small (<500 sqm)	0	0
Small (500-2,000 sqm)	0	0
Medium (2,000-5,000 sqm)	0	0
Large (>5,000 sqm)	5	840,849
Total	5	840,849

Take-up since last audit

The lots taken up are also all large lots. The largest of these are 4.9 Ha, 1.2 Ha and 1.1 Ha in size.

Table A2: Take-up of lots in Valley Central Precinct

	Lots	Land area (sqm)
Extra small (<500 sqm)	0	0
Small (500-2,000 sqm)	0	0
Medium (2,000-5,000 sqm)	0	0
Large (>5,000 sqm)	7	101,931
Total	7	101,931

Infrastructure: transport, power (incl. gas), water and sewage

Valley Central Precinct has decent accessibility via the Bass Highway, however, has fairly poor infrastructure servicing.

Table A3: Infrastructure provisioning in Valley Central Precinct

	Transport	Power	Water	Wastewater
Current	Direct access to Bass Highway	There is an issue with obtaining power as the National Electric Regulator does not allow front-loading to industrial precincts	May require upgrades to accommodate future development.	STP upgrades required with external funding for significant developments.

Planning considerations	Attenuation zones: None of note Specific area plans: no relevant plans noted Sensitive uses: no constraints noted
Environmental constraints (natural hazards and biodiversity)	Vegetation: no constraints noted Hazards: no constraints noted Heritage: no constraints noted
Development and planning opportunities	– Anecdotally, the area is in quite high demand from large manufacturers – Provisions are allowed to respond specifically to individual needs, which has so far been very successful in enabling a quick turnaround of regulatory approvals

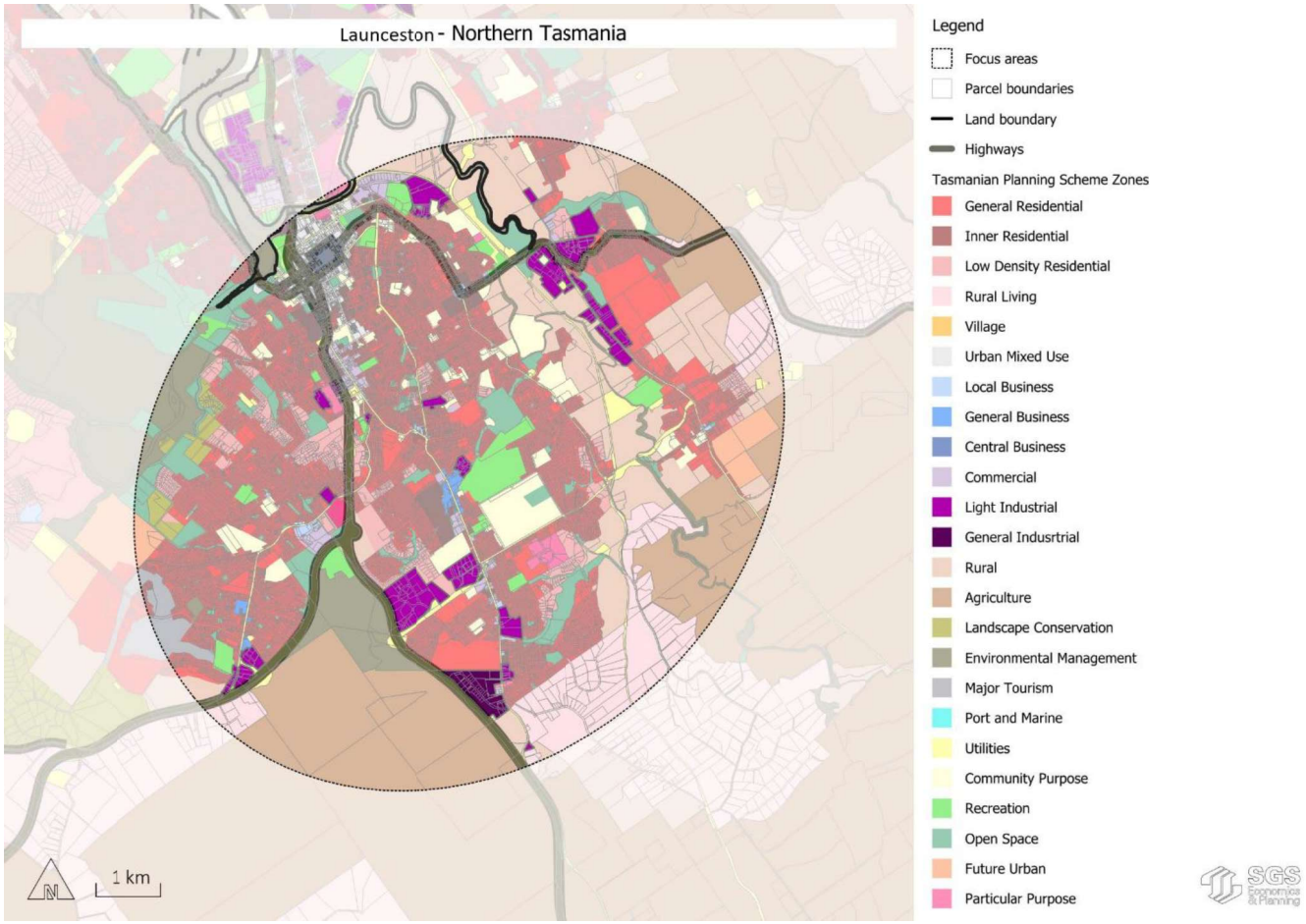
Source: SGS Economics & Planning

Launceston

The Launceston precinct includes a collection of industrial-zoned land across King Meadows, Youngtown, Prospect Vale, Punchbowl, South Launceston, Launceston, and Newstead. It consists of mostly bulky goods retail and local service industries.

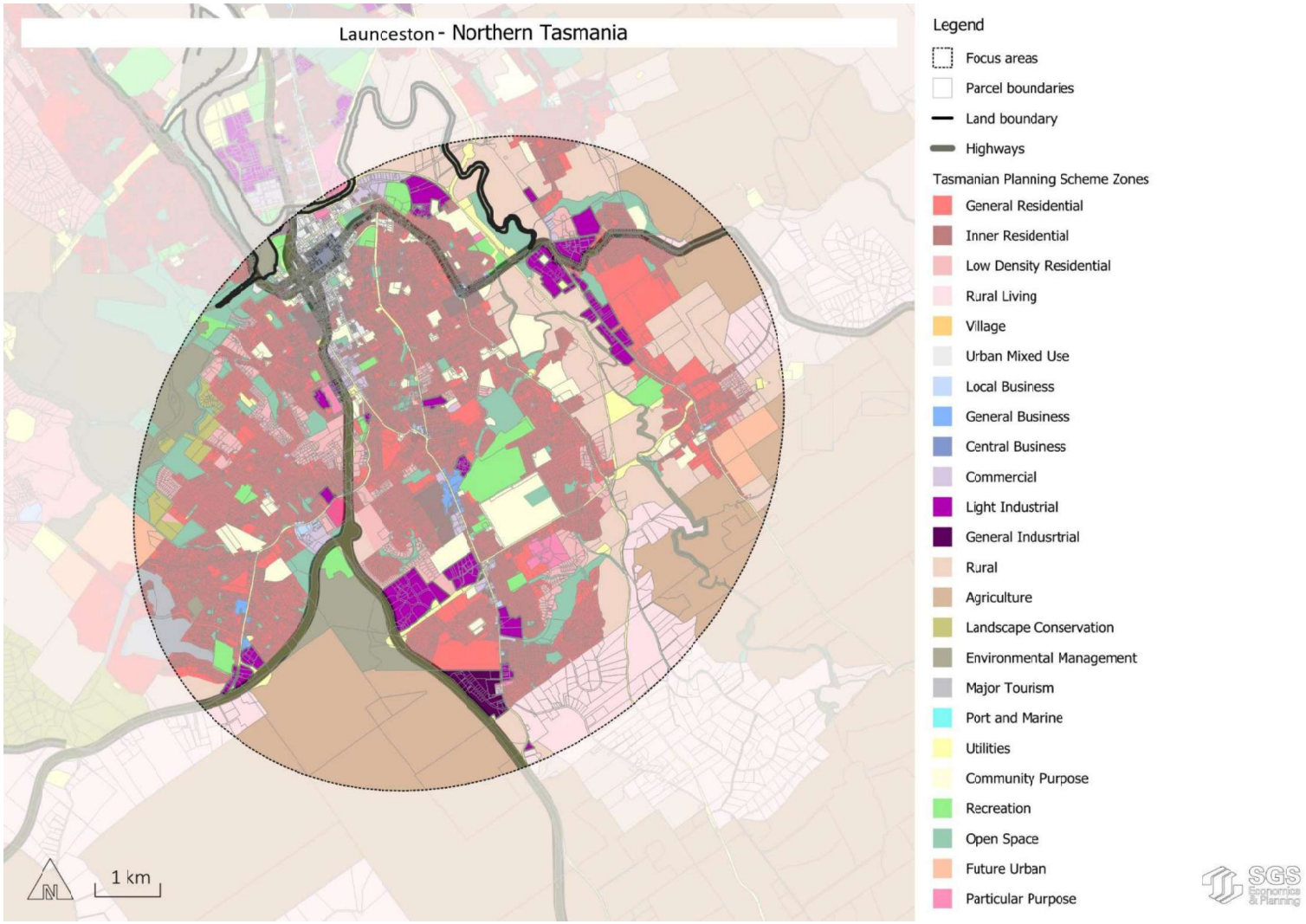
Figure 34 shows the zoning of and around the industrial precinct, while Figure 35 indicates where suitable vacant lots are located. There is a small number of suitable vacant lots across the precinct.

Figure 34: Precinct overview, zoning – Launceston



Source: SGS Economics & Planning (2025)

Figure 35: Precinct overview, suitable vacant lots – Launceston


Launceston - Northern Tasmania
1 km
Legend
Focus areas
Parcel boundaries
Land boundary
Highways
Tasmanian Planning Scheme Zones
General Residential
Inner Residential
Low Density Residential
Rural Living
Village
Urban Mixed Use
Local Business
General Business
Central Business
Commercial
Light Industrial
General Indusrtrial
Rural
Agriculture
Landscape Conservation
Environmental Management
Major Tourism
Port and Marine
Utilities
Community Purpose
Recreation
Open Space
Future Urban
Particular Purpose

Source: SGS Economics & Planning (2025)

Table 54 documents the total area, number of lots and lot sizes of the industrial precinct, in addition to the main employment industries of the SA2s the precinct falls within. From 2011 and 2021, accommodation and food services has replaced public administration and safety as one of the top three industries. Table 54 provides an overview of the precinct's key employers and anchors, characteristics, and strategic positioning. The precinct includes bulky goods retail, storage facilities, transport and warehousing businesses, and local service industries.

Table 54: Activity profile

Character	The Launceston includes industrial-zoned land across King Meadows, Youngtown, Prospect Vale, Punchbowl, South Launceston, Launceston, and Newstead.
Role and function	It is a specialised place for bulky goods retail and local service industries.
Key industries and changes in industry	Top 3 employment industries in 2021 by best fit SA2:[54] 1. Health Care and Social Assistance (8,483 jobs) (27%) 2. Retail Trade (3,819 jobs) (12%) 3. Accommodation and Food Services (2,843 jobs) (9%) Between 2011 and 2021, the top 3 industries by best fit SA2 with the greatest changes in job numbers were in: 1. Health Care and Social Assistance (+3,893 jobs) (+148%) 2. Construction (+709 jobs) (+44%) 3. Accommodation and Food Services (+662 jobs) (+14%)
Businesses	Key businesses include: – Bunnings – home improvement store – Fantastic Furniture Collection Point – warehouse – Island Fresh Produce – produce wholesaler

[54] Best fit SA2s as defined as SA2s (medium-sized statistical area of 3,000 to 25,000 people) that the precinct best fits in due to boundaries not aligning

- Waverley Mills – weaving mill (outside the precinct)
- Suncoast Express – logistics service

Vacant lots by size

The available lots are mostly larger in size (medium/large lots). Of lots larger than 5,000 sqm in size, these are 0.6 Ha and 0.5 Ha.

Table A1: Vacant suitable lots in Launceston

	Vacant lots	Vacant land area (sqm)
Extra small (<500 sqm)	0	0
Small (500-2,000 sqm)	0	0
Medium (2,000-5,000 sqm)	5	14,050
Large (>5,000 sqm)	2	11,685
Total	7	25,734

Take-up since last audit

Medium-sized lots have seen the greatest take-up.

Table A2: Take-up of lots in Launceston

	Lots	Land area (sqm)
Extra small (<500 sqm)	0	0
Small (500-2,000 sqm)	0	0
Medium (2,000-5,000 sqm)	14	46,152
Large (>5,000 sqm)	8	138,196
Total	22	184,347

Infrastructure: transport, power (incl. gas), water and sewage

Table A3: Infrastructure provisioning in Launceston

	Transport	Power	Water	Wastewater
Current	Relatively well connected, but are reliant on a collection of local road networks.	No additional capacity needed	May require upgrades to accommodate future development.	No additional capacity needed

Planning considerations	Attenuation zones: No constraints noted Specific area plans: None noted Sensitive uses: many lots are bordering residential uses and may be too small to allow for sufficient buffer zones A lot of land is not readily developable because of the desires of landowners
Environmental constraints (natural hazards and biodiversity)	Vegetation: no constraints noted Hazards: risk of coastal erosion in Elphin Heritage: heritage overlays affect some lots in the precinct
Development and planning opportunities	– Council has recently approved the final stages of development of heavy industrial uses to the South of the Precinct (Franklin Village) – Opportunity to encourage businesses who want to be located close to Launceston to establish within Launceston's existing industrial areas (instead of TRANSlLink) – Some land just outside the Connector Park boundary which can be subdivided in the future

Source: SGS Economics & Planning (2025)

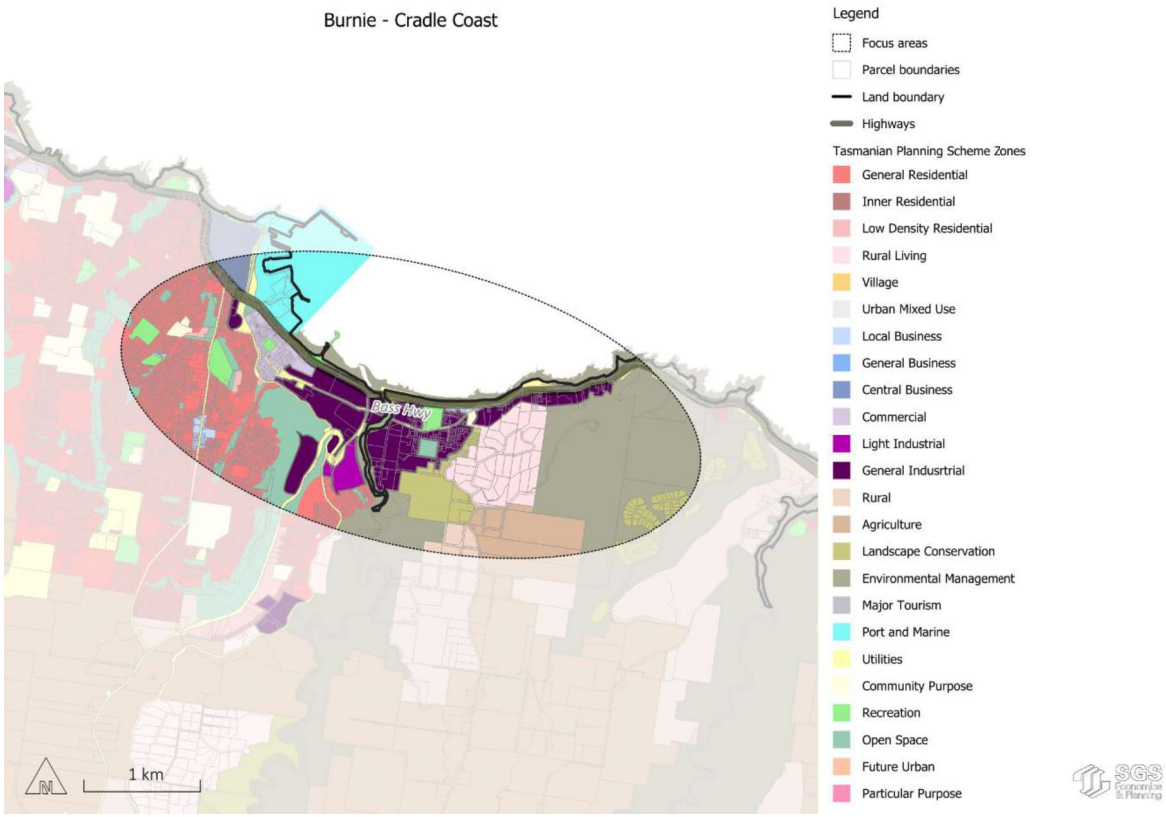
9.6 North West region

Burnie

The Burnie precinct spans Burnie, South Burnie and Wivenhoe, with manufacturing as the main industry. The precinct contains a number of freight and logistics and transportation services. It also includes professional services relevant to transport and warehousing that are located on the former Burnie pulp and paper mill site.

Figure 36 shows the zoning of and around the industrial precinct, while Figure 37 indicates where suitable vacant lots are located. There is one suitable vacant lot in the north western part of the precinct.

Figure 36: Precinct overview, zoning – Burnie



Source: SGS Economics & Planning (2025)

Figure 37: Precinct overview, suitable vacant lots – Burnie

Source: SGS Economics & Planning (2025)

Table 55 documents the total area, number of lots and lot sizes of the industrial precinct, in addition to the main employment industries of the SA2s the precinct falls within. From 2011 and 2021, health care and social assistance has replaced manufacturing as one of the top three industries. Table 55 provides an overview of the precinct's key employers and anchors, characteristics, and strategic positioning.

Table 55: Activity profile

Character	The Burnie precinct spans Burnie, South Burnie and Wivenhoe, with manufacturing as the main industry. It includes the former Burnie pulp and paper mill site, which is now used for aquaculture.
Role and function	The precinct contains several freight and logistics and transportation services, solidifying the precinct's key role in imports and exports.
Key industries and changes in industry	Top 3 employment industries in 2021 by best fit SA2:[55] 1. Health Care and Social Assistance (1,109 jobs) (16%) 2. Retail Trade (874 jobs) (13%) 3. Public Administration and Safety (754 jobs) (11%) Between 2011 and 2021, the top 3 industries by best fit SA2 with the greatest changes in job numbers were in: 1. Health Care and Social Assistance (+576 jobs) (+108%) 2. Manufacturing (-431 jobs) (-44%) 3. Transport, Postal and Warehousing (+207 jobs) (+52%)
Businesses	Key businesses include: – Advanced Manufacturing Group – manufacturer – De Bruyn's Transport – transport service – Brianna – transport service – Pentarch Group (Pentarch Logistics) – logistics service – Elphinstone Enterprises – mining machine manufacturer – Billing Cranes – crane hire – Team Global Express?
Vacant lots by size	There is currently one vacant lot in Burnie, which is 7.0 Ha in size.

[55] Best fit SA2s as defined as SA2s (medium-sized statistical area of 3,000 to 25,000 people) that the precinct best fits in due to boundaries not aligning

Table A1: Vacant suitable lots in Burnie

	Vacant lots	Vacant land area (sqm)
Extra small (<500 sqm)	0	0
Small (500-2,000 sqm)	0	0
Medium (2,000-5,000 sqm)	0	0
Large (>5,000 sqm)	1	69,936
Total	1	69,936

Take-up since last audit

There are three lots that have been taken up in Burnie, these are 1.4 Ha, 0.7 Ha and 0.3 Ha in size.

Table A2: Take-up of lots in Burnie

	Lots	Land area (sqm)
Extra small (<500 sqm)	0	0
Small (500-2,000 sqm)	0	0
Medium (2,000-5,000 sqm)	1	3,175
Large (>5,000 sqm)	2	21,113
Total	3	24,288

Infrastructure: transport, power (incl. gas), water and sewage

Burnie has well-placed along the northern coastline but has fairly poor access to inland areas. There are no constraints noted in terms of power connectivity and water infrastructure, however the sewer is currently at capacity and will require upgrading.

Table A3: Infrastructure provisioning in Burnie

	Transport	Power	Water	Wastewater
Current	Good access to the National Network (Bass Highway and rail). Fairly poor access via road to reach inland areas (most	No issues in terms of power constraints – there's a substation at Heybridge	May require upgrades to accommodate future development.	Sewer and wastewater systems require some upgrades

		traffic runs east to west); areas with greater access are limited by topography			
	Future	There are plans to do some work in the stormwater space (trapping and containment of stormwater)			

Planning considerations	Attenuation zones: none of note Specific area plans: no relevant plans noted, the Burnie Town Centre Parking Plan may impact activity for vehicles near the port Sensitive uses: none of note, barring commercial uses
Environmental constraints (natural hazards and biodiversity)	Vegetation: no constraints noted Hazards: risk of coastal erosion on the riverbank of the Emu River Heritage: no constraints noted
Development and planning opportunities	– The western side of the precinct is substantial in size and well-connected to the Bass Highway and Burnie Port – Uses on the eastern side are in flood-prone areas, and therefore more consideration must be given to the types of potential uses – Larger lots tend to be more desirable around ports; therefore many users need to purchase multiple adjacent sites to have a usable piece of land

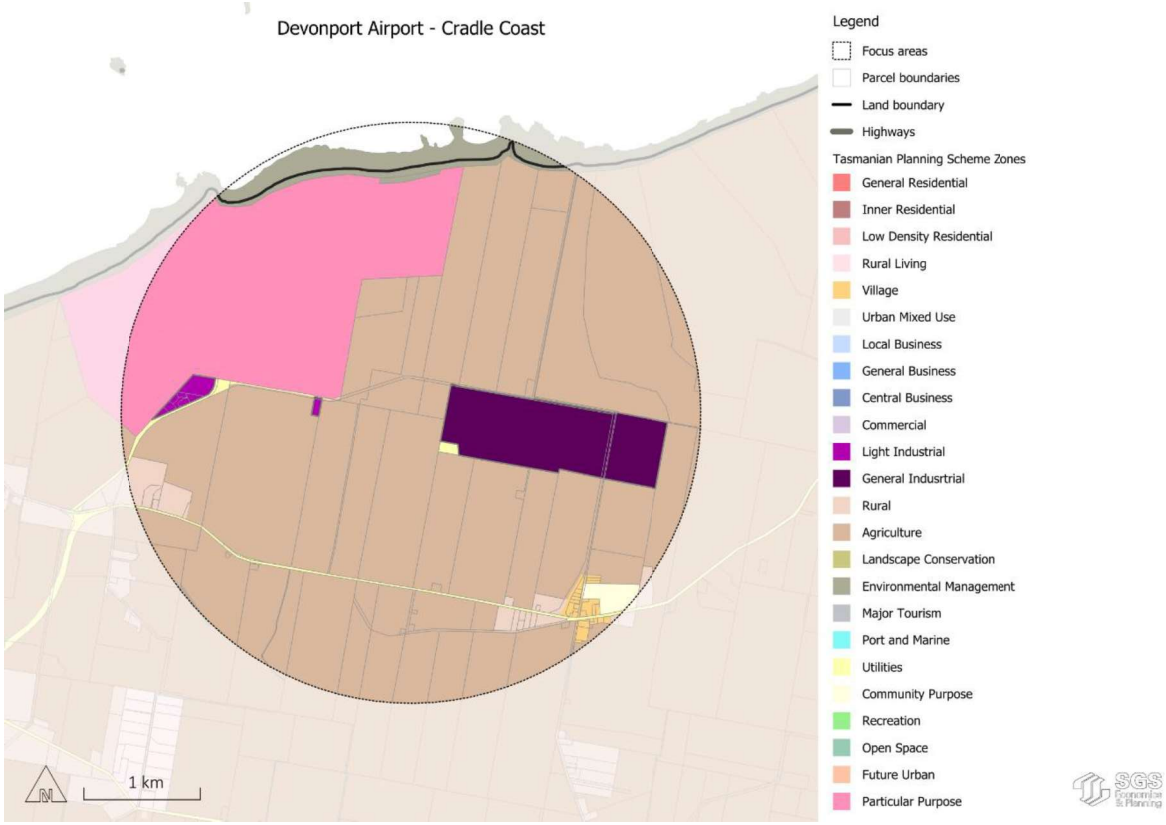
Source: SGS Economics & Planning

Devonport Airport

Located in the town of Wesley Vale, the Devonport Airport precinct is adjacent to the airport. The precinct includes the former Wesley Vale paper mill and board mill site which is currently a training centre and aquaculture facility.

Figure 38 shows the zoning of and around the industrial precinct, while Figure 39 Figure 37indicates where suitable vacant lots are located. There are no suitable vacant lots.

Figure 38: Precinct overview, zoning – Devonport Airport



Source: SGS Economics & Planning (2025)

Figure 39: Precinct overview, suitable vacant lots – Devonport Airport

Source: SGS Economics & Planning (2025)

Table 56Table 55 documents the total area, number of lots and lot sizes of the industrial precinct, in addition to the main employment industries of the SA2 the precinct falls within. From 2011 and 2021 transport, postal and warehousing, and retail trade have replaced construction and manufacturing as two of the top three industries. Table 56 provides an overview of the precinct's key employers and anchors, characteristics, and strategic positioning.

Table 56: Activity profile

Character	Located in the town of Wesley Vale, the Devonport Airport precinct is adjacent to the airport. The precinct includes the former Wesley Vale paper mill and board mill site which is currently a training centre and aquaculture facility.
Role and function	The Devonport Airport precinct is a key transport and intermodal hub that enables freight to move via air, therefore playing a key role in the transport chain. The precinct also has logistic-related functions, with imports and exports being transported to and from the precinct.
Key industries and changes in industry	Top 3 employment industries in 2021 by best fit SA2:[56] 1. Agriculture, Forestry and Fishing (294 jobs) (20%) 2. Transport, Postal and Warehousing (172 jobs) (12%) 3. Retail Trade (144 jobs) (10%) Between 2011 and 2021, the top 3 industries by best fit SA2 with the greatest changes in job numbers were in: 1. Transport, Postal and Warehousing (+130 jobs) (+310%) 2. Agriculture, Forestry and Fishing (+116 jobs) (+65%) 3. Health Care and Social Assistance (+77 jobs) (+122%)
Businesses	Key businesses include: – Link Resources Training Tasmania – training centre – Vale Timber Products Pty Ltd – manufacturer – Pawmobile – transportation service – Tasmanian Fibreglass Products - Corrosion Technology Tasmania – manufacturer
Vacant lots by size	There is currently no suitable vacant land.
Take-up since last audit	There is one medium-sized lot taken up since the last audit. This is 0.4 Ha in size.

[56] Best fit SA2s as defined as SA2s (medium-sized statistical area of 3,000 to 25,000 people) that the precinct best fits in due to boundaries not aligning

Table A2: Take-up of lots in Devonport Airport

	Lots	Land area (sqm)
Extra small (<500 sqm)	0	0
Small (500-2,000 sqm)	0	0
Medium (2,000-5,000 sqm)	1	4,488
Large (>5,000 sqm)	0	0
Total	1	4,488

Infrastructure: transport, power (incl. gas), water and sewage

Devonport Airport has decent connectivity via road and to the airport, however the wastewater infrastructure is in need of upgrades to meet increased demand in the future.

Table A3: Infrastructure provisioning in Devonport Airport

	Transport	Power	Water	Wastewater
Current	Well connected on transport routes towards the airport and South to the highway (both sides of Bass Highway)	No constraints identified at high-level; subject to detailed technical assessment and formal connection enquiry with TasNetworks.	Likely to require upgrades to accommodate future development.	There are currently plans to upgrade Pardoe wastewater treatment facility to be a centralised facility which would service Devonport

Planning considerations

Attenuation zones: no constraints noted

Specific area plans: no constraints noted

Sensitive uses: no constraints noted

Environmental constraints (natural hazards and biodiversity)

Vegetation: the area to the south has very fertile land and therefore great potential for agriculture uses, which limits the possible future expansion of industrial land

Hazards: some risk of coastal erosion across parts of the former paper mill site

Heritage: no constraints

Development and planning opportunities	– No perceived demand for land around Devonport Airport identified at this stage - consider as part of future-proofing – Anecdotally, there is a lot of demand for logistics and distribution uses around the former paper mill site – Potential for aviation support given its location near the airport

Source: SGS Economics & Planning

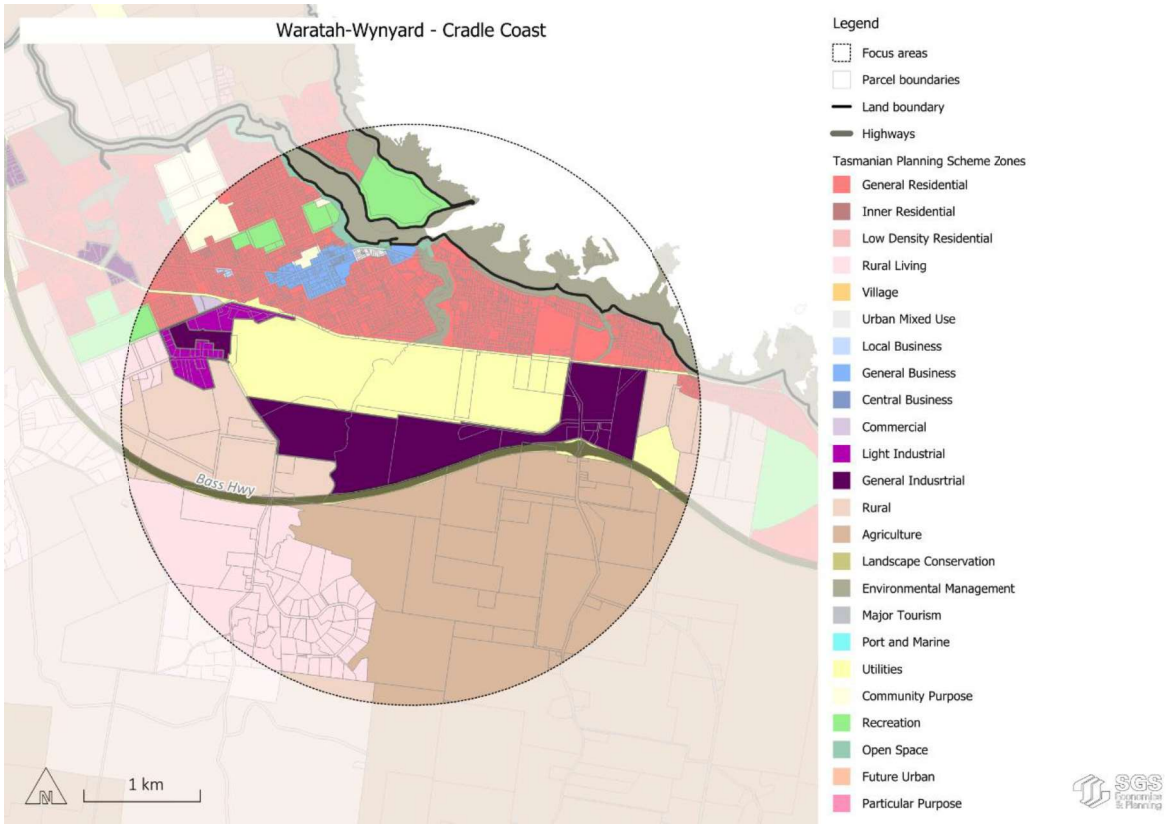
Waratah-Wynyard

The Waratah-Wynyard precinct is located in coastal town of Wynyard, which is driven by growth in horticulture, vegetable growing, dairy production, and forestry (namely timber production),[57] as well as mining. The precinct was earmarked by Burnie City and Waratah-Wynyard Councils as the preferred site for strategic industrial development.[58]

Figure 40 shows the zoning of and around the industrial precinct, while Figure 41 Figure 39Figure 37indicates where suitable vacant lots are located. There are suitable vacant lots scattered throughout the precinct.

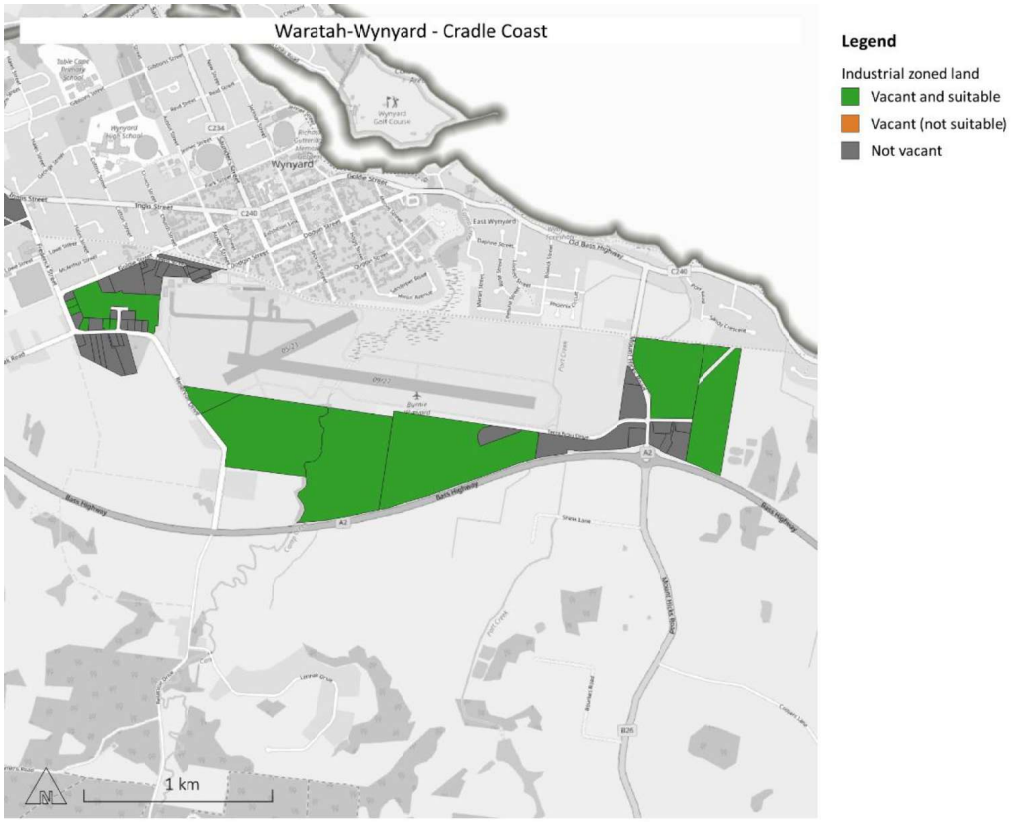
[57] https://www.warwyn.tas.gov.au/our-place/facts-and-figures/
[58] Office of the Coordinator-General (n.d.), Cradle Coast Tasmania

Figure 40: Precinct overview, zoning – Waratah-Wynyard



Source: SGS Economics & Planning (2025)

Figure 41: Precinct overview, suitable vacant lots – Waratah-Wynyard



Source: SGS Economics & Planning (2025)

Table 57Table 55 documents the total area, number of lots and lot sizes of the industrial precinct, in addition to the main employment industries of the SA2 the precinct falls within. The top three industries have remained the same between 2011 and 2021. Table 57 provides an overview of the precinct's key employers and anchors, characteristics, and strategic positioning. The precinct contains a mix of businesses supporting agriculture, forestry and mining.

Table 57: Activity profile

Character	The wider Waratah-Wynyard region is known for its horticulture, vegetable growing, dairy production, forestry and mining. The precinct itself was originally rural land but now includes heavier industrial uses that support these key industries.
Role and function	Given that the precinct is adjacent to Burnie Airport, it plays a role in importing and exporting goods. There is also a lot of showrooms in the Somerset area. The precinct was earmarked by Burnie City and Waratah-Wynyard Councils as their preferred site for strategic industrial development.
Key industries and changes in industry	Top 3 employment industries in 2021 by best fit SA2:[59] 1. Retail Trade (268 jobs) (14%) 2. Health Care and Social Assistance (263 jobs) (14%) 3. Manufacturing (237 jobs) (12%) Between 2011 and 2021, the top 3 industries by best fit SA2 with the greatest changes in job numbers were in: 1. Health Care and Social Assistance (+104 jobs) (+65%) 2. Construction (+43 jobs) (+38%) 3. Wholesale Trade (-39 jobs) (-28%)
Businesses	Key businesses include: – Elphinstone Pty Ltd – mining machine manufacturer – Wynyard Timber & Hardware – hardware store – Blackley Pipelines & Irrigation Wynyard – irrigation equipment supplier – Wynyard Transport – transportation service – Volla Co Op – agricultural product wholesaler – Zezt Pty Ltd – pipe supplier

[59] Best fit SA2s as defined as SA2s (medium-sized statistical area of 3,000 to 25,000 people) that the precinct best fits in due to boundaries not aligning

Vacant lots by size

The available lots are mostly larger in size (medium to large lots). The largest of these are 25.3 Ha, 21.8 Ha and 20.6 Ha in size.

Table A1: Vacant suitable lots in Waratah-Wynyard

	Vacant lots	Vacant land area (sqm)
Extra small (<500 sqm)	0	0
Small (500-2,000 sqm)	0	0
Medium (2,000-5,000 sqm)	5	11,493
Large (>5,000 sqm)	7	1,003,799
Total	12	1,015,292

Take-up since last audit

There are four lots that have been taken up since the last audit, one of which is only 100 sqm in size.

Table A2: Take-up of lots in Waratah-Wynyard

	Lots	Land area (sqm)
Extra small (<500 sqm)	1	100
Small (500-2,000 sqm)	0	0
Medium (2,000-5,000 sqm)	1	4,790
Large (>5,000 sqm)	2	20,971
Total	4	25,861

Infrastructure: transport, power (incl. gas), water and sewage

Waratah-Wynyard has good connectivity via the Bass Highway, but is poorly serviced in terms of utilities infrastructure.

Table A3: Infrastructure provisioning in Waratah-Wynyard

	Transport	Power	Water	Wastewater
Current	Good access to the Bass Highway	Not well serviced	Restrictive in the western area of the Somerset precinct (on the edge of the serviceable area), and often requires on-	Insufficient infrastructure to service the area

				site facilities to increase pressure	
Planning considerations	Attenuation zones: no constraints noted Specific area plans: no specific area plans in the Waratah-Wynyard Local Provisions Schedule Sensitive uses: northwest edge of the industrial precinct borders residential uses				
Environmental constraints (natural hazards and biodiversity)	Vegetation: no constraints noted Hazards: no constraints noted Heritage: no constraints noted				
Development and planning opportunities	– Anecdotally receives lots of demand, particularly for medium- to large-sized lots, however this land is on the fringe of serviceable area therefore development often doesn't follow through				

Source: SGS Economics & Planning

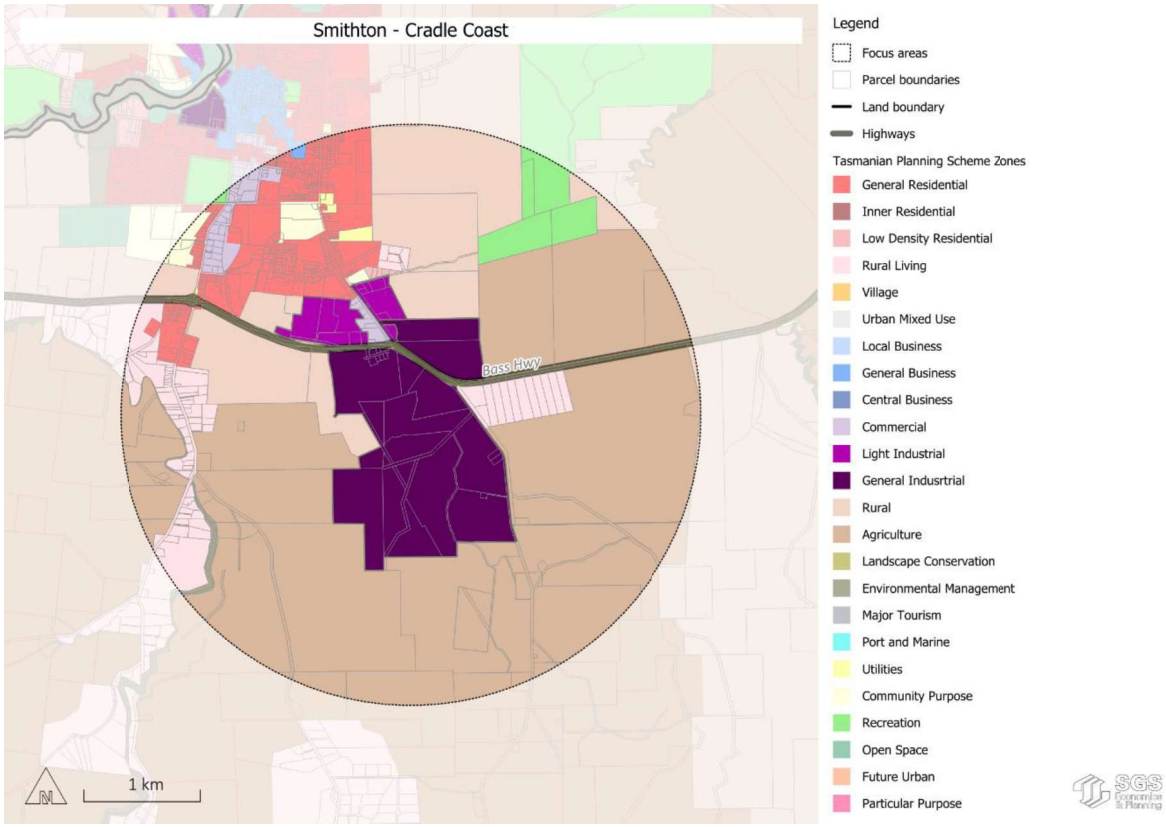
Smithton

The Smithton precinct is located in the coastal town of Smithton, which has an economy driven by potato processing, beef and dairy production,[60] and timber milling.

Figure 42 shows the zoning of and around the industrial precinct, while Figure 43 Figure 39Figure 37indicates where suitable vacant lots are located. There is a small number of suitable vacant lots in the northern and southern ends of the precinct.

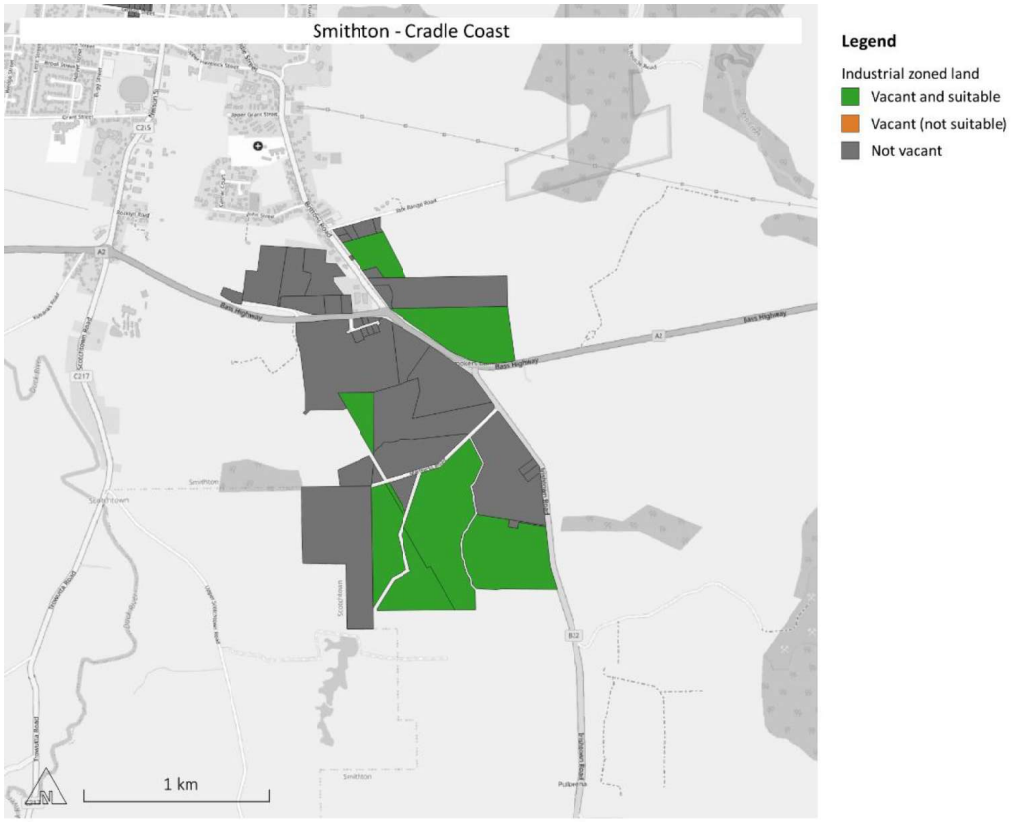
[60] https://tasmania.com/points-of-interest/smithton/

Figure 42: Precinct overview, zoning – Smithton



Source: SGS Economics & Planning (2025)

Figure 43: Precinct overview, suitable vacant lots – Smithton



Source: SGS Economics & Planning (2025)

Table 58 documents the total area, number of lots and lot sizes of the industrial precinct, in addition to the main employment industries of the SA2 the precinct falls within. From 2011 and 2021, health care and social assistance has replaced education and training as one of the top three industries. Table 58 provides an overview of the precinct's key employers and anchors, characteristics, and strategic positioning. The precinct contains a saw mill and abattoir, as well as other supporting businesses.

Table 58: Activity profile

Character	Smithton is a coastal town with an agricultural-based economy known for its premium agricultural land, beef and dairy production, potato processing and timber milling.
Role and function	The Smithton precinct is where beef and dairy production and timber processing in the town occurs. It includes a timber mill and abattoir.
Key industries and changes in industry	Top 3 employment industries in 2021 by best fit SA2:[61] 1. Manufacturing (546 jobs) (25%) 2. Retail Trade (216 jobs) (10%) 3. Health Care and Social Assistance (214 jobs) (10%) Between 2011 and 2021, the top 3 industries by best fit SA2 with the greatest changes in job numbers were in: 1. Retail Trade (-67 jobs) (-24%) 2. Manufacturing (+64 jobs) (13%) 3. Construction (-63 jobs) (-40%)
Businesses	Key businesses include: – Britton Timbers – wholesaler – Armour Mitre 10 – hardware store – Lely Centre Tasmania – farm equipment supplier – Tyrepower Smithton – tire shop
Vacant lots by size	There are six available lots are all large in size. The largest of these are 21.6 Ha, 16.4 Ha and 15.8 Ha in size. **Table A1: Vacant suitable lots in Smithton** | | Vacant lots | Vacant land area (sqm) |

[61] Best fit SA2s as defined as SA2s (medium-sized statistical area of 3,000 to 25,000 people) that the precinct best fits in due to boundaries not aligning

Extra small (<500 sqm)	0	0
Small (500-2,000 sqm)	0	0
Medium (2,000-5,000 sqm)	0	0
Large (>5,000 sqm)	6	752,135
Total	6	752,135

Take-up since last audit

There is one lot that has been taken up since the last audit, it is 20.1 Ha in size.

Table A2: Take-up of lots in Smithton

	Lots	Land area (sqm)
Extra small (<500 sqm)	0	0
Small (500-2,000 sqm)	0	0
Medium (2,000-5,000 sqm)	0	0
Large (>5,000 sqm)	1	201,368
Total	1	201,368

Infrastructure: transport, power (incl. gas), water and sewage

Smithton, relative to other precincts within the Cradle Coast Region, has more limited connectivity to roadways. It has sufficient utilities infrastructure for low-intensity industrial uses.

Table A3: Infrastructure provisioning in Smithton

	Transport	Power	Water	Wastewater
Current	Somewhat limited transport connections	Sufficient capacity	Sufficient	Sufficient

Planning considerations

Attenuation zones: no constraints noted

Specific area plans: no relevant plans noted

Sensitive uses: northern edge of the light industrial area borders residential uses

Environmental constraints (natural hazards and biodiversity)	Vegetation: no constraints noted Hazards: no constraints noted Heritage: no constraints noted
Development and planning opportunities	– Opportunities for agricultural processing and related industries – Good broadband network which could be leveraged to support online businesses

Source: SGS Economics & Planning

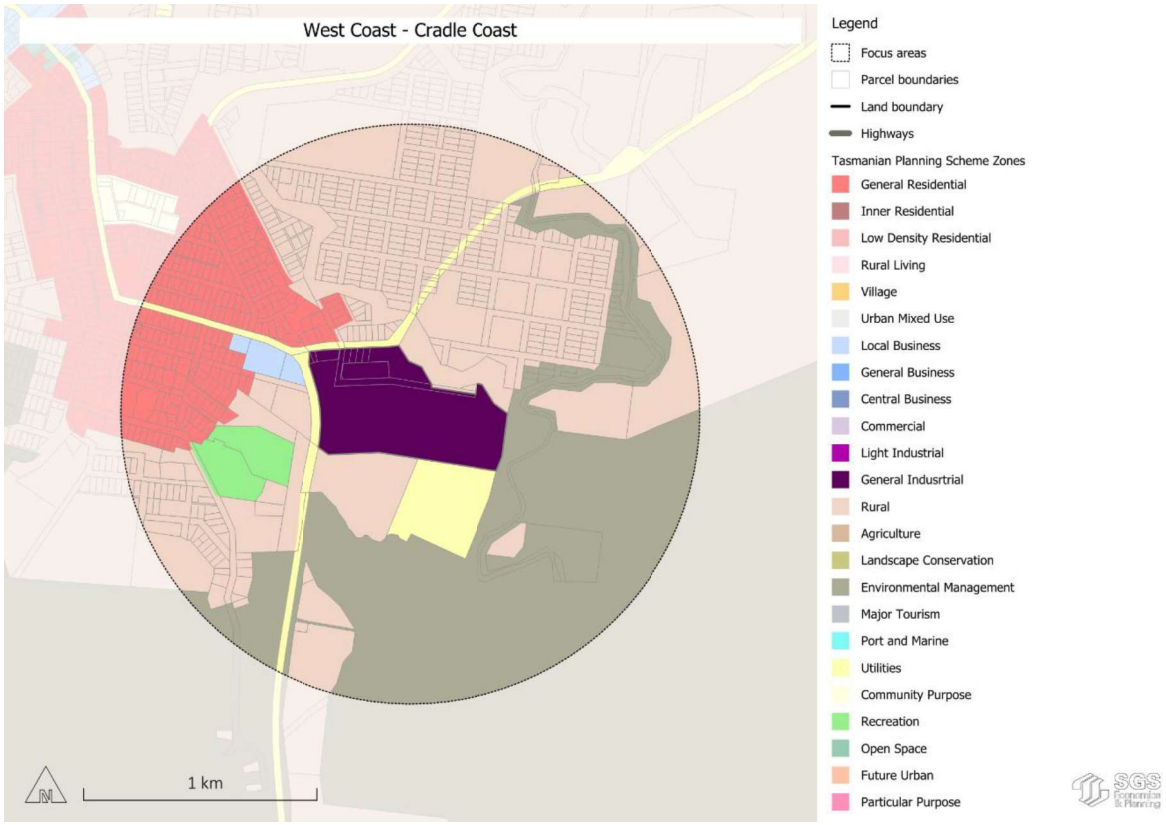
West Coast

The West Coast precinct is in the mining town of Zeehan, which has an economy mostly driven by tourism due to mine closures. The precinct has links to a wind farm (Granville Harbour Wind Farm)[62] and there is a retail/commercial node to the west of the precinct.[63] According to the West Coast Land Use Planning Strategy 2017, the precinct could see demand from Rosebury and Tullah due to the lack of industrial land in the townships.

Figure 44 shows the zoning of and around the industrial precinct, while Figure 45 Figure 39Figure 37indicates where suitable vacant lots are located. There is a small number of suitable vacant lots in the precinct.

[62] https://www.westcoast.tas.gov.au/__data/assets/pdf_file/0018/1230624/Final-IndustrialLandReview_CouncilMeeting_May_v4-part-2.pdf
[63] https://www.westcoast.tas.gov.au/__data/assets/pdf_file/0028/719209/West-Coast-Land-Use-Planning-Strategy-adopted-November-2017.pdf

Figure 44: Precinct overview, zoning – West Coast



Source: SGS Economics & Planning (2025)

Figure 45: Precinct overview, suitable vacant lots – West Coast

Source: SGS Economics & Planning (2025)

Table 58 documents the total area, number of lots and lot sizes of the industrial precinct, in addition to the main employment industries of the SA2 the precinct falls within. From 2011 and 2021, education and training has replaced retail trade as one of the top three industries. Table 59 provides an overview of the precinct's key employers and anchors, characteristics, and strategic positioning. The precinct has a mechanic and what was previously Barminco Zeehan Batch Plant.

Table 59: Activity profile

Character	The West Coast precinct is located in Zeehan, which is a mining town that has seen growth in tourism as its mines experience boom and bust cycles.
Role and function	The precinct is not serviced and has not been identified as having a strategic role. It may play a supporting role for nearby towns Rosebury and Tullah which currently lack industrial land. Being adjacent to Zeehan Highway, the precinct could also take advantage of its proximity to the Granville Harbour Wind Farm and the broader transition to renewable energy.
Key industries and changes in industry	Top 3 employment industries in 2021 by best fit SA2:[64] 1. Mining (791 jobs) (38%) 2. Accommodation and Food Services (241 jobs) (12%) 3. Education and Training (143 jobs) (7%) Between 2011 and 2021, the top 3 industries by best fit SA2 with the greatest changes in job numbers were in: 1. Mining (-105 jobs) (-12%) 2. Manufacturing (-66 jobs) (-78%) 3. Accommodation and Food Services (-63 jobs) (-21%)
Businesses	Key businesses include: – Promec Services – mechanic
Take-up since last audit	The available lots range in size. Three are less than 2,000 sqm and the two largest are 13.7 Ha and 1.2 Ha in size. **Table A1: Vacant suitable lots in the West Coast**

	Vacant lots	Vacant land area (sqm)
Extra small (<500 sqm)	0	0
Small (500-2,000 sqm)	3	2,813

[64] Best fit SA2s as defined as SA2s (medium-sized statistical area of 3,000 to 25,000 people) that the precinct best fits in due to boundaries not aligning

Medium (2,000-5,000 sqm)	0	0
Large (>5,000 sqm)	2	148,984
Total	5	151,797

Take-up over last 10 years	No Industrial lots have been taken up in the last 10 years.
Infrastructure: transport, power (incl. gas), water and sewage	The West Coast has good connectivity to the Zeehan Highway but is very poorly serviced.

Table A3: Infrastructure provisioning in the West Coast

	Transport	Power	Water	Wastewater
Current	Adjacent to Zeehan Highway	Inadequate power supply	Not serviced	Not serviced

Planning considerations	Attenuation zones: some zones in the wider area due to mining Specific area plans: no relevant plans noted Sensitive uses: no constraints noted
Environmental constraints (natural hazards and biodiversity)	Vegetation: no constraints noted Hazards: no constraints noted Heritage: no constraints noted
Development and planning opportunities	– Renewable energy opportunities – Opportunities to rezone land in Tullah (which would also have better connectivity to Burnie) but most of this land is privately owned, therefore requires coordination with landowners

Source: SGS Economics & Planning

Appendix C: Suitability Analysis

9.7 Overview

Suitability analysis is used to determine the appropriateness of a geographic area for a specific use. In this case, we applied multiple weighted criteria to rank and score locations zoned for Light and General Industrial use. This process occurs at two distinct levels:

1. Variable Weighting: each variable is assigned a weight relevant to its impact on the analysis. For instance, some variables are weighted out of 5, while less significant ones are weighted out of 3.
2. Suitability Scores: These scores consolidate information from multiple criteria into a single score.

Tasmania is divided into a 500x500 meter grid, with each cell receiving multiple criterion scores and a weighted score. The suitability scores are calculated through a four-part process: data preprocessing, weighting, summing, and final score scaling.

The table below shows the different weights and scores attributed to the variables of this analysis.

Table 60: Suitability analysis variable scoring

Category	Suitability Component	Weighting
Access	Railway stations (intermodal) 30mn	3
	Railway stations (intermodal) 60mn	2
	Railway stations (intermodal) 90mn	1
	Port 30mn	3
	Port 60mn	2
	Port 90mn	1
	Airport 30mn	3
	Airport 60mn	2
	Airport 90mn	1
	Major roads < 15mn drive time	5
	Major roads 15-30mn drive time	4
	Major roads 30-45mn drive time	3
	Major roads 45-60mn drive time	2

Category	Suitability Component	Weighting
Hazard	Inundation Null	5
	Inundation Low	3
	Inundation Medium	2
	Inundation High	1
	Erosion Null	5
	Erosion Low	3
	Erosion Medium	2
	Erosion High	1
	Bushfire L (Low)	5
	Bushfire M (Moderate)	4
	Bushfire H (High)	3
	Bushfire VH (Very High)	2
	Bushfire E (Extreme)	1
Overlay	Environmental Significance Overlay (ESO) - Null	5
	Environmental Significance Overlay (ESO) - Overlay in place	1
	Heritage overlay - Null	5
	Heritage overlay - Overlay in place	1
Topography	Slope <5%	5
	Slope 5%-10%	4
	Slope >10%	1
Infrastructure	Service Sewage - serviced	5
	Service Sewage - not serviced	1
	Service Water - serviced	5
	Service Water - not serviced	1
Settlement	Population within <400m buffer	0
	Population within 400-1200m buffer	1
	Population within 1200-2000m buffer	3
	Population within 2000-2800m buffer	4
	Population within <2800m buffer	5

Source: SGS Economics & Planning (2025)

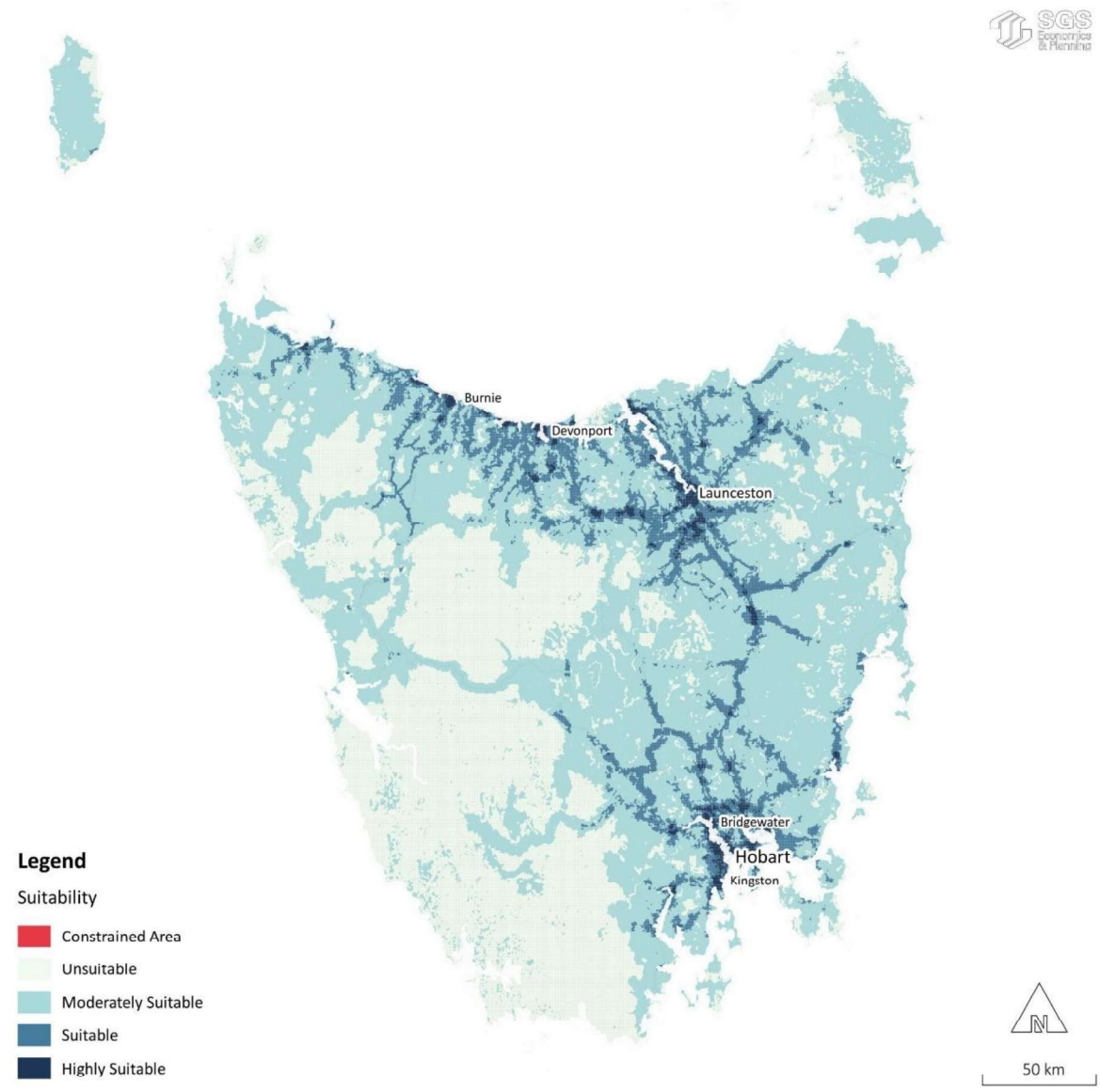
9.8 Results

The following maps illustrate overall suitability for industrial development. Key regionally significant industrial precincts have been highlighted.

Statewide

The statewide map of suitability, as shown in 6 below, reveals that there are only small portions of land that are highly suitable for industrial uses. This occurs mainly in proximity to strategic road and rail networks. Notably, all precincts contain areas that are suitable or highly suitable for development.

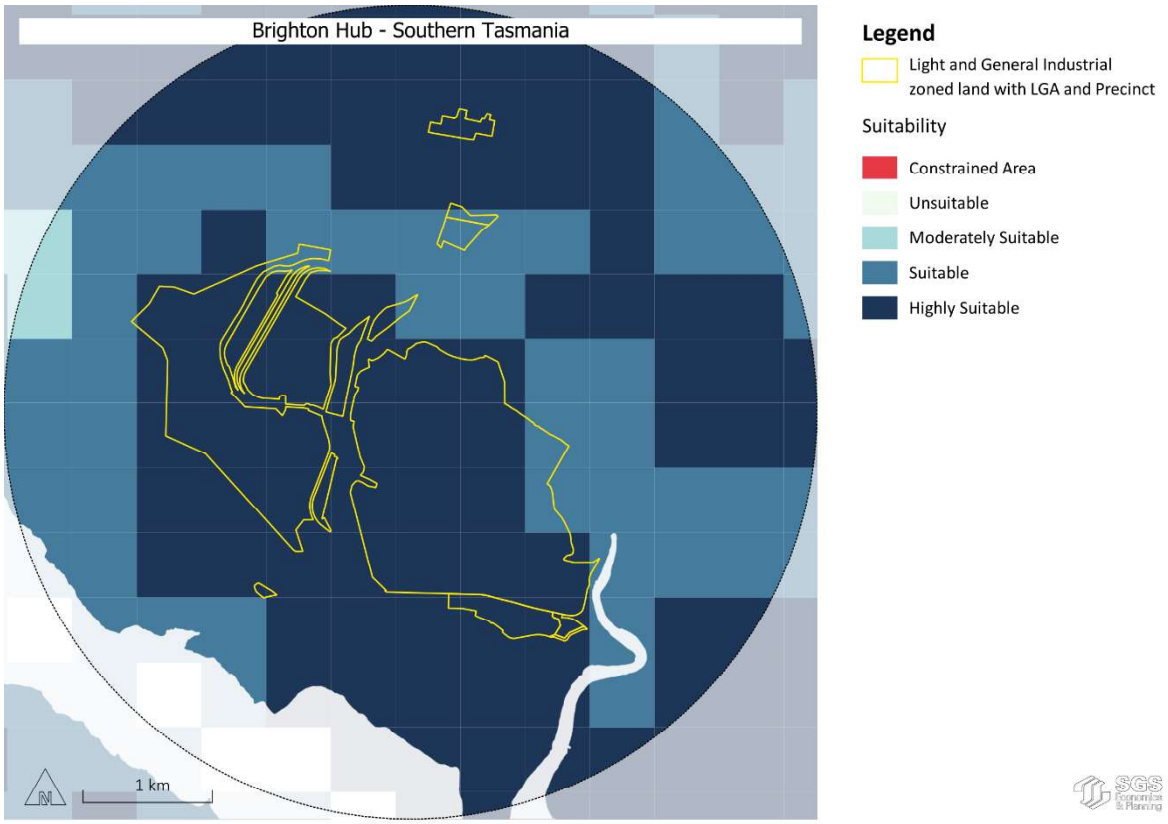
Figure 46: Statewide suitability map, Tasmania



Source: SGS Economics & Planning (2025)

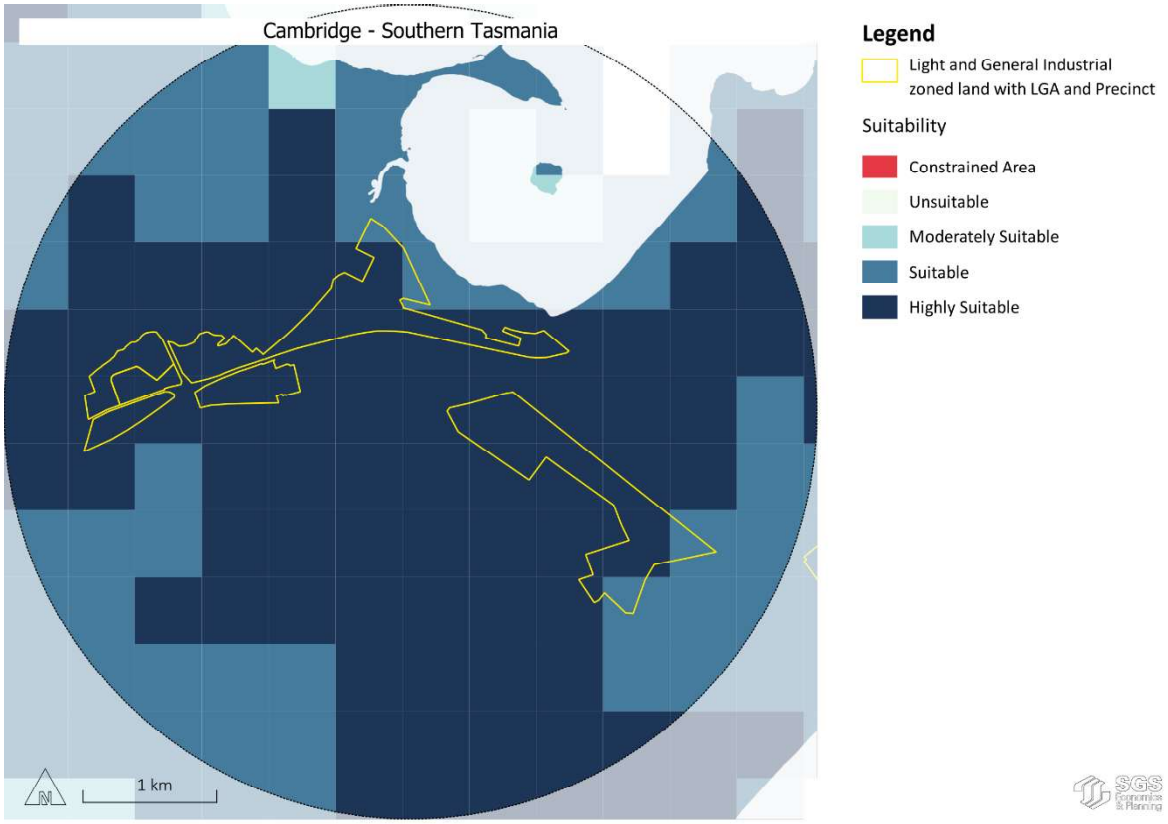
Southern region

Figure 47: Suitability analysis – Brighton Hub RSIP



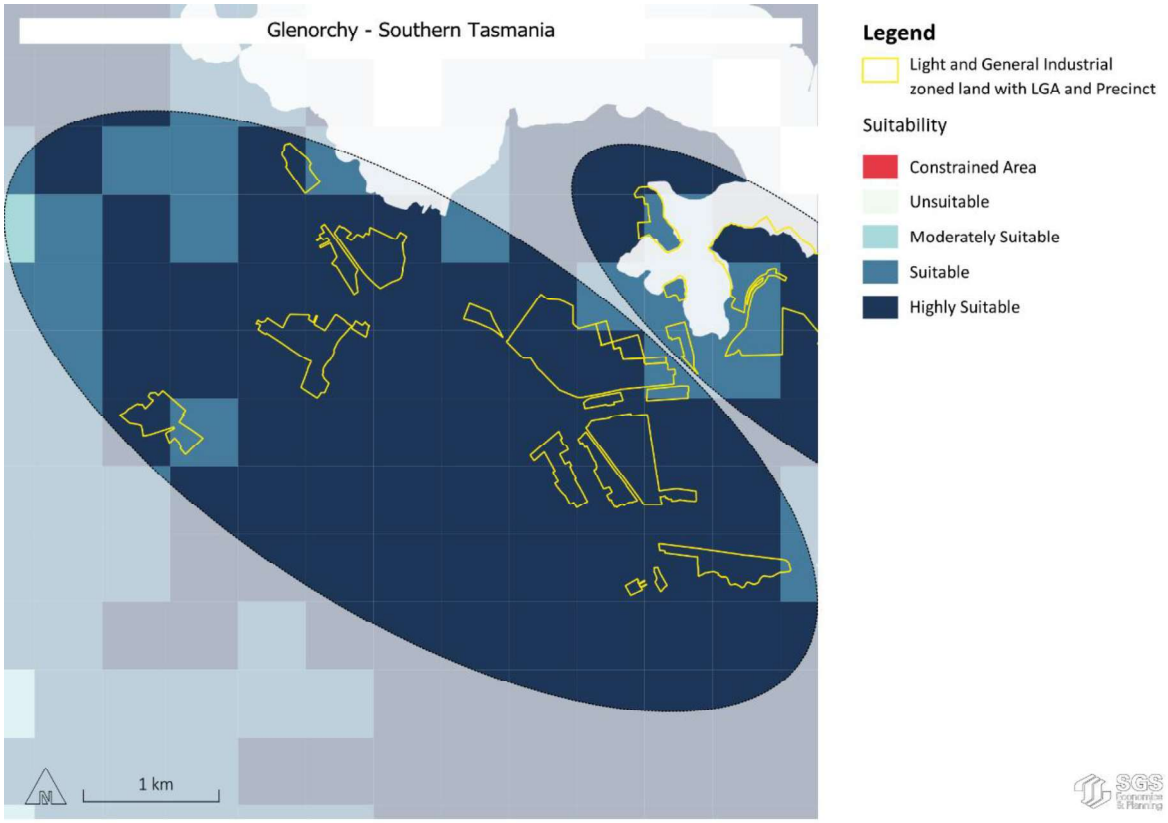
Source: SGS Economics & Planning (2025)

Figure 48: Suitability analysis – Cambridge RSIP



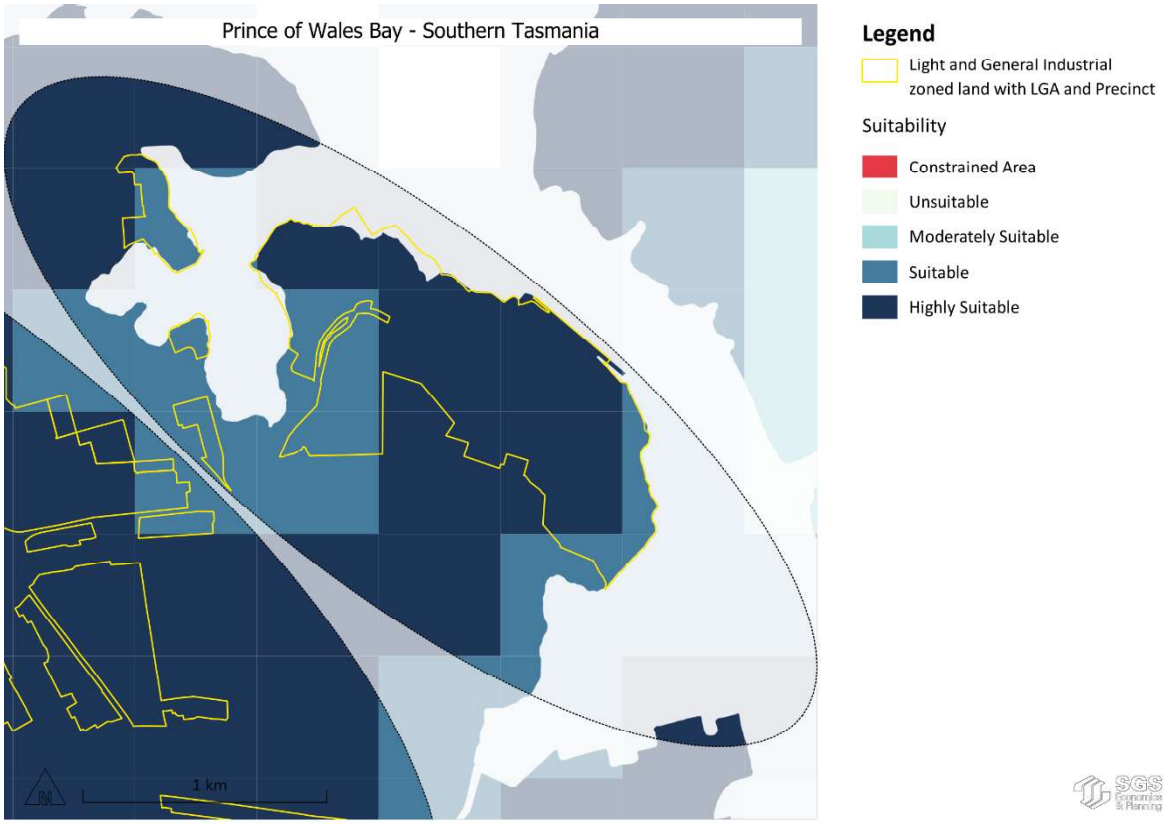
Source: SGS Economics & Planning (2025)

Figure 49: Suitability analysis – Glenorchy RSIP



Source: SGS Economics & Planning (2025)

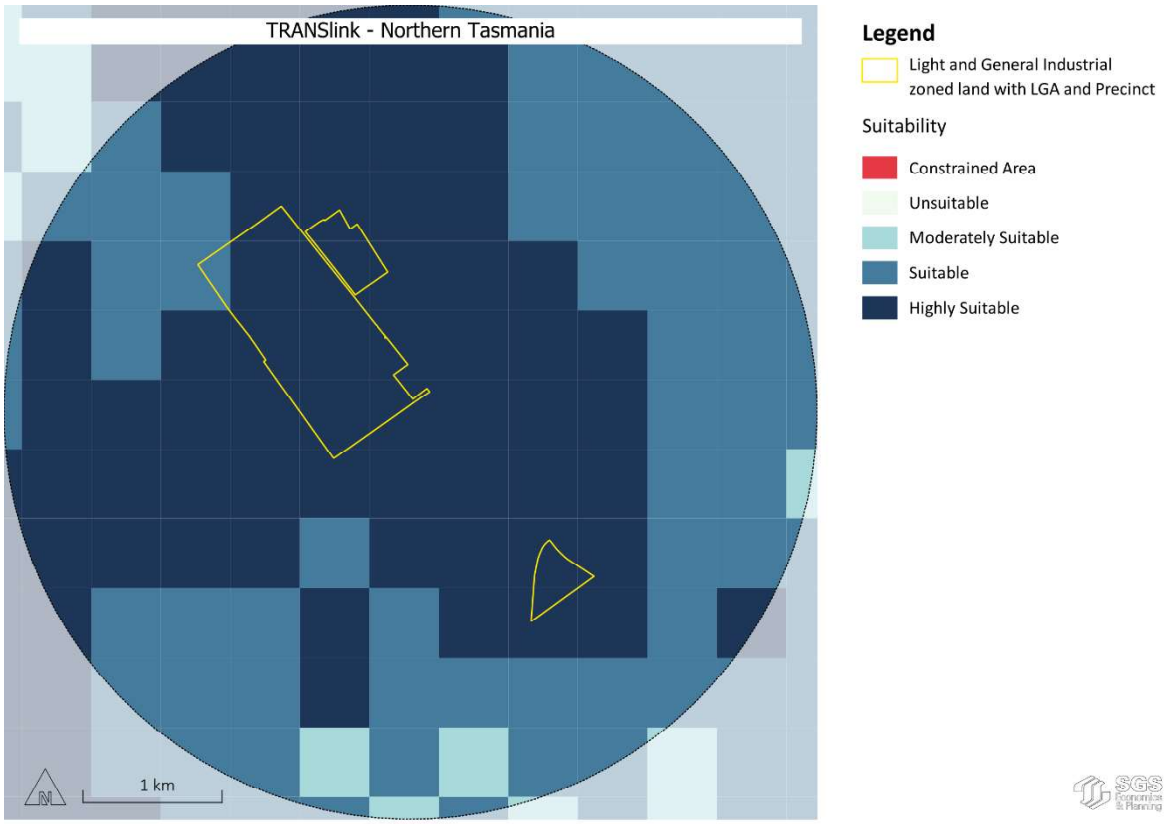
Figure 50: Suitability analysis – Prince of Wales Bay RSIP



Source: SGS Economics & Planning (2025)

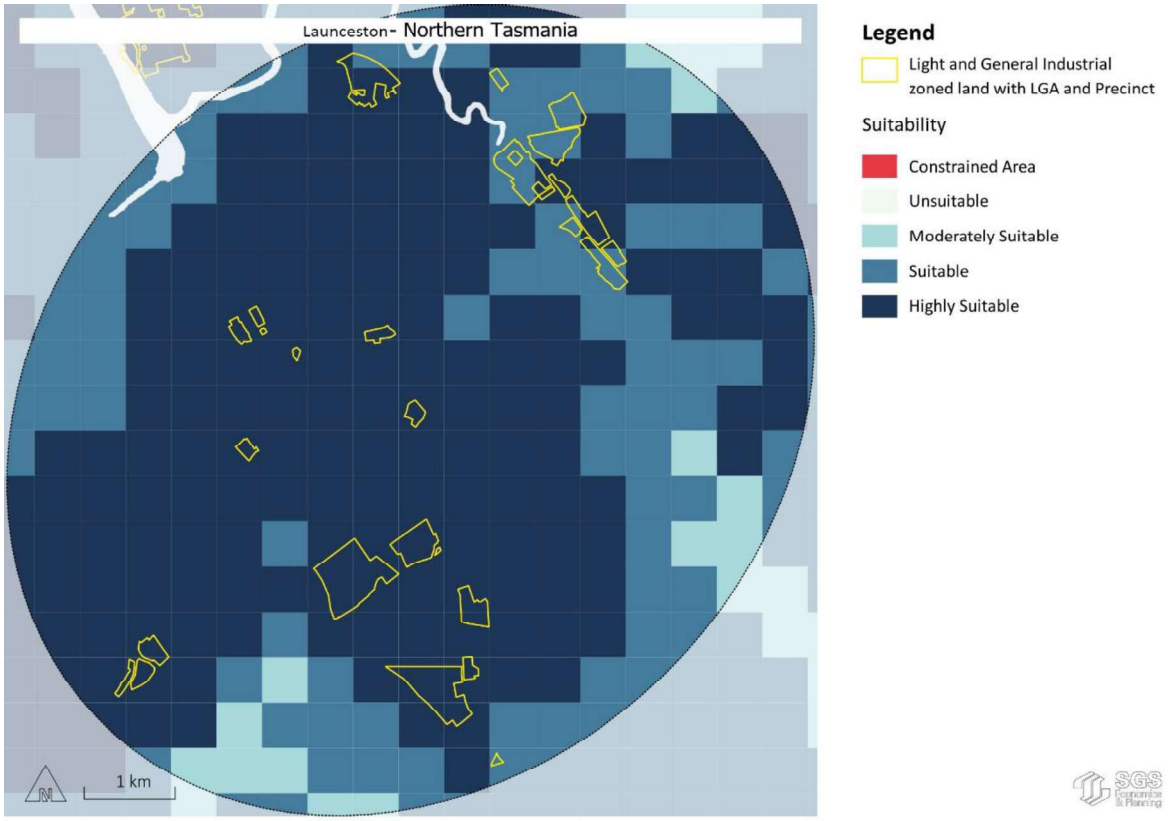
Northern region

Figure 51: Suitability analysis – TRANSLink RSIP



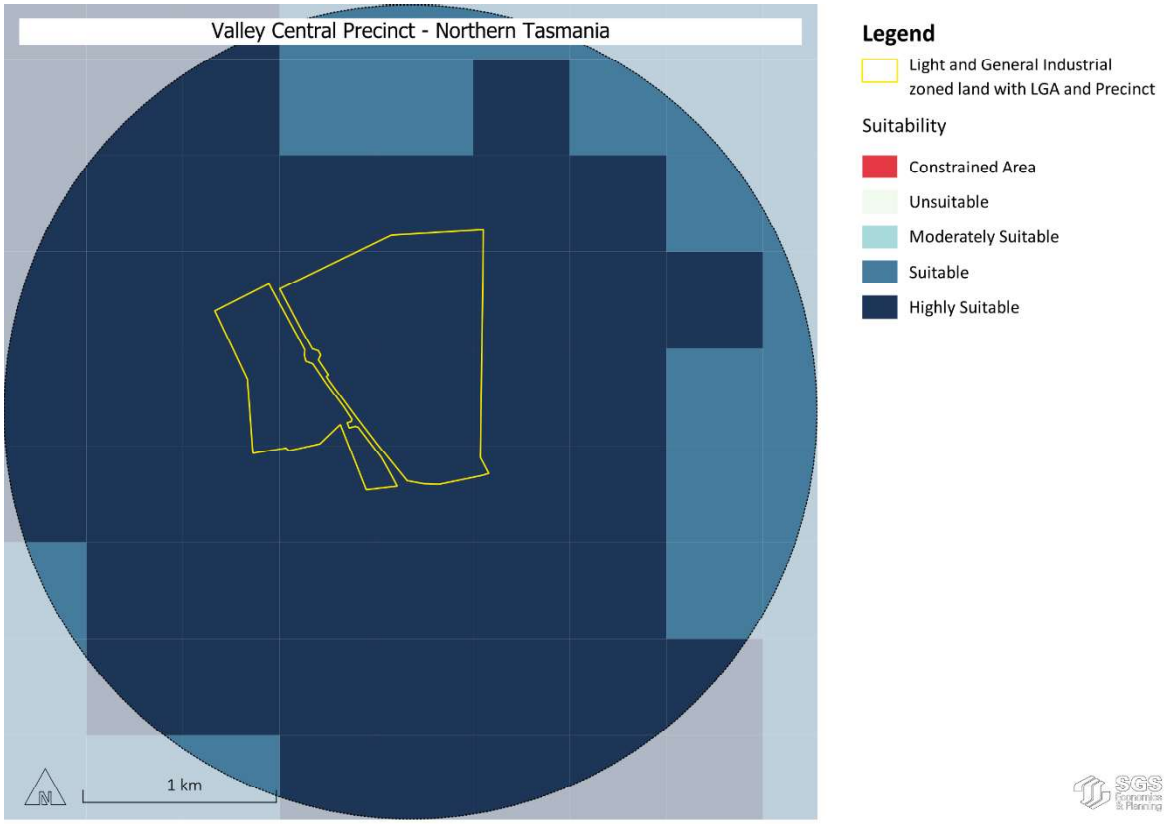
Source: SGS Economics & Planning (2025)

Figure 52: Suitability analysis – Launceston RSIP



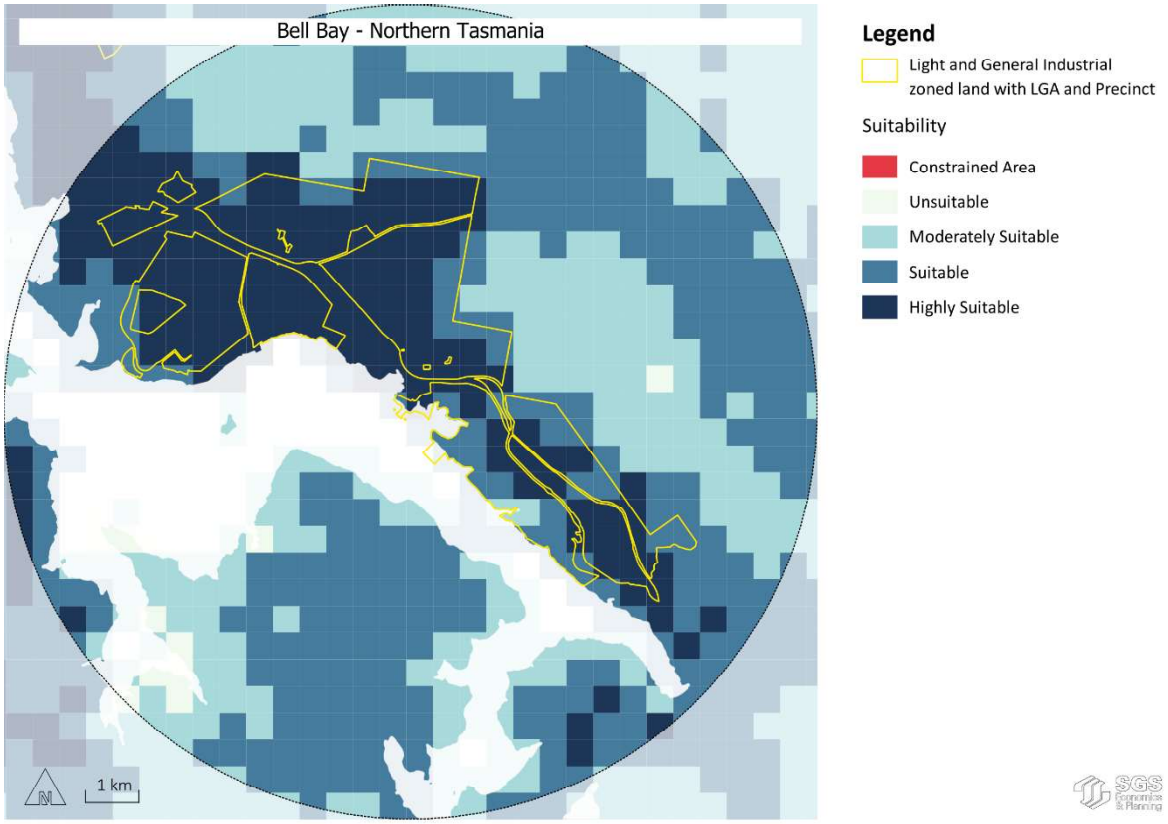
Source: SGS Economics & Planning (2025)

Figure 53: Suitability analysis – Valley Central RSIP



Source: SGS Economics & Planning (2025)

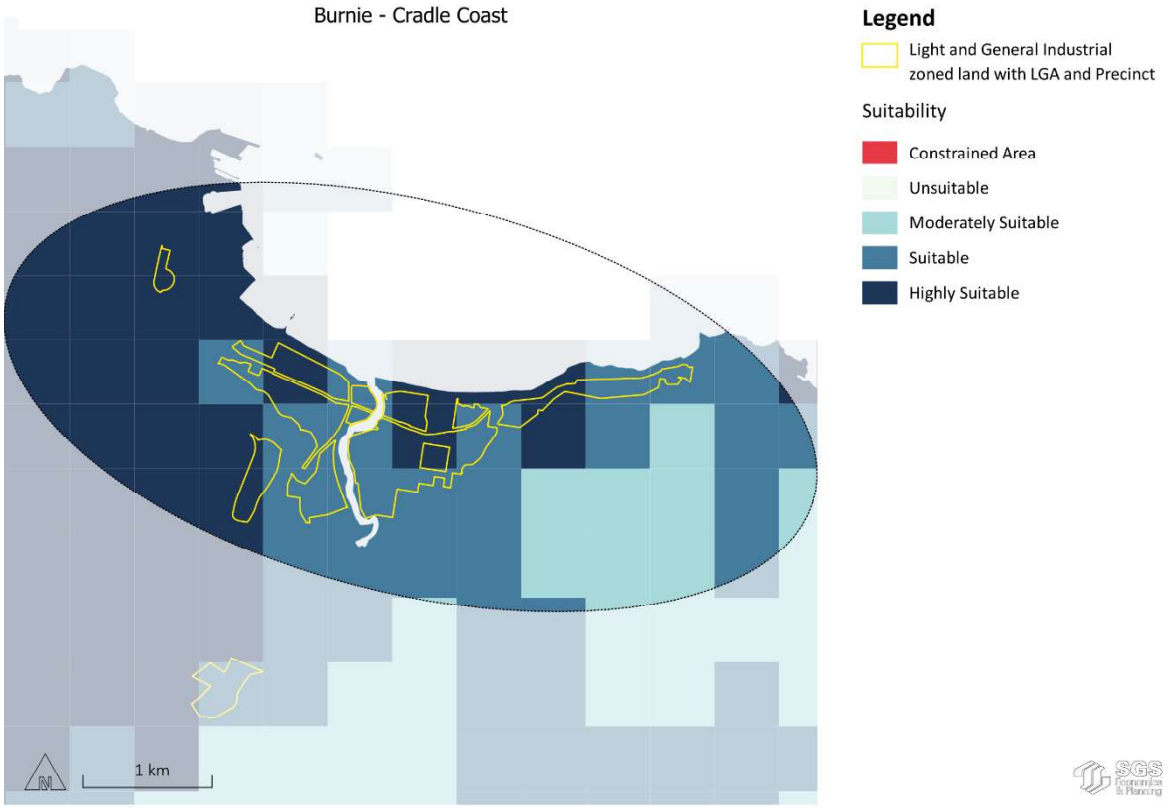
Figure 54: Suitability analysis – Bell Bay RSIP



Source: SGS Economics & Planning (2025)

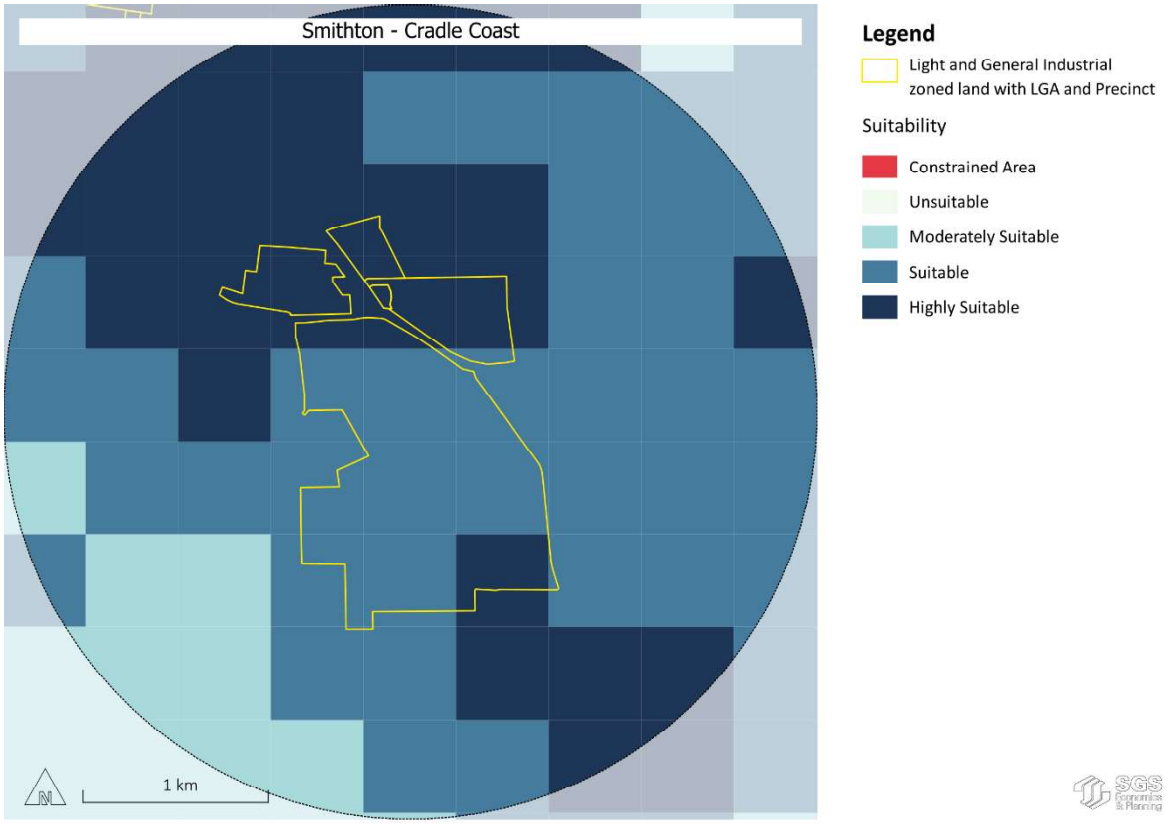
Cradle Coast region

Figure 55: Suitability analysis – Burnie RSIP



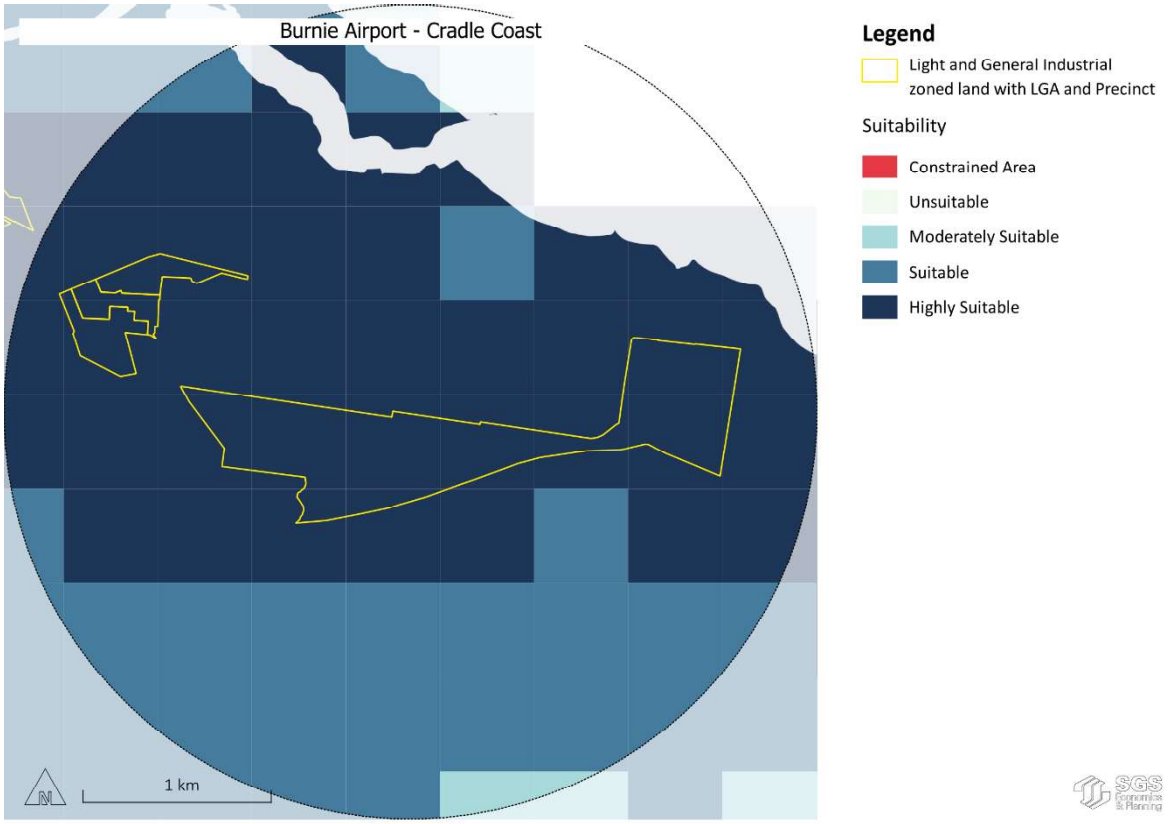
Source: SGS Economics & Planning (2025)

Figure 56: Suitability analysis – Smithton RSIP



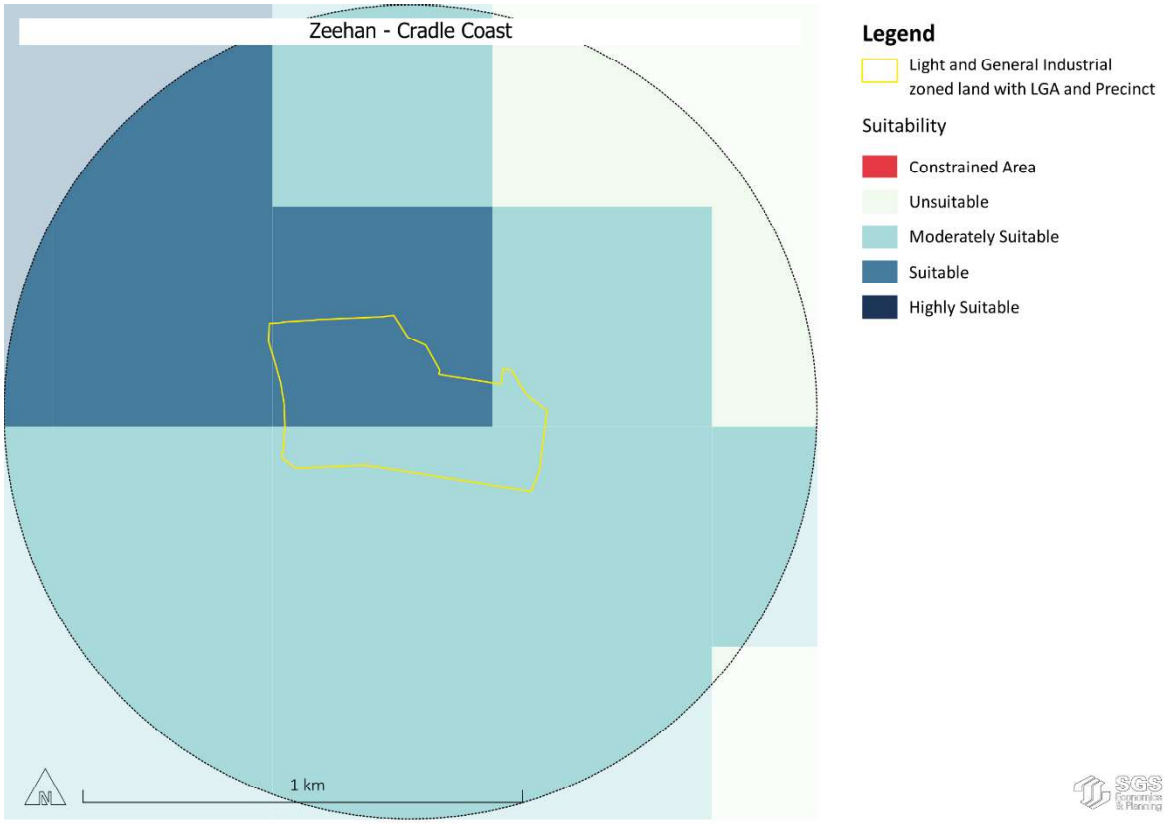
Source: SGS Economics & Planning (2025)

Figure 57: Suitability analysis – Burnie Airport RSIP



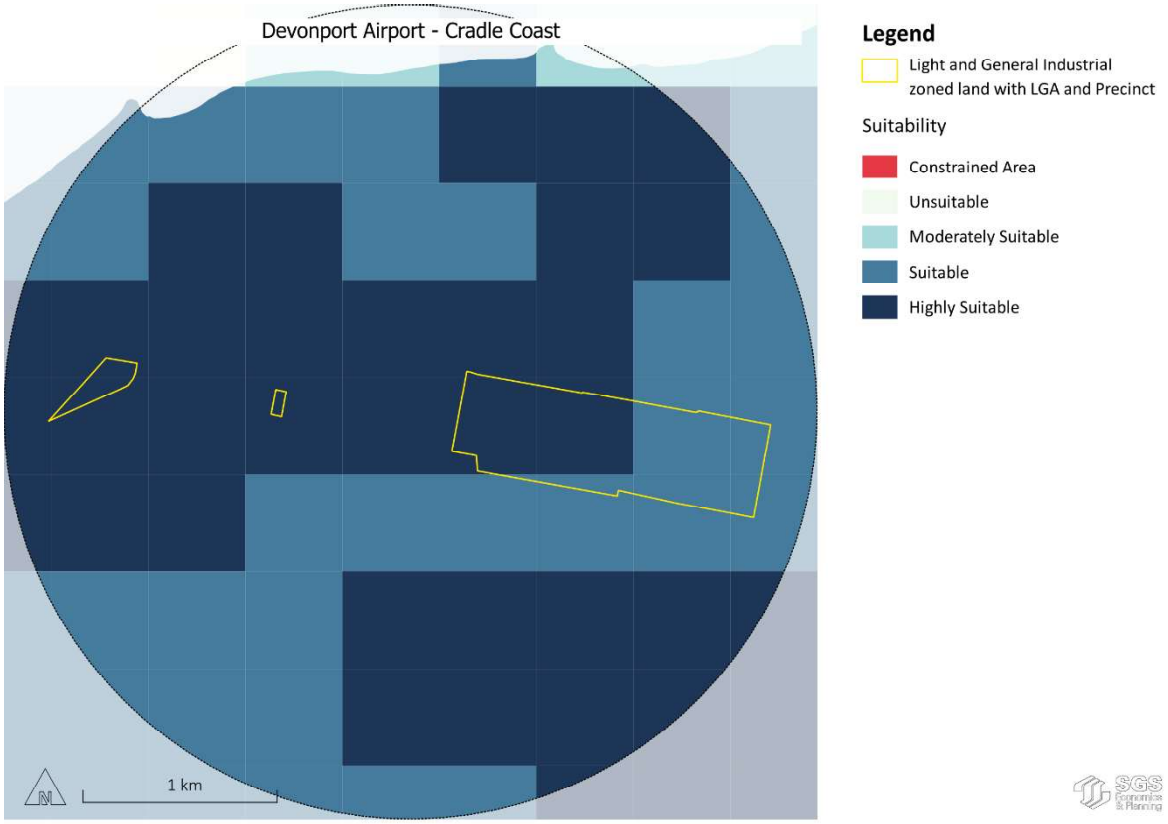
Source: SGS Economics & Planning (2025)

Figure 58: Suitability analysis – Zeehan RSIP



Source: SGS Economics & Planning (2025)

Figure 59: Suitability analysis – Devonport Airport RSIP



Source: SGS Economics & Planning (2025)

9.9 Key takeaways

The following conclusions can be drawn from the suitability analysis.

- Logical expansions: industrial precincts are already located in strategic locations. Should individual precincts wish to expand, they should seek to do so at the fringes of existing precincts where services can be more likely extended.
- Population centres: broad engagement has revealed that land use conflicts are most prominent in areas close (less than a kilometre) to "sensitive" residential uses. This may be particularly apparent in Glenorchy or at the southern end of Brighton Hub.
- Future impacts: rising sea levels as a result of climate change, risk of bushfires and landslip will negatively impact suitability mapping. This will be most apparent in RSIPs near waterways or at the interface between rural and urban.

Appendix D: Water, sewer and power infrastructure audit

9.10 Overview

Infrastructure is a key consideration for the planning of industrial precincts across the state. Coordination with TasNetworks and TasWater are vital to ensure that any required investments are planned for. This section includes an overview of each agency's role, an audit of overall capacity, and strategic implications found during engagement with the providers during the course of the evidence-gathering in this project.

9.11 Power

TasNetworks' role in industrial land planning in Tasmania

This information has been gathered based on consultation with TasNetworks, a data request, and a review of their 2023-24 annual report[65]. TasNetworks is a critical enabler of industrial development in Tasmania. As the state's owner and operator of electricity transmission and distribution infrastructure and jurisdictional planner for the National Electricity Market (NEM), it plays a central role in supporting both existing industries and new investment across the state's growing industrial precincts.

TasNetworks' core responsibilities include maintaining network reliability, connecting new customers (including industrial users and generators), and planning for long-term capacity needs. It facilitates large-scale customer and generator connections, while its telecommunications arm, 42-24, improves regional digital access.

As Tasmania accelerates its renewable energy transition and targets a doubling of its clean energy generation by 2040, infrastructure upgrades like the North West Transmission Developments (NWTD) will unlock significant capacity. These upgrades are directly relevant to precincts such as Burnie, Devonport, Bell Bay, and Zeehan, and will also support the eventual delivery of the Marinus Link an interconnector that positions Tasmania as a clean energy exporter.

Planning and delivery constraints: key themes from engagement

Engagement with TasNetworks revealed several practical challenges and constraints that impact the pace and feasibility of industrial land activation:

[65] https://www.tasnetworks.com.au/about-us/Publications

- Connection Delays and Customer Triggers: While transmission-level capacity is generally not a constraint, distribution-level connections often face lead times of up to 12 months. TasNetworks operates on a "just-in-time, fit-for-purpose" model—capacity is only built when demand is triggered through formal customer requests or justified through a regulatory framework. Regulated frameworks and pricing policies limit the ability for TasNetworks to build infrastructure to attract customers. This approach helps manage risk and affordability to the shared customer base. The regulated environment requires developers to engage early with committed industrial investment in the region. At locations like TRANSLink and Valley Central, this has created a disconnect between developer expectations and actual readiness of infrastructure.
- Perceived Barriers to Investment: In areas like Valley Central (Meander Valley), perceived or real power access issues have discouraged industrial uptake. The nearest injection point at Hadspen is near the limit of its firm capacity, and any augmentation would require a major project with long lead times. This highlights the importance of clear communication and planning coordination between councils, TasNetworks, and developers.
- Development Timing and Coordination: Planning approvals often progress without early consideration of power needs, leaving TasNetworks out of initial discussions. Amendments are currently being sought to ensure that power reticulation is addressed during subdivision design—similar to water and sewage. Without this, developments risk significant delays. Better coordination across infrastructure providers—including water, NBN, and power—was flagged as both a cost and efficiency opportunity.
- Connection Process and Capacity Visibility: Once a developer lodges a formal connection enquiry, it may take 6 weeks for preliminary planning and 10 weeks for design, followed by procurement and construction phases. If information is delayed or expires, timelines can stretch further. TasNetworks is working to improve transparency, including the development of a public-facing "traffic light" map and more robust reporting in its Annual Planning Report.
- Asset Management and Substation Readiness: While major augmentation projects require regulatory approval or Ministerial intervention, there are isolated opportunities. For example, half of the Norwood substation is currently available for future use—pending supply route investment. These types of site-specific insights can be critical for aligning industrial land strategy with near-term opportunities.
- Flexibility and Load Profiles: Many industrial customers are more flexible than initially assumed in terms of energy use. TasNetworks works with businesses to understand whether their needs are 24/7, whether they require automatic restoration, and whether some load can be curtailed to reduce overall pressure on the network. Better forecasting of actual usage could unlock more efficient infrastructure deployment.
- West Coast Challenges: The West Coast, including Zeehan, presents unique planning challenges due to the cyclical nature of mining operations. Demand can spike and then drop off unpredictably, complicating investment decisions.
- Need for Infrastructure Visibility: A recurring theme was the desire for developers to access better data on infrastructure location and capacity. TasNetworks has advocated for inclusion of its distribution assets in the LIST (Land Information System Tasmania), which would greatly assist site selection and feasibility assessments.

Audit of regionally-significant industrial precincts

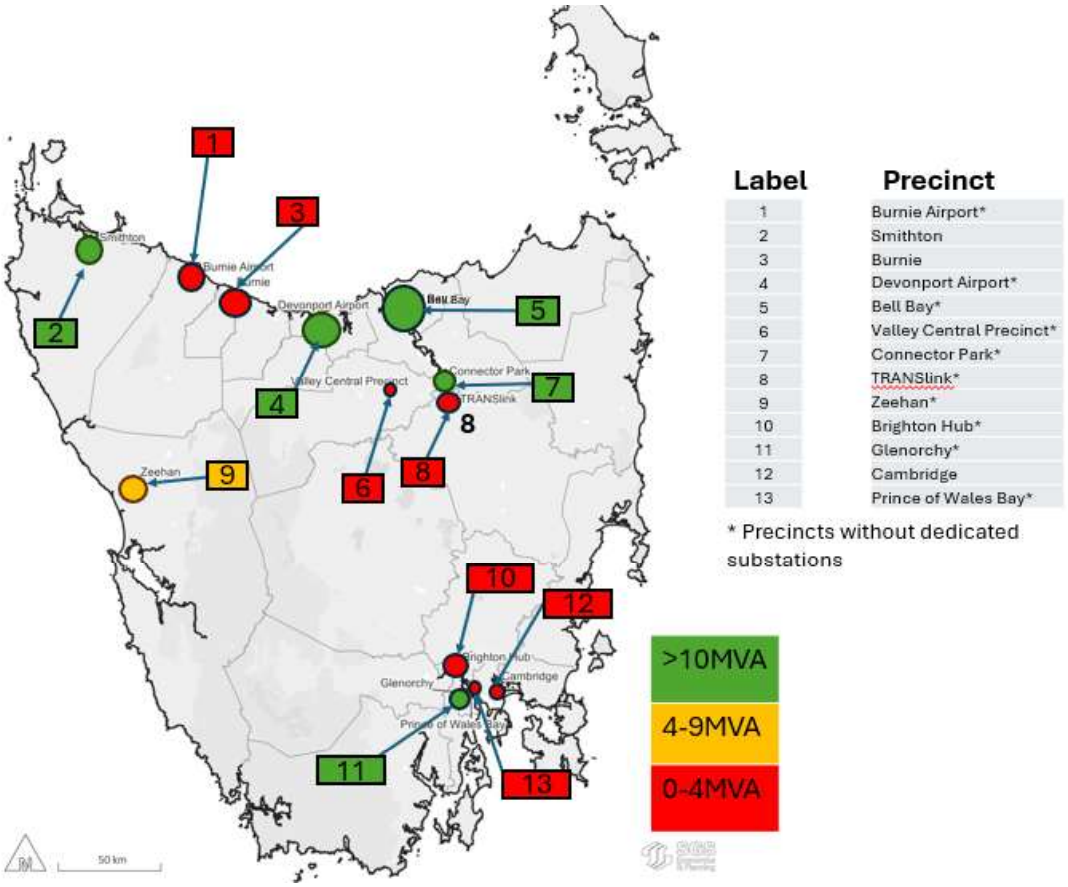
During engagement, TasNetworks provided site-specific guidance regarding distribution network capacity, particularly focusing on the available "firm" (N) headroom at substations and feeders that supply Tasmania's key industrial precincts.

This analysis provides a conservative view of available network capacity, acknowledging that in many cases the actual operational flexibility is greater under "non-firm" (N-1) conditions. Nevertheless, these assessments form a useful baseline for high-level industrial land planning.

TasNetworks highlighted that connection to the distribution network typically follows a demand-triggered model: developments must initiate formal connection requests to unlock design, procurement, and construction of capacity upgrades. Consequently, expectations about "plug and play" infrastructure at industrial sites are often misaligned with the realities of lead time, sequencing, and planning approvals.

The information provided in Figure 60 refers to the overall headroom at the substation node and is not exclusively limited to a specific location within the area. All details should be understood as pertaining to the connecting substation to the respective precinct, not the precinct itself.

Figure 60: Overall headroom at substation node (traffic light assessment), by RSIP



Source: Tasnetworks (2024)

In addition, Table 61 summarises headroom availability of feeders supplying the precincts, also organised according to a traffic light assessment. This indicates that there is limited feeder headroom for significant expansion in all precincts.

Available headroom is indicative only. All proposed load or generation connections must undergo TasNetworks' formal Connection Enquiry process, where technical feasibility, network constraints, and augmentation requirements are assessed in detail.

Table 61: Feeder Headroom by Precinct (MW Available Capacity)

Precinct	Supply feeder	Substation	Feeder headroom (Summer)	Feeder headroom (Winter)
Burnie Airport	91006	Burnie		
Devonport Airport	81001	Wesley Vale		
Bell Bay	53010	George Town		
	53009	George Town		
Valley Central Precinct	67082	Hadspen		
Launceston	67090	Hadspen		
	67091	Hadspen		
	95061	Norwood		
TRANSLink	67090	Hadspen		
	67081	Hadspen		
Zeehan	99981	Trial Harbour		
Brighton Hub	48188	Bridgewater		
	48182	Bridgewater		
	48193	Bridgewater		
	48190	Bridgewater		
Prince of Wales Bay	17100	Derwent Park		

Source: Tasnetworks (2024)

Additional commentary provided during engagement included:

- Valley Central (Hadspen): Businesses have historically been deterred from locating at the site due to perceived (or real) issues securing electricity connections. The Hadspen substation is at the edge of its firm capacity, with larger-scale developments likely to trigger significant upgrades.
- TRANSLink and Launceston Despite being strategically located near major infrastructure corridors, both precincts require developers to invest in connecting infrastructure, as feeder headroom is limited, particularly in winter. As such, assumptions about "readiness" need to be grounded in active planning for network extension and upgrade.

- **Zeehan and Bell Bay:** Specific feeders into Zeehan and one of the Bell Bay feeders (53010) currently have zero firm headroom, which may pose timing and cost risks to large users or energy-intensive industries.

TasNetworks noted that while connection timelines can vary, end-to-end processes for distribution network upgrades (from enquiry to energisation) can extend to 12 months or more for complex projects. Visibility tools, such as the planned "traffic light" mapping overlays, may eventually aid developers and councils in understanding where capacity constraints exist—but for now, planning needs to rely on proactive engagement and early design integration.

Strategic takeaways

TasNetworks is essential to Tasmania's industrial land strategy. However the timing, sequencing, and cost of energy infrastructure must be carefully considered. A key challenge is the mismatch between land availability, developer expectations, and infrastructure readiness. This suggests a need for the following:

- Proactive engagement between councils, developers and TasNetworks during the earliest stages of precinct planning.
- Early engagement between TasNetworks and developers needs to occur and should address -
  - Feasibility,
  - Options for connection,
  - Potential augmentation requirements,
  - Connection timeframes (which may be up to 24 months).

  Formal Connection Enquiries must be submitted to TasNetworks before any application is made.
- Mechanisms to fund or trigger early-stage infrastructure in high-priority areas.
- Better visibility of energy infrastructure through spatial data platforms and planning overlays.
- Ongoing alignment of industrial strategy with TasNetworks' annual planning cycles and regional load forecasts.

Ultimately, energy infrastructure is not a barrier to growth, but a gating factor that must be managed strategically through collaboration, foresight, and smart sequencing of development.

9.12 Water

TasWater's role in industrial land planning in Tasmania

TasWater is Tasmania's sole provider of water and sewerage services and a critical stakeholder in the planning and development of industrial land across the state. With responsibilities for sourcing, treating and delivering drinking water, as well as collecting and treating wastewater, TasWater's infrastructure capacity and investment priorities can shape the feasibility and cost of industrial expansion in both regional and urban precincts.

Operating under a 20-year Long Term Strategic Plan (LTSP), TasWater must manage a vast and ageing asset base while maintaining compliance with environmental and health regulations, improving service reliability, and keeping prices affordable. These long planning horizons mean that while TasWater can often conditionally accommodate low to moderate growth, high-demand and/or industrial developments require case-by-case assessments and potentially infrastructure upgrades.

Current Infrastructure Capacity and Precinct-Level Constraints

While many of Tasmania's key industrial areas are currently serviced or serviceable by TasWater infrastructure, the engagement process revealed that actual development feasibility often depends on the intensity of proposed land uses and whether developer-led upgrades or external funding can be secured. Several common themes emerged during engagement:

General Capacity and Planning Approach

- TasWater applies a planning benchmark of 50 Equivalent Tenements (ETs) per hectare when assessing industrial subdivisions.
- Growth where capacity is not available may require developer-funded upgrades or external infrastructure investment.
- Trade Waste is a particular constraint: high-strength or high-volume waste often requires pre-treatment or may not be accepted at all.

Precinct Insights

Water, sewer and trade waste requirements are distinct in different parts of the state. TasWater has, as part of engagement, provided commentary on the capacity of these components by regionally-significant industrial precinct, summarised in Table 62 below.

Table 62: Water, sewer and trade waste capacity assessment, by regionally significant industrial precinct

Site	Water	Sewer	Trade Waste
Brighton intermodal	Ok	Ok	Catchment is unsuitable for high strength or high volume trade waste
Cambridge, especially around the airport	Ok	Capacity limited in the short term	Catchment is unsuitable for high strength or high volume trade waste
Prince of Wales Bay (Glenorchy)	Ok	Ok	Catchment is unsuitable for high strength trade waste
Norske Skog (Derwent)	Ok	N/A	No sewer service
TRANSLink (Northern Midlands)	Ok	Capacity limited in the short term	Limited to domestic strength and volume equivalent
Bell Bay	Limited	Ok	Catchment Unsuitable for high Strength Trade Waste
Valley Central (Meander Valley)	Ok	Capacity limited in the short term	Limited to domestic strength and volume equivalent
Smithton	OK	Network capacity OK	Ok

Site	Water	Sewer	Trade Waste
Burnie Airport (Wynyard)	Ok	Network capacity limited in both the 150mm gravity mains and the SPS's. Upgrades likely required for both. STP also has significant limitations.	Catchment is unsuitable for high strength or high volume trade waste
South Burnie	Ok	Network capacity OK assuming this is the industrial zoned land on south-eastern edge of Burnie If not, there are capacity limitations on numerous 225mm gravity mains running through the town, which may require upgrades	Catchment is unsuitable for high strength or high volume trade waste
Devonport Airport (Pardoe Rd)	Limited	Network does not extend to airport and industrial zone	Catchment is unsuitable for high volume trade waste
Connector Park (Kings Meadows)	Capacity is limited in the bulk supply main. Infrastructure upgrades likely required for any large development	Network capacity limited in 300mm trunk main. Infrastructure upgrades likely required for any large developments.	Catchment is unsuitable for high strength trade waste
Derwent Park	Ok	Dependent on nominated connection point and size of development. Upgrades may be required in 300-375mm mains.	Catchment is unsuitable for high strength or high volume trade waste

Source: TasWater (2025)

Note: The Sites listed in Table 61 as "Ok" for Water capacity still have servicing challenges but are likely to have more bulk capacity. Upgrade works may still be required for any increase in demand.

Note: Sites listed as 'ok' for trade waste are still subject to individual application, assessment and conditioning

Key themes from engagement:

TasWater's advice highlights several critical considerations for land use and infrastructure coordination:

- **Land Use Intensity Matters:** General servicing availability does not guarantee capacity for high-impact industrial uses. Development intensity must be aligned with infrastructure capacity or accompanied by upgrade planning.
- **Preliminary Servicing Advice is Not a Guarantee:** TasWater will assess actual water and sewer needs once the end user is known. Developers should be encouraged to engage early to confirm feasibility and staging.
- **Upgrades Take Time and Money:** Similar to electricity infrastructure, significant water and sewer upgrades have long lead times, especially if they are outside of current capital programming. These may involve developer contributions, government funding, or co-investment.
- **Trade Waste is a Key Constraint:** Across many precincts, TasWater has set clear boundaries around the type and volume of trade waste that can be accepted. Applications should be made early and comprehensively to allow assessment of risk. An application is not a guarantee of acceptance, TasWater may and does refuse Trade Waste consents.
-
- **Coordinated Infrastructure Planning is Essential:** Engagement confirmed that cost savings and better outcomes are achievable when power, water, and telecommunications are planned in concert. Reinforcing this principle in the industrial strategy could streamline delivery and reduce barriers to investment.

Strategic takeaways

While TasWater can conditionally support incremental growth in most industrial precincts, significant or non-standard developments may encounter infrastructure constraints that require strategic coordination, case-by-case planning, and potentially external funding. The industrial land strategy should recommend:

- Early engagement with TasWater during structure planning and subdivision design.
- Alignment of land use zoning with servicing realities and capacity thresholds.
- Advocacy for infrastructure funding in areas of strategic industrial interest.
- Greater visibility of infrastructure constraints in public-facing land databases.

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