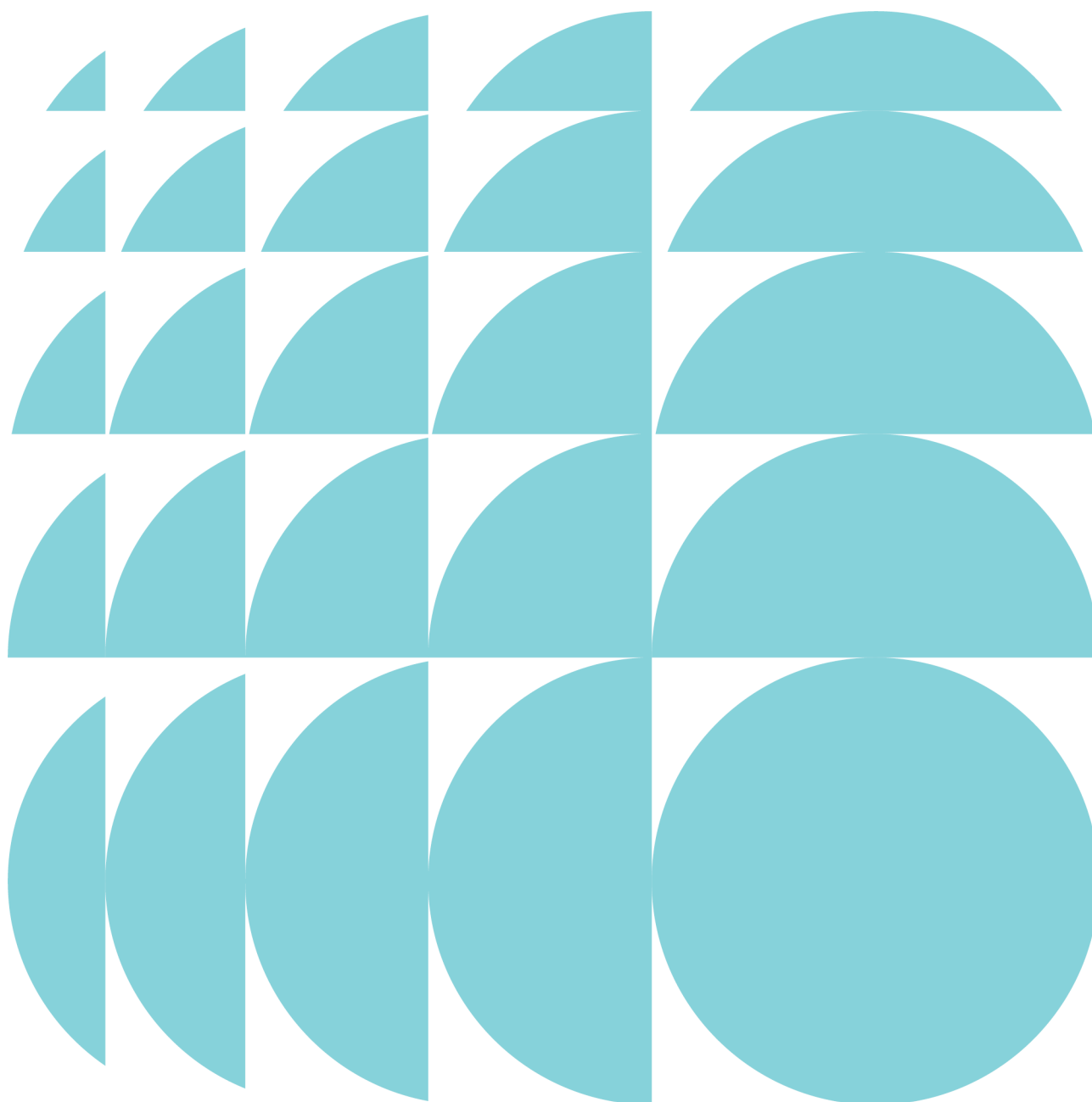


ETHOS URBAN

Albury Regional Job Precinct
Economic Assessment

Submitted to Department of Regional NSW

September 2023 | 2210621



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1.0 Introduction

Albury is a city in NSW that forms part of the greater Albury-Wodonga region along the NSW and Victoria border. As a major service centre for the surrounding region, Albury has significant support from the Commonwealth, State and Local Governments for ongoing growth and development.

In early 2021, the NSW Government announced the Albury Regional Job Precinct (RJP) initiative to support Albury's economic growth and development. The Albury RJP Investigation Area, hereafter referred to as the Albury RJP, is centred around the existing Nexus Industrial Precinct north of the Albury urban area and also includes a 1,200-hectare investigation area.

The aim of the Albury RJP initiative is to improve certainty for the private sector and key industries to invest in new, or expanded businesses, that will strengthen and grow the economy of the region. This Albury RJP initiative will support this outcome by:

- Preparing a masterplan and technical studies to provide a coordinated plan for development and infrastructure investment
- Provide a guide to funding and delivery of core infrastructure, and
- Establish a streamlined assessment and approval process through amendments to local planning controls within the RJP area.

1.1 Study Aims and Objectives

As outlined above, the primary aim of the Albury RJP is to improve certainty for the private sector and key industries to invest in new, or expanded businesses, that will strengthen and grow the economy of the region.

As part of this process Ethos Urban has been engaged to prepare an economic assessment to inform the preparation of a masterplan for the Albury RJP. This economic assessment will ensure the masterplan can facilitate and enable growth and development, including within the target industries of Advanced Manufacturing, Circular Economy and Recycling, Food and Agribusiness and Transport and Logistics which have been identified by the NSW Government.

To achieve this objective the economic assessment must:

1. Understand the current supply and demand for industrial land within Albury-Wodonga
2. Understand the economic potential and competitiveness of Albury-Wodonga for relevant private sector investment
3. Engage with target industries and obtain direct market intelligence on market interest, requirements and investment lead-times to better understand the strengths, weaknesses, opportunities and threats (SWOT) of Albury-Wodonga as a place to establish and operate
4. Assess masterplan options to ensure it facilitates and enables the growth and development of target industries within the Albury RJP
5. Indicative land requirements for the Albury RJP, and
6. Sequencing, timing and take up of industry and land across the Albury RJP.

1.2 Approach

To achieve the above aims and objectives the following key tasks have been undertaken to prepare this economic assessment:

1. A desktop analysis of the Albury RUP and locational context to make observations on the suitability for target industries
2. A strategic assessment of the supply and demand of zoned industrial land within Albury-Wodonga
3. Review relevant socio-economic data to identify key trends and opportunities for the Albury RUP and target industries
4. Gather market intelligence on the needs, issues, considerations of target industries which will inform key stages of the masterplan's development,
5. Undertake a SWOT assessment of Albury-Wodonga with a focus on the perspective of target industries, and
6. Identify key and relevant economic issues and opportunities to consider in the development of subsequent reports and the overall masterplan.

1.3 Report Structure

To facilitate the readability of this Report, it is presented in three parts:

- **Part A – Strategic Context** provides an overview of the Site, the relevant strategic planning and policy framework profiles of the existing and expected socio-economic characteristics of the relevant study areas which will form the basis of the assessment in Part B.
- **Part B – Economic and Competitiveness Assessment** provides a detailed assessment of relevant economic and property factors which illustrates baseline need for industrial land. This Part of the Report also outlines insights gathered from engaging with target industries on the strengths, weaknesses, opportunities and threats of Albury as a place for business.
- **Part C – Masterplan Assessment and Key Findings** provides an economic assessment of masterplan and outlines key findings and consideration for the development of the Albury RUP.

1.4 Assumptions and Exclusions

Key assumptions and exclusions applied in preparing this Report include:

- This report should not be relied upon for the completion of detailed technical assessments. As indicated in Section 1.2 above, this economic assessment focusses on the relevant economic issues and opportunities to consider in subsequent more detailed reporting and the overall masterplan.
- The desktop supply and demand assessment of industrial land for Albury-Wodonga accurately reflects the real-world status of the industrial land market, and

The perspectives, insights and issues gathered from the market sounding accurately reflects the target industries more generally.

1.5 Data Sources

This report was prepared utilising the most up to date data at the time of writing. Key data sources used to prepare this assessment include:

- ABS, *Regional Population (2021)*
- ABS, *Census of Population and Housing (2016)*
- ABS, *Count of Australian Businesses including Entries and Exits (June 2021)*
- Transport for NSW, *Population Projections (2020)*
- Transport for NSW, *Employment Projections (2020)*
- Department of Environment, Lands, Water, and Planning Victoria, *Victoria in Future (2019)*
- Nearmap aerial imagery for 2010 and 2021.
- Core Logic, *Cordell Connect (November 2020)*
- National Skills Commission, *Small Area Labour Markets (March 22)*
- Pricerfinder (2021)
- Albury City Council, .id Consulting, Remplan
- Albury RJP Masterplan, Ethos Urban, (June, 2022)

Part A

Strategic Context

2.0 Albury Regional Job Precinct

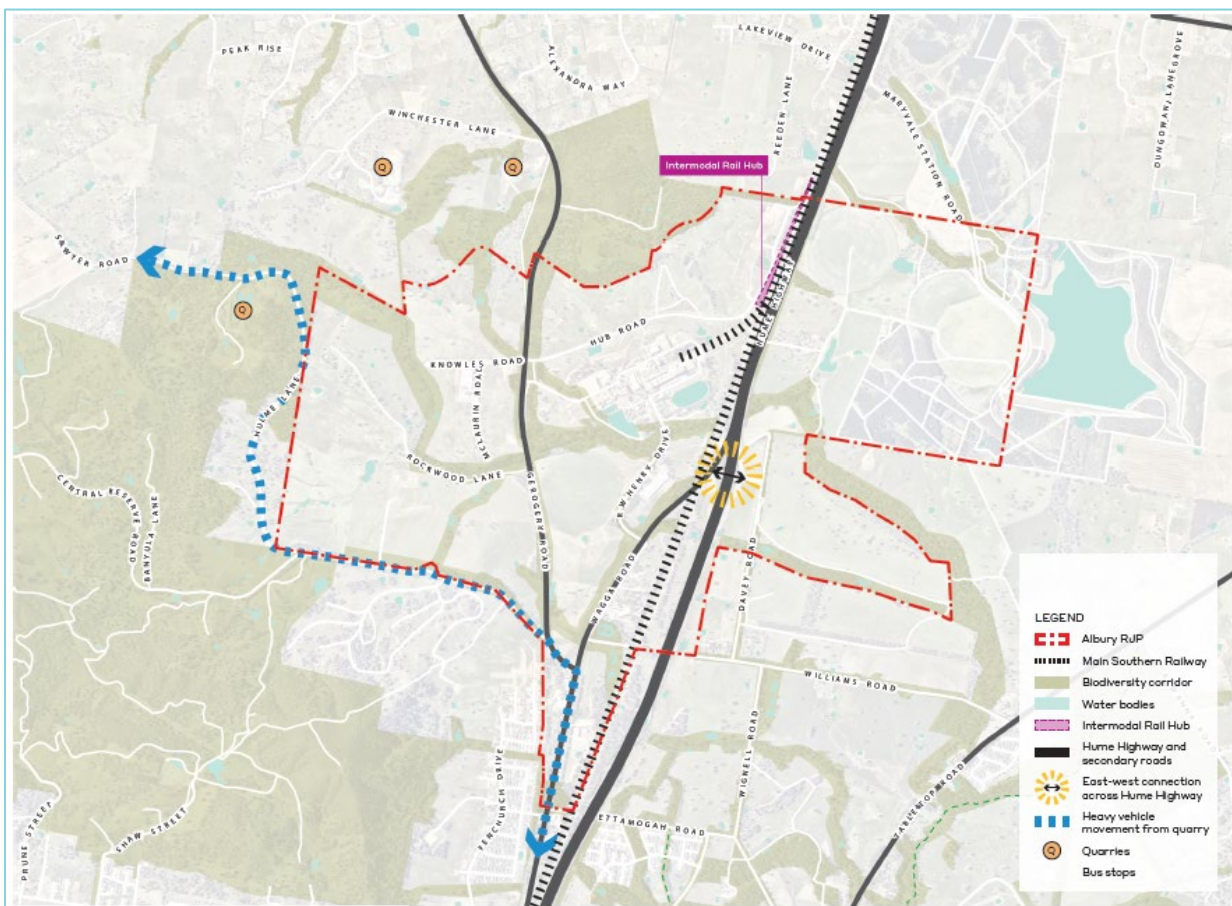
2.1 Surrounding Local Context

The Regional Job Precinct, which encompasses the existing NEXUS Industrial Precinct, is located in the suburbs of Table Top and Ettamogah. These suburbs were originally part of the Greater Hume Shire but were integrated into the City of Albury in 2004. The identified RJP site has previously been known as the Albury Industrial Hub.

The Albury RJP Investigation Area is located approximately 10km north of the Albury CBD and 2km from the current urban extent of the city. Surrounding the area are rural living, agricultural, and some commercial uses, some of which are likely to require buffering or transitional uses to minimise land use conflicts with future industrial development.

Existing uses within the Albury RJP Investigation Area are largely rural/agricultural, noting near the centre of the precinct, west of the Hume Motorway is the former paper mill (now owned by Visy), Ettamogah Rail Hub and Overall Forge. On the eastern side of the Hume Motorway, is the Ettamogah Dam.

Figure 1: Albury RJP Investigation Area and Surrounding Context



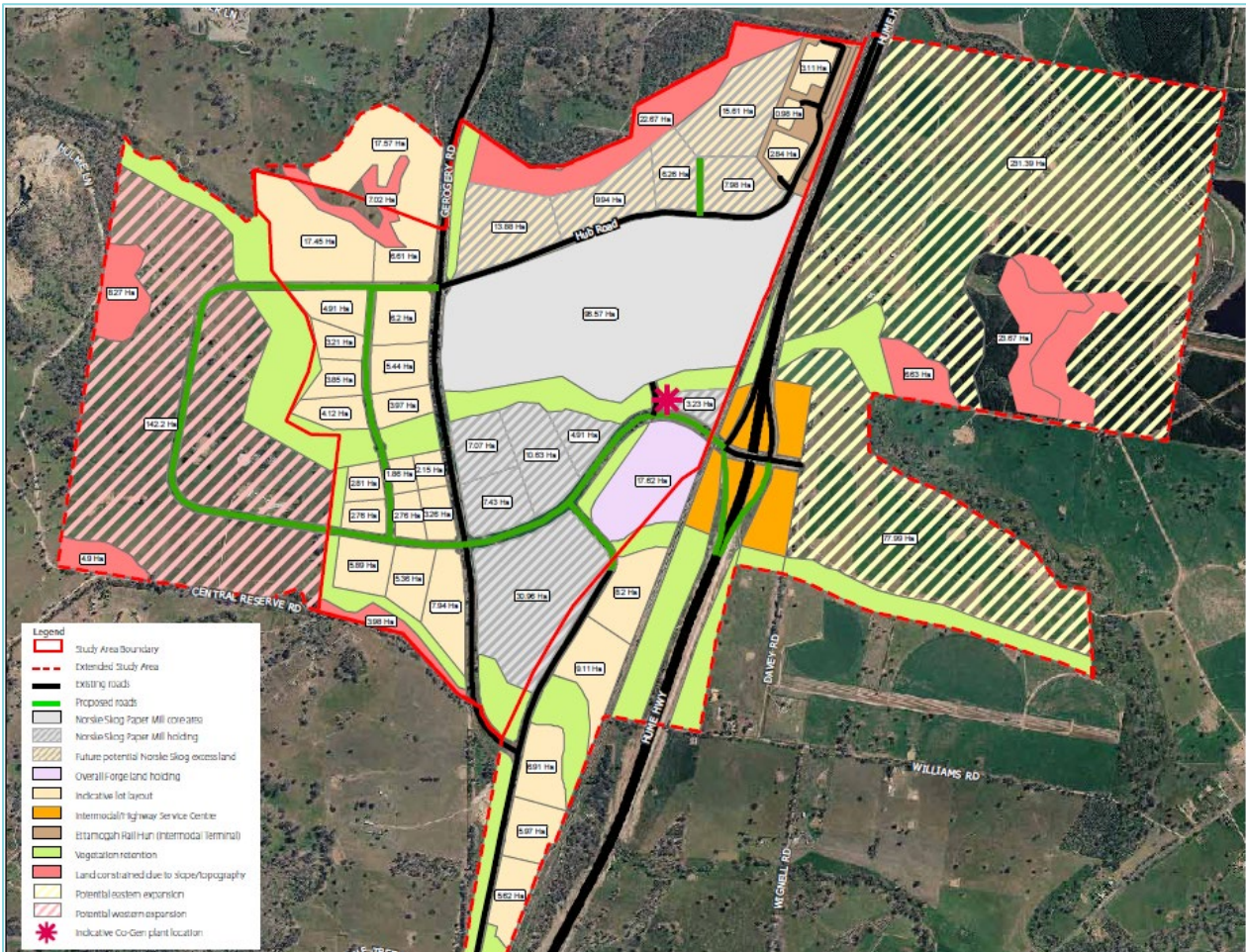
Source: Ethos Urban

2.2 Previous Masterplan

A masterplan framework for the Nexus industrial precinct was prepared by AECOM in 2010. Key aspects of the masterplan include:

- Movement created through a ring-road
- Range of lot sizes to respond to existing largescale use and the crafting of lots appropriate to topography
 - Small = 1 to 5 ha
 - Medium = 5 to 12 ha
 - Large = 12+ ha
- Prioritises north-south movement through the centre road
- Takes into account some of the corridors through retention and enhancement of environmental land
- Landscape features and attributes including the retention of a drainage corridor
- Prioritisation of arrangement lots in a way to maximise the potential of the Ettamogah Intermodal Terminal

Figure 2: Nexus Industrial Precinct Development Framework



Source: AECOM, 2010

3.0 Study Areas

Study areas have been defined to review the relevant factors that will influence competitiveness and attractiveness of the Albury RJP as a place for target industries to establish and operate from. These study areas geographically represent the communities and economies which the target industries will consider in their decision-making to potentially locate or expand in the Albury RJP.

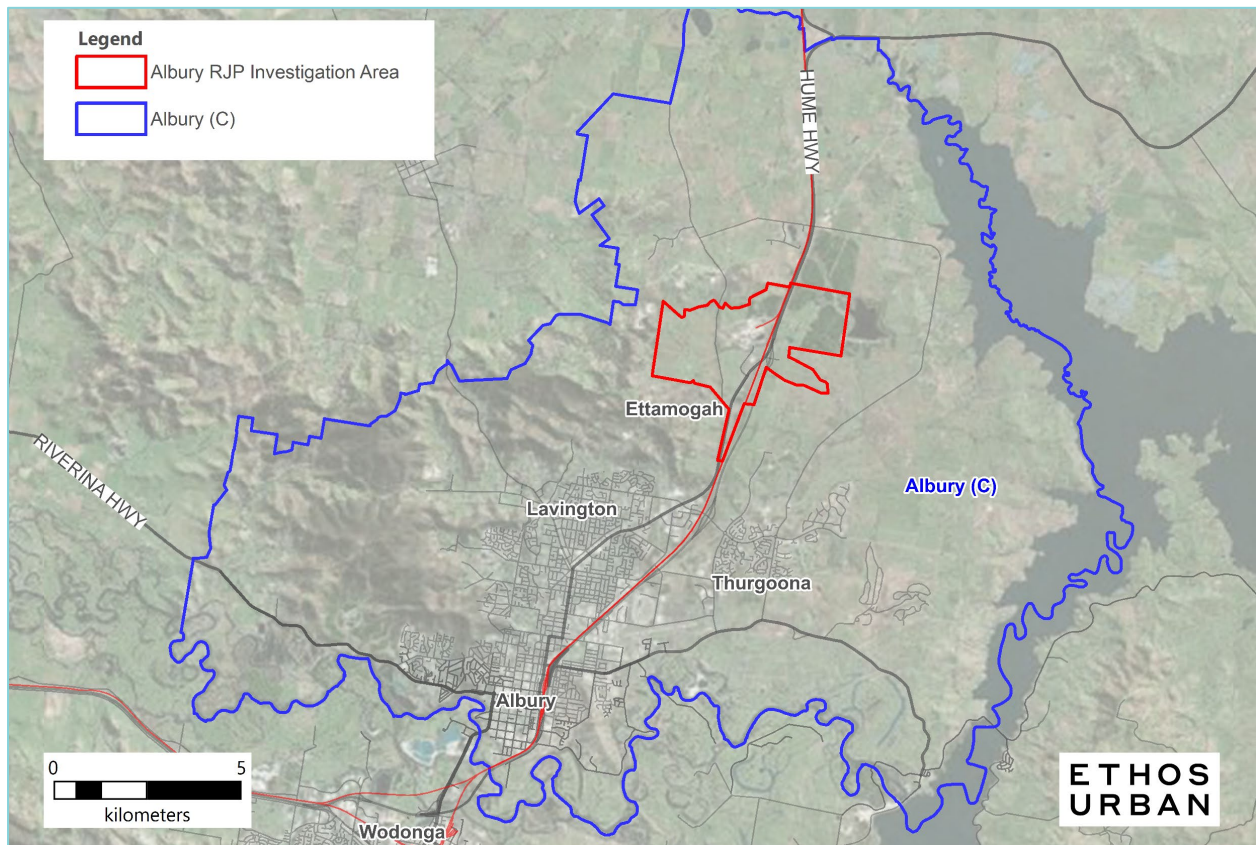
Factors typically considered when defining study areas include:

- Existing and future regional transport network which influences travel time to and from the Albury RJP Investigation Area
- Location of natural and engineering boundaries such as local waterways and heavy infrastructure
- Administrative boundaries such as ABS statistical areas, established property markets, and areas defined in key strategic land use plans, economic development strategies and infrastructure strategies
- Physical and psychological boundaries which affect perceptions of convenience, accessibility, and prominence, and
- Location and nature of existing zoned industrial land, non-residential activities, and surrounding key land uses.

For the purpose of this assessment, three study areas have been identified. These study areas are illustrated in Figure 3, Figure 4 and Figure 5 overleaf and described below:

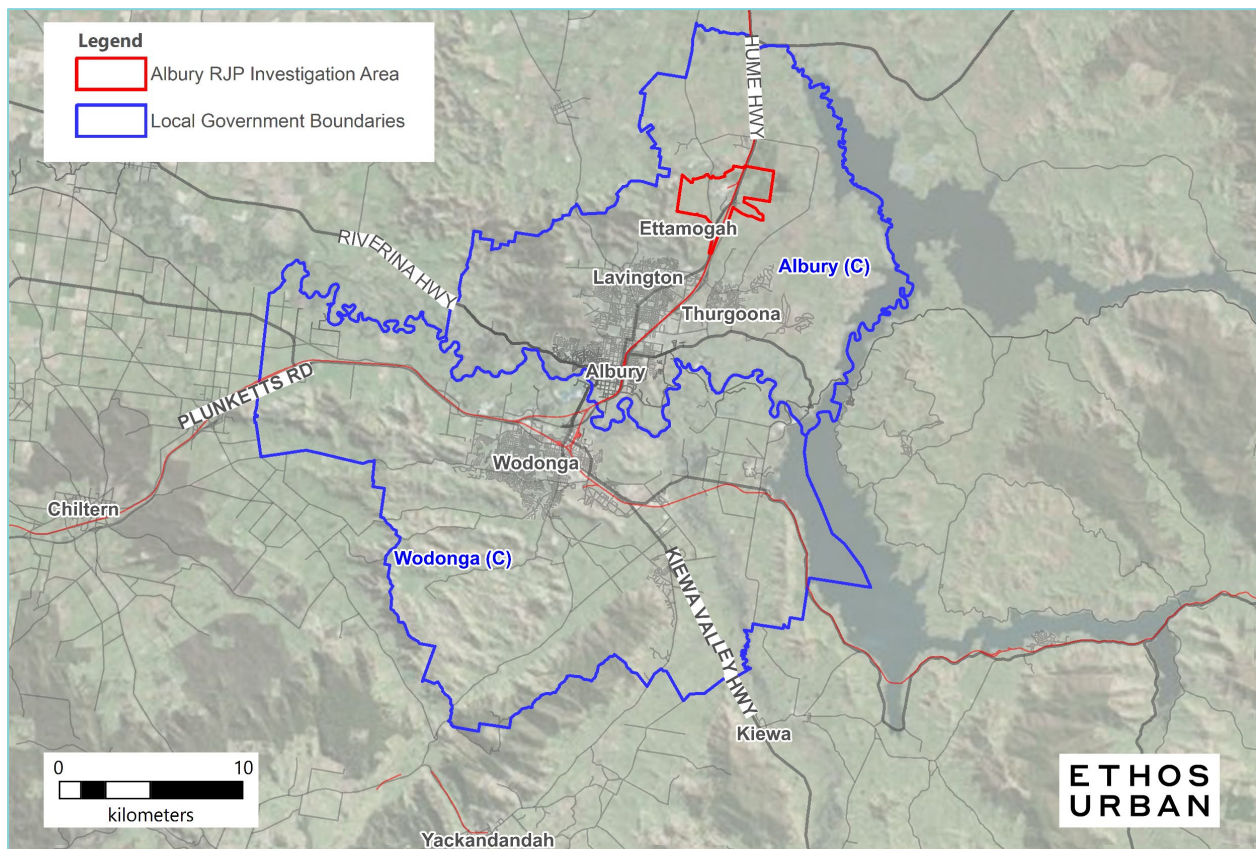
- **Albury LGA** represents the administrative boundary of the Albury City Council. To support the growth and development of the local community and economy Council implements land use policies, strategic plans and delivers critical infrastructure. Analysing this study area can reveal insights specific for Council's consideration.
- **Albury-Wodonga** represents the Albury-Wodonga urban area and consists of the Albury City Council and Wodonga Council LGAs. This study area represents the businesses, infrastructure and community which the private sector would consider as they make their decisions on where to invest. Analysing these study areas provides greater insights into the city's economic attributes and potential for target industries. The two LGAs also form part of the Albury-Wodonga Functional Economic Region (FER), which further encompasses the immediate surrounding LGAs of Greater Hume Shire, Federation and Indigo Shire.
- **Riverina Murray Region** represents the wider region of which the city of Albury-Wodonga serves as the major regional centre and the boundary of the NSW Government's Riverina-Murray Regional Plan. The region encompasses 22 local government areas with other regional centres including Griffith, Wagga Wagga, Deniliquin, Leeton and Tumut. Analysing this study area provides greater insights into the unique characteristics and attributes of Albury-Wodonga as well as a better understanding of the regional economic and industry specialisations the Albury RJP Investigation Area can respond to and be supported by the NSW State Government's regional plan.

Figure 3: Albury LGA



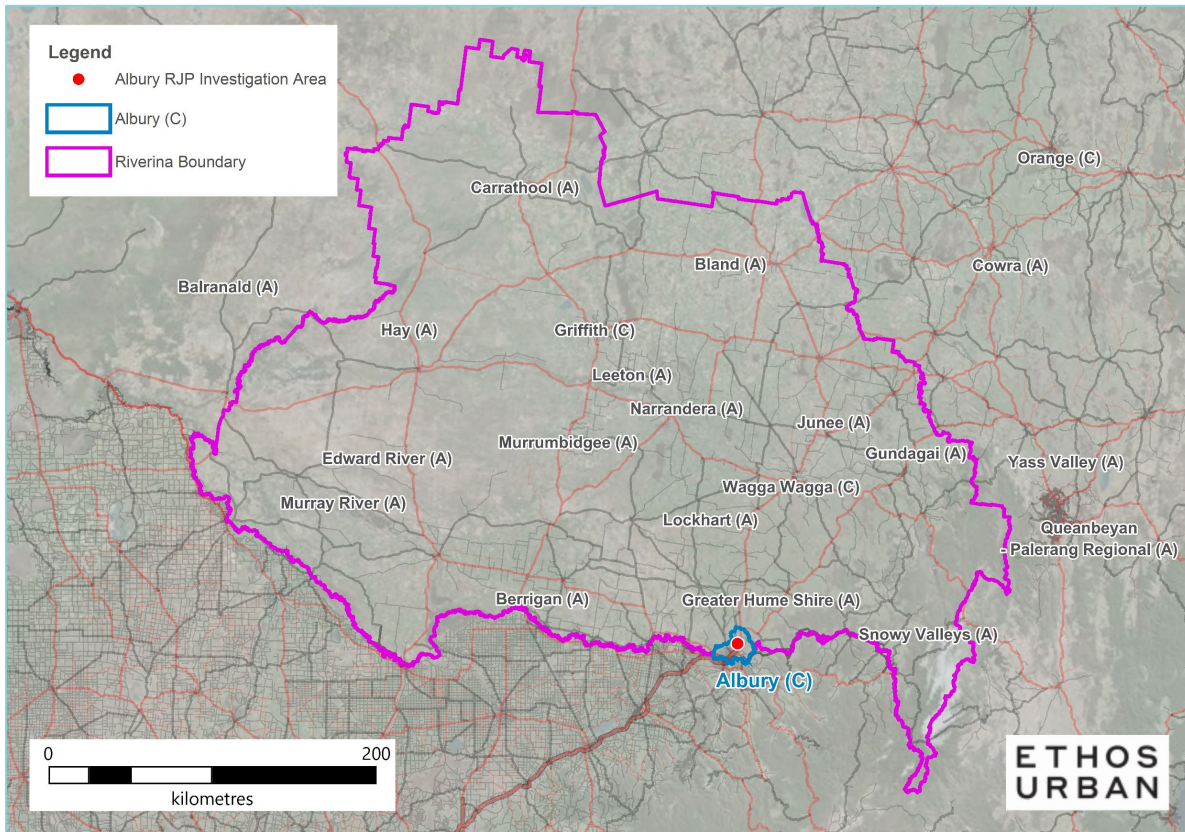
Source: Ethos Urban, BingMaps

Figure 4: Albury-Wodonga



Source: Ethos Urban, BingMaps

Figure 5: Riverina Murray Region



Source: Ethos Urban, BingMaps

4.0 Strategic Planning and Policy Framework

National, State and local government strategic planning and economic development policies can influence the future location and composition of economic activity across NSW. These policies set the planned economic role and function of areas that is to be reinforced by planning controls and infrastructure delivery.

A range of regional and local strategic plans and policies exist which collectively outline the future growth and development vision for the community of Albury. Analysing this framework provides an understanding of the strategic objectives for the area, and identifies potential growth drivers, opportunities and policy settings that will influence the demand and supply of employment land and drivers of the local and regional economy that the Albury RJP Investigation Area can leverage.

To focus the analysis of this framework, and best determine how it might influence the future scale, composition and timing of economic development within Albury (and the role and function of the Albury RJP Investigation Area in this context), the following types of plans and policies have been reviewed and outlined in the remainder of this chapter:

- Key State government strategies and policies
- Region and local strategic plans
- Council's Community Strategic Plan
- Employment and economic development plans and policies.

4.1 National

4.1.1 National Freight and Supply Chain Strategy

The *National Freight and Supply Chain Strategy*, published by the Transport and Infrastructure Council in August 2019, outlines the vision and objectives of a national freight and supply chain. Faced with the challenges of an expected 35% increase of freight volumes in Australia over the next 20 years, the Strategy outlines a series of goals to guide decision making that ensures the nation's freight systems and supply chains contribute to a strong and prosperous Australia.

The six goals of the Strategy include:

- Improved efficiency and international competitiveness
- Safe, secure and sustainable operations
- A fit-for-purpose regulatory environment
- Innovative solutions to meet freight demand
- A skilled and adaptable workforce, and
- An informed understanding and acceptance of freight operations.

The Albury RJP's location on the national transport network, including the direct access to both the road and rail network, means it is well placed to support and deliver on the objectives outlined in the *National Freight and Supply Chain Strategy*.

4.1.2 Australia's Bioenergy Roadmap

Published by the Australian Renewable Energy Agency (ARENA) in November, 2021, *Australia's Bioenergy Roadmap* outlines a vision for the bioenergy industry and its potential to lower emissions, enable regional growth, improve energy resilience and delivery waste management benefits for Australia. Two key themes outlined in the roadmap which relate to the Albury RJP include:

- Enabling market opportunities in hard-to-abate sectors which identifies the potential for industrial renewable heat energy from feedstocks generated through production, and
- Deployment of bioenergy within precincts to complement other low emission technologies.

4.2 State

4.2.1 A 20-year economic vision for regional NSW

A *20-year Economic Vision for Regional NSW* is a strategy which seeks to drive sustainable, long-term economic growth in regional NSW by delivering reliable transport and freight infrastructure, secure and sustainable water and energy, strong education and training, quality services and a stable business environment.

Albury-Wodonga is identified as a key growth area for regional NSW. Focus areas of the strategy for the growth and development of Albury-Wodonga include:

- Manage vital energy and water resource sustainably to ensure supply will meet long-term regional needs
- Provide an attractive environment for businesses to establish and invest in regional NSW
- Build efficiency in freight networks to improve supply, reduce disruptions and lower costs
- Promote regional universities to attract students and retain expertise

The strategy identifies several industries and sectors that will support the economic development of regional NSW. The Albury RJP Investigation Area has the potential to assist the development of the following industries outlined in the vision:

- Advanced Manufacturing
- Renewable Energy and Gas
- Technology-enabled primary industries
- Recycling and waste management
- High-quality food products.

4.2.2 NSW Circular Economy Policy Statement – Too Good to Waste

In February 2019, the NSW Government issued the *NSW Circular Economy Policy Statement, Too Good to Waste*. The policy statement outlines the NSW Government's commitment to move towards a more circular economy over the next 20 years. It defines a circular economy which values

resources by keeping products and material in use for as long as possible. Maximizing the use, re-use and value of resources brings major economic, social and environmental benefits as it contributes to innovation, growth and job creation, while reducing our impact on the environment.

The policy statement outlines seven key principles that will help NSW transition towards a circular economy:

- Sustainable management of all resources
- Valuing resource productivity
- Design out waste and pollution
- Maintain the value of products and materials
- Innovate new solutions for resource efficiency
- Create new circular economy jobs, and
- Foster behaviour change through education and engagement.

Planning and development of the Albury RJP provides an opportunity to embed these principles in the precinct's design and provide a space where industry consistent with the circular economy can grow and develop in regional NSW.

4.2.3 The NSW Industry Development Framework

The NSW Industry Development Framework, prepared by the Centre for Economic and Regional Development, seeks to drive an integrated approach to productive structural economic change and help the NSW Government efficiently deliver the best industry policy for NSW. A key element of the framework is the identification of priority industries and technologies which are expected to deliver the greatest public benefit.

The priority industries and technologies outlined in the plan include:

- Agriculture and agrifood
- Resources
- Defence and aerospace
- Clean energy and waste
- Medical and life sciences
- Digital systems and software
- International education and the visitor economy
- Advanced manufacturing
- Biotechnology, and
- Digital technology including fintech.

The framework specially identifies the role of focus precincts, which includes the Regional Jobs Precincts program, as a key mechanism to support the development of the priority industries and technologies.

4.2.4 Future Transport Strategy 2056

Prepared by Transport for NSW, the *Future Transport Strategy 2056* outlines a 40-year vision for transport and mobility for NSW. Six guiding principles are identified:

- Customer focused
- Successful places
- A strong economy
- Safety and performance
- Accessible services and
- Sustainability.

The Strategy signals a key shift in transport planning for NSW away from a 'Sydney centric' system to a more integrated transport network. Elements of the Strategy which relate to, and may influence the development of, the Albury RUP include:

- Albury-Wodonga is a key regional hub in the transport network of NSW and is a key connection point to Victoria
- The freight task for regional NSW is forecast to increase and a need exists to increase the efficiency of road-based freight
- Inland rail will enable more efficient movement of freight between Melbourne and Brisbane and provides an opportunity for regional NSW to integrate with this freight network
- Future transport initiatives in Albury will focus on delivering seamless cross border travel to Victoria and improved road and rail connections to Inland Rail, and
- Albury-Wodonga is identified as a centre along a potential higher speed corridor that would connect the city with regional Victoria, Wagga Wagga and Sydney.

4.3 Regional

4.3.1 Albury Wodonga Regional Deal

In March 2022, the Australian Government, Albury City and Wodonga City Council announced their funding commitments as part of the Albury Wodonga Regional Deal. The statement of intent for the Albury Wodonga Regional Deal includes support population growth, economic development and ensure a nationally significant, liveable and prosperous region. A total of \$129.9 million has been committed to by the Commonwealth Government and Albury City and City of Wodonga Councils.

Key funding commitments include:

- \$25 million for the Albury Airport expansion
- \$22 million for the Wodonga TAFE's Heavy Vehicle Technology program
- \$15 million for housing and accommodation for workers in the health sector
- \$15 million for the Albury Entertainment Centre Redevelopment, and
- \$2 million for advanced manufacturing

4.3.2 Riverina Murray Regional Plan

The Riverina Murray Regional Plan was prepared in 2017 and is currently being reviewed with the expectation to be publicly exhibited in mid-2022. It sets a framework for economic growth, protection of the environmental values that underpin the region and for the sustainable development of communities in the region. The Regional Plan is a plan to 2036 and sets a vision for the region:

The Riverina Murray region in 2036 will be a diversified economy founded on Australia's food bowl, iconic waterways and a strong network of vibrant and connected communities.

The Regional Plan is structured around four goals:

- A growing and diverse economy
- A healthy environment with pristine waterways
- Efficient transport and infrastructure networks
- Strong, connected and healthy communities

Albury is one of three Regional Cities (with Wagga Wagga and Griffith) that underpin the regional economy and service communities around the region. The Riverina Murray region is climatically and geographically diverse, ranging from alpine areas to the east of Albury (in Snowy Valleys local government area) to vast river flats and plains. The Murray River is the southern border of the region and the Murrumbidgee River traverses the region from east to west through Wagga Wagga and Griffith. Both rivers sustain natural systems across the region and provide the bulk of water that underpins the strong and diverse agricultural economy of the region.

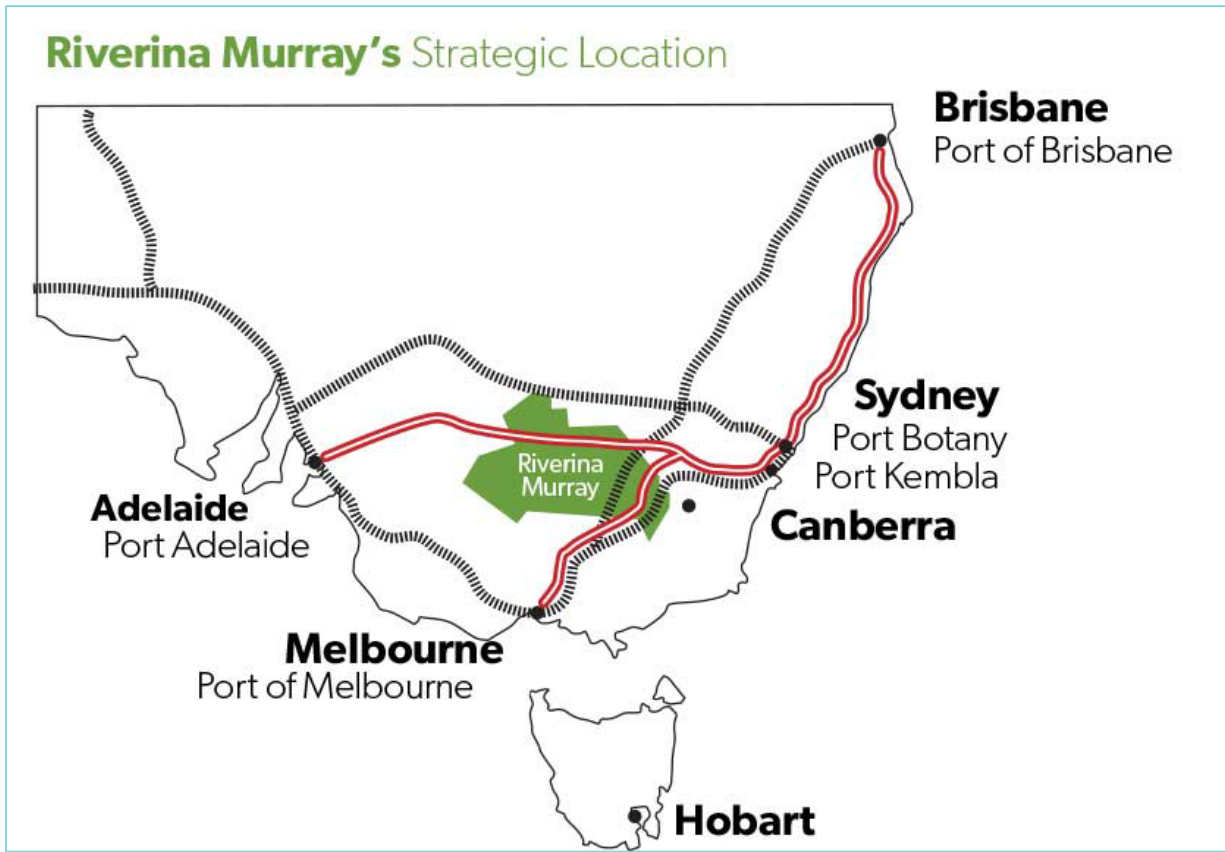
Table 1: Riverina Murray Regional Plan actions for the Albury RJP

Regional Plan Goals and Directions	Relevance to Albury RJP
Goal 1: A Growing and Diverse Economy	
Direction 2: Promote and Grow the Agribusiness Sector	<ul style="list-style-type: none"> • Grow and diversify value adding industries that can leverage the wide variety of primary production in the region. • Provide efficient access to interstate and overseas markets through freight and logistics interfaces. • Expand the capacity of production of ancillary components to agricultural value add processes (packaging, other ingredients) through circular economy activities and by leveraging regional and interstate access for raw materials and products.
Direction 3: Expand advanced and value-added manufacturing	<ul style="list-style-type: none"> • Leverage proximity to markets and sources of raw materials through Sydney and Melbourne. • Expand and diversify existing manufacturing activity through access to skilled workforce, improved training, and providing suitable land that is located to take advantage of supply chain efficiencies (Motorway and Rail hub access).
Direction 4: Promote business activities in commercial and industrial areas	<ul style="list-style-type: none"> • Continue to promote the establishment of new businesses in the RJP through the availability of suitable and serviced land. • Establish a masterplan for the Albury RJP that is flexible and adaptable to specific business requirements. • Streamline approvals processes for businesses that are aligned with the vision and objectives of the Albury RJP to reduce establishment time and costs. • Maintain the supply of industrial land in other parts of Albury LGA that is suited to the needs of local service industries to avoid competition for land in the RJP from uses that are not strategically aligned.
Direction 9: Support the forestry industry	<ul style="list-style-type: none"> • Enable businesses that value add forestry products to establish/re-establish in the Albury RJP.
Direction 10: Sustainably manage water resources for economic opportunities	<ul style="list-style-type: none"> • Ensure the supply of water is sufficient and of appropriate quality to meet the needs of industrial water users. • Facilitate stormwater harvesting and re-use where suitable to minimise potable water consumption by industrial processes and landscaping. • Encourage treatment and re-use of wastewater and trade waste within the Albury RJP.
Direction 11: Promote the diversification of energy supplies through renewable energy generation	<ul style="list-style-type: none"> • Investigate, and enable through planning frameworks, precinct-scale renewable energy generation, storage and distribution within the Albury RJP.

Regional Plan Goals and Directions	Relevance to Albury RJP
Goal 2: A Healthy Environment with Pristine Waterways	
Direction 13: Manage and conserve water resources for the environment	<ul style="list-style-type: none"> • Use water wisely and avoid or minimise extraction from natural water bodies. • Minimise demand for potable water through on-site collection and re-use of stormwater and wastewater to retain water in the catchment.
Direction 15: Protect and manage the region's many environmental assets	<ul style="list-style-type: none"> • Identify and protect areas of remnant vegetation. • Retain and enhance riparian corridors and natural watercourses. • Retain and protect existing roadside vegetation and travelling stock routes
Direction 16: Increase resilience to natural hazards and climate change	<ul style="list-style-type: none"> • Plan for natural hazards including flooding and bushfire to protect investments. • Use natural resources sustainably to minimise the impacts of economic development on the climate and environment
Goal 3: Efficient Transport and Infrastructure Networks	
Direction 17: Transform the region into the eastern seaboard's freight and logistics hub	<ul style="list-style-type: none"> • Take advantage of direct access to the national highway network (Hume Motorway) and national rail network (Ettamogah Rail Hub) for the efficient movement of goods and materials imported and exported to meet the needs of businesses in the RJP
Direction 18: Enhance road and rail freight links	<ul style="list-style-type: none"> • Maximise the efficient movement of goods to and from businesses in the Albury RJP via rail and road.
Direction 20: Identify and protect future transport corridors	<ul style="list-style-type: none"> • Plan for internal movement networks within the Albury RJP that provide for the efficient movement of freight within the precinct and to regional and interstate transport corridors. • Ensure the safe and efficient movement of workers to, from and within the Precinct using a variety of transport modes including public transport, private vehicles and active transport. • Connect the Albury RJP with the surrounding Albury urban area to facilitate easy access for employees.

Regional Plan Goals and Directions	Relevance to Albury RJP
<p>Direction 21: Align and protect utility infrastructure investment</p>	<ul style="list-style-type: none"> • Plan for infrastructure needed to supply essential utilities with capacity to support businesses that establish in the Albury RJP. • Incentivise businesses that maximise the efficiency of consumption of water and power and minimise waste generation, including measures to re-use or otherwise reduce demand on trunk utilities supply. • Align utilities and transport corridors to minimise land take and the fragmentation of land holdings, and ensure all businesses have equitable access to services.
<p>Goal 4: Strong, Connected and Healthy Communities</p>	
<p>Direction 22: Promote the growth of regional cities and local centres</p>	<ul style="list-style-type: none"> • Grow the RJP into one of the key economic engines of the Albury Wodonga region. • In collaboration with the existing Invest Albury Wodonga Brand, utilise the RJP to promote Albury as an attractive place for businesses to invest, particularly leveraging regional accessibility, lifestyle and relatively low establishment costs for businesses considering where best to locate.
<p>Direction 23: Build resilience in towns and villages</p>	<ul style="list-style-type: none"> • Diversify and grow the Albury economy so that it continues to support surrounding towns and villages by providing employment and access to services.
<p>Direction 24: Create a connected and competitive environment for cross-border communities</p>	<ul style="list-style-type: none"> • Build on the strengths of the cross-border community and economic activity, in particular, through key transport connections and access to workforce, skills and training, and complementary industries.
<p>Direction 29: Protect the region's Aboriginal and historic heritage</p>	<ul style="list-style-type: none"> • Understand and integrate connections to Country and significant Aboriginal cultural places and archaeological items into the RJP masterplan.

Figure 7: Strategic Context of Riverina Murray Region



Source: <https://www.planning.nsw.gov.au/Plans-for-your-area/Regional-Plans/Riverina-Murray/Riverina-Murray-regional-plan/Vision>

4.3.3 Albury-Wodonga Regional Economic Development Strategy 2018-2022

Developed by Albury City Council, City of Wodonga Council, Federation Council, Greater Hume-Council and Indigo Shire Council, with the support of the NSW Government, the Albury-Wodonga Regional Economic Development Strategy outlines specific strategies and actions to growth the region's economy. The vision for the region is that it will, *'leverage its endowments, building on its economic strengths and specialisation to grow the transport and logistics, manufacturing, agriculture, healthcare and social assistance and tourism sectors, growing the population and creating prosperity to set the region on a path for sustainable development supporting business development and enhancing quality of life for its residents'*.

The six elements underpinning the strategy include:

- Support and grow Agribusiness and Softwoods industries through the region.
- Growth the Transport and Logistics sector
- Continue to develop and grow the Tourism sector and the visitor economy
- Growth the Healthcare sector through the development of a Health precinct in the in the region
- Attract and retain talent to sustain the supply of skilled workers by improving liveability throughout the region
- Capitalise on the region's opportunity to be a special economic zone.

Key actions and initiatives which relate to the Albury RJP and the industrial economy outlines in the strategy include:

- Complete Nexus Precinct Stage 1 enabling infrastructure projects including gas reticulation, completion of southern access ramps at Davey Road interchange and extension of rail siding at Ettamogah Rail Hub
- The NEXUS and Wodonga Logic industrial precincts can support the growth of major transport and logistics hubs in the region
- Investigate options for provision of reliable and affordable energy at industrial sites to support expansion and growth of food and fibre processors.

4.4 Council

4.4.1 Albury City Community Strategic Plan

Albury 2030 is the Albury City Community Strategic Plan. It was adopted by Council in 2017. It is based around four themes:

- A growing sustainable economy
- An enhanced natural environment
- A caring community
- A leading community

The following outcomes are documented in the Albury 2030 Community Strategic Plan and are specifically relevant to the Albury RJP:

- *Outcome 1.3: Plan and cater for increased population growth, by:*
 - Supporting diversity in residential and commercial development in the Albury and Lavington CBDs,
 - Support and promote sustainable growth to provide employment opportunities.
- *Outcome 1.5: Promote Albury for industry and business by:*
 - Advocating and exploring incentives for business expansion and job creation
 - Ensuring support services and infrastructure are available to facilitate industry and business growth
 - Promote Albury as a major regional economy and the regional city of choice for lifestyle, career and investment opportunities
 - Support and promote business and business opportunities across all sectors to continue to foster economic diversity
- *Outcome 1.6: Integrated transport network for Albury, through:*
 - Integrated transport opportunities to improve connectivity and access to housing, employment and services through a range of transport options
 - Developing and promoting the Inland Rail Freight Corridor and other rail freight improvements.
- *Outcome 2.1: Albury has improved environmental outcomes:*

- Investigate and encourage energy saving initiatives for businesses and industry.
- Promote business and industry participation in opportunities in clean and renewable energy.
- Promote sustainable development that complements and respects the natural environment
- Minimise the impact of stormwater on natural systems.
- *Outcome 2.2: Albury is prepared for changing environmental conditions:*
 - Protect and enhance bushland areas and ensure the connection between corridors.
 - Support and promote regional food production and distribution, and Agribusiness

4.4.2 Albury City Local Strategic Planning Statement

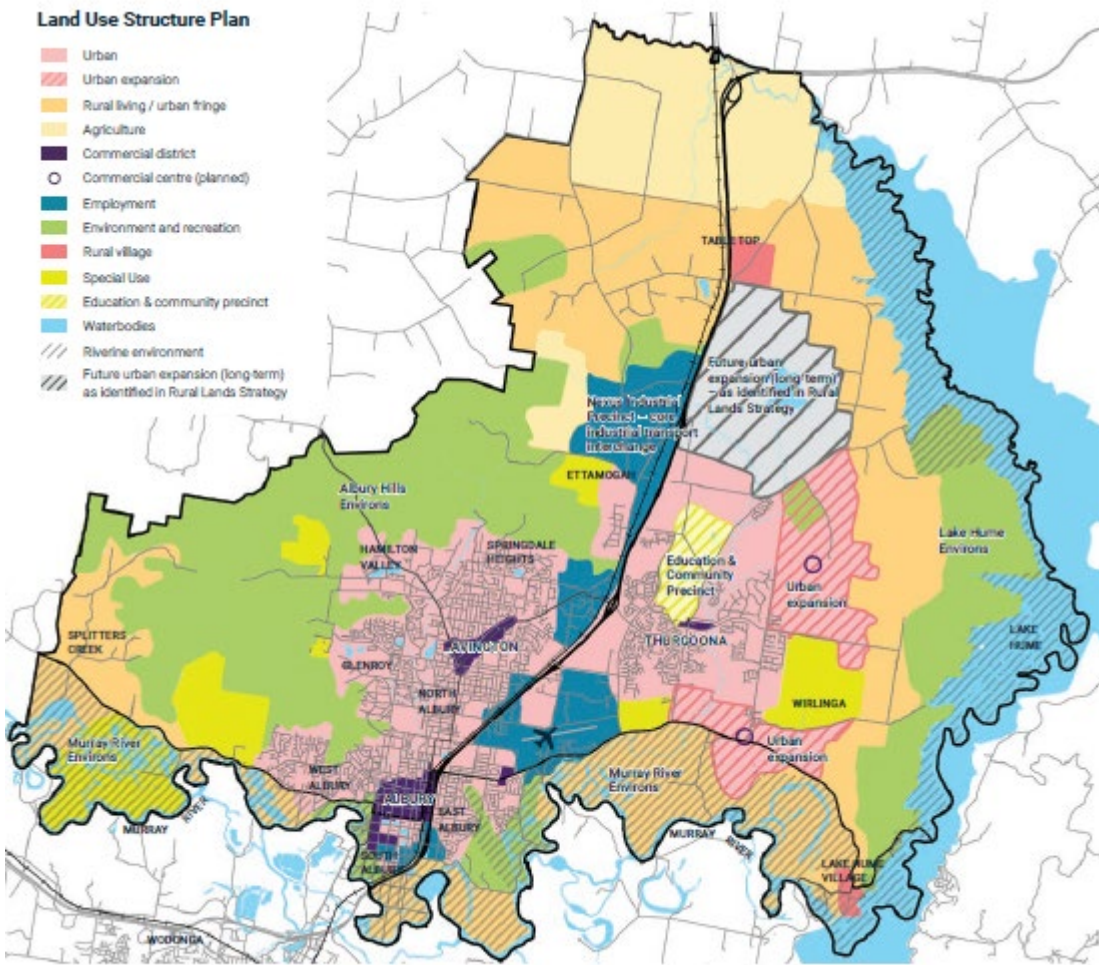
The LSPS is a strategic plan under the Environmental Planning and Assessment Act, 1979. It links to and demonstrates how the Riverina Murray Regional Plan will be implemented in Albury City. Along with the Community Strategic Plan, it is one of a suite of local strategies that guide growth, change and the protection of the environmental and community values in Albury:

The aim of the LSPS is to guide future land use planning and influence public and private investment so that it enhances the wellbeing of our community and environment – making Albury one of the most liveable places in Australia.

To achieve this, the LSPS sets out:

- o *the 20-year vision for land use*
- o *our special characteristics which contribute to our local identity*
- o *our shared community values to be maintained and enhanced how growth and change will be managed into the future*

Figure 8: Albury City LSPS – Land Use Structure Plan



Land Use Structure Plan – indicative broad-scale mapping (not zoning) based on existing land use strategies and plans (e.g. Albury Land Use Strategy 2007, Albury Local Environmental Plan 2010, Thurgoona Wirringa Precinct Structure Plan, Rural Lands Strategy 2015).

Source: Albury City Local Strategic Planning Statement (2020) - <https://www.alburycity.nsw.gov.au/strategies-and-plans/local-strategic-planning-statement>

The Albury LSPS identifies the following characteristics of Albury:

- a nationally significant regional city
- Australia's 20th largest city as a cross-border twin city with Wodonga
- part of the Riverina Murray region – 'Australia's food bowl'
- strategically located, and the largest city, on Australia's busiest inland transport route (Hume Motorway and Melbourne to Sydney railway)
- the largest city on the Murray River
- the health, retail and education focus of our region
- surrounded by agriculture, food production and growing tourism industries

- supported by a diverse and resilient economy and strong commercial centres
- liveable with good housing supply and affordability
- connected to our natural environment, including the Murray River, Lake Hume, hills and natural areas supporting an outdoor lifestyle

Economic drivers identified in the LSPS that are of particular relevance to the Albury RJP include:

- Access to major freight and passenger corridors
- Tertiary education institutions including Charles Sturt University, and UNSW Medical School
- Masterplanned growth corridors for industrial and residential development
- Amenities that contribute to liveability including the natural environment, arts and culture, commercial centres and tourist attractions.
- Key regional specialisations including manufacturing, transport and logistics and agribusiness, with construction and manufacturing in the top 5 for both employers and contribution to the Albury-Wodonga regional economy.

Table 2 summarises key economic development strategies in the LSPS that are relevant to the Albury RJP.

Table 2: Albury LSPS Economic Development Strategies relevant to the Albury RJP

Albury LSPS Economic Strategies	Relevance to Albury RJP
Support and grow Agribusiness and Softwoods Industries throughout the region	
<ul style="list-style-type: none"> • Affordable supply of industrial zoned land for value-add and support industries • Opportunities for Transport and Logistics sector to link agriculture and forestry with manufacturing and markets • Investigate reliable and affordable energy at industrial sites to support growth of food and fibre processors 	<ul style="list-style-type: none"> • Continue to engage with Visy in relation to future plans for the paper mill at Nexus and intended uses of other land owned by them on both sides of the Hume Motorway within the RJP investigation area. • Leverage existing transport infrastructure including the Melbourne to Sydney main line, Ettamogah Rail Hub and Hume Motorway interchanges to provide access for raw materials and products from paper recycling and manufacture. • Consider the potential for precinct scale or individual industries to generate power on site. • Better understand energy network constraints and identify actions to boost supply to service large scale, energy intensive industries. • The Albury RJP is an opportunity to provide certainty to this industry there is a place for them to operate and invest in the region.

Albury LSPS Economic Strategies	Relevance to Albury RJP
Grow the transport and logistics sector	
<ul style="list-style-type: none"> • Nexus Industrial Precinct provides significant opportunity to grow our transport and logistics sector • Completion of Nexus Stage 1 infrastructure projects including gas reticulation, southern access ramps at the Davey Road interchange and extension of rail siding at Ettamogah Rail Hub is needed. • Retain and better utilise other industrial land located near freeway interchanges and Albury Airport 	<ul style="list-style-type: none"> • Albury RJP masterplan and planning framework to facilitate freight and logistics businesses establishing in the precinct, and expansion of the Rail Hub to respond to demand. • Identification of status of priority infrastructure projects and of Stage 2 and beyond infrastructure works required to support the masterplan and growth projections. • Ensure the supply of industrial and other employment land across Albury City is appropriate to projected demand for local industries and local population serving semi-industrial uses so these do not compete for land in Albury RJP with more strategic industries.
Attract and retain talent to sustain the supply of skilled workers by improving liveability throughout the region	
<ul style="list-style-type: none"> • Create an education precinct master plan in Thurgoona • Review the cultural precinct masterplan • Investigate opportunities for clustering service industries to maximise productivity through increased networking, information sharing and conglomeration benefits • Encourage a variety of affordable housing to encourage skilled worker relocation. 	<ul style="list-style-type: none"> • These considerations are peripheral to the Albury RJP masterplan but are related considerations in attracting investment to the RJP. • Businesses will choose to locate in Albury RJP based on a combination of strategic locational considerations, establishment costs and access to resources including a suitable workforce. Access to local training and education opportunities is a critical step on the pathway to establishing a resident workforce. A high amenity lifestyle is a key consideration in where people choose to live, which also drives business decisions in relation to where to invest.
Capitalise on the region's opportunity to be a special economic zone	
<ul style="list-style-type: none"> • Potential need to review planning provisions to accommodate any cross-border Special Economic Zone 	<ul style="list-style-type: none"> • Albury RJP will compete with similar industrial precincts in Victoria. • A masterplan that accommodates businesses that are aligned with the Albury RJP vision and objectives will be an investment attractor. • The statutory planning framework needs to create a level playing field or competitive advantage for Albury RJP on a national scale, to reduce establishment time and cost and increase investment certainty, for aligned industries. • Delivery of the Albury RJP can assist with achieving the desired outcome of establishing a Special Economic Zone.

5.0 Socio-economic Profile

5.1 Community – Resident Profile

A summary of key socio-demographic and economic characteristics of residents of the City of Albury and the City of Wodonga, benchmarked against the Riverina Murray Region and New South Wales is shown below. Data is primarily sourced from the ABS to ensure consistency across the analysis of each study area. It is noted that the release of the 2021 Census results in late June 2022 will provide additional socio-economic. This information can assist identifying potential impacts of Covid-19 and any observable socio-economic trends overtime.



- In 2021 Albury had a population of 55,750 residents which is larger than adjacent Wodonga (43,190 residents). (ABS Estimated Regional Population, March 2021)
- Population growth in Albury over the last 20-years has been moderate, averaging +520 persons per year or 1.0% p.a., compared to Wodonga (1.5% p.a.), Riverina (0.4% p.a.), and NSW (1.1% p.a.). (ABS Estimated Regional Population, March 2021)
- A high proportion of net migration in Albury (43.3%) and Wodonga (31.6%) comprise of persons aged 65 years and older. (ABS Census of Population and Housing, 2016)
- Between July 2016 and June 2021 Albury experienced a net gain of +35 persons from Wodonga. Over the same period, Federation (+240) had the highest net migration of all LGAs in Australia to Albury City. (.id Consulting)



- A relatively high share of professionals live in Albury (19.7%) compared to Wodonga (13.3%) and the Riverina Murray Region (15.7%). This reflects the higher-order role of Albury in the region; noting Albury is still below the NSW average (23.7%) but above Regional NSW (18.1%). (ABS, Census of Population and Housing, 2016)
- In the March 2022 quarter, the size of the labour force in Albury is 27,890 persons, and 23,240 persons in Wodonga. (SALM, March 2022)



- Both Albury and Wodonga have a high share of employment in industrial-related uses including manufacturing (9.2% and 10.5%) and construction (9.2% and 8.6%) respectively. This compares with the NSW average 5.8% for manufacturing and 8.4% for construction. (ABS, Census of Population and Housing, 2016)



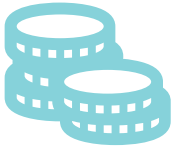
- The national trend of an ageing workforce appears to be occurring at an accelerated rate in Albury and Wodonga. The share of residents aged 15-24 is declining at a rate of -3.6% p.a in Albury. and -4.0% p.a in Wodonga, compared to the Riverina Murray Region (-2.1% p.a.) and NSW (-1.6% p.a.).



- Approximately 48.2% of Albury and Wodonga residents (aged 15 and above) have a non-school qualification, well above the Riverina Murray Region (42.4%) although below the NSW average (50.4%). (ABS, Census of Population and Housing, 2016)
- Of those residents with a non-school qualification, 49.4% and 52.5% had certificates in Albury and Wodonga respectively; compared to NSW (35.9%). The share of residents with bachelor's degree (23.5% and 19.2% respectively) was below average compared to NSW (31.9%). (ABS, Census of Population and Housing, 2016)

5.2 Economy – Place of work

The following provides a summary of key characteristics and indicators of the workforce and economy of the City of Albury and the City of Wodonga, benchmarked against the Riverina region and New South Wales. Data is primarily sourced from the ABS to ensure consistency across the analysis of each study area. It is also noted that the release of the 2021 place of work Census results in late October 2022 will provide additional economic insights. This information can assist identifying potential impacts of Covid-19 and any observable trends overtime.



- Albury-Wodonga has a combined Real Gross Regional Product (GRP) of approximately \$7.8 billion as at 2021. (Remplan)
- Estimated 2021 per capita GRP in Albury (\$79,980) is below Wodonga (\$93,860), NSW (86,121), and VIC (\$80,110) averages. (Remplan)



- Significant movement of employment between Albury and Wodonga occurs given the two form a single urban area. Over the last 24-months Albury has seen significant employment growth from 21,000 employed residents in June 2018 to 26,500 employed residents in June 2021; while Wodonga has seen more limited growth over the same period.



- Professionals (19.9%) and clerical and administrative workers (15.2%) represent the largest occupations employed in Albury, while professionals (17.8%) and technicians and trades workers (16.6%) represent the largest occupations employed in Wodonga. (ABS Census of Population and Housing, 2016)
- Between 2006 and 2016, community and personal service workers (+2,080) and professionals (+1,470) added the most workers in occupations employed in Albury-Wodonga. (ABS Census of Population and Housing, 2016)



- Albury and Wodonga have a high concentration of health care and social assistance workers (17.3% and 14.1% respectively) compared to Riverina (12.9%) and NSW (12.5%). The concentration of retail workers is also high in Albury (12.8%) relative to Riverina (10.3%) and NSW (9.7%). (ABS Census of Population and Housing, 2016)
- Albury and Wodonga have experienced a transition away from the manufacturing industry. Since 2006, manufacturing has seen the largest decline in the total share of workers for both Albury (-5.1%) and Wodonga (-6.2%). On the other hand, health care and social assistance in Albury (+4.5%) and Wodonga (+3.1%) saw the largest increases in the total share of workers. (ABS Census of Population and Housing, 2016)



- The majority of Albury's workforce live in the municipality (64.2%), while 20% live in Wodonga, 4.9% in Greater Hume Shire, and the balance (10.4%) elsewhere. (ABS Census of Population and Housing, 2016)
- In 2016, 69.4% of Albury City's resident workers were employed within the municipality. Conversely, 60.6% of Wodonga City's resident workers were employed within the municipality. These figures are often referred to as 'self-containment', measuring the proportion of resident workers who are employed within the LGA they reside in. (ABS Census of Population and Housing, 2016)

5.3 Business



- Albury and Wodonga have a high share of construction businesses in 2020 (19.1% and 24.6% respectively), compared to NSW (16.9%). Other industrial activities such as manufacturing and transport, postal and warehousing are not as strongly represented relative to the NSW average. (ABS Counts of Australian Businesses, 2021)



- Significant growth has occurred in the business count in Albury, increasing by +322 between July 2019 and June 2021, while Wodonga increased by +117 businesses over the same period. (ABS Counts of Australian Businesses, 2021)
- In Albury, growth was driven by construction (+73), transport and warehousing services (+64), health care and social assistance (+45) as well as professional and technical services (+40). (ABS Counts of Australian Businesses, 2021)
- Most business growth occurred between July 2020 and June 2021 in Albury-Wodonga, highlighting the region's strong rebound in business activity since the pandemic's start. In addition, one of the hardest-hit sectors from the pandemic, accommodation and food services, grew in Albury-Wodonga, underscoring the region's resilience to a significant external shock.



- Business sizes in both Albury and Wodonga are generally in-line with the Riverina region and NSW, with non-employing businesses representing approximately 55% in Albury and 57% in Wodonga of all businesses, and small businesses (1-19 employees) representing 42% in Albury and 40% in Wodonga. The balance of 3% is businesses with more than 20 employees. (ABS Counts of Australian Businesses, 2021)



- The value of non-residential building approvals in Albury has approximately doubled each year since 2018/19. In 2018/19 the total value of non-residential building approvals was \$21 million, increasing to \$46 million in 2019/20 and reaching \$81 million in 2020/21. (ABS Building Approvals)
- Non-residential investment in Wodonga has remained stable between 2017/18 averaging \$37 million a year in total non-residential building approvals. (ABS Building Approvals)

5.4 Future Community



- Albury's population is projected to grow by an average annual rate of +1.3% between 2021 and 2036, below Wodonga, which is anticipated to grow at +1.9% p.a. in the same period. In comparison, the Riverina region is only projected to increase by +0.1% p.a., and NSW by +1.1% over the same period. (ABS Estimated Resident Population; .id Consulting)
- By 2036 the population of Albury is forecast to be 67,430, which is an increase of +11,680 persons from a population of 55,750 in 2021. (ABS Estimated Resident Population; .id Consulting)
- By 2036 the population of Wodonga is forecast to be 57,310, which is an increase of +14,120 persons from a population of 43,190 in 2021. (ABS Estimated Resident Population; .id Consulting)
- It is noted that forecasts for Wodonga City Council were conducted before the start of the pandemic.



- Driven by digital connectivity, enhanced work flexibility and shifting lifestyle preferences, long-term historical trends in migration patterns appear to have altered, perhaps permanently.
- Prior to the pandemic, capital cities (+1.9% per year) in Australia were growing faster than regional centres (+1.0% per year). Over the past year this trend has reversed, with regional centres (+0.9%) overtaking capital cities (-0.1%) in terms of population growth. (ABS Regional Population)
- Changing preferences due to the pandemic has accelerated residential growth in many regional centres, including Albury and Wodonga as evidenced by an uplift in residential building approvals and median house prices.
- In 2020 and 2021, total residential building approvals in Albury-Wodonga averaged 930 dwellings, well above the long-term average of 760 dwellings between 2012 and 2021. (ABS Building Approvals)

5.5 Future Economic



- Limited employment growth is forecast for Albury (+0.6% p.a.) to 2041, compared to NSW (+1.1% p.a.), although this is above expectations for the broader Riverina region (+0.3% p.a.) as per Transport NSW projections. By 2041 the total employment within Albury is forecast to be 35,282, which is an increase of +4,176 workers from the 2021 estimate of 31,106 jobs (including non-residents).
- Employment growth is expected to be driven by knowledge intensive industries (+0.8% per year) and health and education (+0.7% per year), with lower rates of growth in population serving (+0.6% per year) and industrial (0.5% per year) industries.

5.6 Major Projects

Regionally significant major projects that will influence the economic role and function of Albury-Wodonga are outlined and summarised in Table 3 below.

Table 3: Regionally Significant Major Projects and Developments

	Status	Timing
<p>Melbourne to Brisbane Inland Rail</p> <p>Consisting of upgrades to existing rail corridor and construction of new track from Melbourne to Brisbane. The project will allow trains of up 1,800 metres in length and 6.5 metres high that support the running of ‘double stacked’ freight.</p>	Commenced	2026
<p>Melbourne-Albury Rail Upgrade</p> <p>Upgrade of the North East Line to the ‘Victorian Class 2’ performance standard, enabling improved services for passengers and allow Vlocity trains (up to 130km/hour) to run to Albury and Wodonga. Vlocity trains are expected to be running on the line by the end of 2021.</p>	Completed	-

	Status	Timing
<p>Albury-Wodonga Regional Deal</p> <p>The Albury-Wodonga Regional Deal funds a range of projects to deliver economic, tourism and community benefits. This will ultimately increase the liveability of the city and enhance the region's appeal to businesses.</p>	Underway	TBD
<p>Wagga Wagga Special Activation Precinct</p> <p>A NSW Government initiative which seeks to encourage the growth of freight and logistics, agribusiness, advanced manufacturing, renewable energy and recycling within Wagga Wagga by:</p> <ul style="list-style-type: none"> • Fast-tracking planning • Developing tailored infrastructure investment support • Conducting government-led studies - includes; environmental reports, master-planning and market analyses • Leading development • Providing a business concierge service to support development 	Underway	Construction to commence mid 2022
<p>Renewable Energy Zones</p> <p>In 2013, the NSW Government released the Renewable Energy Action Plan (REAP) which seeks to attract investment and renewal energy projects in key areas across the state. The South West Renewable Energy Zone is located within the Riverina Murray Region, 130 kms west of Albury.</p>	Planning	TBD
<p>Snowy 2.0</p> <p>Snowy 2.0 is currently the largest renewable energy project in Australia. The project involves linking Tantangara dam and Talbingo dam as well as building a new underground power station, with an estimated cost between \$3.8 to \$4.5 billion.</p>	Underway	2026
<p>HumeLink</p> <p>The HumeLink is a new 500kv transmission line connecting Wagga Wagga, Bannaby and Maragle. The project is expected to involve 360km of new transmission lines and will be one of the state's largest energy infrastructure projects, costing approximately \$3.3 billion.</p>	Underway	Construction to commence July 2024
<p>Energy Connect/TransGrid</p> <p>EnergyConnect is a new 900km transmission line, known as an interconnector, being built between Wagga Wagga (NSW), Robertstown (SA) and Red Cliffs (VIC). The NSW Government has declared it as Critical State Significant Infrastructure (CSSI), that will cost an estimated \$2.3 billion.</p>	Planning	Construction to commence late 2022

	Status	Timing
<p>Defence Estates – Riverina Redevelopment Program</p> <p><i>The planned Riverina Redevelopment Program is estimated to deliver \$1.1 billion of capital investment to the Riverina region supporting Defence capability for the next 30 years. Comprising of major upgrades and/or replacement of existing infrastructure and facilities, the program will focus on the following three establishments: Albury Wodonga Military Area, Blamey Barracks in Kapooka and the RAAF Base Wagga</i></p>	Planning	Mar 2022 to Sep 2029

Source: Ethos Urban Analysis

Delivery of the above major projects is likely to increase the demand for industrial land and employment within Albury-Wodonga. The project which is likely to have the greatest impact is the Inland Rail which will be operational by the 2030s. During this time, businesses will be attracted to Albury-Wodonga to leverage the supply chain and transport benefits generated by the project once it is delivered.

The Wagga Wagga SAP Planning Reforms are ahead of the Albury RJP in terms of delivery, and a commitment has been made to deliver key infrastructure items to attract target industries. However, it is noted that Council has finalised Stage 1 of the Nexus Industrial precinct, with investment ready land already attracting private investment. Over time, the Wagga Wagga SAP may make the city more competitive for target industries as an alternate investment location to Albury-Wodonga. This indicates the importance of the Albury RJP to continue and enhance its investment attraction activities.

5.7 Key Findings and Considerations

An assessment of the existing and forecast socio-economic profile of the three study areas has revealed the following considerations for the preparation of the Albury RJP:

- Population and employment growth for Albury-Wodonga has been moderate over the past 20-years. Albury is forecast to experience continued moderate growth over the next two decades. Wodonga has experienced high population growth recently and is forecast to continue. Changing preferences due to the pandemic has accelerated residential growth in many regional centres, including Albury and Wodonga with pre-pandemic forecasts likely to underestimate potential growth in the region.
- Albury and Wodonga have significant cross-border labour flows indicating the close economic connections between the two cities.
- Albury and Wodonga are experiencing an ageing population and labour force consistent with trends in the wider Riverina Murray Region and NSW. This reflects the need to carefully monitor the available skilled labour force in the region, and emphasise the liveability of Albury-Wodonga as a means of attracting new talent.
- Delivery of major projects in the region is likely to result in an increase demand for industrial land and employment within Albury-Wodonga into the early 2030s. This will occur as businesses seek to leverage the supply chain and transport benefits generated by projects such as the Inland Rail.

- The Wagga Wagga SAP is ahead of the Albury RJP in terms of planning reform delivery and will compete to some degree for the attraction of businesses in the target industries.

Part B

Economic and Competitiveness Assessment

6.0 Albury-Wodonga’s Tradeable Economy

6.1 Economic Structure

The economic structure of a place can generally be described by the composition of population serving and tradeable and/or high value economic activities.

The population serving economy refers to industries and businesses that primarily service the needs of the local community such as retail, construction, primary and secondary education, and health care and social assistance. Although these industries provide important local services and are an integral part of the economy, in isolation they do not generate the employment and economic activity to enable growth and relative economic well-being. Employment within these industries is typically aligned with population growth, an increase in household incomes, and/or an increase in government expenditure on education and health care within the local area.

The tradeable economy refers to industries and businesses that generate economic activity by trading their goods and services with other economic geographies, either domestic or international. These industries are increasingly knowledge intensive and include creative and digital, advanced manufacturing, tourism, knowledge and corporate services, energy and resources and food and agribusinesses.

The growth of tradeable industries is not dependent on local consumption alone. Through trade, these industries generate wealth from demand created in other economic geographies. This wealth is then circulated into the local economy including enhanced population serving infrastructure and capabilities.

A key objective of the Albury RJP is to attract, facilitate and enable the growth and development of tradeable industries. To do this effectively, it is important to understand the structure of Albury’s economy and composition of its tradeable economy.

The economic structure and presence of tradeable industries for key study areas utilising information from the 2016 Census is outlined in Table 4 and Table 5 below.

Table 4: Albury-Wodonga’s Economic Structure – Employment Share

	Albury LGA	Albury-Wodonga	Riverina Murray Region	Regional NSW	Greater Sydney	NSW
Population Serving	81.6%	81.7%	72.4%	75.0%	71.0%	73.0%
Tradeable	18.4%	18.3%	27.6%	25.0%	29.0%	27.0%

Source: Ethos Urban analysis utilising place of work information from the 2016 Australian Population and Household Census

Table 5: Composition of Tradeable Industries

	Albury LGA	Albury-Wodonga	Riverina Murray Region	Regional NSW	Greater Sydney	NSW
Tourism	38.5%	28.7%	21.1%	27.0%	22.3%	23.5%
Knowledge and Corporate	29.4%	24.2%	14.1%	17.7%	40.1%	33.5%
Food and Agribusiness	9.7%	20.6%	50.0%	28.5%	5.5%	12.1%
Energy and Resources	7.7%	10.0%	6.9%	17.3%	9.3%	11.8%
Creative and Digital	7.9%	7.6%	3.6%	5.7%	17.5%	14.3%
Advanced Manufacturing	6.3%	9.0%	4.4%	3.7%	5.2%	4.8%
Total Tradeable Industry Employment	4,379	7,682	28,585	241,551	608,179	865,339

Source: Ethos Urban analysis utilising place of work information from the 2016 Australian Population and Household Census

Albury-Wodonga has a higher proportion of employment in population serving industries relative to Regional NSW and the Riverina Murray Region. This can be expected in that as a major regional centre for communities across Southern NSW and Northern Victoria, Albury-Wodonga provides significant population serving industries such as education, construction, health care and retail.

Importantly, Albury-Wodonga and the wider Riverina Murray Region has a higher proportion of employment in tradable industries such as Tourism, Knowledge and Corporate Services, Food and Agribusiness and Advanced Manufacturing relative to other areas of NSW.

Food and Agribusiness is the predominant tradeable industry for the Riverina Murray Region and has a close connection to the Advanced Manufacturing within Albury-Wodonga.

The concentration of employment in Tourism and Knowledge and Corporate Services in Albury-Wodonga reflects the city's role as a major commercial centre along the Hume Motorway Corridor, between Sydney and Melbourne.

6.2 Industry of Employment Specialisations

Further analysis of the industry employment indicates that the Riverina Murray Region has a number of State significant industry specialisations. A notable number of industries within the Riverina Murray Region (by ANZSIC level 4) account for over 25% of total employment within NSW as shown in Table 6 below.

Table 6: Industry of Employment Specialisation

Industry	Proportion of NSW Employment	Industry	Proportion of NSW Employment
Pig Farming	62%	Natural Textile Manufacturing	33%
Citrus and Fruit Growing	53%	Hydro-Electricity Generation	31%
Timber Resawing and Dressing	53%	Synthetic Textile Manufacturing	30%
Apple and Pear Growing	50%	Wine and Other Alcoholic Beverage Manufacturing	28%
Veneer and Plywood Manufacturing	48%	Cotton Ginning	28%
Other Grain Growing	38%	Grain Mill Product Manufacturing	27%
Pulp, Paper and Paperboard Manufacturing	37%	Agricultural Machinery and Equipment Manufacturing	27%
Explosive Manufacturing	37%	Agricultural and Fishing Support Services	27%
Beef Cattle Feedlots (specialised)	36%	Grape Growing	26%
Grain-Sheep or Grain-Beef Cattle Farming	34%	Grain Storage Services	26%

Source: Ethos Urban analysis utilising place of work information from the 2016 Australian Population and Household Census

As such, the Riverina Murray Region has a number of State significant concentrations of employment in the Food and Agribusiness. This provides some insight into the potential business and supply chains which may have a competitive advantage, or find value in, operating from the Albury RJP.

For example, given the region's high level of employment in pig farming the potential for a high value small goods meat processing factory exists.

It should be noted that employment associated with pulp, paper and paperboard manufacturing is likely connected to the now closed, Norske Skog newsprint Mill within the Nexus Industrial Precinct.

6.3 Albury RJP Target Industries

As identified in the Introduction, the NSW State Government has identified a set of target industries specifically for the Albury RJP. These target industries are all part of the tradeable economy and are defined in detail below:

- **Advanced manufacturing** - includes any manufacturing process that takes advantage of high-technology or knowledge-intensive inputs as an integral part of its manufacturing process. It includes chemical and medicinal manufacturing, vehicle and transport manufacturing, professional and scientific equipment manufacturing, computer and electronic manufacturing and specialised machinery and equipment manufacturing.
- **Circular economy and recycling** - A 'circular economy' is one which employs not only waste management, but reuse, recycling and responsible manufacture of goods which could support the development of new industries and jobs, reducing emissions and increasing efficient use of natural resources (including energy, water and materials).
 - By maximising resource use and incorporating the circular economy concept during production and consumption (i.e. not just focused on waste management), the circular economy encourages new industries aligned with the more efficient use of resources and minimisation of waste.
- **Food and agribusiness** – includes food-related agricultural production, food processing and the major inputs into these sectors (such as veterinary services and the production of pesticides and food packaging), although not the wholesale or retail sale of these goods. Food and agri-business can be divided into two subsectors:
 - i) Food products including all food processing and beverage manufacturing, as well as key inputs into this sector; and
 - ii) Agribusiness including all agriculture that relates directly to food production as well as key inputs into this sector.
- **Transport and logistics** – provide delivery of vital goods and services throughout Australia and includes road transportation, logistics, warehousing and stevedoring. It captures all forms of transport of transport such as road, rail, air and port and specific infrastructure providers which enable this activity.

It is also noted that Regional NSW has identified four specific industry groups to target which are expected to be attracted to establish and operate from the Albury RJP. The four industries include:

- Plastic product manufacturing (utilising PET)
- E-waste processing
- Food processing/manufacturing
- Outdoor recreational equipment manufacturers

6.4 Target Industry Cluster Analysis

A detailed analysis of the 2016 Census was undertaken to determine the locations these industries appear to be clustering across Regional NSW. The analysis revealed that all the target industries, except for the Circular Economy and Recycling, have Significant, Established or Emerging Clusters within Albury-Wodonga, as outlined Table 7 below. A more detailed overview is also provided in Appendix A.

Table 7: Target Industry Clusters within Albury-Wodonga

Target Industry	Significant Cluster	Established Cluster	Emerging Cluster
Advanced Manufacturing	Wodonga SA2	Albury East SA2	
Food and Agribusiness		Albury Region SA2	West Wodonga SA2
Transport and Logistics	Wodonga SA2	Albury East SA2 West Wodonga SA2	Lavington SA2
Circular Economy and Recycling			

Source: Ethos Urban analysis utilising information from the 2016 Australian Population and Household Census

Note: A Significant Cluster is defined as an area that has been identified to have the most significant and prominent attributes of the industry group relative to Regional NSW. An Established Cluster is an area which has been identified to have a specialisation and sizeable employment within the industry group relative to Regional NSW. A Potential Cluster is an area that has been identified to have a specialisation in the industry group but not a significant workforce relative to Regional NSW.

While the large regional cities of Newcastle and Wollongong have the greatest number of Significant Clusters of the target industries, several significant clusters already exist within the Riverina Murray and Albury-Wodonga. It is also noted that future investment overtime may the location and size of clusters, particularly for the Circular Economy and Recycling industry as it continues to grow and mature.

This analysis highlights that Albury-Wodonga, relative to Regional NSW, has demonstrated it is an attractive location for at least some businesses within the target industries to establish and operate. Albury-Wodonga has the potential to build on its competitive advantage for these industries, as considered in more detail in **Section 7.0**.

6.5 Trade Enabling Infrastructure

Albury-Wodonga's tradeable economy benefits from the presence of a range of trade enabling infrastructure. Trade enabling infrastructure can generally be described as infrastructure which enables businesses to import and export goods, access inputs for produce, and access specialist knowledge and skills for production and support.

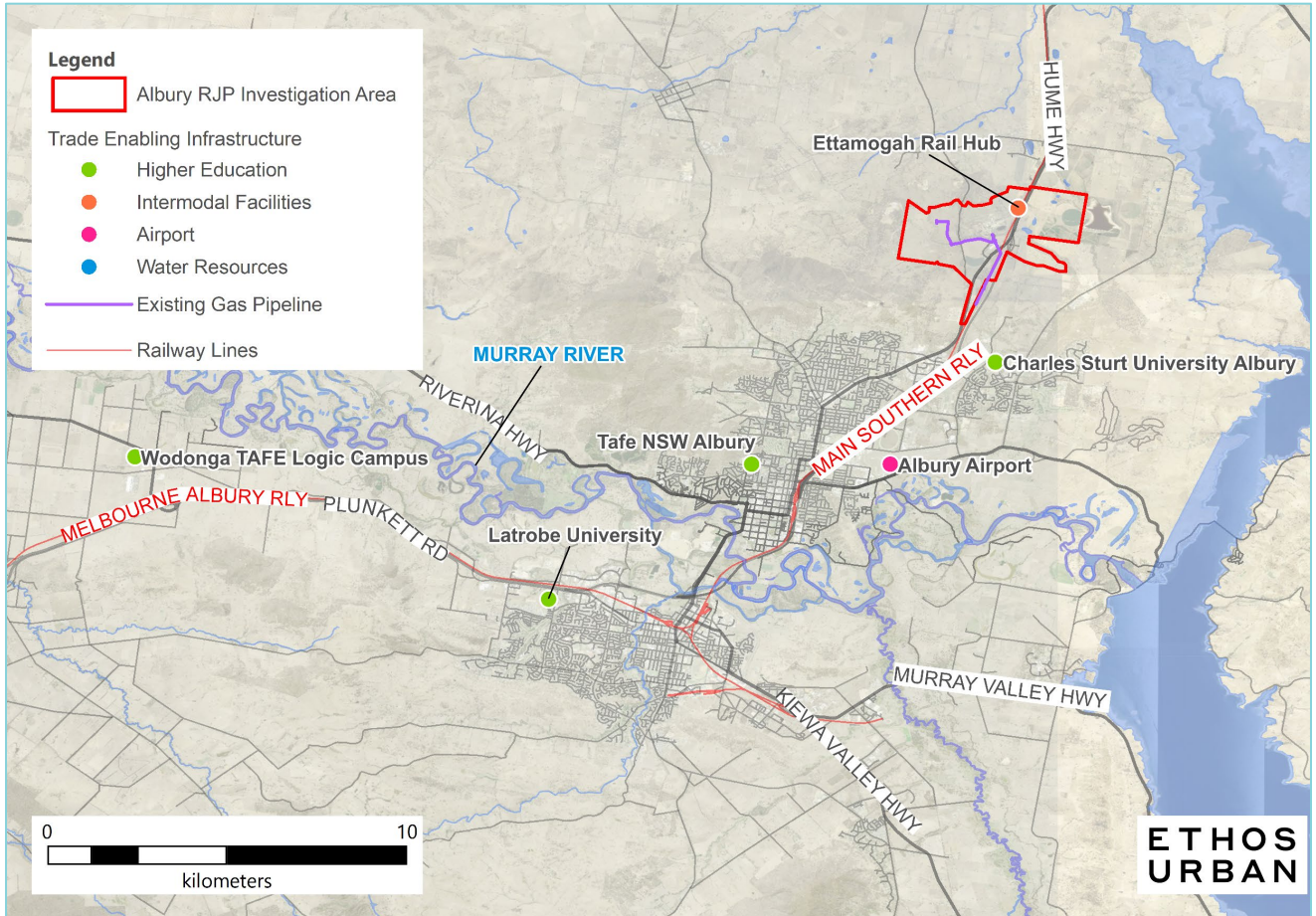
Table 8: Trade Enabling Infrastructure

Trade	Production	Knowledge and Skills
Intermodal facilities	Cropping land	Tertiary and adult education facilities
Highways, railways and major roads	Grazing land	
Ports (Coastal and Inland)	Water reserves	
Airport	Energy	
	Gas	
	Digital infrastructure	

Source: Ethos Urban analysis utilising Google Maps

As illustrated in Figure 9 below, businesses in Albury-Wodonga have access to range of trade enabling infrastructure including higher education, Ettamogah Rail Hub, Albury Airport and Hume, Riverina and Murray Valley Highways which connect Albury-Wodonga to Sydney, Melbourne and neighbouring regional cities.

Figure 9: Albury-Wodonga’s Trade Enabling Infrastructure



Source: Ethos Urban Research utilising Google map

The status of trade enabling infrastructure associated with production i.e. energy, water, gas and digital infrastructure requires further investigation to determine if any barriers to the growth and development of the target industries in the Albury RJP.

6.6 Key Findings and Considerations

An assessment of Albury-Wodonga’s tradeable economy has identified the following key findings and considerations for the preparation of the Albury RJP:

- Albury-Wodonga, and surrounding Riverina Murray Region, have a higher proportion of employment in tradable industries such as Tourism, Knowledge and Corporate Services, Food and Agribusiness and Advanced Manufacturing relative to other areas of NSW. Food and Agribusiness is the predominant tradeable industry for the Riverina Murray Region and has a close connection to the Advanced Manufacturing with Albury – Wodonga

- The Riverina Murray Region has a number of State significant concentrations of employment in the Food and Agribusiness indicating potential competitive advantages to identify and exploit for the attraction of investment to the Albury RUP
- A cluster analysis of target industries identifies Wodonga has a significant concentration, relative to Regional NSW, of employment in Advanced Manufacturing and Transport and Logistics. Albury has a number of significant clusters of Advanced Manufacturing, Food and Agribusiness and Transport and Logistics, and;
- A desktop analysis of trade enabling infrastructure indicates that Albury has many of the critical infrastructure required to support the tradeable economy. The status and condition of civil infrastructure such as energy, water and transport infrastructure, will need to be investigated to ensure there are no limitations or impediments for businesses growth within the Albury RUP.

7.0 Albury-Wodonga Economic Competitiveness Assessment

7.1 Drivers of Economic Competitiveness

Businesses seek to locate in areas which offer them the greatest competitive advantage. By leveraging the competitive advantages offered by an area, businesses can improve their profitability and future growth prospects.

Across NSW significant variation in competitive advantages exists between and across regions. For this reason, not all areas of NSW can attract global headquarters of Fortune 500 companies, world leading research institutes, centres of excellence in advanced manufacturing or national logistics hubs. The factors that influence the competitiveness of a location and subsequent drivers for economic and employment growth are outlined and described in Table 9 below.

Table 9: Drivers of Economic Competitiveness

Drivers	Description
Access to skilled workers	Locations that provide access to the largest skilled labour market within a suitable travel time (30 to 60 minutes) are highly attractive for businesses. In particular, this a critical factor for the success and performance of tradeable and high value industries like advanced manufacturing that require specialist skilled labour. Locations that cannot provide easy access to skilled labour markets are unlikely to attract or retain high value or tradeable economic activity.
Scale and scope of economic activity	Tradeable and high value businesses seek locations which provide access to large (scale) and diverse (scope) economic activity. This allows those businesses to leverage the scale of local economic activity to sustain their business operations as they export to other regions. For example, the use of road networks, access to suppliers, and other day-to-day business advantages associated with engagement into a large and diverse regional economy. Locations that have a diverse range of economic activity are also more likely to have the necessary range of goods and services required for the production of high value and tradeable goods and services. An example is the ability of an agricultural business to easily access professional services such as accountants, lawyers and other specialised expertise on an as needed basis.

Drivers	Description
Clustering of tradeable and high value economic activity	Tradeable and high value economic activities generally seek to co-locate within clusters of complementary or aligned businesses – even sometimes in instances where this means co-locating with a key competitor. These clusters allow businesses to benefit from the transfer of knowledge between industries, facilitates innovation and product development, improves opportunities to collaborate and enhances access to specialised labour markets and infrastructure.
Concentration of knowledge creation and trade enabling infrastructure	Given the increasing focus of industry and the economy on technology and knowledge-based systems, locations with major universities, other adult education providers, research institutes and a well-educated workforce are increasingly at a competitive advantage. Further, access to regionally significant infrastructure such as airports, seaports, freight transport networks and high-speed internet is a critical locational requirement for tradeable and high value economic activities.
Amenity	The actual and perceived quality of lifestyle, cultural choices, retail offer and amenity of a city and region directly influences the attractiveness to, and ability to retain, a skilled workforce. For example, businesses with a significant on-site professional management component (often national and international corporate businesses) will carefully assess schools, sport and recreation facilities and other social infrastructure in a region prior to making a significant investment.

Each of the above drivers of economic competitiveness is considered in more detail for Albury-Wodonga below.

7.2 Access to Skilled Workers

Access to a large and suitably skilled labour force within a reasonable travel time, is a key determinant to economic competitiveness and investment attraction. Insights provided by the National Skills Commission (NSC) on the labour market and skills shortages outline that regional areas have more difficulty recruiting positions compared to capital city areas. The greatest skills shortages currently in the Australian labour market, as identified by the NSC, are for technician and trade occupations such as construction trade workers, engineering, ICT and science technicians, and food trades technicians. These skills shortages are likely to greatly impact the businesses within Albury-Wodonga.

It is also acknowledged that the Covid-19 national and state border restrictions have impacted businesses capacity to find and secure skilled labour.

A detailed analysis of the 2016 Census has been undertaken to determine the composition and location clusters across Regional NSW of skilled workers in categories relevant to industrial activities.

Wodonga has significant clusters of machinery operators and drivers, and technician and trade workers.

Albury also has a number of Established and Emerging Clusters of skilled workers, relative to Regional NSW, as outlined in Table 10 below and in greater detail in **Appendix B**.

Table 10: Skilled Workers Cluster Analysis

Occupation	Significant Cluster	Established Cluster	Emerging Cluster
Labourers			Albury Region SA2
Machinery Operators and Drivers	Wodonga SA2	West Wodonga SA2 Albury East SA2	Albury Region SA2
Technicians and Trade workers	Wodonga SA2	Albury East SA2	Lavington SA2

Source: Ethos Urban analysis utilising information from the 2016 Australian Population and Household Census

Note: A Significant Cluster has a highest concentration and specialisation of residents skilled occupations for regional NSW.

7.3 Scale and Scope of Economic Activity

For Albury-Wodonga, the scale and scope of economic activity can be reflected in the size of the population and workforce relative to other regional cities, as summarised in Table 11.

Table 11: Scale and Scope of Economic Activity of key Regional Centres

	Albury-Wodonga	Shepparton	Wagga Wagga	Wangaratta
Total Population	98,940	66,790	66,410	29,380
Workforce	43,623	28,026	30,601	12,310

Source: Ethos Urban analysis utilising estimated resident population statistics from the ABS and the 2016 Australian Population and Household Census.

Note: Population statistics are for 2021 and the workforce statistics are for 2016

The combined population and workforce of Albury-Wodonga is clearly larger (at least 40%) than other key regional urban centres in Northern Victoria and Southern NSW. This indicates Albury-Wodonga provides economies of scale which is larger and more diverse than alternative investment destination in this part of regional Australia.

7.4 Concentration of Knowledge Creation and Trade Enabling Infrastructure

Albury-Wodonga has a number of tertiary education facilities and programs providing skills and support for tradeable and high value industries and businesses. This is important in the context that tertiary education and 'feeder' training programs for industry is often a critical location requirement.

A review of the local education sector within Albury-Wodonga has identified programs and courses which are considered to be directly aligned with the industrial sector as shown in Table 12 below.

Table12: Tertiary Education Programs for Employment in the Industrial Economy

	Latrobe University	Albury-TAFE NSW	Charles-Sturt University Albury	Wodonga TAFE Logic Campus
Programs	6	16	1	20

Source: Ethos Urban analysis.

Further to education infrastructure, Albury-Wodonga benefits from the provision of a range trade enabling infrastructure, as illustrated previously in Figure 9 , which includes Ettamogah Rail Hub, Albury Airport, Hume, Riverina and Murray Valley Highways and the Melbourne to Sydney mainline. Most importantly, Albury-Wodonga is strategically located midway between Australia's two largest metropolitan areas (Sydney and Melbourne) with very strong transport links to both.

7.5 Workforce Amenity

The actual and perceived diversity of lifestyle, cultural choices, retail offer and amenity of a place directly influences the ability to retain and attract skilled workers critical to sophisticated industrial users targeted by the Albury RJP.

Measuring workforce amenity and lifestyle is a relative concept and a composition of many factors. Research undertaken by the Australian Urban Observatory, in partnership with the RMIT, prepared an index of 21 Australian cities to measure and compare their liveability.

The liveability index includes factors such as housing stress, access to employment, social infrastructure, access to large public open space, accessibility to public transport and provision of social infrastructure. A summary of the liveability scores, as developed by the Australian Urban Observatory, for a range of major regional LGAs and cities across Australia are shown in Table13 below.

Table13: Regional LGAs Liveability Score

LGA	Liveability Score	Housing Stress (%)	Access to Large Open Space within 400m (%)	Social Infrastructure*
Wodonga LGA	98.8	32.6	51.7	6
Bendigo LGA	98.8	30.3	41.9	4.7
Albury LGA	99	33.2	51.6	5.4
Ballarat LGA	99	31.6	58.1	5.3
Toowoomba LGA	99.1	31.5	41.5	5.3
Wollongong LGA	100.4	33.2	45.4	5.9
Newcastle LGA	104.8	36.6	63.4	7.2

Source: Australian Urban Observatory and RMIT University utilising information from 2018

Note: Score range for social infrastructure is between 0 and 15.

Overall, the liveability scores are relatively close, with the exception of Newcastle LGA which is notably higher on all measures.

The Albury and Wodonga LGAs have marginally higher rates of housing stress (a negative) and a slighter higher provision of social infrastructure and access to large open space when compared to other regional cities.

Currently, Albury-Wodonga is not identified as having a workforce amenity competitive advantage relative to other regional cities. However, delivery of the Albury-Wodonga Regional Deal seeks to deliver a range of projects that will improve liveability which will likely positively influence the liveability score in the future.

7.6 Clustering of Tradeable Industries

As identified in **Section 6.0**, State and regionally significant clusters of tradeable industries are located within Albury-Wodonga and the surrounding Riverina Murray Region.

In particular, Food and Agribusiness is identified as the dominant tradeable industry with significant specialisations in fruit growing, protein farming (meat and plant based) and manufacturing associated with the Food and Agribusiness Industry.

Albury-Wodonga also has a significant proportion of employment in Tourism, Knowledge and Corporate Services and Advanced Manufacturing. The scale, number and depth of these tradeable industries make Albury-Wodonga a competitive place for complementary and aligned businesses to establish, relative to other parts of Regional NSW.

7.7 Key Findings and Considerations for the Masterplan

An assessment of Albury-Wodonga's economic competitiveness has identified the following key findings for the preparation of the Albury RUP:

- Albury Wodonga has significant concentrations of skilled workers. Notwithstanding this clustering of skilled workers, the size of the labour pool available for businesses accounts for just 4.5 % of all industrial skilled workers in Regional NSW. As such, how the Albury RUP can attract and retain skilled workers will be a critical consideration.
- Albury-Wodonga's economy has greater scope and scale relative to other regional centres in southern NSW and north-east Victoria. This is attractive for businesses seeking to access the infrastructure and services required for the production of high value and tradeable goods.
- Analysis of the programs offered by the four tertiary education providers in Albury Wodonga identifies 43 training programs and courses which support employment within the industrial economy. This is a key location requirement for high value – tradeable industries which seek access to the high-quality talent and infrastructure to operate cost effectively.
- Food and Agribusiness is identified as the dominant tradeable industry in Albury Wodonga with significant specialisations in fruit growing, protein farming and manufacturing associated with the Food and Agribusiness Industry. Albury Wodonga also has a significant proportion of employment in Tourism, Knowledge and Corporate Services and Advanced Manufacturing. The scale, number and depth of these tradeable industries make Albury-Wodonga a competitive place for businesses to establish, relative to other parts of Regional NSW.

8.0 Albury-Wodonga Industrial Land Market

8.1 Supply

An assessment of current vacant land supply was undertaken using aerial imagery sourced from Nearmap, dated 31 October 2021. The assessment categorises land as either 'Vacant, Underutilised, or Taken-up. Classifications were applied based on a visual assessment of development activity on each parcel of land zoned for industrial uses.

- **Vacant** – Land that does not contain significant built-form or evidence of an industrial operation or use. Generally, this land is vegetated or cleared, but may include evidence of earthworks of clearing. Does not include temporary storage of materials or equipment.
- **Underutilised** – Parcels that contain some built-form or an operating use, but where substantial portions of the site remain undeveloped/used.
- **Taken-up** – Parcels that contain built-form or an operating use. They may contain sites that aren't fully developed, although those undeveloped areas are used for parking or permanent storage and are necessary for normal operations of an industrial precinct.

The Albury LGA has approximately 871ha of zoned industrial land of which 346ha (40%) is vacant, 203ha (23%) is underutilised, and 323ha (37%) is taken-up. The underutilised land primarily relates to a large parcel (164ha) located in the Albury RJP Investigation Area, which includes the former Norse Skog Mill and a large area of vacant land north of Hub Road.

Note that this supply assessment does not include land in the Albury RJP Investigation Area that is not currently zoned for industrial use. Should this be included, the total zoned industrial land within the Albury LGA would be a total of 2,071 hectares.

Wodonga currently has substantially more zoned industrial land, totalling approximately 1,110ha with 517ha vacant (47%), 65ha underutilised (6%) and 529ha taken-up (48%), as shown in Table 14.

Table 14: Albury and Wodonga Industrial Land Supply Summary, as at October 2021

	Taken-up	Under-utilised	Vacant	Total
Albury				
General Industrial	229.8	199.1	294.4	723.3
Light Industrial	92.8	3.4	51.9	148.1
Total	322.6	202.6	346.3	871.4
Wodonga				
Industrial 1	528.7	64.5	516.7	1,109.9
Total	528.7	64.5	516.7	1,109.9

Source: Ethos Urban analysis utilising aerial imagery from NearMap

Industrial land supply in the Albury LGA is divided between land zoned General Industrial (83%) and Light Industrial (17%), with a similar split for both vacant and taken-up land. All industrial zone land in Wodonga LGA is zoned Industrial 1.

For the purposes of this assessment, the share of underutilised land able to be redeveloped for industrial uses is assumed to be 50%, this increases vacant land supply from 400ha to 510ha; the balance of underutilised land is considered taken-up. This is summarised in Table 15.

Table 15 Albury and Wodonga Future Industrial Land Supply Summary, as at October 2021

	Under-utilised and available for redevelopment	Vacant	Total Future Supply
Albury			
General Industrial	99.6	294.4	394.0
Light Industrial	1.7	51.9	53.6
Total	101.3	346.3	447.5
Wodonga			
Industrial 1	32.2	516.7	549.0
Total	32.2	516.7	549.0

Source: Ethos Urban, NearMap

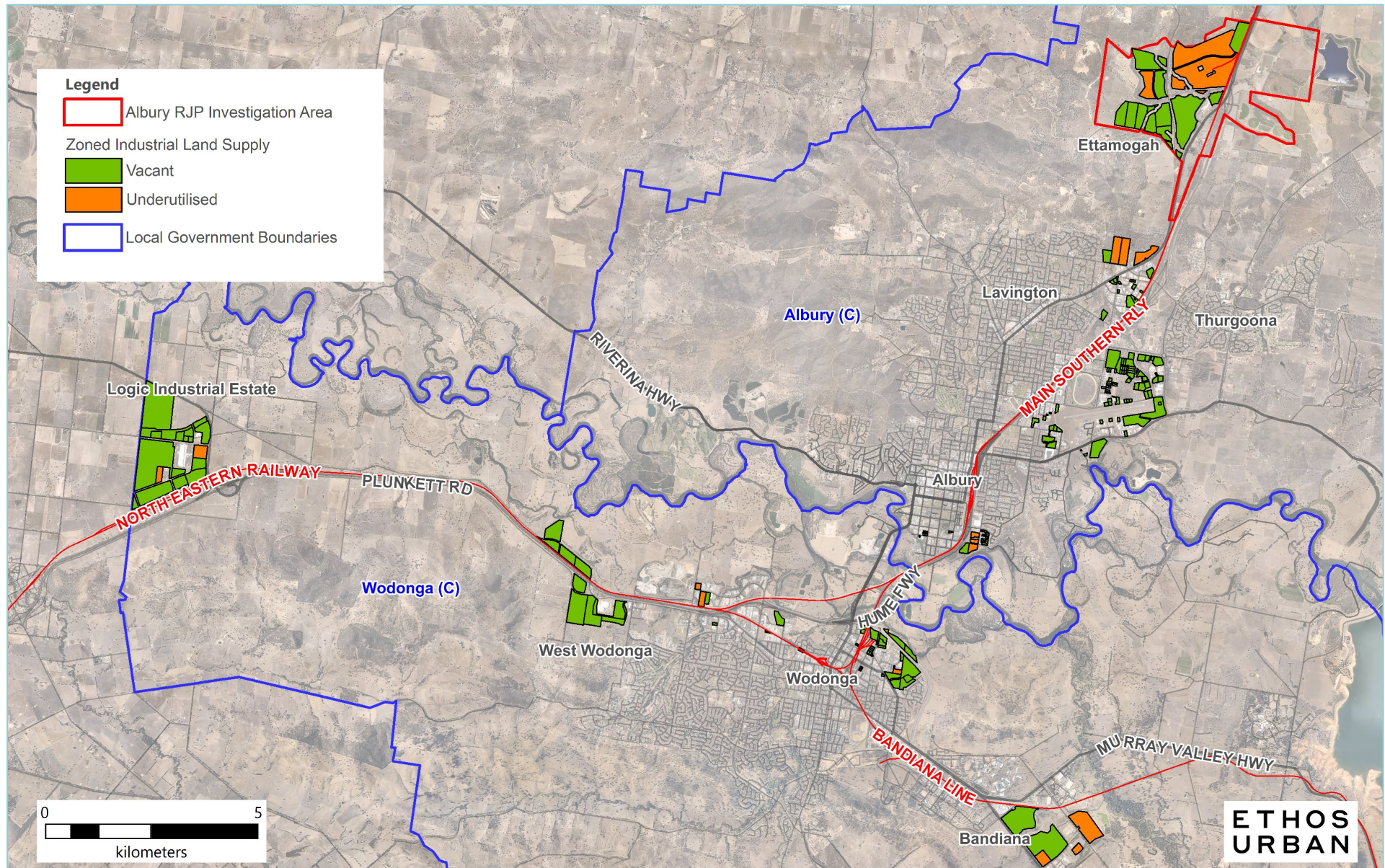
Most of Albury LGA's future industrial land supply is located in the Albury RUP Investigation Area (198ha or 57%, excluding underutilised land), which is zoned for General Industry use. Another large concentration is around the Albury Airport (119ha or 34%), including a mix of General and Light Industry zoned land.

Logic Business Park contains the bulk of Wodonga's vacant industrial land supply (253ha or 48%), the balance split between three locations; West Wodonga, central Wodonga, and Bandiana.

A high share of vacant industrial land in both Albury (70%) and Wodonga (86%) is in parcels larger than 5ha (50,000m²).

This presents a potential competitive advantage over other more established industrial markets where larger sites are more limited, in particular for attracting large-scale corporate tenants (see Table 16).

Figure 10: Albury and Wodonga Zoned Industrial Land Supply, as at October 2021



Source: Ethos Urban

Table 16: Albury and Wodonga Vacant Industrial Land Supply Summary, as at October 2021

Lot size (m ²)	Vacant Lots*			
	No.	Share (%)	Area (ha)	Share (%)
Albury (C)				
0 - 1,000	18	12%	0.2	0%
1,000 - 2,000	10	7%	1.5	0%
2,000 - 5,000	46	32%	15.4	4%
5,000 - 10,000	25	17%	17.8	5%
10,000 - 15,000	8	5%	10.8	3%
15,000 - 30,000	16	11%	31.8	9%
30,000 - 45,000	7	5%	24.9	7%
45,000 - 50,000	0	0%	0.0	0%
50,000+	16	11%	243.9	70%
Total	146	100%	346.3	100%
Wodonga (C)				
0 - 1,000	8	11%	0.3	0%
1,000 - 2,000	9	13%	1.3	0%
2,000 - 5,000	9	13%	3.1	1%
5,000 - 10,000	6	8%	5.1	1%
10,000 - 15,000	2	3%	2.8	1%
15,000 - 30,000	6	8%	12.6	2%
30,000 - 45,000	8	11%	31.4	6%
45,000 - 50,000	3	4%	14.6	3%
50,000+	20	28%	445.6	86%
Total	71	100%	516.7	100%

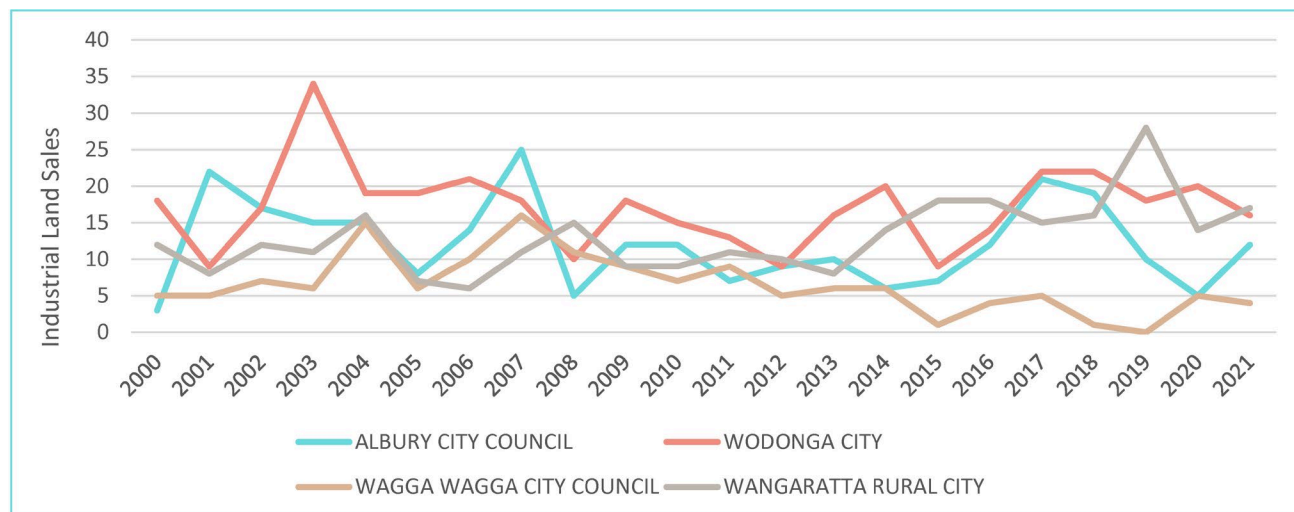
Source: Ethos Urban, NearMap

Note: *does not include portion of underutilised land that could be redeveloped.

8.2 Market Activity

As Albury and Wodonga compete in a broad industrial sector for industrial development with other regional centres, a comparison with nearby industrial markets at Wagga Wagga (NSW) and Wangaratta (VIC) has been prepared and is shown in Figure 11.

Figure 11: Industrial Property Sales, January 2000 to November 2021



Source: Pricefinder

Industrial lot sales over the period January 2000 to November 2021 show similar levels of activity in both Albury and Wodonga. Over the period, Albury averaged 12 sales per year, compared to 17 sales per year in Wodonga.

Activity in Wagga Wagga was substantially lower, at just seven sales per year over the period, with very limited activity over the last five years. In Wangaratta, the sales rate was more similar to Albury and Wodonga at 13 sales per year.

Price differences between Albury and Wodonga are mainly in the 1,000m² to 5,000m² lot size range, where Wodonga has land prices approximately one-third lower. Limited differences in prices are apparent in the balance of the industrial land market, with Wodonga typically being marginally cheaper than Albury.

Activity in the market is generally focused on smaller lots, from sub-1,000m² to 1ha, Albury sales are marginally more concentrated in sub-1,000m² lots (21%) and 2,000m² to 5,000m² lots (24%) compared to Wodonga (16% and 19%) respectively. This is shown in **Table 17**. Insights provided by Albury City Council outline a strong demand for small to medium sized lots in the area.

Sales in Wagga Wagga are more concentrated in slightly larger lots sized 2,000m² to 5,000m² (41%), with few lots in the sub-1,000m² size (8%).

Similarly, in Wangaratta sales are focused on lots in the 2,000m² to 5,000m² (34%) range. Sales of lots 50,000+m² in Wangaratta are generally consistent with Albury (6%) and Wodonga (6%).

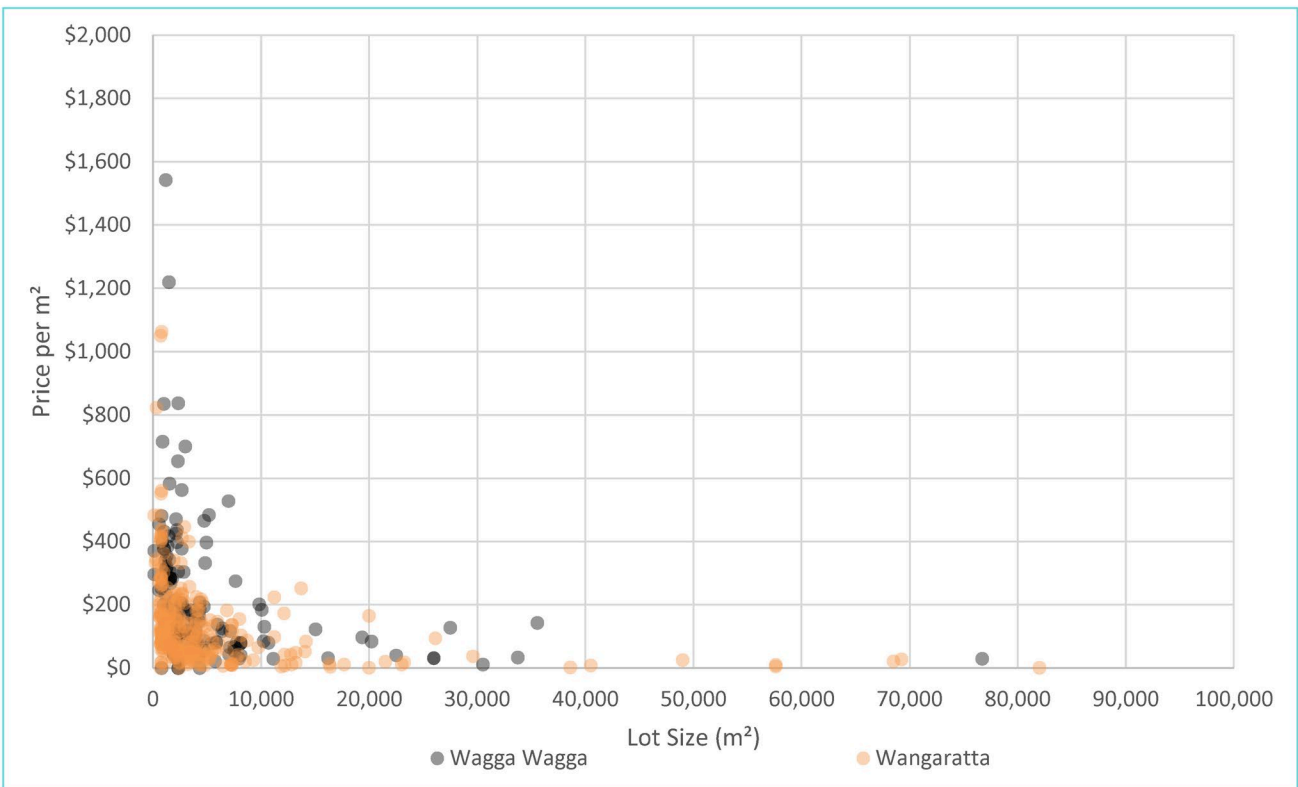
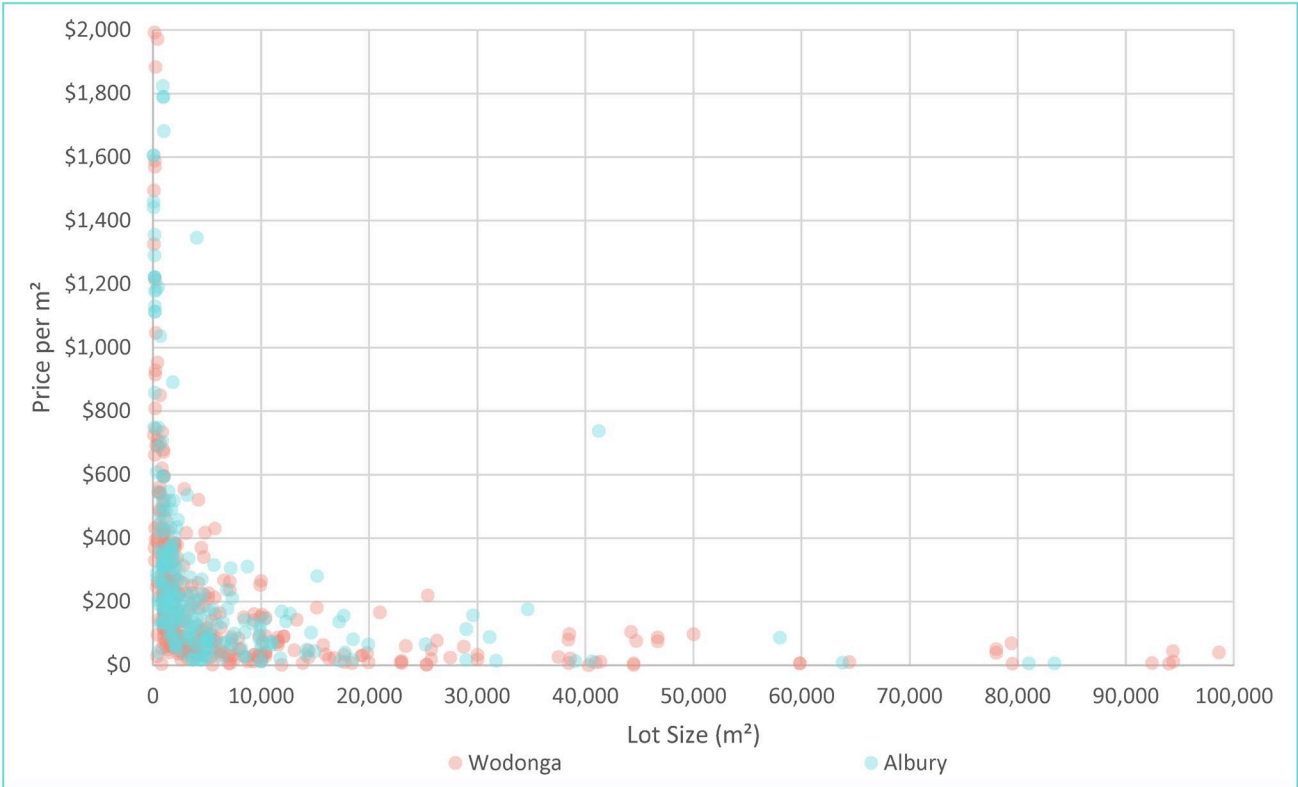
Table 17: Albury Wodonga Industrial Property Sales, January 2000 to November 2021

Lot Size	Median Sales Price per m ²			
	Albury	Wodonga	Wagga Wagga	Wangaratta
0 - 1,000	\$510	\$540	\$330	\$200
1,000 - 2,000	\$270	\$180	\$280	\$120
2,000 - 5,000	\$150	\$110	\$140	\$80
5,000 - 10,000	\$90	\$70	\$80	\$60
10,000 - 15,000	\$70	\$60	\$90	\$50
15,000 - 30,000	\$70	\$30	\$60	\$20
30,000 - 45,000	\$50	\$20	\$30	\$10
45,000 - 50,000	-	\$80	-	\$20
50,000+	\$20	\$10	\$30	\$1
Total	\$180	\$130	\$150	\$90
Lot Size	Number of Sales			
	Albury	Wodonga	Wagga Wagga	Wangaratta
0 - 1,000	57	61	12	64
1,000 - 2,000	58	105	34	47
2,000 - 5,000	64	72	58	98
5,000 - 10,000	39	51	22	34
10,000 - 15,000	15	23	5	13
15,000 - 30,000	12	25	8	10
30,000 - 45,000	6	14	3	2
45,000 - 50,000	0	2	0	1
50,000+	15	24	1	16
Total	266	377	143	285

Source: Pricerfinder

Both Albury and Wodonga markets have a much larger number of sales of lots over 10,000m² in size relative to both Wagga Wagga and Wangaratta. This indicates that Albury and Wodonga have a much more active market for large lot industrial land of the scale likely to be delivered by the Albury RUP (see Figure 12).

Figure 12: Industrial Property Sales by Size in Each City, 2000 to 2021



Source: Pricefinder

8.3 Demand

Over the period January 2010 to October 2021, take up of industrial land in Wodonga (109ha) was underpinned by development of the Wodonga TAFE Logic Campus and Driver Training Complex (61ha).

Development in Albury was lower than for Wodonga at 61ha, with activity split relatively evenly between the area surrounding the airport and the industrial precinct west of the Hume Motorway at the Thurgoona Drive exit.

In annual terms, Albury had a development rate of 5.2ha per year compared to 9.2ha per year in Wodonga. If development remains constant at this rate Albury's industrial land supply is equivalent to approximately 86 years of supply, and Wodonga 59 years of supply, as shown in Table 18.

The historical rate of industrial land development and the forecast rates of population growth indicates future demand for the Albury RJP Precinct is unlikely to be driven to any significant degree by businesses focussed primarily on servicing the local needs of Albury or Wodonga residents/businesses.

That is, the success of the Albury RJP Precinct will be heavily influenced by the ability to attract major tenants that operate large scale supply chains, potentially extending from South Australia to Queensland or even internationally. This reflects the importance of State Government and Council supporting the appropriate mechanisms to facilitate the various requirements of these tenants.

Table 18: Albury and Wodonga Industrial Land Demand, January 2010 to October 2021

	Occupied		Total Take up (ha)	Annual Take Up (ha)	Total Future Supply (ha)	Years of Remaining Supply
	2010	2021				
Albury						
General Industrial	284.8	329.3	44.6	3.8	394.0	103.8
Light Industrial	77.8	94.5	16.7	1.4	53.6	37.7
Total	362.6	423.9	61.3	5.2	447.5	85.8
Wodonga						
Industrial 1	452.3	560.9	108.6	9.2	549.0	59.4
Total	452.3	560.9	108.6	9.2	549.0	59.4

Source: Nearmap Imagery, Ethos Urban

8.4 Key Findings and Considerations for the Masterplan

An assessment of the industrial land market within Albury Wodonga has identified the following:

- Significant supply of industrial land exists within Albury-Wodonga. Historic development rates indicate between 59 and 85 years of land available to service trend growth. Much of this supply exists in lots of greater than 5 hectares. Staging and development sequencing of the Albury RJP will need to be mindful of the existing supply of available land. Demand for smaller lots to support industrial uses and operators can be absorbed in the Productivity Support and General Industry locations to preserve this opportunity within Heavy Industry areas. Timely take up rates and development in the Albury RJP will require proactive investment attraction by State and Local Governments for target industries serving extensive supply chains. The subdivision of larger lots may also be required to assist the market find access to smaller lots within the Albury RJP if desired.

- Albury's industrial property market is marginally more expensive than Wodonga and Wagga Wagga, reflecting a more established market and strategic location.
- Sales in Albury and Wodonga have been concentrated in sub-5,000m² lots, while Wagga Wagga and Wangaratta are concentrated more specifically on 2,000m² to 5,000m² lots. It is also noted that Albury and Wodonga have more large-lot sales of greater than 10,000m² (1 hectare) compared to Wagga Wagga and Wangaratta.

9.0 Market Intelligence

9.1 Market Engagement

Market engagement was undertaken in two phases to assist the preparation of this report. The first phase was with industry associations and peak bodies representing the target industries identified by Government of Advanced Manufacturing, Food and Agribusiness, Transport and Logistics and Circular Economy and Recycling. Participants were asked a series of questions to 'ground truth' and gain a deeper understanding of the key drivers, decision making criteria, infrastructure needs and location preferences.

The second phase of engagement was with key businesses that either operated in the Albury RUP investigation area or were considering relocating to the area. Participants were asked questions specifically relating to their key needs, drivers and operational requirements.

Together, this knowledge enables the masterplan to respond to the needs of key industries and support the Albury RUP to be an attractive place for investment.

9.1.1 Growth Sectors

Key sectors of the target industries expected to experience the most significant growth over the next 10 years include:

- Plant protein and other meat free alternatives
- Meat and dairy products
- Building and construction supplies
- Health and wellbeing products
- Defence industries
- Renewable energy
- Space
- Third party logistics.

9.1.2 Rising Costs of Production

All target industries identified rising costs of production, particularly energy and transport costs, are impacting profitability.

Target industries are finding it difficult to pass these costs onto the consumer. As a result, many businesses are contemplating either offshoring, where labour costs can be up to 95% cheaper, and/or digitise production improve efficiencies and reduce domestic labour costs.

The Narrabri Special Activation Precinct was cited as an example of how access to commercial quantities of energy (gas) was attractive to large scale industrial businesses.

9.1.3 Sustainability and the circular economy

All target industries outlined the growing significance of operating sustainably. Some industry groups cited sustainability as a critical requirement for their consumers, and can be a competitive advance in the marketplace.

Many businesses recognised the environmental, social and economic benefits of adopting circular economy principles however, cited difficulty accessing precinct/regional information about potential and available waste streams as a major limiting factor.

Cost effective and readily available access to renewable energy is seen as a competitive advantage for all industry groups.

9.1.4 Increasing digitisation of production

A key trend of many of the target industries is the increasing digitisation of production. This is occurring to improve production efficiencies, reduce labour costs, as well as increase production quality, testing and product specialisation. It has been noted that the increasing digitisation, and technological sophistication of production, is reducing the typical land requirements for many businesses.

Access to secure and fast internet was cited as important for all industries to operate competitively. It was also noted that access to local ICT professionals who can provide ongoing support as a competitive advantage.

9.1.5 Access to skilled Labour

All target industries identified the greatest challenge facing their industries is the access to skilled labour i.e. labourers, technicians, drivers and engineers. This is particularly an issue for businesses operating in regional areas as they find it extremely difficult to attract and retain labour re-located from major cities.

This lack of sufficient skilled labour has been cited as the one of the main reasons why businesses are reluctant to expand operations in regional areas.

Reasons identified as to why it is difficult to attract and retain skilled labour include:

- The challenges of regional areas being attractive for the 'whole family' and not just the skilled worker
- The incentive of relocating/staying in regional areas to access cheaper housing is no longer holding as the cost of housing in regional areas is increasing.
- Competing industries, such as Construction and Mining, are considered more attractive for skilled labour

In addition to the limited access to skilled labour in regional areas, it was also outlined that businesses operating in regional areas often find it difficult to access training facilities to skill and train staff. Key skills/training initiatives identified as being in short supply in regional included information, communication and technology, skills, management, leadership and accounting.

9.1.6 Investment decision making criteria

The investment decision making criteria for businesses across all target industries were similar and predominately related to cost. Factors included access to skilled labour, access to cheap commercial quantities of energy and water, transport costs and rent.

All industries identified that financial support, such as grants, tax incentives and instant asset write offs, greatly increase the attractiveness of a location to invest in.

The Queensland Government's Regional Manufacturing Hub program was cited as exemplar program. It was suggested the program integrated and addressed many immediate and ongoing investment decision making factors into a 'one stop shop'. With dedicated staff at each hub the program provided a 'concierge' style service which enabled businesses to access investment grants, streamline statutory planning and approvals, connect businesses with skilled labour and provide ongoing training and skills development programs.

'Planning risk' i.e. the risk of not receiving an approval for the development and operation of a business, was cited as a key obstacle for businesses looking to relocate or expand operations at a another location.

9.1.7 Lead time for investment

All target industries indicated that it could take between 1-3 years for large scale businesses to identify and acquire a new site. Depending on the scale of operations proposed at the new site, an additional 1-2 years is required to gain planning approval and develop the site. Thus, the lag between the decision to locate and beginning operations can be up to 5 years for some businesses.

Smaller businesses are often seeking an existing premises to tenant and a much shorter relocation timeline of within 6 months is common.

Businesses wishing to relocate or expand operations have noted the planning and approval process has impacted investment and development timeframes. Businesses are often unaware of the process, requirements and costs associated with securing a development approval which means it is often unaccounted for in investment and business planning.

9.1.8 Essential and desirable soft and hard infrastructure

Soft and hard infrastructure which is considered essential in a location for target industries include:

- Skilled labour
- Energy and gas – at commercial quantities
- Water – at commercial quantities
- Access to major roads and highways and freight handling facilities
- Broadband internet

Soft and hard infrastructure which is considered desirable in a location for target includes include:

- Adequate housing for workers
- Lifestyle and amenity to support families relocating e.g. schools, hospitals and entertainment

- Tertiary education and training facilities
- Local industry association and business networks
- Airport.

9.1.9 Region and provenance branding

The brand and identity of a region and place is increasingly influencing the location decisions for businesses, particularly those in the Food and Agribusiness industry.

It was stated by stakeholders outside of the region that they do not have a clear understanding or appreciation of the unique brand, identity and provenance story of the Riverina Murray Region i.e. the story of the origins of food such as where it has been grown, raised or caught, was not clear.

Regions which had a more prominent brand and provenance story, e.g. Gippsland, the Hunter Valley, Newcastle and Northern Rivers, were able to attract investment as businesses could leverage the region's brand recognition with consumers and customers.

It was also outlined that the economic opportunities of Albury-Wodonga was difficult to understand. This was in part explained by the varying levels of information available and how the region's story was told. i.e. at an Albury LGA scale, Wodonga LGA scale, combined Albury-Wodonga scale, Riverina Murray Region and Ovens Murray Region.

9.1.10 Key Challenges for Growth

The key challenges for growth of target industries over the next 10 years include:

- Access to skilled labour
- Rising cost of production e.g. labour, energy, transport
- Offshoring of manufacturing capacity making it difficult to access products locally which increases import costs
- Declining number of courses at schools which encourage students to take up careers in the target industries
- Perception Australia no longer manufactures things, therefore the industry does not need to be supported
- Declining rates of investment in research and development
- Congestion and loss of direct freight corridors to ports, airports, and intermodal freight facilities
- Varying payroll tax and investment incentives Australian making it a challenge to do business in some states. It is noted that NSW has a higher Payroll tax compared to Victoria.

Stakeholders recognised that most of the challenges for growth are not directly influenced by geography however, stated that the two key challenges of growth for Albury-Wodonga is access to skilled labour and rising costs of production.

9.1.11 Competitive advantages of Albury-Wodonga

The biggest competitive advantages for business operating from Albury-Wodonga were identified as:

- Access to the inland rail and Ettamogah intermodal facility
- Access to the Hume Motorway
- Albury Airport
- Leverage the agricultural products of the Riverina Murray and Northern Victoria to manufacturer higher value products
- Being equidistant to Melbourne and Sydney
- Government's focus on supporting the growth and development of the of the region i.e. Regional Deal.

9.1.12 Challenges to utilising the rail network to transport freight

Businesses recognise the value of being proximate to the rail network, however, several challenges remain to utilise the rail network to transport freight efficiently. Some of these challenges include:

- The additional time required to transport, load and unload freight at an intermodal facility
- The network of intermodal facilities and distribution centres at key destinations means that rail freight is less efficient than road transport
- Rising costs of ports, stevedores, and container infrastructure
- Scarcity of container infrastructure

10.0 SWOT Assessment

10.1 SWOT Assessment

Informed by the insights gathered from the preceding Sections of this Report, and analysis completed by Invest Regional NSW, a Strengths, Weaknesses, Opportunities and Threats (SWOT) assessment of Albury Wodonga as a place for target industries to establish is provided. This assessment provides insight into how the masterplan, and accompanying implementation plan, can best enhance Albury Wodonga's strengths, capitalise on the opportunities, address the identified weaknesses, and mitigate the threats.

Strengths	Weaknesses
<ul style="list-style-type: none"> Albury-Wodonga provides prospective businesses with access to major road and rail freight infrastructure which can reach over 75% of Australia's population within 24 hours. The region already has a large quantum of competitively priced vacant, and serviced, industrial land, particularly lots over 5 hectares, which can support the growth and development of new businesses. Relative to Regional NSW, and competing regional cities, Albury-Wodonga has competitive advantages in economies of scale and scale, access to trade enabling infrastructure, clustering of skilled labour and target industries. Delivery of committed major infrastructure projects and Government initiatives will likely increase the demand, and competitiveness, of industrial land within Albury. The region is rich in natural resources including agricultural land and forestry. 	<ul style="list-style-type: none"> Albury-Wodonga does not have a widely recognised provenance story or identity, relative to other regions, which the Food and Agribusiness industry can align with. The economic opportunities within Albury-Wodonga are poorly understood by target industries which may stifle market interest and investment. An established, consistent and dependable demand for large scale industrial operators in Southern NSW is not apparent at the current time. Moderate forecast population and employment growth within the region will limit localised demand for industrial land. A number of perceived/ actual challenges exist in utilising the rail network to transport freight.
Opportunities	Threats
<ul style="list-style-type: none"> Delivery of the Inland Rail and the Albury RJP's proximity to the Ettamogah Rail Hub, provide an opportunity for the expansion of transport and logistics operators within the RJP. The Albury-Wodonga Regional Deal will improve the liveability of the city. This will help improve the ability to attract and retain investment and skilled labour. Ability to develop supportive planning and regulatory environment through the RJP and potential zoning changes to accommodate large scale industrial activities more easily. Leverage existing industry specialisations in Food and Agribusiness. Development of the South West Renewable Energy Zone could enable prospective businesses to access commercial quantities of sustainable energy. Reshoring of manufacturing supply chains. 	<ul style="list-style-type: none"> Increasing transport costs facing target industries may make Albury-Wodonga a less competitive location to other regional cities who are closer to capital city markets. The Wagga Wagga SAP could secure investment that could otherwise come to Albury-Wodonga. Digitisation of production may result in the decline of total employment generated by the Albury RJP relative to current expectations. Financial incentives offered by other states and local government to attract investment.

Part C

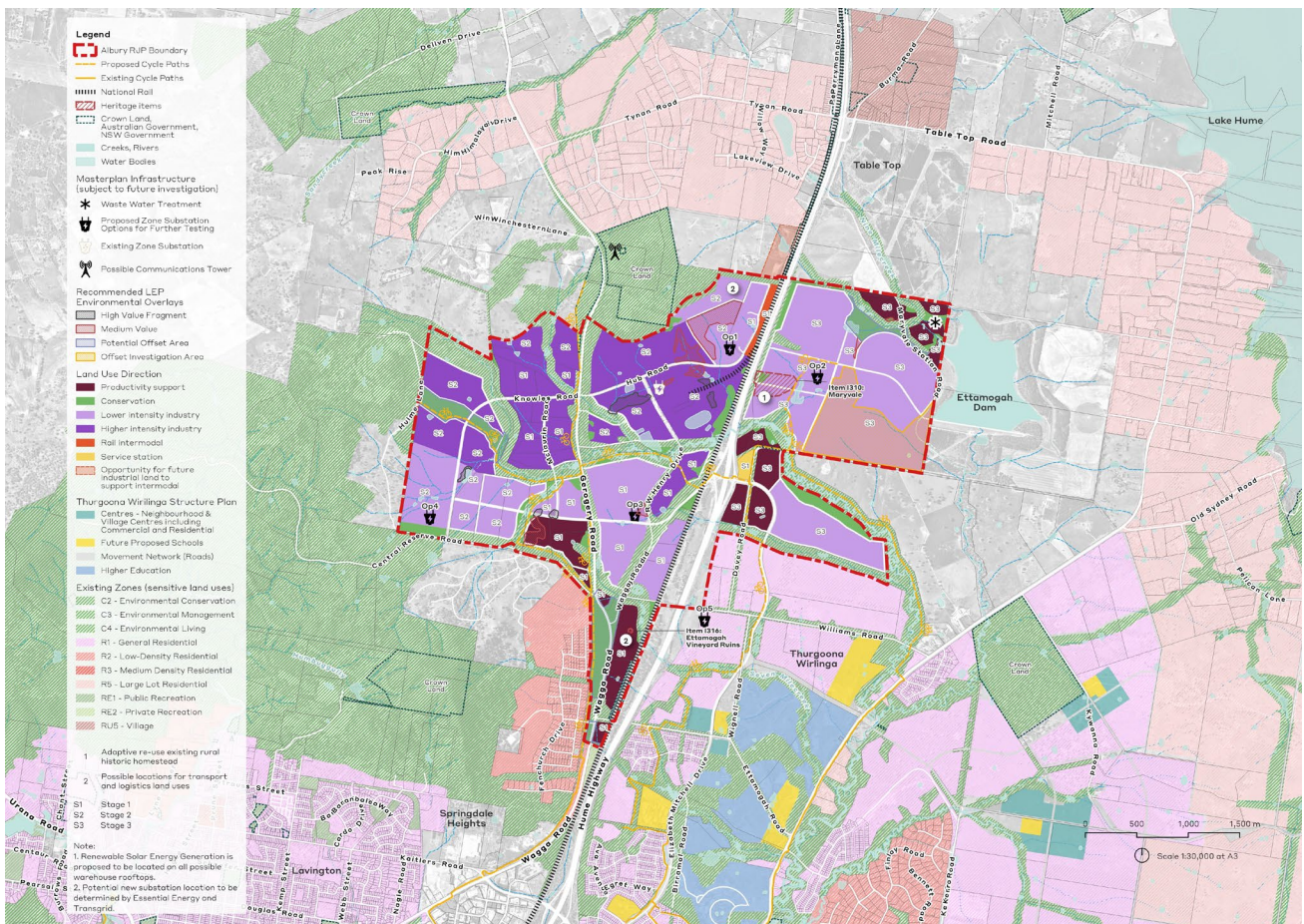
Masterplan Assessment and Key Findings

11.0 Masterplan Assessment

11.1 Albury RJP Masterplan

The masterplan for the Albury RJP, as illustrated in Figure 13 below, seeks to improve certainty for the private sector and key industries to invest in new, or expanded businesses, that will strengthen and grow the economy of the region. The masterplan identifies land uses such as Lower Intensity Industry, Higher Intensity Industry, Productivity Support, Rail Intermodal and Service Station to be accommodated. The masterplan also includes three stages, or horizons, of development.

Figure 13: Albury RJP Masterplan



Source: Ethos Urban

A staged delivery of the masterplan is proposed which will enable:

- Gradual delivery of infrastructure, including road and services infrastructure
- Initial densification of development within a specific geographic area to encourage activity and vibrancy, collaboration, workforce community and identity
- Relatively equal portions of land for each stage, and
- Flexibility in terms of lot subdivision size and timing.

This staging assumes a level of coordination and cooperation with all land holders. For further details of the Albury RJP Masterplan refer to the urban design report prepared by Ethos Urban. A summary of the proposed land use mix, potential uses in each land use zone and planned delivery of each stage is outlined in Table 19 below.

Table 19: Albury RJP Masterplan Staging and Land Use Summary

Land Use	Potential Uses	Stage 1 (ha) (2022-2026)	Stage 2 (ha) (2027-2036)	Stage 3 (ha) (2036+)	Total
Lower Intensity Industry	<ul style="list-style-type: none"> Industrial, warehouse and logistics related industries. Limited non-industrial activities that provide facilities and services to meet the needs of businesses and workers. 	88	99	234	421
Higher Intensity Industry	<ul style="list-style-type: none"> Industrial activities that need to be separated from other land uses. 	72	180	0	252
Rail Intermodal	<ul style="list-style-type: none"> Warehouses, transport and logistics 	4	0	0	4
Productivity Support	<ul style="list-style-type: none"> A range of facilities and services, light industries, warehouses and offices. Activities that are compatible, but do not compete with land uses in surrounding local and commercial centres. New and emerging light industries Land uses that meet the needs of the community, businesses, and industries that are not suited in location in other employment zones. Land uses that provide facilities and services that meet the needs of workers, to seal goods of a larger size, weight or quantity or sell goods manufactured on-site. 	40	0	46	86
Service Station	<ul style="list-style-type: none"> Services station 	3	0	0	3
Total		207	279	280	766

Source: Ethos Urban

Key economic principles embedded into the masterplan include:

- Providing capacity to increase economies of scale and scope within the Albury-Wodonga region
- Delivering a high workforce amenity outcome in the precinct to attract and retain skilled workers

- Outlining stages of development which help create momentum of investment while preserving the opportunity for large scale industrial businesses to locate in the precinct in future stages
- Outlining stages of development which help stage and sequence the delivery of infrastructure to support the precinct's development and match market demand as it occurs
- Enables flexibility of lot sizes to support range of businesses and investors
- Supports the delivery of key government strategies and promoting Albury-Wodonga as a priority location to do business in key industries
- Support the growth and development of target industries Advanced Manufacturing, Circular Economy and Recycling, Food and Agribusiness and Transport and Logistics
- Providing a clear signal to the market that the Albury RJP seeks to support the development of large-scale industrial businesses, and
- Be at a scale where circular economy principles can be adopted.

11.2 Employment Capacity

Estimates of employment capacity have been prepared to provide guidance for infrastructure planning. These estimates are high-level and should only be considered as a demonstration of the employment potential of the Albury RJP if fully developed.

The following assumptions underpin the employment capacity analysis:

- Assessment of the total developable area with reference to a high-level review of environmental and site constraints
- After allowing for environmental and site constraint, consideration of civil infrastructure requirements (15% of land area), including roads, stormwater and other utilities, etc
- Building footprint and Gross Floor Area ratios informed by local case study analysis and industry averages, and
- Floorspace to employment ratios based on broad land use categories relevant to the RJP.

Based on the assumptions above, the Albury RJP masterplan has a potential employment capacity of 18,070 jobs, with the majority of jobs in the Lower Intensity Industry (7,800 jobs), Productivity Support (5,950 jobs) and Higher Intensity Industry (4,200 jobs) sectors. The Albury RJP's significant employment potential reflects the size of the precinct at 766 ha.

Table 20: Employment Capacity (Jobs)

Land Use	Stage 1	Stage 2	Stage 3	Total
Lower Intensity industry	1,470	1,650	4,680	7,800
Higher Intensity industry	1,200	3,000	0	4,200
Rail Intermodal	40	0	0	40
Productivity Support	2,500	0	3,450	5,950
Service Station	80	0	0	80
Total	5,290	4,650	8,130	18,070

Source: Ethos Urban N.B. figures rounded

12.0 Key Findings and Considerations for the Albury RJP and Masterplan

In preparing this Report a number of key findings and considerations for development of the Albury RJP and masterplan have been identified. These key findings and considerations are based on a detailed assessment of the strategic context of the Albury-Wodonga region, an economic competitiveness assessment of the precinct for target industries and through the outcomes of stakeholder market engagement.

The key findings and consideration for the masterplan include:

- A key advantage of the Albury RJP is its proximity to major transport infrastructure, such as the Hume Motorway, Ettamogah Rail Hub as well as the future Inland Rail. This is a significant competitive advantage which means the masterplan should emphasise efficient movement of goods and people. This can include issues relating to traffic, freight trucks and industries interacting with the railway line, layover spaces, road width, turning circles, speed, lighting, and rail sidings.
- Forecast industrial growth expectations for Albury and Wodonga are positive, although relatively moderate in scale. Development of the Albury RJP will occur as a result of investment attraction efforts for large and sophisticated tenants with extensive supply chains, rather than localised demand growth only. Development of the masterplan, and supporting planning framework, should therefore focus on flexibility and adaptability to target significant investment by specific industries.
- Some demand is already apparent for industrial development in Albury and Wodonga. At present, the market is absorbing approximately 14.4 ha of vacant industrial zoned land per year across Albury-Wodonga. At this rate of consumption there is approximately 69 years of vacant land supply in the region. This provides an opportunity for the Albury RJP to accommodate land intensive uses such as large-scale manufacturing and warehousing, or uses which require greater buffers zones due to the nature of their production.
- The significant volume of vacant industrial land across Albury-Wodonga presents a strategic opportunity to preserve the Albury RJP for land intensive and heavy industry users. Demand for smaller industrial uses and operators can be absorbed in the Productivity Support and General Industry locations to preserve this opportunity within Heavy Industry areas. An investigation into the planning implications and benefits of zoning part of the Albury RJP where heavy industrial uses are more appropriately located should be considered. This zoning may help the Albury RJP position itself as a strategic place for large scale industrial uses and confirm where smaller industrial uses can operate.
- Access to skilled labour is one of the most critical issues facing target industries. The masterplan should consider how it can best provide workforce amenity for workers on site. This could include providing access to local goods and services, convenience retail, high quality open space and sports and recreation facilities.

- The existing NEXUS brand and Invest Albury Wodonga campaign would benefit from the inclusion of the region's provenance storey. Additionally feature landscaping at existing entry points and duplication of signage at new entry points will assist in wayfinding and place branding for the precinct.

In addition to the key findings and considerations for development of the masterplan, several investment attraction initiatives have also been identified for the Albury RJP. These initiatives have been identified in the preparation of this Report and through the outcomes of the market engagement exercise. The objectives of these initiatives are to build on the work already being done by Council in the investment attraction space, to help bring forward investment, increase activity within the RJP and make it a more competitive place for target industries. The governance, programming, effectiveness and budgetary implications of the investment attraction initiatives have yet to be confirmed but they are likely to require collaboration between the NSW government and Albury City Council and will require ongoing support.

Investment attraction initiatives identified for consideration include:

- Improve the availability of grants and subsidies available by the NSW Government for target markets
- Publish information on existing waste streams to facilitate/promote the growth of the circular economy
- Allocate additional funding to Albury City's Invest Albury Wodonga campaign to enable greater reach into target markets
- Prepare an Albury RJP monitoring and evaluation program to ensure key issues or opportunities are identified and appropriate mitigation or enhancement strategies can be implemented.
- Developments that meet the criteria of target industry identified in the masterplan to be fast tracked through the NSW Planning framework

Appendix A. Target Industry Cluster Analysis

Advanced Manufacturing			
SA2 Name	Cluster Type	SA2 Name	Cluster Type
Newcastle Port - Kooragang	Significant	Maitland - West	Established
Wodonga	Significant	Beresfield - Hexham	Established
Raymond Terrace	Significant	Albury - East	Established
Glendale - Cardiff - Hillsborough	Significant	Corowa Region	Established
Williamstown - Medowie - Karuah	Significant	Unanderra - Mount Kembla	Established
Moss Vale - Berrima	Established	Mittagong	Emerging
Orange	Established	Wickham - Carrington - Tighes Hill	Emerging
Cessnock Region	Established	Griffith (NSW)	Emerging
Hamilton - Broadmeadow	Established	Taree	Emerging
Tamworth - West	Established	Wagga Wagga - East	Emerging
Nowra	Established	Ballina	Emerging

Food and Agribusiness			
SA2 Name	Cluster Type	SA2 Name	Cluster Type
Goulburn Region	Significant	Walcha	Established
Griffith Region	Significant	Bega - Tathra	Established
Armidale Region - North	Significant	Wentworth-Balranald Region	Established
Leeton	Significant	Bathurst - East	Established
Branxton - Greta - Pokolbin	Significant	Yass Region	Established
Lismore Region	Significant	West Wodonga	Emerging
Deniliquin Region	Significant	Scone	Emerging
Moree Region	Significant	Dungog	Emerging
Beresfield - Hexham	Significant	Gloucester	Emerging
Orange Region	Significant	Kempsey Region	Emerging
Woolgoolga - Arrawarra	Significant	Tamworth - East	Emerging
Tamworth Region	Significant	Bega-Eden Hinterland	Emerging
Casino	Significant	Bathurst Region	Emerging
Wagga Wagga Region	Significant	Far West	Emerging
Inverell Region - West	Established	Taree Region	Emerging

Food and Agribusiness			
Ballina Region	Established	Murwillumbah Region	Emerging
Albury Region	Established	Tenterfield	Emerging
Casino Region	Established	Narrandera	Emerging
Coonabarabran	Established	Grafton Region	Emerging
Mudgee Region - West	Established	North Nowra - Bomaderry	Emerging
Cowra Region	Established	Tumbarumba	Emerging
Blayney	Established	Gilgandra	Emerging
Dubbo - East	Established	Tumut Region	Emerging
Quirindi	Established	Port Macquarie Region	Emerging
Glen Innes	Established	Cootamundra	Emerging
Scone Region	Established	Junee	Emerging
Inverell	Established	Gundagai	Emerging
Tamworth - West	Established	Armidale Region - South	Emerging
Corowa Region	Established	Walgett - Lightning Ridge	Emerging
Tocumwal - Finley - Jerilderie	Established	Narrabri Region	Emerging
Forbes	Established	Wellington	Emerging
Wagga Wagga - North	Established	Nyngan - Warren	Emerging
Young Region	Established		

Transport and Logistics			
SA2 Name	Cluster Type	SA2 Name	Cluster Type
Port Kembla - Warrawong	Significant	West Wodonga	Established
Port Kembla Industrial	Significant	Wickham - Carrington - Tighes Hill	Established
Beresfield - Hexham	Significant	Maitland - West	Established
Port Macquarie - West	Significant	Dubbo - East	Established
Newcastle Port - Kooragang	Significant	Murwillumbah	Emerging
Raymond Terrace	Significant	Broken Hill	Emerging
Glendale - Cardiff - Hillsborough	Significant	Lavington	Emerging
Tamworth - West	Significant	Cootamundra	Emerging
Wodonga	Significant	Quirindi	Emerging

Transport and Logistics			
Unanderra - Mount Kembla	Significant	Corowa	Emerging
Parkes (NSW)	Established	Bathurst - East	Emerging
Shortland - Jesmond	Established	Wauchope	Emerging
Orange - North	Established	Mittagong	Emerging
Mayfield - Warabrook	Established	Wentworth - Buronga	Emerging
Goulburn	Established	Queanbeyan West - Jerrabomberra	Emerging
Taree	Established	Gunnedah	Emerging
Hamilton - Broadmeadow	Established	Edgeworth - Cameron Park	Emerging
Thornton - Millers Forest	Established	Williamstown - Medowie - Karuah	Emerging
Sawtell - Boambee	Established	Leeton	Emerging
Albury - East	Established	Corrimal - Tarrawanna - Bellambi	Emerging
Grafton	Established	Moss Vale - Berrima	Emerging
Wagga Wagga - East	Established	Kempsey	Emerging

Appendix B. Skilled Labour Cluster Analysis

Labourers			
SA2 Name	Cluster Type	SA2 Name	Cluster Type
Glendale - Cardiff - Hillsborough	Significant	Murwillumbah	Emerging
Unanderra - Mount Kembla	Significant	Forbes	Emerging
Griffith Region	Significant	Orange Region	Emerging
Casino	Significant	Goulburn Region	Emerging
Tamworth - East	Significant	Port Kembla Industrial	Emerging
Beresfield - Hexham	Significant	Blayney	Emerging
Tamworth - West	Significant	Quirindi	Emerging
Leeton	Established	Kingscliff - Fingal Head	Emerging
Mudgee	Established	Sawtell - Boambee	Emerging
Bega - Tathra	Established	Laurieton - Bonny Hills	Emerging
Nelson Bay Peninsula	Established	Scone	Emerging
Inverell	Established	Albury Region	Emerging
North Nowra - Bomaderry	Established	Scone Region	Emerging
Kempsey	Established	Moree Region	Emerging
Port Kembla - Warrawong	Established	Cootamundra	Emerging
Macleay - Yamba - Iluka	Established	Deniliquin Region	Emerging
Branxton - Greta - Pokolbin	Established	Thornton - Millers Forest	Emerging
Morisset - Cooranbong	Established	Gunnedah	Emerging
Bathurst - East	Established	Tocumwal - Finley - Jerilderie	Emerging
Jindabyne - Berridale	Established	Kurri Kurri - Abermain	Emerging
Tamworth Region	Established	Tumut	Emerging
Maitland - West	Established	Mittagong	Emerging
Dubbo - East	Established	Ulladulla	Emerging
Young	Established	Forster	Emerging
Wagga Wagga - North	Established	Corowa	Emerging
Ballina Region	Established	Lismore Region	Emerging
Woolgoolga - Arrawarra	Established	Corowa Region	Emerging
Macksville - Scotts Head	Emerging	Kempsey Region	Emerging
Armidale Region - North	Emerging	Wentworth - Buronga	Emerging
Moss Vale - Berrima	Emerging	Young Region	Emerging
Deniliquin	Emerging	Cowra	Emerging

Machine Operators and Drivers			
SA2 Name	Cluster Type	SA2 Name	Cluster Type
Port Kembla - Warrawong	Significant	Orange - North	Emerging
Wodonga	Significant	Orange Region	Emerging
Port Kembla Industrial	Significant	Edgeworth - Cameron Park	Emerging
Glendale - Cardiff - Hillsborough	Significant	Parkes (NSW)	Emerging
Raymond Terrace	Significant	Albury Region	Emerging
Muswellbrook	Significant	Lithgow	Emerging
Singleton	Significant	Jindabyne - Berridale	Emerging
Beresfield - Hexham	Significant	Queanbeyan - East	Emerging
Singleton Region	Significant	Narrabri Region	Emerging
Newcastle Port - Kooragang	Significant	Quirindi	Emerging
Tamworth - West	Significant	Narromine	Emerging
Mudgee Region - West	Significant	Sawtell - Boambee	Emerging
Unanderra - Mount Kembla	Significant	North Nowra - Bomaderry	Emerging
Moss Vale - Berrima	Established	Shellharbour - Flinders	Emerging
Mayfield - Warabrook	Established	Oberon	Emerging
Morisset - Cooranbong	Established	Goulburn Region	Emerging
Cobar	Established	Albion Park Rail	Emerging
Muswellbrook Region	Established	Corowa Region	Emerging
Griffith Region	Established	Kurri Kurri - Abermain	Emerging
West Wodonga	Established	Tocumwal - Finley - Jerilderie	Emerging
Lithgow Region	Established	Leeton	Emerging
Albury - East	Established	Gunnedah	Emerging
Wagga Wagga - East	Established	Moree Region	Emerging
Blayney	Established	Casino	Emerging
Gunnedah Region	Established	Cessnock Region	Emerging
Broken Hill	Established	Moree	Emerging
Dubbo - East	Established	Bathurst - East	Emerging
Thornton - Millers Forest	Established	Wauchope	Emerging
Maitland - West	Established	Nyngan - Warren	Emerging
Tumut	Established	West Wyalong	Emerging
Narrabri	Emerging		

Technicians and Trade Workers			
SA2 Name	Cluster Type	SA2 Name	Cluster Type
Muswellbrook	Significant	North Nowra - Bomaderry	Emerging
Nowra	Significant	Lithgow Region	Emerging
Beresfield - Hexham	Significant	Mudgee Region - West	Emerging
Raymond Terrace	Significant	Thornton - Millers Forest	Emerging
Maitland - West	Significant	Kingscliff - Fingal Head	Emerging
Singleton Region	Significant	Tumut	Emerging
Glendale - Cardiff - Hillsborough	Significant	Orange - North	Emerging
Unanderra - Mount Kembla	Significant	Maclean - Yamba - Iluka	Emerging
Wodonga	Significant	Laurieton - Bonny Hills	Emerging
Williamstown - Medowie - Karuah	Significant	Ulladulla	Emerging
Moss Vale - Berrima	Established	Queanbeyan - East	Emerging
Newcastle Port - Kooragang	Established	Branxton - Greta - Pokolbin	Emerging
Albury - East	Established	Sawtell - Boambee	Emerging
Broken Hill	Established	Wagga Wagga Region	Emerging
Port Kembla - Warrawong	Established	Bathurst - East	Emerging
Griffith (NSW)	Established	Merimbula - Tura Beach	Emerging
Singleton	Established	Kurri Kurri - Abermain	Emerging
Morisset - Cooranbong	Established	Mittagong	Emerging
Tamworth - West	Established	Port Kembla Industrial	Emerging
Balgownie - Fairy Meadow	Established	Wauchope	Emerging
Tweed Heads South	Established	Lavington	Emerging
Dubbo - East	Established	Goulburn Region	Emerging
Wagga Wagga - East	Established	Orange Region	Emerging
Mudgee	Established	Blayney	Emerging
Wallsend - Elermore Vale	Established	Gunnedah	Emerging
Mayfield - Warabrook	Established	Woonona - Bulli - Russell Vale	Emerging
Warners Bay - Boolaroo	Established	Queanbeyan West - Jerrabomberra	Emerging
Belmont - Bennetts Green	Established	Young	Emerging
Wickham - Carrington - Tighes Hill	Established		