

PLACES OF PENRITH

PENRITH



# EMPLOYMENT LANDS STRATEGY

OCTOBER 2021

**PENRITH**  
CITY COUNCIL

[penrith.city](https://www.penrith.city)

# STATEMENT OF RECOGNITION OF PENRITH CITY'S ABORIGINAL AND TORRES STRAIT ISLANDER CULTURAL HERITAGE

Council values the unique status of Aboriginal people as the original owners and custodians of the lands and waters, including the land and waters of Penrith City.

Council values the unique status of Torres Strait Islander people as the original owners and custodians of the Torres Strait Islands and surrounding waters.

We work together for a united Australia and City that respects this land of ours, that values the diversity of Aboriginal and Torres Strait Islander cultural heritage, and provides justice and equity for all.

## Disclaimer

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## ABBREVIATIONS

ABS	Australian Bureau of Statistics
CBD	Central Business District
DCP	Development Control Plan
DPIE	Department of Planning, Industry and Environment
ELDM	Employment Lands Development Monitor
EDS	Economic Development Strategy
ELS	Employment Lands Strategy
GPEC	Greater Penrith to Eastern Creek
GRP	Gross Regional Product
GSC	Greater Sydney Commission
GVA	Gross Value Added
LEP	Local Environmental Plan
LGA	Local Government Area
LSPS	Local Strategic Planning Statement
NSW	New South Wales
SEPP	State Environmental Planning Policy
SME	Small and Medium Enterprise
TfNSW	Transport for NSW
WCD	Western City District
WSEA	Western Sydney Employment Area
WSA	Western Sydney Airport

## FOREWARD - A CITY-WIDE STRATEGY

Penrith's Local Strategic Planning Statement (LSPS),<sup>1</sup> adopted by Council in March 2020, sets out a vision for Penrith's future. It outlines the economic, social and environmental land use needs over the next 20 years and the strategies and planning needed to most effectively build on the significant infrastructure investment in and around our city for our community.

This Employment Lands Strategy is one of a number of strategies and plans that are being developed to form a city-wide strategic framework for Penrith that will provide direction for future growth in our city.

The consolidated strategic framework for the whole Local Government Area (LGA) will establish a place-based vision and plans for the desired future character and community benefits for our corridors and centres, consistent with the Planning Priorities outlined in the LSPS.

It will provide clarity on the development of our centres and where the housing, jobs and transport should be located while protecting our

most important natural assets and rural areas.

This Employment Lands Strategy addresses our community's priorities to grow our local economy, attract investment to our city and ensure a greater number and diversity of jobs and businesses can be located closer to Penrith's growing population.

Most importantly, it is intended to help realise our community's aspirations for Penrith's future as a connected, healthy, innovative and balanced city.

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1. Penrith City Council 2020

In 2036 our City remains unique, we have capitalised on our opportunities, and our City is connected, healthy, innovative and balanced.

Penrith Local Strategic Planning Statement  
(2020) Planning for a brighter future



# EXECUTIVE SUMMARY

## POSITIONING PENRITH FOR A PRODUCTIVE FUTURE

Penrith City is at a turning point. The recent shocks and stressors of extreme weather events of heatwaves, bushfires, floods followed by the COVID-19 pandemic has impacted all aspects of our lives and economy. The COVID-19 pandemic has highlighted the value of having a strong local manufacturing sector, efficient freight and logistics and advanced information and communication technologies. These sectors have been identified in the NSW Government's COVID-19 Recovery Plan<sup>2</sup> as presenting prime opportunities for rebuilding an even more resilient economy.

The NSW Government is positioning Western Sydney to become the national capital for advanced manufacturing, built around the Western Sydney International Airport and development of the Aerotropolis precincts, along with its connecting infrastructure. With a strong manufacturing and freight and logistics base in our existing employment lands, and 60% of Greater Sydney's potential future employment lands within its boundaries, Penrith can leverage these opportunities to become a leader in enabling sustainable economic growth and productivity.

## WHY DO WE NEED AN EMPLOYMENT LANDS STRATEGY?

Penrith City is emerging as a metropolitan area playing a vital role in the future productivity of the Western Parkland City and Greater Sydney. Having a sufficient supply of land suitable for

a variety of businesses and urban services to establish and expand locally is key to economic development and employment growth for the future wellbeing of our community.

## Local jobs for local people

Penrith City is one of Greater Sydney's fastest-growing local government areas and is rapidly transforming as a metropolitan clusters in the Western Parkland City, but growth in the number of local jobs has not kept pace with population growth. Prior to COVID-19 pandemic, as many as 61% of resident workers have to travel outside of the LGA for work.

Penrith's employment lands provide space for the vast majority of local employment. In 2016, there were 47,450 jobs located in Penrith's

## Population projections

This Strategy largely relies on the NSW Government's Department of Planning, Industry and Environment (DPIE) population projections from 2019. However, the COVID-19 pandemic and associated government restrictions are known to have had an impact on immigration and population growth. The DPIE is expected to release their next population projections in 2022. If the population projections change substantially, the number of resident workers and the number of jobs needed in the LGA will naturally be affected. These figures would be revisited in any future iteration of the Employment Lands Strategy.

<sup>2</sup> NSW Government, 2021

<sup>3</sup> Department of Planning, Industry and Environment 2019

existing industrial, commercial and special purpose health and education and tourism precincts, representing nearly 70% of all jobs in Penrith LGA. Penrith's population is projected to grow to as much as 370,000 residents over the next twenty years<sup>3</sup>. At that rate, Penrith will need to attract and enable businesses to grow the number of local jobs for local people by between 85,000 and 109,000 jobs to support our growing population and workforce. Penrith will need to provide even more jobs to fully realise its potential in the region as a thriving, innovative 30-minute city, home to new technologies and opportunities. Planned employment precincts are projected to provide up to 22,000 jobs and future employment land in the Western Sydney Airport and Aerotropolis precincts have been estimated to add a further 52,000 jobs within the LGA by 2056. Even with these opportunities, there will be a shortfall of between 10,000 and 34,000 local jobs if employment in Penrith is to keep pace with its projected population growth.

## **A thriving and resilient economy**

The wellbeing of our community depends on having a thriving and resilient economy with a diverse range of businesses and jobs across the City, not only to support our growing population, but to be ready to respond to social, economic, environmental changes that are reshaping how we live, work and move around. These changes include the city shaping impacts brought about and amplified by the COVID-19 pandemic, both the virus and the responses to help stop the spread<sup>4</sup>. These changes include greater rates of working from home, purchasing of goods and accessing services online, accelerated uptake of digital technologies, new requirements for building design and the elevated importance of access to open space and active travel for health and wellbeing. These changes present the opportunity to strengthen our economic resilience by supporting local businesses to expand and attracting new businesses to the region.

In addition to generating more jobs, there is a need for Penrith to diversify the types of jobs and industries that provide those jobs to help create a thriving and resilient economy. Penrith needs to retain a mix of industrial precinct types, strengthen its commercial centres and enhance its health and education precincts to serve local small and medium businesses as well as attract new enterprises.

We need to protect employment lands within our existing industrial areas and in our commercial centres which provide higher job density and business diversity compared to large scale industrial precincts. This diversity underpins our economic resilience and generates greater productivity in our region.

## **A reliable pipeline of new land supply of the right type in the right places**

In terms of land supply, at an LGA level Penrith has 60% of Greater Sydney's potential new employment lands supply with substantial new employment lands in the Mamre Road and the Aerotropolis precincts. However, these new employment precincts will take time to become available and serviced. These precincts will mainly cater for large floorplate, global transport, logistics and warehousing seeking proximity to Western Sydney Airport (WSA).

A similar mix of precinct types for general and light industrial uses will need to be identified as new urban areas are developed along the North-South Corridor with good access to planned new centres and transport infrastructure.

## **Great places attract investment and innovation**

Placemaking, improved public realm, good roads, public transport, and pedestrian and cycling connectivity are critical to increasing the attractiveness of employment precincts and centres.

Penrith's oldest industrial precincts lack the levels of amenity that suit contemporary expectations for safe and healthy workplaces. Improved

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4. Greater Sydney Commission 2020

amenity in our employment areas help create places where people want to work. Improving public domain amenity in existing industrial precincts helps maintain their attraction for local business owners and workers.

Our main centres, Penrith City Centre and St Marys Town Centre, are being revitalised. Continued investment in these centres will help attract and provide opportunities for new businesses to be established locally.

## WHAT ARE OUR CHALLENGES?

Beyond identifying and zoning land to enable the supply, location and site suitability for employment generating businesses, there are a number of major challenges that Council needs to take into account when planning and managing our employment lands. These challenges include:

- Increasing the number and diversity of jobs to support a growing population
- Managing rising freight movements safely and efficiently
- Supplying a variety of serviced land for a range of businesses of different types and sizes
- Enabling flexibility in the planning framework
- Improving amenity and connectivity
- Cooling the city and bolstering our resilience

## WHAT ARE OUR OPPORTUNITIES?

Penrith has a proud history as a liveable place and a welcoming community, where people can live and work comfortably and affordably. It has long served the wider Western Sydney community as a regional destination for work, to access education, shopping, health and other services, and to enjoy arts, culture, sport and recreation. On this basis, our opportunities include:

- Building on existing strengths
- Maximising new opportunities in a circular economy
- Optimising emerging technologies
- Capitalising on the changing nature of work and e-commerce

- Facilitating growth in tourism, sport and leisure, arts, culture and creative industries

## KEY MOVES IN OUR CORRIDORS

Penrith's Local Strategic Planning Statement (LSPS) 2020, introduced the concept of the Economic Triangle, a triangle anchored by Penrith City Centre, St Marys and the Western Sydney Airport at its three apexes. The opportunities identified above lend themselves to strengthening the Economic Triangle with each of the three arcs or corridors being ideal for making specific key moves:

**East-West Corridor** - This Corridor, stretching from Penrith to St Marys, encompasses large areas of existing urban development in Penrith. The corridor includes adjacent industrial precincts in North Penrith and St Marys North-Dunheved and Penrith's specialised health, education and technology precinct, locally known as The Quarter, as well as the special purpose tourism area around Penrith Panthers and the large format retail and business centre in Jamisontown. In this Corridor it will be important to identify complementary roles for Penrith City Centre and St Marys Town Centre as commercial and service centres; and safeguard employment floorspace in each to ensure long term economic viability of these centres as gateways for workers and visitors to the LGA. Improved transport accessibility will increase the desirability of station catchments for housing and employment growth.

The Quarter health and education precinct includes Nepean Hospital, Western Sydney University Kingswood and Werrington campuses and NSW TAFE Western Sydney Institute Kingswood campus. This precinct generates one in 10 local jobs in Penrith LGA. To reinforce the important employment role that this precinct provides will require advocating and enabling better connections by rapid and frequent public transport connections between the precinct and St Marys and Penrith City Centre. The Quarter, together with the development of the Sydney Science Park, located in the Northern Gateway



precinct of the Western Sydney Aerotropolis, will emerge as an innovation core to Penrith's Economic Triangle.

**North-South (New Enterprise) Corridor** – The North-South Corridor stretches from St Marys North-Dunheved Industrial precinct to the Western Sydney Airport. It is delineated by the Sydney Metro Western Sydney Airport rail line, major roads and future Outer Sydney Orbital motorway, which will ultimately connect Penrith's two planned intermodal terminals in St Marys North and in the Mamre Road industrial precinct. Future centres with Metro Stations, will also need to provide space for employment opportunities and offer services to residents close-to-home. It is critical that the Sydney Metro Western Sydney Airport rail line facilitates jobs growth and the access to those jobs.

Opportunities to build on the existing strengths and businesses in this Corridor include advanced manufacturing, and freight and logistics to support the Western Sydney Airport and Aerotropolis. The presence of a number of resource recovery and recycling facilities in the North-South Corridor lends itself to an expansion of these businesses as well as new and emerging sectors supporting a circular economy.

**Western (Scenic) Corridor** - The Scenic Corridor stretches from the Western Sydney Airport north to Penrith and Penrith Lakes. By preserving and enhancing the unique natural, scenic and cultural landscapes from the Airport along the river to Penrith Lakes, new business and employment opportunities may be supported by activities such as nature-based tourism, heritage and farm gate trails, accommodation options, sporting and recreational experiences, lifestyle activities, and Aboriginal cultural education experiences.

The Northern Road will connect the proposed Agribusiness precinct, on the western side of the Aerotropolis, with Penrith's northern rural lands. The Agribusiness precinct presents an opportunity for Penrith's agricultural production and agricultural supply chain businesses to expand and become more export oriented.

## Corridors and Centres

Following the Employment Lands Strategy, Council will be developing a Corridors and Centres Strategy as part of its "Places of Penrith" suite of strategies. The Corridors and Centres Strategy is expected to delve further into the function and future of the Corridors, as well as individual centres.

## STRATEGIC DIRECTIONS AND ACTIONS

In addressing the challenges and planning for growth the Employment Lands Strategy sets out four Strategic Directions that are aligned to the LSPS vision of Penrith as a connected, healthy, innovative and balanced city.



### Connected

Deliver a safe, efficient and sustainable 30-minute city



### Healthy

Support the health and wellbeing of workers, residents and visitors



### Innovative

Build on existing strengths and attract new enterprise



### Balanced

Protect our environment and strengthen our resilience

## COMMUNITY CONSULTATION

The Employment Lands Strategy aims to build on the strengths that exist in Penrith's diverse employment lands and maximise the employment and economic opportunities offered by the development of the Western Sydney Airport and associated investment.

## EXECUTIVE SUMMARY

The draft Employment Lands Strategy was exhibited for public comment from 8 June to 3 August 2021. Penrith City Council invited comment, feedback and ideas on the draft Strategy through online surveys, interviews, social media polls and written submissions. Feedback was received from 266 survey respondents, 12 written submissions from organisations and 15 interviews with local businesses.

There was strong support for all four key directions set out in the Strategy. The Employment Lands Strategy has been refined to reflect community input and issues raised in written submissions.

### IMPLEMENTATION AND MONITORING

Implementation of the Employment Lands Strategy will be considered in the development of Council's next Community Strategic Plan and Delivery program. This will allow a coordinated approach to the implementation of the strategy and monitoring of progress. An Implementation Plan to realise the strategic directions and actions of the Strategy, and guide its delivery, sets out Council's role and responsibilities in relation to the actions with timeframes for delivery.

# 1. INTRODUCTION

Employment lands are essential to the functioning of productive cities. The industries and businesses that locate in these spaces support jobs growth and economic development that generate significant economic and social benefits for the community.

In 2017, Council adopted an Economic Development Strategy (EDS) that set an aspirational target of up to 55,000 additional jobs by 2031. Achieving this target would improve the proportion of jobs to working residents (job containment ratio) from 0.71 in 2016 to 0.99, based on 2016 population projections. That is around one job for every resident worker.

Since the EDS was adopted, the development of the Western Sydney Airport and Aerotropolis and other major infrastructure investments by State and Federal governments through the Western Sydney City Deal requires a rethink of the approach to planning and management of land for employment. The recently announced rezoning of Mamre Road Industrial precinct and fast tracking of major projects like the Sydney Metro Western Sydney Airport have expedited the need to have a position on employment lands across the Penrith LGA.

Prior to the COVID-19 pandemic Penrith's population was projected in 2019 to grow to more than 370,000 over the next twenty years. While population growth has been impacted by the global COVID-19 pandemic, population growth in the LGA will likely gather pace again beyond the next five years. To plan for a return to a high level of population growth, it is estimated that Penrith will need to provide many more jobs to fully realise its potential in the

Western Parkland City and achieve a vision of a thriving, innovative 30-minute city, home to new technologies and opportunities.

## 1.1 POSITIONING PENRITH FOR A PRODUCTIVE FUTURE

Penrith City is at a turning point. The recent shocks and stressors of extreme weather events of heatwaves, bushfires, floods followed by the COVID-19 pandemic has impacted all aspects of our lives and economy. The COVID-19 pandemic has highlighted the value of having a strong local manufacturing sector, efficient freight and logistics and advanced information and communication technologies. These sectors have been identified in the NSW Government's COVID-19 Recovery Plan<sup>5</sup> as presenting prime opportunities for rebuilding an even more resilient economy.

The NSW Government is positioning Western Sydney to become the national capital for advanced manufacturing, built around the Western Sydney International Airport and development of the Aerotropolis precincts, along with its connecting infrastructure. With a strong manufacturing and freight and logistics base in our existing employment lands, and 60% of Greater Sydney's potential future employment lands within its boundaries, Penrith can leverage these opportunities to become a leader in enabling sustainable economic growth and productivity.

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5. NSW Government, 2021



## 1.2 PENRITH EMPLOYMENT LANDS STRATEGY

The Penrith Employment Lands Strategy is intended to help guide Council's future planning. The development of this Employment Lands Strategy is an immediate action (Action 12.1) identified in the Penrith Local Strategic Planning Statement (LSPS) under Planning Priority 12 to 'Enhance and grow Penrith's Economic Triangle'.

The Employment Lands Strategy responds to the Western City District Plan's<sup>6</sup> principles to 'retain and manage' existing employment lands, and to 'plan and manage' new employment lands.

### 1.2.1 Aim

The Employment Lands Strategy aims to strengthen the economic development and resilience of Penrith as a productive and innovative city and to improve community wellbeing in an environmentally responsible way.

## 1.3 WHAT ARE EMPLOYMENT LANDS?

Penrith's employment lands are located in precincts of varying size and function. These employment precincts provide sites for the vast majority of Penrith's businesses, from global enterprises to the many local small to medium enterprises (SMEs). The New South Wales (NSW) Government's Department of Planning, Industry and Environment (DPIE) provides annual updates on the stock of industrial and business zoned lands across greater Sydney through its Employment Lands Development Monitor (ELDM).

Penrith City Council takes a broader definition of employment lands than the ELDM. In this Strategy, employment lands refer to lands that are zoned in planning instruments for:

- Industrial and urban services or similar purposes
- Commercial and business purposes
- Land for employment generating special purposes such as health and education, tourism, entertainment, infrastructure or other special purposes

### 1.3.1 Industrial and urban services lands

Industrial and urban services lands are areas that contain a variety of land uses, including major freight and logistics, heavy manufacturing, light industry, urban services and new economy or creative uses. These industries generate significant economies and investments for the State and are essential to the effective functioning of urban areas.

Industrial and urban services land include industrial zoned land that provide the essential space for the delivery of:

- utilities and urban services, including depots, repair trades and service centres,
- goods including the research, design and manufacturing of goods through to their warehousing, distribution and sale.

Across Penrith LGA, our main industrial lands are in Erskine Park, St Marys North – Dunheved, North Penrith, Emu Plains and Jamisontown. Together these five main industrial precincts cover 1,506 hectares and provide for over 22,300 jobs. A detailed profile of each of our five main industrial precincts has been compiled in the Penrith Industrial Precinct Technical Report.

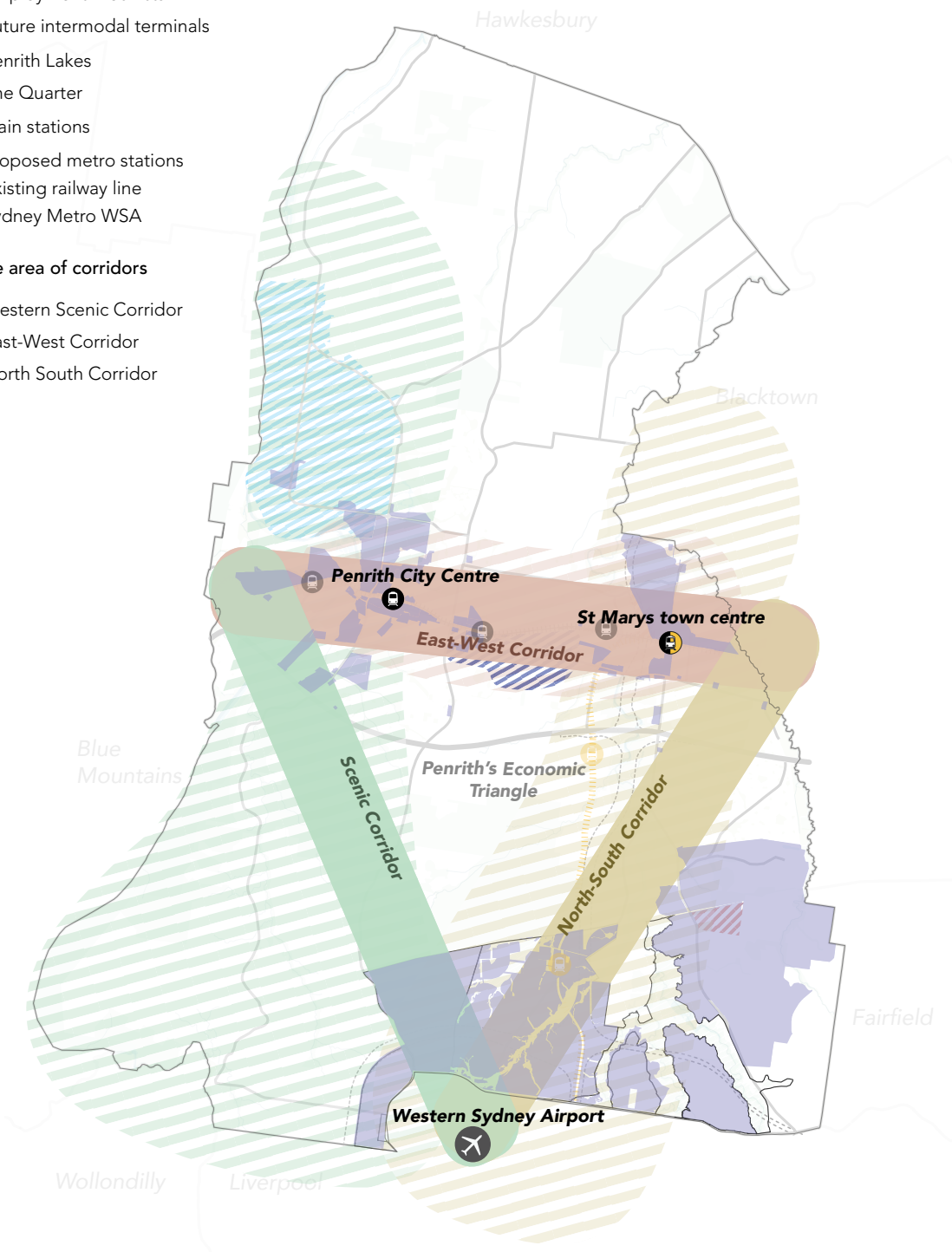
### 1.3.2 Commercial centres and business parks

Commercial and business land includes areas for office-based businesses, services and retail functions. These types of activities are generally located in commercial centres and business parks.

6. Greater Sydney Commission, 2018a

# Map 1: Penrith's Economic Triangle

- Employment Precincts
  - Future intermodal terminals
  - Penrith Lakes
  - The Quarter
  - Ⓜ Train stations
  - 🚇 Proposed metro stations
  - Existing railway line
  - Sydney Metro WSA
- Indicative area of corridors**
- Western Scenic Corridor
  - East-West Corridor
  - North South Corridor



Commercial centres are areas of concentrated employment in retail and office-based businesses and services. They are important for jobs growth and but also serve civic, cultural and community functions.

Penrith's main commercial centres are Penrith City Centre, which is the central business district (CBD) of the LGA, and St Marys Town Centre. Penrith City Centre is the historical core of Penrith LGA and acts as the administrative, civic and retail hub providing almost 13,000 jobs and services for communities in a catchment that extends beyond the Blue Mountains and the Hawkesbury. St Marys Town Centre is a strategic centre that is around half the size of Penrith City Centre and provides around 4,000 jobs. St Marys is set to transform into an important transport interchange and business hub with construction of the Sydney Metro WSA rail that will connect St Marys directly to the Western Sydney Airport.

Business parks can support a mix of manufacturing, logistics, warehousing, research and development and office functions in the one place. Large business parks differ from traditional commercial office centres as they are generally purpose built and located away from traditional commercial centres. They also often include retail and service functions.

Penrith has two large precincts identified as business parks. The first is the Werrington business park which is part of the Western Sydney University on its Werrington south campus and covers 71 hectares. It is the site of the Werrington Park Corporate Centre, a 3-storey commercial building providing 5,500 square metres of commercial space. Other commercial development within the precinct has been limited and the site presents an opportunity for future employment generating development

The second business park is Sydney Science Park, an area of 163 hectares under development,

that is located within the Northern Gateway precinct of the Western Sydney Aerotropolis. The Science Park is based on the character of university towns and is expected to provide up to 12,000 new jobs across a variety of sectors including health, education and research. The Science Park is planned to have a town centre that is transit-oriented and include 30,000 square metres of retail floorspace with potential for retail development in other select locations in the precinct<sup>7</sup>.

Retail businesses are primarily concentrated in commercial centres and business parks but can also be located in industrial lands and dedicated business precincts. Outside of the two main commercial centres, Penrith's large format retail businesses are concentrated in the Jamisontown employment precinct. This precinct accounts for around 1,000 retail jobs, compared to just over 2,000 retail jobs in Penrith City Centre and 470 retail jobs in St Marys Town Centre.

### 1.3.3 Special purpose zoned lands

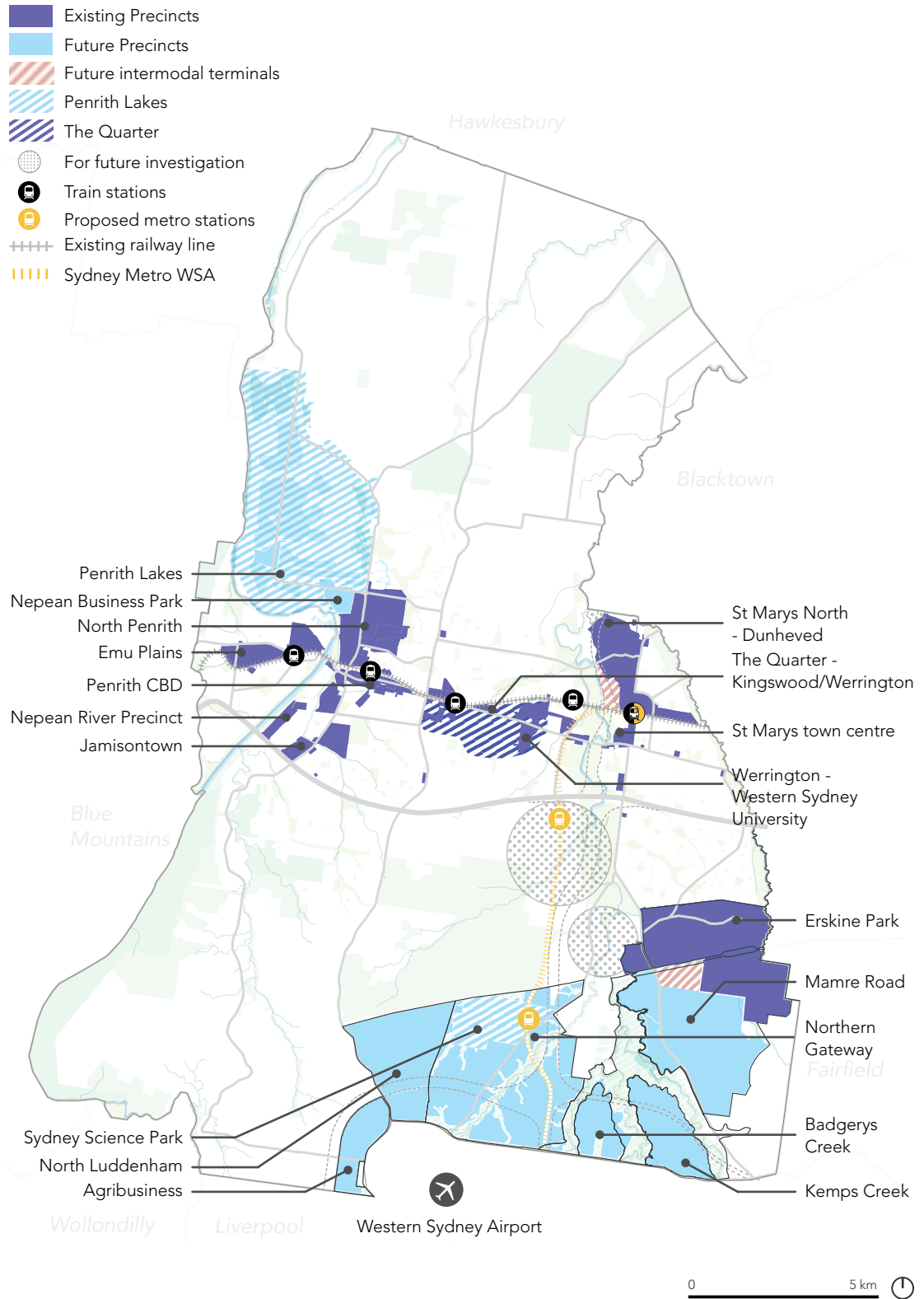
Special use precincts include areas of land for hospitals and health care, education institutions as well as tourism activities and some infrastructure. Where these are employment generating lands they are considered in this strategy.

Of particular importance is Penrith's health and education precinct, known as The Quarter comprising Nepean Hospital, Western Sydney University, and Western Sydney Institute of TAFE NSW in Kingswood. This precinct provides 1,760 jobs in Education and Training and over 3,600 jobs in Health Care and Social Assistance, two of Penrith's largest industries by employment.

In Penrith, the special purpose lands along the Nepean River have become a regional tourism and leisure destination. The precinct includes Penrith Panthers Leagues Club, hotel and conference facilities and a range of dining and leisure activities providing almost 1,000 jobs. Over time it is anticipated that demand for sites for tourism and leisure will grow especially with future development of Penrith Lakes.

<sup>7</sup> Department of Planning, Industry and Environment, 2020c

## MAP 2: Existing and Future Employment Precincts





## 1.4 WHERE ARE PENRITH'S EMPLOYMENT LANDS?

Penrith's economy benefits from having substantial areas of employment lands that are diverse in nature, scale and function. Future employment precincts have been identified within Western Sydney Airport Aerotropolis precincts and Penrith Lakes. There is potential to provide new precincts to strengthen the diversity of our employment lands within Penrith's urban investigation area in Orchard Hills and in the broader Western Sydney Employment Area (WSEA).

### 1.4.1 Penrith's Economic Triangle

Penrith's existing and future employment precincts are located within the three arcs of Penrith's Economic Triangle. The Penrith LSPS introduced the concept of the 'Economic Triangle' to help guide future development across three intersecting corridors that connect Penrith Central Business District (CBD) and St Marys Town Centre to the Western Sydney Airport. As shown in Figure 1, these corridors comprise:

- The East-West Corridor from St Marys through to Emu Plains is anchored by the two commercial centres of Penrith CBD and St Marys Town Centre, connected by the T1 Western rail line, the Great Western Highway and the M4 Motorway.
- The North-South Corridor forms a new enterprise arc from St Marys to the Western Sydney Airport and on to the planned Aerotropolis. The Corridor is connected by Mamre Road with future connections along the Sydney Metro WSA rail line and the Outer Sydney Orbital.
- The Western Scenic Corridor that connects Western Sydney Airport north to Penrith Lakes following the Nepean River along Mulgoa Road, where it intersects with the East West Corridor, then extends further north along Castlereagh Road.

Central to the East-West Corridor lies Penrith's existing health and education precinct, locally known as The Quarter, which includes Nepean Hospital, Western Sydney University Kingswood and Werrington campuses and TAFE NSW Western Sydney Institute's Kingswood Campus.

A future Health and Education precinct at Sydney Science Park is planned for the North-South Corridor. Together these two health and education precincts will provide an innovation core to support growth in Penrith's Economic Triangle.

An economic analysis of strategic assets and economic and market drivers across Penrith's employment precincts can be found in the North-South Corridor Study.<sup>8</sup>

### Penrith's rural lands

Penrith's rural lands lie outside of Penrith's employment lands but still generate a variety of economic and employment opportunities. Penrith's rural lands were the subject of a separate draft Rural Lands Strategy prepared for the Penrith LSPS. They will be further considered the context of other strategies currently under development.

Penrith's rural economy will have added impetus with the development of the Agribusiness precinct planned within the Western Sydney Aerotropolis.

The Agribusiness precinct plan incorporates Luddenham village as a Local Centre anticipating employment in tourism and cultural uses. The Agribusiness precinct plan identifies new employment zone centres across the precinct and flexible enterprise land uses in the north of the precinct.

These opportunities for new enterprise and employment in Agribusiness in Penrith will be subject to further investigation.

8. *Mecone Atlas Urban Economics, 2021*



A growing city needs to be a working city. It needs spaces that allow it to function, make and create.

Greater Sydney Commission (2018)  
A Metropolis that Works

### 1.4.2 Penrith's existing employment precincts

As shown in Figure 1, Penrith's existing employment lands include:

- Penrith's two main commercial centres
  - Penrith CBD
  - St Marys town centre
- The Quarter health and education precinct
- Five primary industrial precincts:
  - Erskine Park
  - St Marys
  - North-Dunheved
  - North Penrith
  - Emu Plains
  - Jamisontown
- Several smaller secondary industrial and business zoned precincts
- Special purpose lands zoned for tourism along the Nepean River

### 1.4.3 Penrith's future employment precincts

Future employment precincts that have already been identified in the Penrith LGA are:

- Nepean Business Park
- Mamre Road Industrial Precinct
- Sydney Science Park (located in Northern Gateway precinct)

Planning for the Western Sydney Aerotropolis Precincts also includes future employment land within the Penrith LGA in the following precincts:

- Northern Gateway
- North Luddenham
- Badgerys Creek (part)
- Kemps Creek (part)
- Agribusiness (part)

There is also potential to identify and zone additional employment lands as part of the planning for the future development of:

- Penrith Lakes
- Orchard Hills urban investigation area
- Broader Western Sydney Employment Area

## 1.5 WHY DO WE NEED AN EMPLOYMENT LANDS STRATEGY?

Penrith City is one of Greater Sydney's fastest-growing local government areas and is rapidly transforming from an outer urban area to a thriving diverse metropolitan cluster of regional significance to Greater Sydney and the NSW economy.

Penrith's population is forecast to grow to around 370,000 people over the next twenty years<sup>4</sup>. Penrith's urban and rural areas and our economy are being reshaped by the once in a generation development of the Western Sydney Airport and transport projects that will support it, including the Sydney Metro Western Sydney Airport, Western Sydney Freight Line, M12 Motorway and Outer Sydney Orbital.

While the economic impact of the COVID-19 pandemic has created some uncertainty about Penrith's population and economic growth in the short term, it has underscored the need to

reinvigorate our economic development and resilience to support our community in the longer term.

Penrith's status as part of the Western Parkland City (WPC) and the emerging Western Sydney Aerotropolis mean that Penrith will require continued transformational change with strong growth in jobs, services and housing over the coming decades.

The need for Council to have a position on managing its employment lands is now more pressing than ever. Given the urgency with which the state and federal governments are seeking to stimulate post-COVID-19 economic recovery, including the announcement of the acceleration of Mamre Road Precinct rezoning, we need to ensure our employment lands deliver sustained employment growth and strengthen our economic resilience into the future.

### 1.5.1 Local jobs for local people

Penrith City is one of Greater Sydney's fastest-growing local government areas and is rapidly transforming as one of three metropolitan clusters in the Western Parkland City. Penrith's population is projected to grow to around 370,000 over the next twenty years<sup>9</sup>. The COVID-19 pandemic and government restrictions are known to have impacted immigration and population growth, and accordingly, a further projection is expected to be released in 2022.

At that rate, Penrith will need to attract and enable businesses to grow the number of local jobs for local people by between 85,000 and 109,000 jobs to support our growing population and workforce. Penrith will need to provide even more jobs to fully realise its potential as a Local Government Area serving a regional function and to achieve a vision of a thriving, innovative 30-minute city, home to new technologies and opportunities.

### 1.5.2 A thriving and resilient economy

The wellbeing of our community depends on having a thriving and resilient economy with a diverse range of businesses and jobs across the City, not only to support our growing population, but to be ready to respond to social, economic, environmental changes that are reshaping how we live, work and move around. These changes include the city shaping impacts brought about and amplified by the COVID-19 pandemic, both the virus and the responses to help stop the spread<sup>10</sup>. These changes include greater rates of working from home, purchasing of goods and accessing services online, accelerated uptake of digital technologies, new requirements for building design and the elevated importance of access to open space and active travel for health and wellbeing. These changes present the opportunity to strengthen our economic resilience by supporting local businesses to expand and attracting new businesses to the region.

In addition to generating more jobs, there is a need for Penrith to diversify the types of jobs and industries that provide those jobs to help create a thriving and resilient economy.

Penrith needs to retain a mix of industrial precinct types, strengthen its commercial centres and enhance its health and education precinct to serve local small and medium businesses as well as global enterprises.

### 1.5.3 A reliable pipeline of new land supply of the right type in the right places

In terms of land supply, at an LGA level Penrith has 60% of Greater Sydney's potential new employment lands supply with substantial new employment lands in the Mamre Road and the Aerotropolis precincts. However, these new employment precincts will take time to become available and serviced. These precincts will mainly cater for large floorplate, global transport, logistics and warehousing seeking proximity to Western Sydney Airport.

9. Department of Planning, Industry and Environment, 2019

10. Greater Sydney Commission 2020

Therefore, we need to retain and manage our existing industrial areas which lie along our East-West Corridor. These existing industrial precincts closer to the centres of Penrith and St Marys provide higher job density and greater business diversity compared to larger scale industrial precincts like Erskine Park. A similar mix of precinct types for general and light industrial use could be considered for future development close to new centres planned for the North-South Corridor close to transport in Orchard Hills and Luddenham.

### 1.5.4 Great places attract investment and innovation

Placemaking, improved public realm, good public transport, and pedestrian and cycling connectivity are critical to increasing the attractiveness of employment precincts and centres.

Penrith's older existing industrial precincts lack the levels of amenity that suit contemporary expectations for safe and healthy workplaces. Our centres are in a period of renewal. We need better amenity in our employment areas to create places where people want to work.

Continued investment in our centres will help create an opportunity for Penrith to attract businesses to set up work areas locally instead of have their workers travelling into the city. Similarly, by improving public domain amenity in existing industrial precincts we can maintain their attraction for local business, start-ups and scale ups.

In the post-pandemic era, cities will require high-quality place making, encouraging open streets, arts, culture and nature, to ensure their central CBDs and suburban areas have distinct identities and clear areas of industry specialisation<sup>11</sup>.

### 1.6 PURPOSE

The purpose of the Employment Lands Strategy is to provide guidance for Council's future planning, property development and economic initiatives to strengthen Penrith's economic resilience and improve community wellbeing in an environmentally responsible way.

The Employment Lands Strategy is intended to:

- a. identify and protect strategically important employment lands
- b. encourage a diverse mix of high-quality employment opportunities that strengthen Penrith's Economic Triangle.
- c. facilitate renewal and release of employment land precincts to attract business investment to generate economic growth and enhance Penrith's role in the Western Parkland City
- d. identify and create additional industrial and urban services land in land release areas where suitable to service the growing population, to grow jobs closer to home and help achieve a 30-minute city
- e. consider and facilitate contemporary and future industry requirements and market preferences for employment lands, such as, office development in industrial zones where it does not compromise industrial or urban services activities; and adaptation of industrial and warehouse buildings through increased floor to ceiling heights
- f. identify suitable locations and encourage opportunities for new smart work hubs that encourage and support local entrepreneurship
- g. inform the review of current planning controls and create capacity to achieve the job targets across industry sectors

### 1.7 APPROACH

The Employment Lands Strategy has progressed through five phases and considered both land use planning and economic development outcomes concurrently.

The first phase involved a review of existing employment precincts, including a land use audit and analysis of employment and industry sectors conducted by HillPDA based on ABS Census 2016 data.

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11. Greater Sydney Commission 2021

Phase 2 involved further analysis by HillPDA of the supply and demand for employment lands to meet jobs growth targets in light of new DPIE 2019 population projections.

Phase 3 involved consideration of various scenarios for growth and market trends across retail, commercial and industrial property.

Phase 4 involved planning for future industry growth based on analysis of the character and land use within each of the main industrial precincts as well as consideration of opportunities for economic development in the North-South Corridor provided by Mecone and Atlas Urban Economics.

The final phase of developing the strategy involved consideration of actions and differentiating between what Council can deliver, what development and investment Council can influence, and what requires advocacy for investment or involvement from other tiers of government.

## 1.8 COMMUNITY CONSULTATION

A draft Employment Lands Strategy was developed, guided by the vision and priorities of Council's Local Strategic Planning Statement, based on feedback from the community. The directions and action in the draft Employment Lands Strategy formed the basis for a range of community engagement activities to gather comment from residents, local businesses and other agencies.

The draft Employment Lands Strategy was exhibited for public comment from 8 June to 3 August 2021. Penrith City Council invited comment, feedback and ideas on the draft Strategy through online surveys, interviews, social media polls and written submissions. Feedback was received from 266 survey respondents, 12 written submissions from organisations and 15 interviews with local businesses.

There was strong support for all four key directions set out in the Strategy. The Employment Lands Strategy has been refined

to reflect community input and issues raised in written submissions.

## 1.9 STRUCTURE

The structure of this strategy includes an overview of the strategic planning context for Penrith's employment lands in Section 2. Penrith's existing employment lands supply is summarised in Section 3. The economic contribution of Penrith's employment lands is outlined in Section 4 followed by analysis of some of the market trends evident in different types of employment lands in Section 5.

The implications of population and jobs growth for future supply of employment lands is considered in Section 6, followed by a summary of the challenges in Section 7 and opportunities this presents for Penrith in Section 8.

The Strategic Directions and Actions identified to respond to these challenges and opportunities are outlined in Section 9 with a plan for implementation and monitoring outlined in Section 10.

# 2. STRATEGIC CONTEXT

There is a hierarchy of plans that govern the management of employment lands from the State and metropolitan level to the local precinct level.

## 2.1 PENRITH COUNCIL STRATEGIC PLANS

The Employment Lands Strategy is aligned to Penrith City Council's aspirations and vision for the social and economic development of the Penrith Local Government Area as is set out in its strategic planning documents:

- Penrith Community Plan<sup>12</sup> (2017)
- Local Strategic Planning Statement<sup>13</sup> (2020)
- Economic Development Strategy<sup>14</sup> (2017)



### 2.1.1 Penrith Community Plan (2017)

The Employment Lands Strategy focusses on Council's strategic outcomes as set out in the Community Plan 2017, Delivery Program 2017-21 and Operational Plan 2019-20. Specifically, the Strategy aims to help realise two key community outcomes:

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<sup>12, 13, 14.</sup> Penrith City Council

**Outcome 1:** We can work closer to home

**Outcome 2:** We plan for our future growth.

Council's community plan is currently being updated following extensive engagement over the last twelve months. The need to plan and manage development across the LGA, and to ensure there are sufficient local employment economic opportunities for our growing population, especially our young people, remain high priorities for our community.



### 2.1.2 Economic Development Strategy (2017)

The 2017 Economic Development Strategy (EDS) set out how Council can best support economic development, foster greater investment and grow jobs in Penrith. The Strategy set an aspirational target for up to 55,000 additional jobs by 2031. It identified growing new jobs in a range of sectors with a focus on health, education, tourism, arts and culture, advanced manufacturing and advanced logistics, complemented by growth in service activity in the night-time economy.

If achieved, this target would vastly improve the proportion of jobs to working residents (job containment ratio) from 0.71 local jobs for every resident worker to almost one local job for every resident worker (a jobs to worker ratio of 0.99). This ambitious jobs target was based on 2016 population projections, which have subsequently been updated by the State Government in 2019. A further population projection is expected in 2022.

With the next ABS Census 2021 data becoming available in the next twelve months, it will be timely to reconsider our jobs growth targets across industry sectors and renew Council's economic development activities that can help achieve them.



### 2.1.3 Penrith Local Strategic Planning Statement (2020)

The Local Strategic Planning Statement (LSPS) outlines a vision for economic, social, and environmental land use over the next 20 years. The LSPS introduces the concept of the Economic Triangle with Penrith, St Marys and Western Sydney Airport at its apexes. The Economic Triangle encompasses the main areas for economic activity across the LGA. The development of an Employment Lands Strategy is an immediate action (Action 12.1) identified in the LSPS under planning priority 12 to 'Enhance and grow Penrith's Economic Triangle'.

Critical to the success of the Economic Triangle are the new city shaping transport connections, including the Sydney Metro WSA that will provide a north-south rail link between St Marys and WSA. The LSPS highlights the key transport infrastructure needed to support the growth of Penrith. It emphasises the need to consider planning for

increasing freight movements as Airport operations expand.

The LSPS identifies the Health and Education precinct in Kingswood and Werrington, known locally as 'The Quarter', as an international destination for investment in health services, education, research, and related technology that has great potential for jobs growth. The LSPS recognises the many benefits associated with growing tourism, and the arts and cultural industries, that attract investment in our centres and contribute to a vibrant night time economy.

The key planning priorities in the LSPS that are relevant to employment lands are:

#### Planning Priority 9

Support the North-South Rail Line and emerging structure plan

#### Planning Priority 10

Provide a safe, connected and efficient local network supported by frequent public transport options

#### Planning Priority 11

Support the planning of the Western Sydney Aerotropolis

#### Planning Priority 12

Enhance and growth Penrith's Economic Triangle

#### Planning Priority 13

Reinforce The Quarter as a specialised health, education, research and technology precinct

#### Planning Priority 14

Grow our tourism, arts and cultural industries

#### Planning Priority 14

Boost our night-time economy

## 2.2 A METROPOLIS OF THREE CITIES

The Employment Lands Strategy responds to the vision and actions in the Greater Sydney Commission's (GSC) Greater Sydney Region Plan<sup>15</sup> and Western City District Plan (WCDP)<sup>16</sup> (2018) regarding planning for centres and reviewing Council's industrial and urban services land.



### 2.2.1 Greater Sydney Region Plan (2018)

The Greater Sydney Region Plan sets a vision for a productive metropolis of three cities where people can easily access a wide range of jobs, facilities and services within 30 minutes of their home by public or active transport. Under Objective 23 of the Greater Sydney Region Plan (2018), the retention, growth, and enhancement of industrial and urban services land should reflect the needs of each of Greater Sydney's three cities, and their local context. It should provide land for a wide range of businesses that support the city's productivity and integrated economy.

The plan identifies three approaches to managing industrial land: to review and manage older employment lands that are transitioning to other purposes; to retain and manage existing productive employment lands; and to plan and manage new future employment lands to meet the needs of a growing population and thriving economy.

<sup>15</sup> Greater Sydney Commission 2018

<sup>16</sup> Greater Sydney Commission 2018a

These principles are intended to ensure there is sufficient land for employment purposes to support population growth and that new tracts of employment lands are identified and strategically planned to ensure sufficient supply and enable jobs growth.

The Penrith LGA is a major contributor to employment lands in the Western Parkland City. The two approaches that apply to employment lands in Penrith are:

- **Retain and Manage**

This principle applies to all existing productive employment, industrial and urban services land to safeguard it from competing pressures especially residential and mixed-use zones. This approach has the objective to retain land for economic and employment purposes with management to evolve as business practices change and for economic activities required for Greater Sydney's operation, such as urban services. The GSC's thought leadership paper 'A Metropolis that Works' also advocates for caution in allowing additional permissible uses, which in the longer-term might impact the productivity of industrial and urban services areas. This should be a consideration for Council if required to translate its existing Industrial

### Review of Retain and Manage policy

The GSC is leading a cross-agency review of the industrial and urban services lands Retain and Manage policy under 2018 the Greater Sydney Region Plan.

The Review responds to Recommendation 7.5 of the NSW Productivity Commission's 2021 White Paper: Rebooting the Economy, to identify and adopt the approach that maximises the State's welfare in the next update to the Greater Sydney Region Plan.

The review is scheduled to be completed by the end of 2021.



zones as part of the proposed Employment Zone Reform (see discussion in Section 3.3)

- **Plan and Manage**

This principle specifies that strategic plans are prepared to determine the need for industrial land in land release areas, accompanied by timely infrastructure and sequencing. This relates to the new employment precincts in the LGA, especially those that are part of the Aerotropolis.

## 2.2.2 Western City District Plan (2018)

The Western City District Plan (2018) provides a link between the Region Plan and local planning. It articulates how the objectives of the Greater Sydney Region Plan are to be achieved for the Western Parkland City. It sets out to establish the land use and transport structure to deliver a liveable, productive and sustainable Western Parkland City.

A key objective of the District Plan is to capitalise on the Western Sydney Airport and Aerotropolis by bringing together infrastructure, businesses, and knowledge-intensive jobs. The plan aims to create collaboration and strong relationships in the Western Parkland City between the Western Sydney Aerotropolis with its key centres,

including Greater Penrith. This, in part, will be realised through the Sydney Metro Western Sydney Airport rail line which is integral to creating more and diverse jobs in the Western City District. Planning for urban development, new centres and employment uses that optimise the public value and use of the Sydney Metro Western Sydney Airport rail is identified as a key action for councils and other planning authorities.

Importantly the District Plan sets out key planning priorities for growing jobs and skills in the Western Parkland City:

- **WCDP Planning Priority W8 - Jobs and Skills** - Leveraging industry opportunities from the Western Sydney Airport and Badgerys Creek Aerotropolis
- **WCDP Planning Priority W9 - Jobs and Skills** - Growing and strengthening the metropolitan cluster
- **WCDP Planning Priority W10 - Jobs and Skills** - Maximising freight and logistics opportunities and planning and managing industrial and urban services land
- **WCDP Planning Priority W11 - Jobs and Skills** - Growing investment, business opportunities and jobs in strategic centres



The District Plan provided the impetus to adopt a place-based approach to planning and development of the Western Parkland City metropolitan cluster, including Greater Penrith. Planning for the cluster has evolved as the Greater Penrith Collaboration Area Place Strategy.

### **2.2.3 Greater Penrith Collaboration Area Place Strategy<sup>17</sup> (2018)**

The Greater Penrith Collaboration Area Place Strategy, was identified in the Western City District Plan. It recognises Greater Penrith as a key metropolitan centre and cluster in the Western Parkland City which has diverse and expansive economic opportunities to serve a growing catchment. The Place Strategy also recognises Greater Penrith's transport connections and the key opportunity provided by Sydney Metro Western Sydney Airport. Specifically the Place Strategy aims to revitalise and grow the Penrith CBD as a viable commercial core as well as to reinforce, capitalise and support the expansion of the Penrith health and education precinct.

### **2.2.4 Western Sydney City Deal and Greater Penrith to Eastern Creek corridor**

The Western Sydney City Deal, signed on 4 March 2018, brought together the Australian and New South Wales governments and the eight local councils in the Western Parkland City to work collaboratively to set the investment foundation for the Western Parkland City and implement a series of 38 commitments to deliver transformative change to the region over the next 20 years.

One commitment of the Western Sydney City Deal involves the land use and infrastructure planning for a new Growth Area for the Greater Penrith to Eastern Creek (GPEC) corridor.

This aims to ensure new housing can be planned, delivered and integrated with new infrastructure such as schools, health care and transport. Balancing the supply of land for housing and for employment purposes and urban services in this investigation area will be key to achieving liveability in the corridor and broader aims of the City Deal for the Western Parkland City.

## **2.3 Regional context**

Penrith's employment lands play a significant role in Greater Sydney's and NSW's economy. Penrith's industrial lands form a large part of the Western Sydney Employment Area (WSEA). Penrith's industrial and urban services lands represent:

- 11% of Greater Sydney's existing zoned and serviced industrial and urban services land
- 20% of Greater Sydney's undeveloped and serviced industrial and urban services land

Our employment lands will become even more important for Greater Sydney's economy because Penrith has around:

- 40% of zoned employment land in the Western Sydney Aerotropolis
- 60% of all Sydney's potential future supply.

## **2.4 Future Transport 2056**

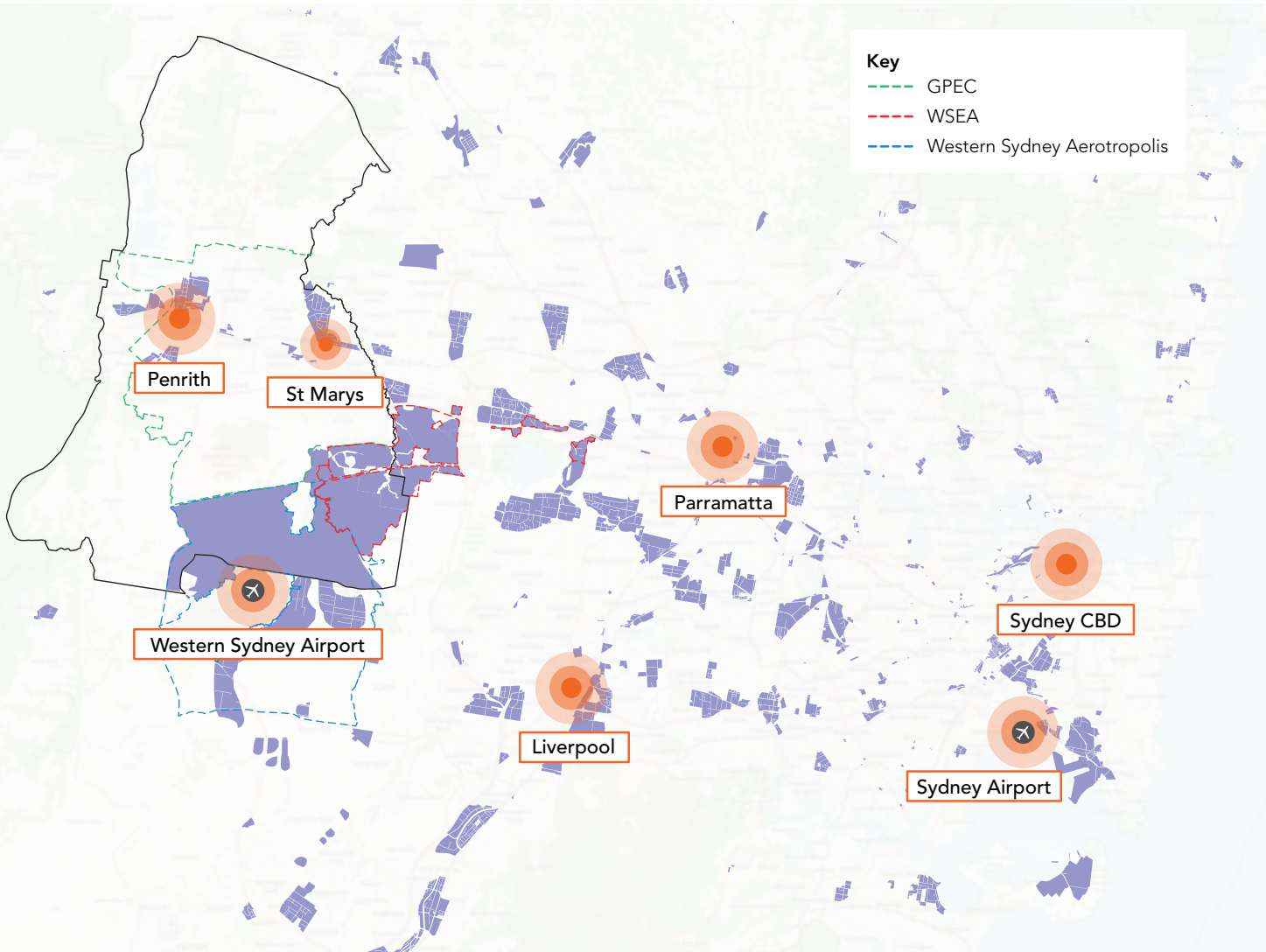
Future Transport 2056 sets a 40-year vision, directions and principles for customer mobility in NSW. It set out to guide transport investment over the longer term. It was developed collaboratively with the Greater Sydney Commission, Infrastructure NSW, and the Department of Planning, Industry and delivering an integrated vision to balance the need for movement and efficient transport corridors with enhanced liveability and attractive places.

Future Transport 2056 includes multiple transport projects under construction and planned in Penrith LGA providing greater connectivity to other parts of Greater Sydney, regional NSW and the Western Sydney Airport (WSA). These projects include upgrades to the Northern Road and Mamre Road already in development.

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<sup>17</sup>. Greater Sydney Commission 2018b

## MAP 3 Penrith LGA within the Greater Sydney Region



The Sydney Metro WSA rail link and proposed rapid bus network routes will help connect people to strategic centres, the WSA and Aerotropolis.

### 2.5 NSW Freight and Ports Plan 2018-2023

The NSW Freight and Ports Plan 2018-2023 is a supporting plan to Future Transport 2056. It provides direction for managing NSW's growing freight task. Freight in NSW is set to grow by 28%

by 2036, accelerated by logistics technologies and online retail. About 80% of the Greater Sydney freight task is undertaken by road so making the shift from road to rail is a government priority. Penrith has two intermodal terminals planned, one in St Marys North and one in Mamre Road employment lands both planned to be connected to the rail freight network. These will be critical for easing road congestion in Greater Sydney, particularly for moving containers to and from Port Botany.

# 3. EMPLOYMENT LAND USE ZONING & SUPPLY

It is critical that there is enough land located in the right places to support the economic activities that provide enterprise opportunities for businesses, generate jobs and provide essential goods and services for communities.

The NSW Department of Planning, Industry and Environment (DPIE) has been monitoring the status and availability of existing and potential future industrial land and business parks as part of the Employment Lands Development Monitor (ELDM) since 2010. Information from the ELDM 2020<sup>18</sup> as well as the Penrith Employment Land Use Study<sup>19</sup> have been used to understand the distribution, supply and demand for employment land in Penrith. Both studies were undertaken prior to COVID-19.

Most of Penrith's employment lands are currently subject to Penrith Local Environmental Plan<sup>20</sup> (LEP) 2010. There are, however, a number of precincts in the Penrith LGA that fall outside the control of the Penrith LEP 2010. Precincts zoned under State Environmental Planning Policies (SEPPs) include the Western Sydney Employment Area, Penrith Lakes, St Marys Release Area and the Western Sydney Aerotropolis. These precincts have been planned under the jurisdiction of the State Government.

## 3.1 EMPLOYMENT LANDS IN PENRITH LEP 2010

Employment lands subject to Penrith LEP 2010 currently includes the following zones:

- IN1** General Industrial
- IN2** Light Industrial
- B3** Commercial Core
- B4** Mixed Use
- B5** Business Development
- B6** Enterprise Corridor

### **B7** Business Park

In addition, this Strategy considers land and employment in the following special use precincts:

**SP2** Infrastructure (where appropriate such as Nepean Hospital)

**SP3** Tourist

## 3.2 EMPLOYMENT LANDS OUTSIDE OF COUNCIL'S PLANNING AUTHORITY

### 3.2.1 Western Sydney Employment Area (WSEA SEPP)

The Western Sydney Employment Area applies to land identified in the State Environmental Planning Policy (Western Sydney Employment Area) 2009 (WSEA SEPP).

The WSEA was established to supply employment land close to major road transport and provide jobs for Western Sydney. The WSEA is located within the vicinity of the intersection of the M4 and M7 Motorways. The WSEA includes a number of precincts that straddle four local government areas (Penrith, Blacktown, Fairfield and Cumberland Council) covering an area of approximately 2,450 ha. A large portion of this land lies within Penrith LGA making up Erksine Park Industrial area.

18. Employment Lands Development Monitor, 2020

19. HillPDA, 2020

20. Penrith Local Environment Plan, 2010

# MAP 4: Employment Zones

## Penrith Employment Zones

- General industrial
- Light industrial
- Commercial core
- Mixed use
- Business zones
- Business Park
- Tourism
- Health & Education

## Western Sydney Aerotropolis Zones

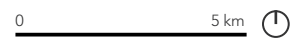
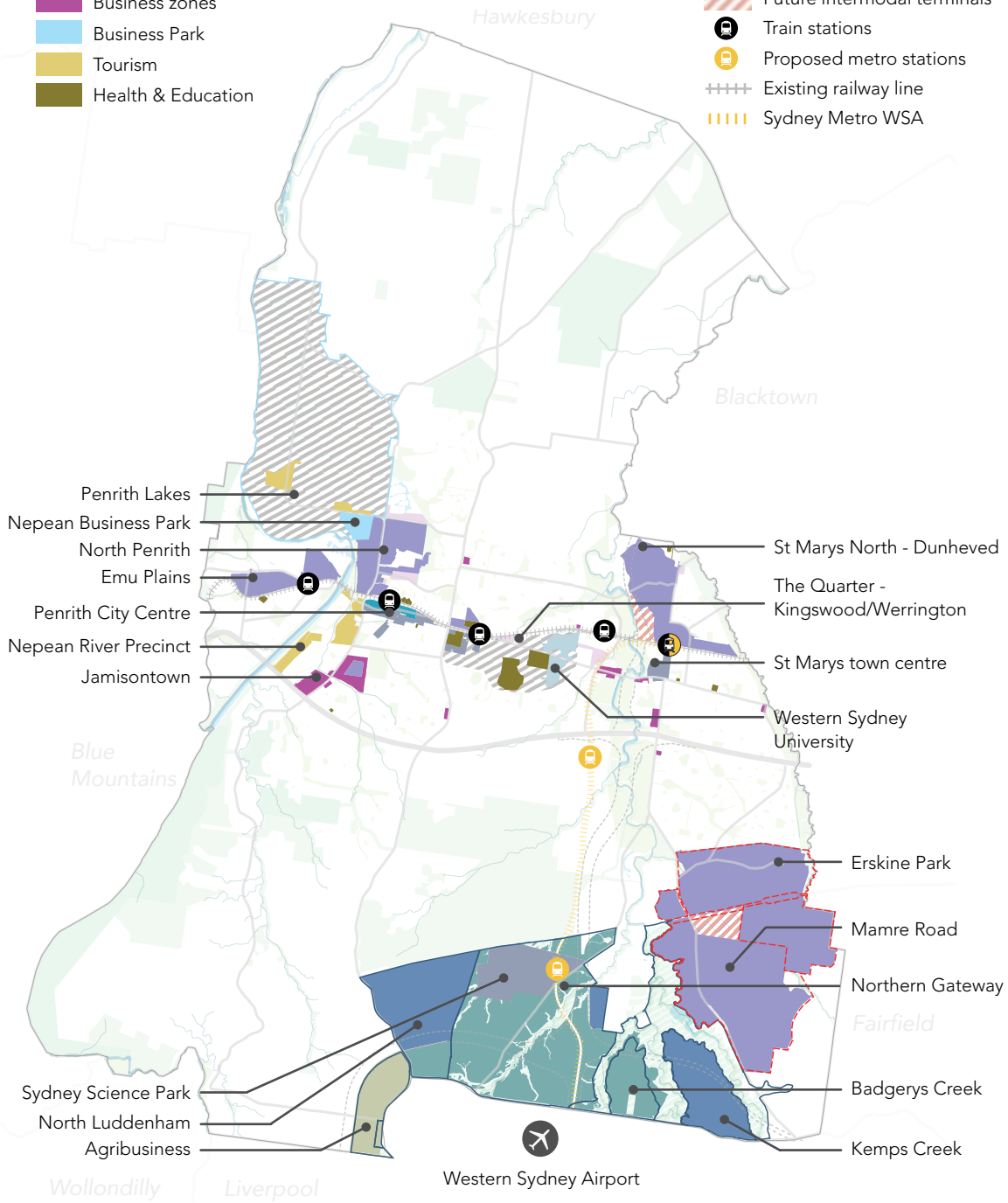
- Agribusiness
- Enterprise
- Other Aerotropolis precincts

## Applicable SEPP's

- Penrith Lakes SEPP
- WSEA SEPP
- WSA SEPP

## Others

- Future intermodal terminals
- 🚂 Train stations
- 🚇 Proposed metro stations
- Existing railway line
- Sydney Metro WSA



The WSEA has delivered tens of thousands of jobs in freight and logistics, manufacturing and other industrial businesses over the last 10 to 15 years. Most of the land zoned for industrial by the WSEA SEPP prior to 2020 has now been built out. An adjacent area of land, the Broader Western Sydney Employment Area, has been identified as future employment land.

The development of the Western Sydney Airport has increased demand for new industrial lands in surrounding areas. In response, the NSW Government accelerated the rezoning of the Mamre Road Precinct within the Western Sydney Employment Area in June 2020.

The Mamre Road Precinct provides about 850 hectares of industrial land with potential to generate about 5,200 construction jobs and 17,000 ongoing jobs when fully developed. The rezoning of the precinct preserves around 95 hectares of land for environmental conservation and open space and protects a site for a potential Western Sydney freight intermodal terminal (IMT).

Penrith City Council and State Government agencies are working with landowners to enable development in the precinct and the delivery of key infrastructure, including local roads, drainage and local open space.

### 3.2.2 Western Sydney Aerotropolis SEPP 2020

The Western Sydney Aerotropolis surrounding the planned Western Sydney Airport will be a major generator of employment, contributing towards the 200,000 jobs target for the Western Parkland City. Jobs will be offered in technology, logistics, science, creative industries and agribusiness, within a cool, green connected environment.

The Aerotropolis includes approximately 3,900 hectares of employment land within the Penrith LGA boundary. The Aerotropolis SEPP 2020<sup>22</sup> provides the statutory framework to facilitate the planning and development of land consistent with the Aerotropolis Plan<sup>23</sup>. It also seeks to protect the operations of the Airport within and beyond the Aerotropolis.

The Aerotropolis SEPP introduces new land use zones to support the vision of the Aerotropolis, many of which facilitate employment outcomes. As explained in the Draft Aerotropolis Precinct Plan<sup>24</sup> (2020) these new land use zones are:

- ENT** Enterprise Zone – supports the establishment of enterprise uses while mitigating the impacts of Airport operations. No residential or noise sensitive developments are permitted.
- MU** Mixed Use Zone – promotes flexibility in establishing a range of uses including employment, residential and noise-sensitive uses, with high amenity and good connections to public transport.
- ENZ** Environment and Recreation Zone – applies to the Wianamatta-South Creek Corridor and other areas identified for conservation, biodiversity and recreational uses.
- SP2** Infrastructure Zone – covers physical infrastructure provision including new and existing road and rail corridors, transport facilities, land required for utilities, the Airport and associated land in Commonwealth ownership to support Airport operations.
- AGB** Agribusiness Zone – supports high-tech agribusiness uses, including freight, logistics and horticulture.

### 3.2.3 Penrith Lakes SEPP 1989

Penrith Lakes is governed by the *State Environmental Planning Policy* (Penrith Lakes Scheme) 1989, commonly known as the Penrith Lakes SEPP. The NSW Government is committed to making Penrith Lakes a destination to play, relax, work and visit. The overall vision is for Penrith Lakes to be a signature piece of regional open space in the Western Parkland City, with a strong world-class sporting and recreational identity. The Penrith Lakes SEPP includes zoning for employment and tourism which aim to provide employment opportunities relating to health, high order technology, culture and sports and a variety of tourist related uses.

22. Department of Planning, Industry and Environment, 2020b

23. Department of Planning, Industry and Environment, 2020a

24. Department of Planning, Industry and Environment, 2020d

### 3.3 EMPLOYMENT ZONE REFORM

The NSW Government's Department of Planning, Industry and Environment (DPIE) is currently undertaking the first comprehensive reform of Business (B) and Industrial (IN) zones to simplify the employment zone framework. The reform seeks to better align with the way cities are evolving; support businesses and industry to adapt; and facilitate business innovation and change now and into the future.

At the time of writing, the proposed Employment Zone Reform package has been subject to public consultation, but not yet finalised. Council made a submission to the reforms, raising concerns in respect to the compatibility of certain mandated uses, the timing around implementation of the changes, and suggesting improvements to several of the proposed land use terms and definitions. Notwithstanding, Council expressed its general support for the proposed framework and its intent, with the proposed suite of zones considered to be a logical, modern, and complementary consolidation of the existing zones. The draft Employment Lands Strategy formed part of Council's input into the reform process.

The Employment Zones Reform proposes to consolidate the nine existing Business and Industrial zones into five employment zones, two mixed use zones and one new flexible zone. The Reform would be a translation of existing employment zones to new employment zones and not an opportunity for rezoning of individual sites. Similarly, these amendments are expected to be a straight-forward process of transitioning existing zones to their new equivalent. Council may have limited scope when selecting an equivalent zone, as corresponding zones are largely prescribed by the Reform package.

The Employment Zones Reform also proposes to increase the number of mandated land uses within certain zones, and updates or adds several land use terms. The additional mandated uses would introduce greater flexibility by allowing a wider range of land uses. Amongst the new land use terms are 'creative industry' and 'data centre' which

have not been previously recognised as distinct uses. This is another way the Reform is responding to the evolving nature of industrial and urban services uses.

The DPIE is expected to largely lead the transition of the new zoning framework. The new zoning and land use amendments would be introduced via a self-repealing SEPP. This SEPP would amend Penrith LEP 2010 but not apply to precincts outside the principal LEP (i.e. Penrith Lakes, Western Sydney Employment Area, Aerotropolis). The DPIE has indicated that the amendments would come into force by mid-2022.

### 3.4 INDUSTRIAL AND URBAN SERVICES LAND TYPES AND FUNCTIONS

The Greater Sydney Commission (GSC) has classified industrial and urban services land across Sydney according to the role, location and infrastructure requirements of a range of activity types. Penrith industrial precincts do not fit neatly into the GSC typology and a modified table has been developed to describe the scale and function of Penrith's industrial precincts as shown in Table 1.



**Table 1:** Penrith industrial and urban services lands and activity types

Activity	Role and uses	Typical site requirements	Precincts in Penrith
Large Scale Major freight and logistics	Intermodal terminals Major freight and logistics, warehousing and regional distribution servicing metropolitan or larger areas.	Large precinct area and large lot sizes. Close to critical infrastructure, including motorways, arterial roads, the freight rail network, intermodal terminals, ports and airports. Requiring direct access to motorways.	North St Marys - Dunheved Mamre Road* Northern Gateway*
Large Scale Major industrial manufacturing	Major manufacturing and production.	Separated from residential uses, typically on the urban fringe, near to trade gateways.	Erskine Park North St Marys - Dunheved North Penrith (part) Mamre Road* Northern Gateway*
Large scale urban services and utilities	Industries that enable the city to develop and its businesses and residents to operate. Include concrete batching, waste recycling, construction depots, and utilities (electricity, water, gas supply).	Locations that allow 24 hour access to large, articulated heavy vehicle movement and separated from residential and other activities to avoid impacts on safety, pollution and noise	Erskine Park North St Marys - Dunheved Mamre Road*
Medium scale General industrial, manufacturing and urban services	Wide range of business that service other business and populations. Include warehousing, freight and logistics, construction and building supplies, and domestic storage, motor vehicle sales and repairs.	Mixed lot sizes depending on the needs of the business. Closer to connecting movement corridors access by small, medium to heavy rigid vehicles. Closer to surrounding businesses, urban services, residential and commercial centres they directly serve.	North Penrith Emu Plains North St Marys - Dunheved
Medium scale urban services lands	Urban services businesses to support local population and businesses including energy and resource recovery and recycling.	Mixed medium lot sizes depending on the sizes and needs of the business.	North Penrith (part) North St Marys - Dunheved
Low impact industry, smaller scale, light and/or niche manufacturing, new economy businesses and creative uses.	Low impact uses with a combination of industrial and commercial functions. Includes new economy uses (e.g. artisan industries such as furniture making, upholstery, craft breweries) and creative uses.	Mixed small to medium size lots. Typically higher ratio of office space Closer to surrounding, businesses residential and commercial centres they directly serve. Rely on proximity to markets, access to movement corridors Typically surrounded by residential uses with some access to public transport.	Jamisontown Emu Plains North Penrith (part) Kingswood North St Marys (part) Kingswood Werrington Business Park (WSU) Nepean Business Park*
Local population serving businesses	Some retail, recreational and population serving businesses requiring affordable, larger floorspaces than typically available in commercial centres	Includes one or a small number of purpose-built factory buildings typically located on movement corridors	Werrington Road Cambridge Gardens Colyton St Marys (Great Western Hwy) St Marys (Mamre Road) South Penrith St Clair

\*Future precincts



### 3.5 LAND SUPPLY IN EXISTING PRECINCTS

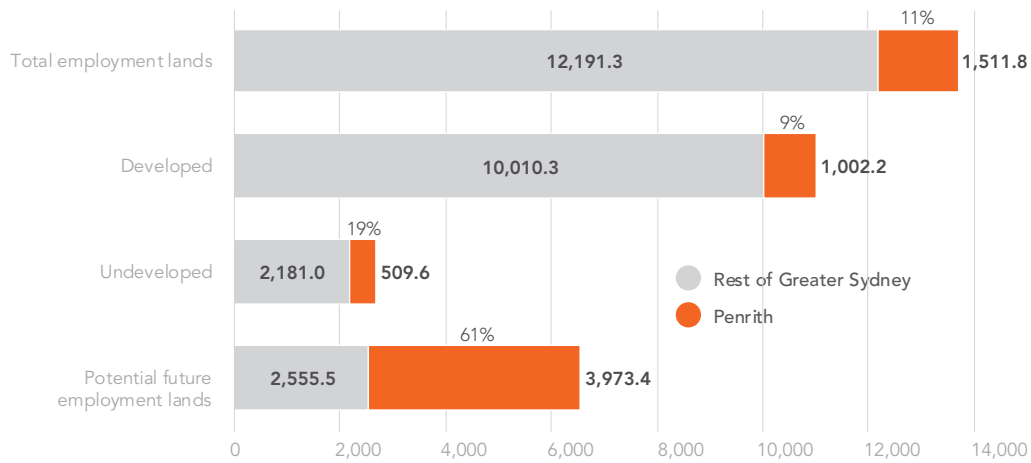
An audit of Penrith’s employment lands<sup>25</sup> found that, as at December 2019, Penrith’s existing employment lands cover 1,810 hectares including a total of 463 hectares of vacant zoned and serviced employment land in existing industrial precincts. However, land supply is not evenly distributed with 70% of this vacant zoned and serviced employment land located in Erskine Park Industrial precinct. Further analysis

by Penrith City Council in 2021 has shown strong development of industrial land in Erskine Park Industrial precinct reducing the total amount of available serviced vacant employment land.

Land in other industrial precincts, like North St Marys-Dunheved and North Penrith is more limited and some vacant land is not available on the market.

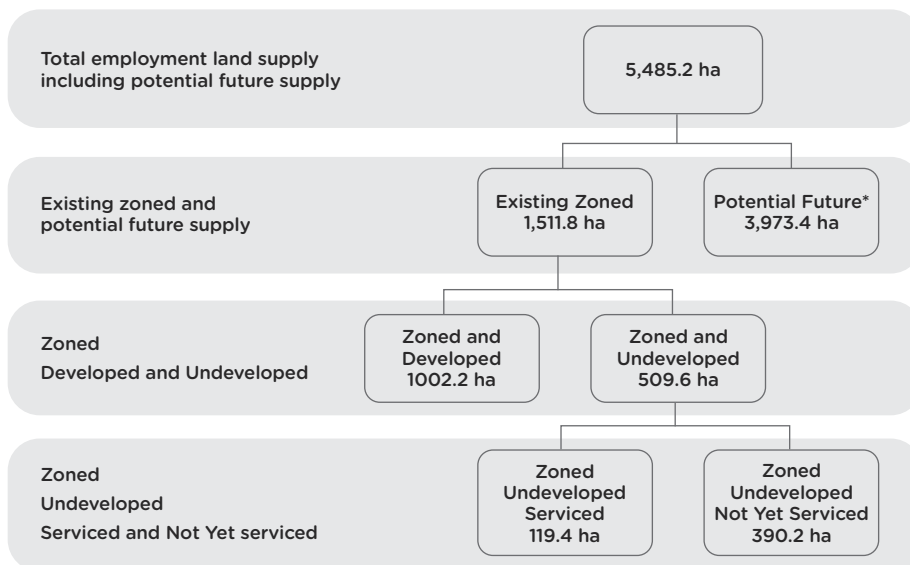
25. HillPDA, 2020

**Figure 1:** Penrith’s employment lands as part of Greater Sydney stocks, 2020 (hectares)



Source: NSW DPIE Employment Lands Development Monitor 2020 Sydney Region Zoned Supply by LGA

**Figure 2:** Penrith Employment Land Stocks, January 2020 (hectares)



Source: Department of Planning, Industry and Environment, 2021, Employment Land Development Monitor, January 2020

### 3.6 LANDS SUPPLY AND ZONING MIX

Penrith’s employment lands include a range of industrial, business and commercial zoned land.

#### 3.6.1 Industrial zoned lands supply

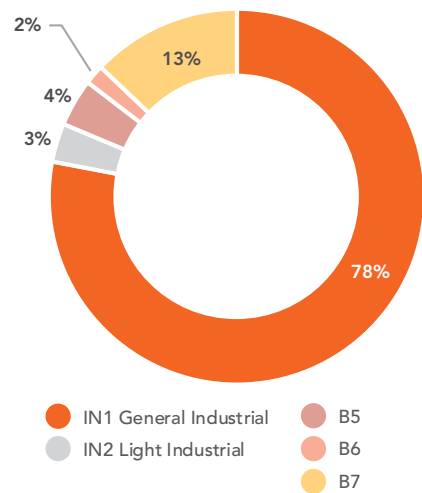
Almost all (96%) of Penrith’s industrial lands stock is zoned IN1 General Industrial. Only a very small proportion (4%) of industrial lands are zoned IN2 Light Industrial. This proportion of IN2 Light Industrial is very small compared to other LGAs in the Western Parkland City and the Greater Sydney region average where 19% of industrial lands stock is zoned IN2 Light Industrial.

A new area of 38,000 square metres of commercial land zoned IN2 was released by Lend Lease in August 2021 as part of its new Kings Central development in Werrington. Due to be completed in 2022 the employment land is adjacent to the development of around 350 dwellings for 1,000 residents.

Penrith has no industrial lands supply zoned IN3 Heavy Industrial, in contrast to Liverpool where 29% of the industrial lands stock is zoned IN3. Liverpool, Wollondilly, Parramatta and Sutherland are the only LGAs in Greater Sydney with IN3 zoned land.

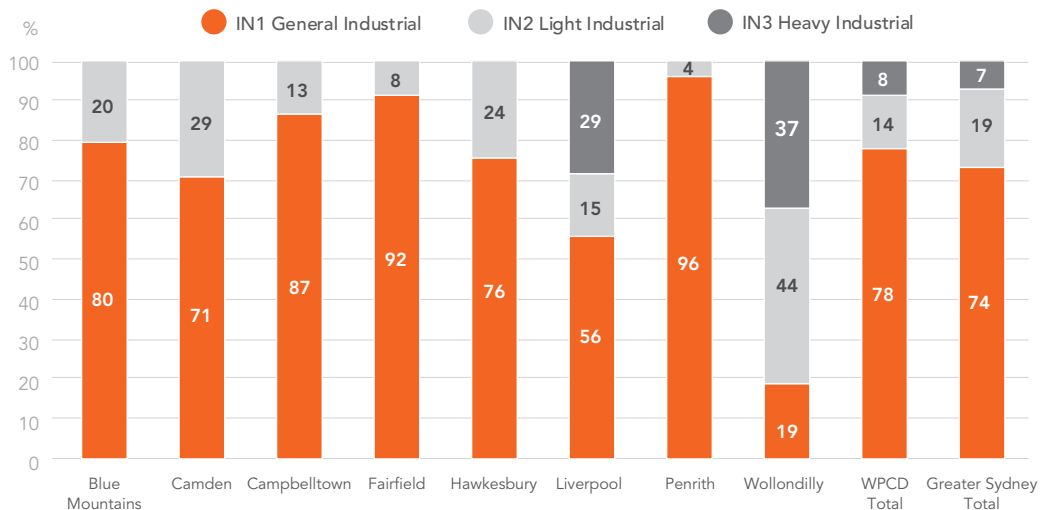
Penrith’s broad application of IN1 zoning across the precincts means that there is risk that some potentially hazardous industries may be located adjacent to lighter manufacturing or other low impact business uses and population serving activities. For example, in Jamisontown there are a number of industries that require frequent movement of heavy vehicles such as auto repairers and recyclers located close to population serving businesses, including a number of children’s activities like dance schools.

**Figure 3:** Industrial and business land stocks by zoning in Penrith LGA, January 2020



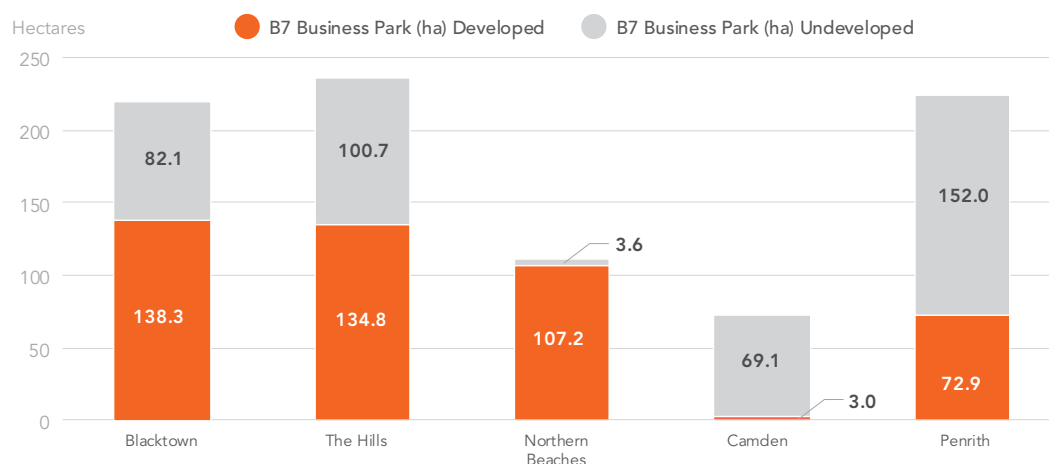
Source: NSW DPIE Employment Lands Development Monitor 2020 Sydney Region Zoned Supply by LGA

**Figure 4:** Industrial lands stock by zoning, Western Parkland City LGAs, January 2020



Source: NSW DPIE Employment Lands Development Monitor 2020 Sydney Region Zoned Supply by LGA

**Figure 5:** Top 5 LGAs by area of B7 zoned land stocks, January 2020 (hectares)



Source: NSW DPIE Employment Lands Development Monitor 2020 Sydney Region Zoned Supply by LGA

Another example is near Werrington Road, Werrington, where two schools are located next to industrial ‘St Marys Sand and Soil’ and a bus depot. Further investigation is required of land uses in existing precincts to identify and more clearly separate hazardous uses from population serving businesses to reduce safety risks.

There is, however, likely to continue to be demand for land for heavy industries that support economic development in greater Sydney and the Western Sydney Aerotropolis. It will be necessary to investigate and identify suitable sites and plan new precincts to provide for these industries to ensure compliance with environmental legislation and mitigate impacts to surrounding land uses. Large floorplate warehousing freight and logistics will be primarily located in Aerotropolis Northern Gateway and Mamre Road precincts.

### 3.6.2 Business zoned lands supply

Business Parks make up an important type of employment land, supporting a mix of manufacturing, logistics, warehousing, research and development, and office functions in one place. This allows companies to consolidate functions. By enabling a mix of uses to meet the day-to-day demands of workers in the immediate area, business parks provide significant employment opportunities to the community.

Penrith has a total of 225 hectares of employment lands zoned B7 Business Park across two sites -

- Werrington owned by Western Sydney University and
- Sydney Science Park being developed by Celestino.

The amount of B7 land in Penrith is comparable to LGAs outside of the Western Parkland City, like Blacktown and The Hills.

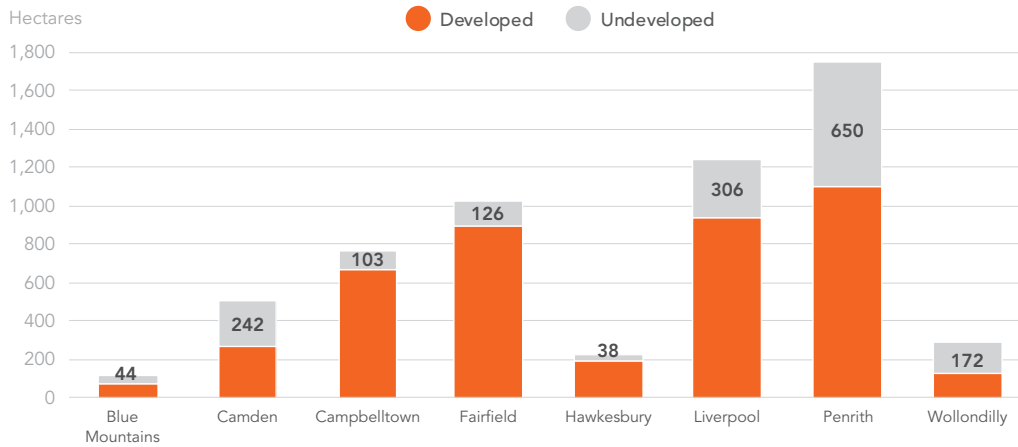
It should be noted that the ELDM data shows B7 land at Werrington as developed, when in fact much of the area is vacant but serviced. In contrast, land in Sydney Science Park is not yet fully serviced.

There has been limited take up of land in Greater Sydney’s business parks in recent years, with only 0.7 hectares taken up in 2019. This is a significant decrease compared with the 5.8 hectares taken up in 2018. However, it is consistent with recent years previous to that, with 0.7 hectares taken up in 2017 and 0.6 hectares in 2016<sup>26</sup>. This low take up rate may be related to the level of serviced land available. At January 2020, there were 897 hectares of zoned employment land in major business parks across greater Sydney. Of these business park zones, 404 hectares was undeveloped. Only 17 hectares of undeveloped business park zoned land was serviced (water and sewer lead-in)<sup>27</sup>.

26, 27. DPIE Employment Lands Development Monitor 2020



**Figure 6:** Total industrial and B5, B6 and B7 zoned land stocks in Western Parkland City LGAs, January 2020 (hectares)



Source: NSW DPIE Employment Lands Development Monitor 2020 Sydney Region Zoned Supply by LGA

Established business parks, like Macquarie Park and Sydney Olympic Park/Rhodes and Norwest, are almost fully developed. Norwest for example, currently comprises more than 140 hectares of land and is a major employment centre for Sydney. It is home to more than 400 companies and businesses, including large corporations Woolworths, ResMed, Optus and IBM GSA. In addition to its commercial and industrial tenants, the business park also contains many servicing businesses to enable business function and meet the needs of workers. These include supermarkets, childcare centres, medical centres, eateries, business hotels and a drive-through post office.

Despite the generally low take up of B7 land in greater Sydney overall, Werrington B7 land presents a good opportunity for business park development, potentially sooner than other locations. It has a land size of more than 50 hectares located with high visibility from the Great Western Highway connected by shared walking and cycling paths, proximity to motorways, and pre-existing amenity as well as Western Sydney University's LaunchPad building providing co-working space for start ups.

### 3.7 LAND SUPPLY ZONED IN FUTURE PRECINCTS

New employment lands in the Mamre Road and the Aerotropolis precincts will be substantial

but will take time to become available and serviced. These precincts will mainly cater for large floorplate, global transport, logistics and warehousing seeking proximity to the Western Sydney Airport.

### 3.8 PENRITH EMPLOYMENT LANDS IN THE WESTERN PARKLAND CITY

Penrith's employment lands represent a substantial proportion of all employment lands in the Western Parkland City District (WPCD). ELDM data shows Penrith's industrial and urban services lands represent 30% of the total employment lands in the WPCD and 39% of the vacant land in the existing employment precincts.

Overall, there is an ample supply of potential employment land identified in the Penrith LGA to meet demand for industries that can leverage and support the Western Sydney Airport and Aerotropolis.

This can only be achieved, however, if the land is fully serviced and available to the market in a timely manner. It is also important to note that the Aerotropolis lands are not necessarily the solution for all businesses and additional employment lands in other locations to serve other markets are required.

# 4. ECONOMIC VALUE

The wellbeing and resilience of our community relies on having a thriving economy and a diverse range of jobs across the city to support a growing population. Penrith's employment lands are where the majority of Penrith's jobs growth and business development occurs.

Gross Regional Product (GRP) is a measure of size or net wealth generated by the local economy. Penrith's GRP was \$11.3 billion as of the 30th June 2020. This has increased from \$9.40 billion in June 2018, despite the COVID-19 pandemic. Changes in this figure over time can represent changes in employment, productivity or the types of industries in the area. Penrith's GRP has experienced an average annual growth rate of 2.5% from 2002 to 2020. Much of this wealth has been generated by businesses in our employment lands.

## 4.1 GROSS VALUE ADDED

Gross Value Added (GVA) is similar to GRP. It is a measure of an industry's productivity – the value of its outputs less the costs of its inputs over time. The main components that make up GVA are workers' remuneration, company gross profits and tax revenues generated by the industry.

It is estimated that in 2019/20, industries in the Penrith LGA contributed around \$ 8.9 billion to the NSW economy. An analysis of the valued added by industry sectors in Penrith City in 2019/20 shows the three largest industries were:

- Construction (\$1,333 million or 15.0%)
- Health Care and Social Assistance (\$985 million or 11.1%)
- Manufacturing (\$820 million or 9.2%)

In combination these three industries accounted for \$3,138 million or just over a third (35.2%) of Penrith's total value added by industry in the

Penrith City. Manufacturing contributed \$576 million in international manufacturing exports<sup>28</sup>.

## 4.2 INDUSTRIES

Four of Penrith's top five employing industries are concentrated in Penrith's employment precincts, highlighting the economic value of these precincts. Penrith CBD accounts for 25% of all retail jobs, while The Quarter Health and Education Precinct accounts for 34% health care and social assistance jobs.

Manufacturing is, not surprisingly, the most highly concentrated industry in our industrial precincts.

Penrith's main industrial precincts account for:

- 81% of Penrith's 5,616 jobs in Manufacturing
- 71% of Penrith's 4,294 jobs in Transport and Warehousing
- 45% of Penrith's 6,426 jobs in Construction

Jobs in education and training sector are more widely dispersed.

## 4.3 JOBS AND BUSINESSES

In 2016 Penrith's employment lands, including Penrith CBD, The Quarter and St Marys town centre, accounted for 47,450 jobs.

This represents nearly 70% of all jobs in Penrith in 2016. The remaining 30% of jobs are dispersed

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<sup>28</sup>. National Institute of Economic and Industry Research (NIEIR) 2021

across the LGA, mainly in the Education and Training sector, in local retail jobs in smaller commercial centres and in rural lands and other special purpose zones, such as correctional centres.

New employment land precincts are projected to provide a further 22,000 jobs including:

- up to 12,000 new jobs at Sydney Science Park on its 163hectare site
- up to 4,000 new jobs at Nepean Business Park on a site of 47 hectares.
- up to 6,000 new jobs in health and education on the 71 hectare WSU Werrington site

The recently released Mamre Road industrial precinct and the Western Sydney Airport and Aerotropolis precincts have been estimated to add a further 52,000 jobs within the Penrith LGA<sup>29</sup>.

#### 4.4 JOB DENSITY

Analysis of employment lands across Greater Sydney in 2018 found that the average job density in Greater Sydney's Employment Lands is around 54 jobs per hectare<sup>30</sup>. This varies across regions with the Western Parkland City having generally lower job densities of between 25 to 35 jobs per hectare.

Within Penrith LGA, existing industrial precincts closer to centres, like Emu Plains or St Marys North – Dunheved, provide higher job densities and greater business diversity compared to larger scale industrial precincts, like Erskine Park.

While some industrial uses have the potential to intensify over time (and accommodate more workers per hectare), there is limited capacity for some building typologies to densify because industrial properties will still require space for vehicle movement, goods handling and storage. Penrith will need to retain a mix of industrial precinct types to serve local small and medium businesses as well as global enterprises if it is to achieve higher job densities in its employment lands over time.

29. HillPDA, 2020

30. SGS Economics and Planning, 2019



# 5. MARKET TRENDS

New technologies, global competition and changing consumer preferences are changing the way we work and do business. The COVID-19 pandemic has dramatically altered the nature of work, travel and how people are purchasing goods. It has disrupted supply chains and highlighted the importance of local manufacturing.

Across all industry sectors tenants, buyers, and investors are seeking assets that have improved sustainability features, including in terms of building materials and design, energy efficiency, water-use reduction and waste management systems<sup>31</sup>. Local businesses too, have told us how they are improving the sustainability of their buildings and operations to reduce costs of waste, energy and water. Some of the emerging changes to demand for commercial, industrial and retail space are outlined in this section.

## 5.1 COMMERCIAL

Greater Sydney's economy is shifting towards knowledge-intensive employment and this has driven the demand for commercial office spaces. Traditional purpose-built office spaces, which were largely concentrated in Sydney's CBD, are increasingly giving way to co-working spaces.

Western Sydney's economy has been dominated by population serving sectors, mainly in education, healthcare, retail, as well as transport and logistics, and manufacturing sectors.

The COVID-19 pandemic has normalised the trend to remote working. A majority of office staff shifted to working from home in early 2020 and the share of employees making use of these arrangements is expected to remain higher over the long term than prior to the pandemic. The ability of many office-based workers to work remotely and the desire to work closer to home, may fuel the growth of a

distributed office model, with large companies and government agencies establishing smaller offices throughout the Greater Sydney region – including in the Penrith CBD.

Penrith City Council's direct investment of \$300 million in the revitalisation of Penrith CBD over the next five years aims to attract more knowledge intensive business and jobs to the centre. Three A-Grade office developments have been either announced or under way in central Penrith that, combined, will have the capacity to accommodate up to 2,500 workers. These developments include the \$50 million development by Sandran Property Group of an eight-storey A-grade office building at 50 Belmore Street, which has 10,500 square metres commercial space; a four-storey commercial building with 6,000 square metre floor space above a five-storey, multi-deck car park in Soper Place; and the six-storey A-Grade building at 131 Henry Street in the heart of Penrith's CBD, designed by Woods Bagot, which will include 8,000 square metres of commercial office space. These developments will strengthen Penrith's role as an employment and service cluster in western Sydney.

## 5.2 INDUSTRIAL

Greater Sydney's demand for industrial precincts has increased with the growth of logistics and

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31. Green Building Council of Australia, 2020.



e-commerce, yet the development of industrial precincts has occurred at a slower rate than employment growth. Historically, industrial developments have been single level, on large lots, with at grade parking and/or relatively level ground. However, this development model has been challenged in recent years resulting from limited land stocks, high land values, and high rents. These market trends have resulted in “vertical” industrial development being explored within Sydney. While it is desirable to encourage vertical industrial development, it is unlikely that Penrith will be leading this change due to environmental limitations, but some of Penrith’s industrial precincts may be redeveloped for higher density occupation.

Large-scale industrial occupiers tend to locate nearest to orbital and arterial road networks where land is at a premium. Penrith’s industrial sites are uniquely positioned to leverage off this trend with several of them positioned near existing and planned transport corridors: the M4, M7, M12, Western Sydney Airport and Aerotropolis, Eastern Creek, and railway lines.

Penrith’s industrial precincts are increasingly occupied by non-traditional users, such as retail and recreational services. In the Penrith LGA, 17% of all industrial floor space is occupied by non-traditional users, and in Jamisontown alone, 57% of all industrial floor space is occupied by non-traditional users. Non-traditional occupation of industrial precincts can increase market rents and land values. Automation may render some forms of employment in manufacturing, transport, and warehousing obsolete, but this will not directly translate into reduced demand for industrial precincts.

### 5.3 RETAIL

The COVID-19 pandemic has also accelerated the shift toward online retailing and away from retail outlets in central business districts (CBDs). This has exacerbated the challenges facing the bricks-and-mortar retail sector but has led to a significant increase in demand for industrial property such as logistics and warehouse space<sup>32</sup>.

Demand has increased for e-commerce, while demand has decreased for some forms of physical retail, such as department stores. Department stores are, however, the fastest-growing market of e-commerce. The growth of e-commerce has transformed retail leasing models from long-term to short-term arrangements. Demand for supermarket and grocery stores has experienced strong growth, particularly smaller supermarkets in village and neighbourhood precincts.

An increasing number of larger retailers are offering ‘click and collect’ services, which combine online shopping with in-store experience, providing customers savings on shipping costs and return fees. Usually, this service is available at any of the retailer’s stores, but in some cases is only available at select locations or at their distribution centres.

Occasionally, retailers allow pick-ups at alternate locations, especially if a business does not have a bricks-and-mortar location. For example, some purchases on eBay may be able to be collected at a local Woolworths store.



32. Reserve Bank of Australia



Smaller localised distribution centres and locations for 'click and collect' e-commerce options may be potential new users of larger format business centres especially where they are strategically located near transport corridors and nearby residential areas. Examples of businesses that offer localised 'click and collect' services, include Fantastic Furniture warehouse and Bunnings in North Penrith and Harvey Norman among other bulky goods retailers in Jamisontown.

## 5.4 TOURISM AND HOSPITALITY

Sydney's café culture has grown, and Penrith's food offerings and night-time economy continues to grow and evolve. Accommodation and Food Services represents 8,000 jobs (9%) in Penrith. This sector has experienced strong growth of 2,143 jobs between 2014-15 and 2018-19 but was more severely impacted by COVID-19 pandemic than other sectors.

The Nepean River entertainment precinct, incorporating Penrith Panthers Leagues Club

and nearby hotel, hospitality and recreational businesses, is an important generator of jobs in the tourism, accommodation and food services, and arts and recreational services sectors. The precinct provides around 951 local jobs, which represents around 15% of all jobs in these sectors in the Penrith LGA.

New boutique food and beverage products, and food delivery services have emerged as growth sectors from the pandemic as well as all-in-one venues that produce, retail and serve their food and beverage products as factory door cafes, bars and restaurants. Examples in Penrith include the Rusty Penny craft brewery in North Penrith.

Greater flexibility may be required in employment zones such as light industrial areas or business zones to allow these new hybrid boutique food and beverage manufacturers which combine retail, wholesale and services in the one location. Similarly, larger retail spaces in the city centre may be repurposed in similar way.



# 6. FUTURE JOBS AND LAND SUPPLY

A growing population can generate new jobs but it is only one factor that contributes to a robust and resilient economy.

Economic growth also relies on

- Participation - the change in the ratio of employed residents to population.
- Employment capacity - the change in the ratio of employed residents to number of local jobs.
- Productivity - the change in the ratio of GRP to the number of local jobs.

## 6.1 A GROWING POPULATION AND WORKFORCE

Accessing jobs closer to home has been a long standing concern of the Penrith community and a priority outcome identified in Council's 2018 Community Plan. In 2016, 61.4% of Penrith's resident workers travelled outside of the LGA to work. This proportion represents around 58,000 resident workers travelling beyond Penrith for work. A greater number and variety of jobs available in Penrith will be needed to provide more opportunities for residents and workers in neighbouring local government areas to work closer to home, and to boost the local and regional economy.

## 6.2 THE JOBS CHALLENGE

In 2017 Penrith City Council adopted an Economic Development Strategy (EDS) that set an aspirational target of up to 55,000 jobs by 2031. At the time, achieving this target would improve the proportion of jobs to working residents (job containment ratio) from 0.71 in 2016 to 0.99 based on 2016 population projections by DPIE. That is around one job for every resident worker.

However, DPIE population projections released in December 2019 show Penrith reaching a population of 370,000 by 2041. With this higher level of population growth, there would be 175,750 residents of working age by 2041.

If Penrith's jobs target were to remain the same as the 2017 EDS, at 55,000 jobs, the job containment ratio would decline to 0.69, meaning fewer jobs to every resident worker<sup>33</sup>.

If Penrith is to support its growing population as well as play a greater role in supporting jobs for Greater Sydney we need to reconsider our EDS targets and consider alternative growth scenarios for Penrith.

For example, in a steady growth scenario, where the job containment ratio remains at the same level as 2016, an extra 57,783 new jobs by 2041 would be needed. A medium growth scenario would see an improvement in the jobs to workers ratio of up to 0.86 by 2041 and would require 85,000 new jobs.

If we are to increase the number of local jobs to keep pace with the growth in the number of resident workers (that is, to attain a jobs to worker ratio of up to 1:1) by 2041, the number of new jobs required would need to be 109,000 new jobs, as shown in the scenarios in Figure 7.

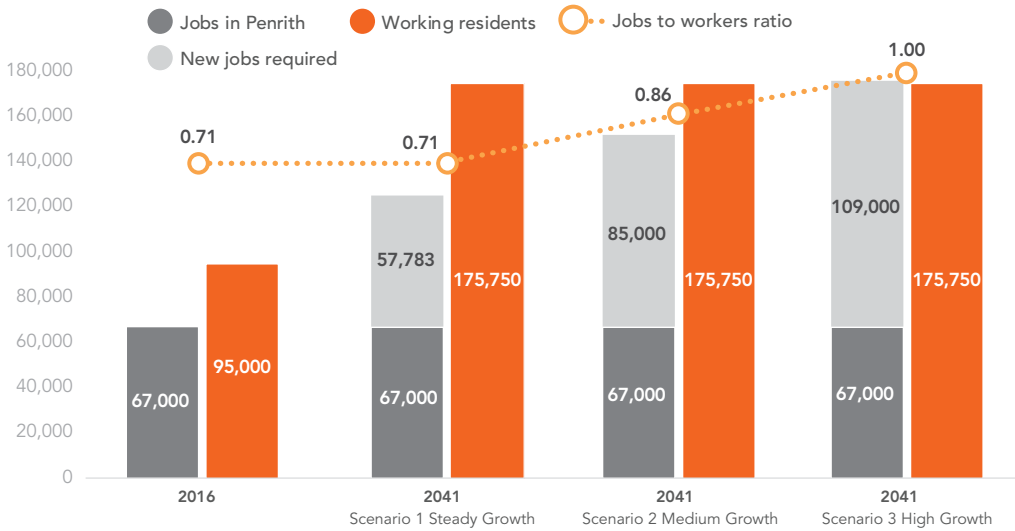
## 6.3 THE PRODUCTIVITY CHALLENGE

Productivity is a measure of the rate at which output of goods and services are produced per unit of input. Many factors can affect productivity

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33. *Mecone Urban Atlas 2021*

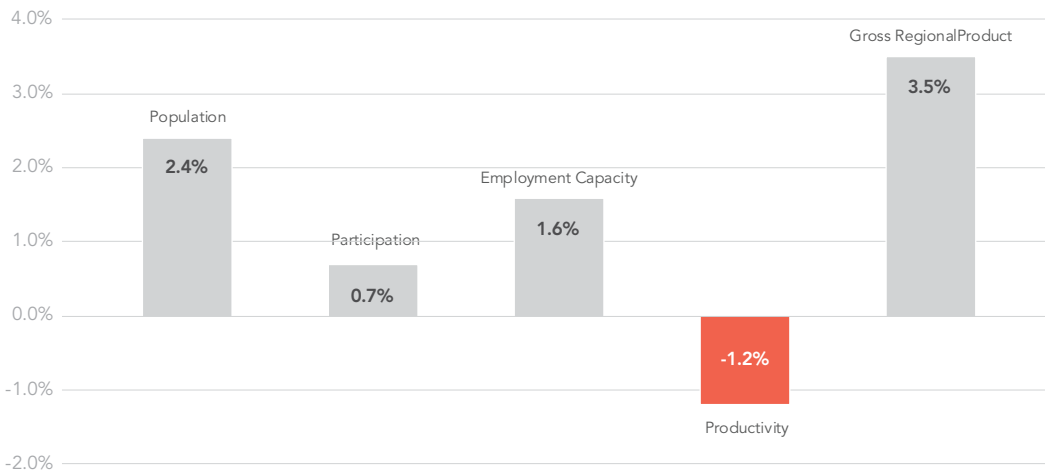
**Figure 7:** Workforce projections and jobs growth scenarios for Penrith 2041



Source: DPIE2019 Population Projections, HillPDA 2020 Addendum Scenarios analysis

Notes: The following definitions are used: Population is change in population. Participation is change in the ratio of employed residents to population. Employment capacity is change in the ratio of employed residents to number of local jobs. Productivity is change in the ratio of GRP to number of local jobs.

**Figure 8:** Contributions to Western Sydney's economic growth 2016-2018



Source: National Economics 2018 cited in O'Neill, 2020

growth. These include labour productivity (output per hours worked), technological improvements, economies of scale and scope, workforce skills, management practices, changes in other inputs (such as capital), competitive pressures and the stage of the business cycle.

Australia's labour productivity growth has been in decline since 2005. This decline has been evident in the Western Sydney region.

Even though the number of jobs in the region grew by more than 100,000 jobs between 2016 and 2018, these jobs were mainly related to population growth, in population serving sectors of construction, health care and social assistance, education and training, retailing, and accommodation and food services<sup>34</sup>. Productivity in the region declined by 1.2% over the same period as shown in Figure 8.



... some sub-regions in Western Sydney are likely to experience unemployment at double national rates or more, and these are likely to persist long after a national economic upturn.

Professor Phillip O'Neill (2020) Where are the jobs?

The decline in productivity nationally is related to three sectors: Manufacturing; Agriculture; and Electricity, Gas, Water and Waste services. These are three important sectors in Penrith's economy, with manufacturing being the fifth largest employment sector in the LGA.

The two main contributors to productivity growth in any economy are the levels of capital investment and the level of skills among the workforce<sup>35</sup>. With significant investment in Western Sydney Airport and Aerotropolis and associated infrastructure, Penrith should be well placed to increase its contribution to productivity in Greater Sydney. However, investment in infrastructure must be matched with investment in skill development among the workforce.

## 6.4 IMPACT OF COVID-19

The COVID-19 pandemic triggered Australia's worst recession since the Great Depression<sup>36</sup>. More recently, signs of recovery have been encouraging that the Australian economy is regaining momentum. Nevertheless, COVID-19 has had an irrevocable impact on how and where

we live and work with the economic effects of these changes far reaching.

Penrith's local economy has shown considerable resilience in the face of COVID-19 because of its sectoral diversity. While the COVID-19 pandemic has had a significant impact on local businesses and jobs in Penrith, these impacts have been somewhat less than in other areas of Greater Sydney until the 2021 Delta outbreak. Business agility has been put to the test as organisations have constantly had to react and adapt to changing circumstances. A survey of local businesses in August 2021 found that, whilst government fiscal policies have had positive impacts on businesses, ongoing financial strain and pressures during these uncertain times have caused considerable stress and unease<sup>37</sup>.

However, COVID-19 has been most deeply felt by Penrith's residents and workforce. The proportion of working aged residents (15 to 64 years) in Penrith receiving JobSeeker payments or Youth Allowance increased by 5,100 people between March and December 2020.

The rate of Jobseeker and Youth Allowance recipients in Penrith in December 2020 was 8.5%, higher than the Greater Sydney rate of 6.9% and NSW of 8%. In some suburbs of the Penrith LGA, the rate was almost twice as high: 15.8% in Penrith, 15.3% in St Marys and North St Marys, 12.5% Colyton and Oxley Park.

The greatest numbers of people receiving JobKeeper or Youth Allowance in December 2020 were in Kingswood-Werrington (687 people), St Marys – North St Marys (627 people) and Cranebrook – Castlereagh (625 people). With the Delta outbreak in June 2021 these suburbs were amongst 12 suburbs in Penrith LGA impacted by the most stringent government restrictions.

34. O'Neill, 2020

35. Productivity Commission, 2019

36. Productivity Commission, November 2020

37. Penrith City Council, 2021a

### 6.4.1 Signs of recovery

While case numbers of COVID-19 remained low in Australia, the economic downturn had not been as deep as was initially feared and the recovery had been earlier and stronger than was expected. Prior to the recent Delta outbreak, there were signs of steady recovery in the economy in Penrith with local jobs returning and new businesses being established.

The Delta outbreak in June 2021, however, has seen another dip in employment and business activity which has yet to be fully assessed. The second wave of extended restrictions also impacted the construction and manufacturing sectors more than in 2020.

Although still promising, the recovery is likely to take some time. Some sectors, like tourism will remain impacted for longer than others. Population serving industries (such as retail and hospitality) may take longer to reach pre-COVID levels largely because of lower population growth.

The impact of the COVID-19 pandemic has increased uncertainty surrounding population projections and employment targets. Australia's population growth is projected to be around 0.2% in 2021, the lowest since World War I<sup>38</sup>. This slower population growth will have a direct

effect on the size of our economy with the full implications yet to be determined.

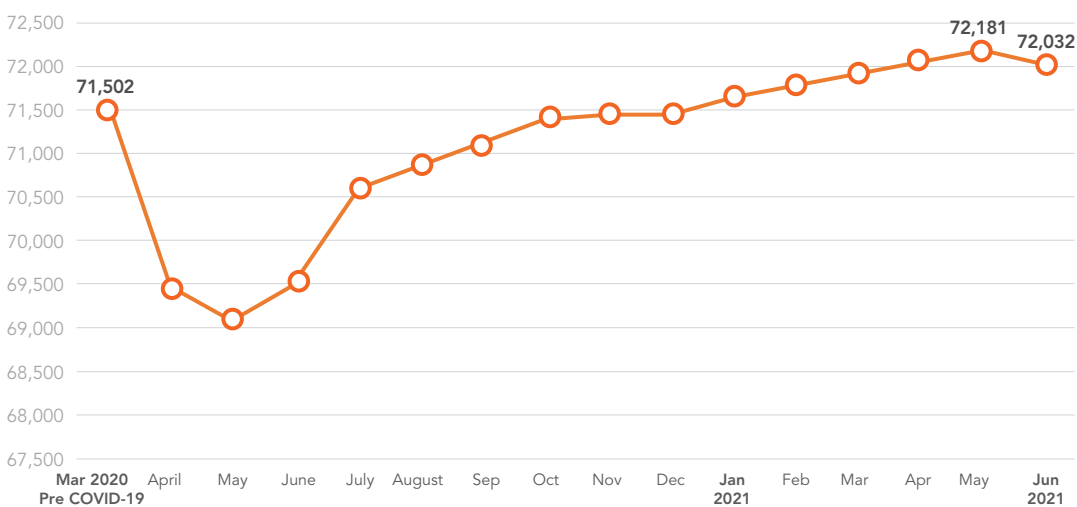
While the COVID-19 pandemic and government restrictions will impact immigration and population growth in the short term nationally, Penrith's population is still expected to grow significantly over the next twenty years.

It is estimated that Penrith will now need more than 100,000 new jobs to 2041 to provide at least one job for every resident worker. It will need to provide even more jobs for Penrith to fully realise its potential as part of a metropolitan cluster and achieve a vision of a thriving, innovative 30-minute city, home to new technologies and opportunities.

A low population growth rate underscores the need to boost productivity by attracting and nurturing employment-generating, export-oriented enterprise to stimulate a stronger and more diverse economy. In this context, the Employment Lands Strategy sets out to maximise the opportunities for jobs and investment growth in Penrith. At the same time, the response by State and Federal governments in accelerating the development of the Aerotropolis, the Sydney Metro Western Sydney

38. Reserve Bank of Australia, 2021a

**Figure 9:** The impact the COVID-19 pandemic had on local employment in Penrith LGA



Source: REMPLAN estimates based on ABS 2016 Census, REMPLAN ABEIS Survey, ABS Weekly Payroll Jobs & Wages, and Grattan Institute.

Airport and employment land in the Mamre Road precinct provides a unique opportunity to create a thriving and resilient economy and attract new employment opportunities for our future workforce.

## 6.5 DO WE HAVE ENOUGH SUPPLY TO MEET DEMAND FOR JOBS GROWTH IN PENRITH?

The land use study by HillPDA<sup>39</sup> 2020 found that with at least 463 hectares of vacant land available in our existing primary industrial precincts that there is sufficient supply to meet demand for the EDS target of 55,000 jobs.

HillPDA conducted further analysis to estimate demand and supply of employment lands for each of the three growth scenarios. They found that, only under the highest growth scenario, would the demand for industrial zoned lands exceed the estimated existing vacant land area.

New employment lands in the Western Sydney Aerotropolis Plan (WSAP)<sup>40</sup> and the accelerated rezoning of the Mamre Road industrial precinct will add an estimated 3,900 hectares of employment land to Penrith's employment lands future supply – more than two and half times the current supply of industrial land.

At an LGA level, it would seem there is ample supply to meet demand for jobs, even under a high growth scenario. However, the Aerotropolis is not necessarily the solution for businesses that have a particular need to be located close to centres, other supply chains, or markets and/or servicing population and local businesses. Existing primary industrial sites, located near this infrastructure, is in high demand with low vacancy rates.

## 6.6 SERVICING NEW EMPLOYMENT LANDS

It will be important to maintain a strong supply of land that is serviced and available on the market to minimise the problems of increased land scarcity and land price escalations. New employment lands will take time to be serviced and ready for

development. The question of the adequacy of land supply for employment growth in Penrith is less about the quantum of land and more about availability of suitable sites on the market.

Vacant land supply must be considered in terms of whether it is serviced or unserviced. Where vacant land is already serviced, it may be available on the market or close to established centres or local supply chains where industry clusters exist. If the land is unserviced, it needs to be serviced to ensure a steady future supply of employment land. We need this future supply of land to be able provide a mix of lot sizes to facilitate a variety of businesses and diversity of jobs.

## 6.7 SITE SUITABILITY

The best location for different types of jobs and businesses depends on the nature of their industries and operational requirements of the business. An economic study by Mecone Atlas Urban Economics<sup>41</sup> for Penrith City Council noted that, whilst every business is unique, many of the key location and site selection criteria are common across different industries and sectors.

These criteria include access to markets and supply chains, place and amenity and access to skilled workforce as shown in Figure 10.

These criteria have implications for the role of different centres and employment precincts. Penrith will be well positioned to generate jobs growth with deliberate attention to the factors that attract and build business investment, including affordable and suitable site locations, close to supply chains and distribution networks, certainty and ease of doing business, amenity and place, and access to a skilled workforce.

The analysis highlights the importance of employee amenity as a critical selection factor for many businesses, particularly those in the knowledge sectors. As employment lands become more flexible, with some businesses seeking to co-locate head office, with operations

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39. HillPDA 2020

40. Western Sydney Aerotropolis Plan, 2020

41. Mecone Atlas Urban Economics, 2021



**Figure 10:** Site selection criteria for businesses



Source: Mecone 2021

and distribution functions, access to amenity will be increasingly important if Penrith is to improve its attractiveness for higher order jobs.

## 6.8 CONNECTIVITY

Penrith’s future employment lands provide a competitive advantage with good connectivity for freight and logistics and proximity to the WSA. There is, however, an need to consider all aspects of the growth in freight movements for our economy and community.

There are two intermodal terminals to be located in Penrith. One in St Marys North is under-construction and one is planned for the Mamre Road precinct. Both are planned to be connected to Port Botany by rail. While both intermodals are located in industrial precincts, planning road infrastructure upgrades for suitable and safe routes for distribution from these intermodals is equally important for last mile efficiencies as it is for maintaining local amenity.

It is also important to note that the freight task is not solely make up of large vehicles and that catering to the last mile freight task will bring congestion benefits particularly for centres. It will be important to plan for appropriate freight facilities in our urban commercial areas to reduce congestion, improve local amenity and free up kerbside space for other uses<sup>42</sup>.

Planning for improved connectivity to commercial, industrial and specialised employment precincts will also need to consider new modes of transport for both passengers and freight, electric and automated vehicles and micro-mobility and active travel. This includes considering a range of infrastructure and facilities such as battery charging, lay-over space, drone deliveries, separated cycling paths and end of trip facilities

42. *Transport for NSW, 2021*

# 7. CHALLENGES IN PLANNING FOR GROWTH

The wellbeing of our community depends on having a thriving economy and a diverse range of jobs across the city to support our growing population. Beyond enabling the supply, location and site suitability of employment lands, there are a number of other challenges that Council needs to take into account when planning and managing employment lands.

## 7.1 INCREASING THE NUMBER AND DIVERSITY OF JOBS

Much of the land in our new employment precincts around Western Sydney Airport, Mamre Road, and the Aerotropolis precincts are likely to be sought by large format industry that typically results in lower employment densities. It will be important to balance the number of large floorplate, low job density logistics functions with higher job density industries like advanced manufacturing which provide a greater number and diversity of jobs for our resident workforce within close proximity of their homes.

## 7.2 SUPPLYING A VARIETY OF SERVICED LAND FOR A RANGE OF BUSINESS SIZES AND TYPES

It is critical that there is enough land located in the right places to support the economic activities that provide enterprise opportunities for businesses, jobs, goods, and services for communities.

With new centres being developed south of the M4, we may need to consider the introduction of population serving employment lands close to these centres. The larger

format employment lands being delivered through the Western Sydney Employment Area and Aerotropolis are unlikely to meet the needs of these future communities.

## 7.3 MANAGING DEMAND FOR FREIGHT AND LOGISTICS

With a growing population and the development of the Western Sydney Airport, the total volume of freight that is coming from or to Western Sydney is expected to increase from 18.5 million tonnes in 2014<sup>42</sup> to 41 million tonnes by 2041. Much of this freight will be moving through Penrith's North-South Corridor with new intermodals planned in St Marys North and Mamre Road industrial precincts.

The 2019 Australian Infrastructure Audit found that freight transport is increasingly impacted by congestion leading to higher costs. Traffic modelling undertaken by Transport for NSW indicates that the existing transport network will not be able to efficiently service future demand. If this is not addressed, delays in our urban supply chains will become more common and costs will increase hindering our economic growth. Additional pressure on the road network will also increase safety risks, worsen travel outcomes and

affect planning and development undertakings within our region. Moving more freight on to rail will help improve road safety, ease traffic congestion and reduce emissions on Western Sydney motorways and roads.

Improvements to road and rail infrastructure are needed to cope with growing freight demand in the region and a number of transport infrastructure projects and initiatives have been identified by Infrastructure Australia as high priorities. These priorities include the M12 Motorway, the Western Sydney Freight Line and intermodal, as well as corridor preservation for Outer Sydney Orbital road and rail/M9, and Castlereagh Connection.

All of these nationally significant transport infrastructure initiatives will directly shape future development and connection of employment lands within Penrith LGA. A key challenge in Penrith will be to ensure that the State arterial road network, and the local roads that connect to it, that provide access between proposed new intermodals and motorways, are upgraded in a timely way so as avoid congestion at access points and poor outcomes for surrounding communities.

For example, the development of the Pacific National Freight Hub in the St Marys North-Dunheved industrial precinct, is a State Significant Development. Approved in May 2020 and due to start operation in 2021, the Freight Hub is an inland container terminal, with capacity to transport an estimated 300,000 shipping containers by rail between Port Botany and St Marys each year. While it is estimated that the shift from road to rail will remove between 70,000 to 80,000 truck movements from the Greater Sydney road network overall<sup>43</sup>, truck movements on nearby roads are likely to increase as the shipping containers are expected to be delivered from the Freight Hub to surrounding warehouses and distribution centres in Western Sydney by truck.

State arterial roads are the responsibility of the NSW Government, but Council's transport planning highlights where key connections to State arterial roads and upgrades are needed

most. In the case of St Marys Freight Hub, the LSPS has identified the Werrington Aerial Stage 2 to provide better connectivity to the industrial estate and direct access to the M4, and the Dunheved Road upgrade, as two key connections that will be required to support this growth in freight in this area. Council is actively engaged with State and Federal governments to advocate for investment in the upgrade of this vital connection.

## 7.4 ENABLING FLEXIBILITY IN THE PLANNING FRAMEWORK TO ALLOW FOR INNOVATION

Planning controls are not necessarily keeping up with market trends and changing needs of businesses. For example, height limitations and setbacks may be too restrictive for the types of industrial development now being built.

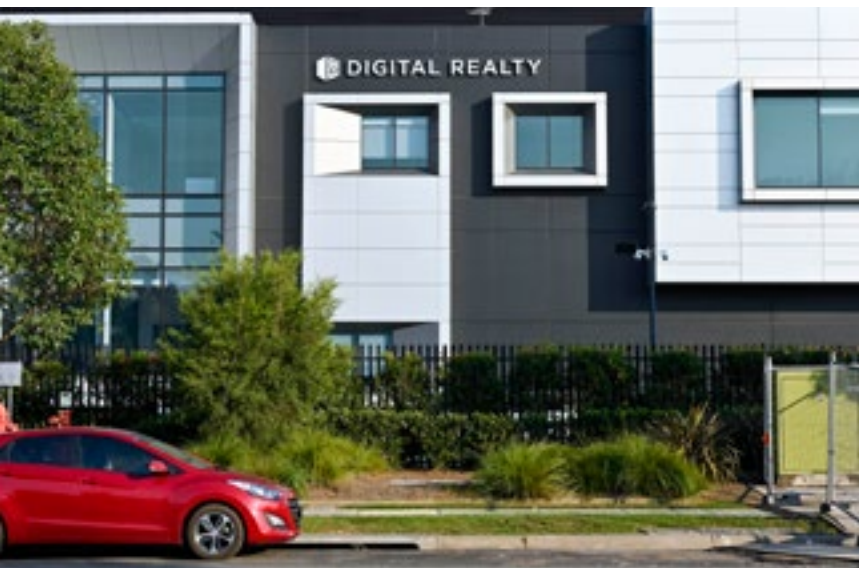
There is a large area of land zoned for business park purposes in Werrington and in Sydney Science Park. Research by DPIE<sup>44</sup> has shown that the take up of this type of employment land across Sydney has been very low over the last few years. Perhaps this zone is not facilitating the outcomes that the market is looking for, particularly such a large area.

There is a very small amount of land zoned for light industrial uses across the Penrith LGA. We may need to consider providing more light industrial land in the future.

Penrith's broad application of IN1 zoning across the precincts means that there is potential for more hazardous industries to be located adjacent to lighter manufacturing and other low impact business uses. This has resulted in minimal IN2 zoned land and therefore we have the mix of light and general in our IN1 lands in Jamisontown and Emu Plains - where we have a variety of population serving businesses like gyms and indoor recreational facilities, garden and hardware centres. We have the opportunity

43. Infrastructure Australia

44. Pacific National, 2021



to consider rezoning some of this land to enable more low impact businesses closer to centres, for example in North Penrith.

## 7.5 IMPROVING AMENITY AND CONNECTIVITY

Employee amenity is a critical selection factor for many businesses, especially for those in the knowledge-based sectors. Businesses seeking to combine office and industrial spaces in the one location are attracted to places with improved public realm rather than traditional industrial areas with limited services and facilities.

In Penrith, our existing employment precincts, particularly our older industrial precincts, are in need of rejuvenation and upgraded infrastructure to make them more attractive places to work and invest in three main ways:

- **Low levels of amenity:** There is an opportunity to improve landscaping, not only within the public domain, but also on private land to provide our workers with an attractive place to work, where there are green and shaded areas outdoors places to spend breaks outside, eating and/or exercising. Improving amenity will make these areas more attractive to a range of new industries.
- **Transport connectivity:** Our larger employment precincts located away from centres, such as Werrington Corporate Park and Erskine Industrial Park, need more

frequent and convenient public transport connectivity. Conversely, in existing precincts close to rail stations like St Marys North-Dunheved and North Penrith, the pedestrian and cycle connections from the rail station through the industrial precinct need to be improved to provide better safety, directness, attractiveness. Separated infrastructure for cyclists, like in Erskine Park, is essential in industrial areas where there is a high volume of heavy vehicles.

- **Demand for high-speed digital connectivity:** Economic resilience in the digital age relies on fast internet connectivity. Access to consistent, high quality, large capacity digital connection is required to support business development and employment opportunities in our employment precincts in both our existing and new industrial precincts. It is essential in our commercial centres and health and education precincts.

Place-making initiatives to create an attractive the public realm and pedestrian, cycling and public transport connectivity will be equally important in the planning of new precincts. Planning in our future employment precincts will need to consider the principles for quality design being developed as part the proposed Design and Place SEPP<sup>45</sup>.

## 7.6 COOLING THE CITY AND BUILDING OUR RESILIENCE

Striking a good balance between enabling economic activity for community benefit while safeguarding sustainable environmental outcomes is key to planning and managing Penrith's employment lands.

Compared to metropolitan Sydney, Penrith's micro-climate is hotter and drier in summer, and colder with frosts in winter. Our buildings and streets must be designed to minimise urban heat island impacts. Opportunities to cycle and walk will be supported by access to drinking water, and shady pathways. Tree-lined streets,

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<sup>45</sup>. Department of Planning, Industry and Environment, 2021

verandas and awnings will provide cooling and shelter from the sun. Water play and connections with water will become essential elements of our City Centre. Our buildings and open space must respond to our cultural identity as a River City and contribute to cooling down Penrith, so it remains a destination of choice, where people want to live, work, play and invest<sup>46</sup>.

Penrith has taken a lead in developing strategies to address urban heat and preparing our city for future climate change shocks with the development of the *Cooling the City Strategy 2015*<sup>47</sup> and most the draft *Resilient Penrith Action Plan 2021*<sup>48</sup>. The *Cooling the City Strategy* introduced a number of actions to address and reduce heat through the application of sustainable urban design including choice of building materials, water sensitive urban design and increasing tree canopy cover. There are opportunities to support greening of landscapes and cooling of buildings in employment lands with the re-use of water, particularly climate independent, non-drinking water.

The *Resilient Penrith Action Plan* notes that 34.5% of Penrith's total greenhouse gas emissions of 2.15 million tonnes CO<sub>2</sub>e based on 2018-19 data, were contributed by the commercial, retail and industrial sector. The plan notes that efficient and sustainable use of resources will assist in reducing waste, energy and greenhouse gases and introduces the concept of a circular economy which employs the approach of continual reuse and recycling of products to minimise waste to landfill and shifts towards the use of renewable energy promoting a healthier environment.

In addressing these challenges, there are opportunities to build on existing strengths within the Penrith economy as well as to take up new opportunities being created through new and emerging sectors, changing work and industry practices, advanced digital technologies and creative industries.

46. Penrith City Council, 2015

47. Penrith City Council, 2015a

48. Penrith City Council, 2021



# 8. MAXIMISING OUR OPPORTUNITIES

Penrith has a proud history as a liveable place and a welcoming community, where people can live and work comfortably and affordably. It has long served the wider western Sydney community as a regional destination for work, education, shopping, services, sport and recreation. Broader economic drivers and significant infrastructure investments are influencing market activity and interest in commercial, industrial, and retail land use in Penrith employment precincts.

## 8.1 WESTERN SYDNEY AIRPORT AND AEROTROPOLIS

The Western Sydney Airport and associated development of the surrounding Aerotropolis is a once in a generation opportunity for all communities in the Western Parkland City. The 11,200 hectare Aerotropolis includes five initial precincts that were rezoned in late 2020. Of these, the Northern Gateway and the Agribusiness precincts are within the Penrith LGA. In addition, the Mamre Road industrial precinct has been identified for accelerated development to ensure there is sufficient industrial land to accommodate business investment seeking to capitalise on the economic benefits of the new airport.

Penrith is uniquely positioned to take advantage of the expected 'first movers' to the Aerotropolis, who are likely to be large scale industrial enterprises particularly freight and logistics companies, particularly in the Mamre Road industrial precinct. It will be important, however, to ensure that the employment land in Penrith's Aerotropolis precincts is planned to also accommodate businesses that offer higher order knowledge-intensive jobs and sectors that attract higher job densities.

While the majority of land in the Agribusiness precinct is located in neighbouring Liverpool, the part that lies within Penrith LGA has an important role for employment within the precinct. Luddenham Village is earmarked as a special local centre to be structured to enhance and protect its character and heritage. Luddenham village will provide opportunities for tourism and cultural uses and act as the gateway for tourism through the Scenic Corridor. New flexible enterprise land uses have also been identified in the north of the precinct adjacent to the Northern Gateway. This area of the precinct that offers potential for a mix of integrated logistics and food and pharma production.

## 8.2 MAJOR INFRASTRUCTURE INVESTMENTS

Along with the development of the Western Sydney Airport is the State and Federal government commitment to the North-South rail link, the Sydney Metro WSA between St Marys and the Western Sydney Airport. This transport infrastructure means Penrith will have the first connection between the Western Sydney Airport and the Greater Sydney rail network. This will transform the role of St Marys into a major transport interchange and create two new

station precincts located at Orchard Hills and Luddenham.

### 8.3 BUILDING ON OUR ECONOMIC STRENGTHS

The 2017 EDS identified jobs growth in six specific industry sectors, namely health, education, tourism, arts and culture, advanced manufacturing, and advanced logistics. Since then, there has been growth in all but the arts and culture sector.

Additionally, the greatest employment growth in the last five years, has been in the construction sector. Construction is now the largest employer, generating 13,497 local jobs in 2021/20<sup>49</sup>.

With good economic diversity, Penrith's economy has a solid foundation for growth by building on these existing strengths. The arts and culture sector, however, will likely require more direct government support and investment to nurture growth in the creative industries that stimulate innovation in our city.

The manufacturing base in Penrith provides opportunities for a range of manufacturing businesses to trial new technologies to improve their productivity and output. Opportunities can be further explored in collaboration with Western Sydney University and TAFE to increase skills required to support the introduction and expansion of advanced manufacturing.

### 8.4 FACILITATING GROWTH OF NEW AND EMERGING SECTORS

Recent economic analysis by EY<sup>50</sup> of the employment opportunities created by Western Sydney Airport suggest that the airport will generate jobs growth both in our existing growth sectors as well as new airport-related industry clusters including aerospace and Defence, food and agribusiness, and building and construction.

Technological innovation continues to evolve all parts of the economy and society. These technologies have dramatically changed how we work, live and do business enabling remote learning and working, e-commerce and opening up new global markets.

New digital technologies like artificial intelligence, the internet of things, augmented and virtual reality, cloud computing, blockchain, robotics and autonomous vehicles, have to potential to help businesses develop new products, access new markets, work more efficiently, better target consumer preferences through use of data, and deliver safer working environments. Our economic success depends on our ability to harness technological advances to improve existing businesses, create new products and markets, and enhance daily life<sup>51</sup>. Access to reliable, fast, secure and affordable telecommunications and mobile networks in our existing and new employment precincts is key to supporting growth for local business and to facilitating new and emerging sectors.

### 8.5 TRANSITIONING TO A CIRCULAR ECONOMY

Increasingly companies both large and small are seeking to achieve improved sustainability in all aspects of their business.

A growing number of businesses support an emerging 'circular economy'.

The circular economy is based on three principles:

- design out waste and pollution
- keep products and materials in use
- regenerate natural systems.

Transitioning to a circular economy is an objective set out in the Western Sydney Aerotropolis Plan (WSAP)<sup>52</sup> (2020) and an environmental priority of the NSW Government as set out in the NSW Circular Policy Statement (2019)<sup>53</sup>. Here in Penrith, we already have a number of businesses that support the circular economy, including 23 businesses providing Waste Remediation and Materials Recovery

49. National Institute of Economic and Industry Research (NIEIR) ©2021

50. EY, 2018

51. Australian government 2018

52. Western Sydney Aerotropolis Plan, 2020

53. NSW Environment Protection Authority, 2019





Services. Around half of these businesses are located in the North-South Corridor.

St Marys is also the location of Sydney Water's Advanced Water Recycling Plant and their planned resource recovery plant which is an innovative and integrated facility that will produce recycled water and co-digest waste to generate energy. Another resource recovery plant, the Upper South Creek Advanced Water Recycling Centre, is planned for Badgerys Creek precinct. In addition to St Marys, Sydney Water also operates Penrith Water Recycling Plant that supplies recycled water to irrigate local sports fields.

## 8.6 KEY MOVES FOR OUR CORRIDORS

These opportunities lend themselves to strengthening the Economic Triangle with each of the three arcs being ideal for making specific key moves:

**East-West Corridor** - This Corridor, stretching from Penrith to St Marys, encompasses large areas of existing urban development in Penrith. The corridor includes adjacent industrial precincts in North Penrith and St Marys North-Dunheved and Penrith's specialised health, education and technology precinct, locally known as The Quarter, as well as the special purpose tourism area around Penrith Panthers and the large format retail and business centre in Jamisontown. In this Corridor it will be important to identify complementary roles for Penrith City Centre and St Marys Town Centre as commercial and service centres; and safeguard employment floorspace in each to ensure long term economic viability of these centres as gateways for workers and visitors to the LGA. Improved transport accessibility will increase the desirability of station catchments for housing and employment growth.

The Quarter health and education precinct includes Nepean Hospital, Western Sydney University Kingswood and Werrington campuses and NSW TAFE Western Sydney Institute Kingswood campus. This precinct generates one in 10 local jobs in Penrith LGA. To reinforce the important employment role that this precinct provides will require advocating and enabling

better connections by rapid and frequent public transport connections between the precinct and St Marys and Penrith City Centre. The Quarter, together with the development of the Sydney Science Park, located in the Northern Gateway precinct of the Western Sydney Aerotropolis, will emerge as an innovation core to Penrith's Economic Triangle.

**North-South (New Enterprise) Corridor** – The North-South Corridor stretches from St Marys North-Dunheved Industrial precinct to the Western Sydney Airport. It is delineated by the Sydney Metro Western Sydney Airport rail line, major roads and future Outer Sydney Orbital motorway, which will ultimately connect Penrith's two planned intermodal terminals in St Marys North and in the Mamre Road industrial precinct. Future centres will need space for employment and urban services for local communities. It is critical that the Sydney Metro Western Sydney Airport rail line facilitates jobs growth and the access to those jobs.

This Corridor offers a prime location for advanced manufacturing, freight and logistics and construction industries associated the Airport. There are also a number of resource recovery and recycling facilities in this Corridor that reflect an opportunity to support growth of a circular economy.

**Western (Scenic) Corridor** - The Scenic Corridor stretches from the Western Sydney Airport north to Penrith and Penrith Lakes. By preserving and enhancing the unique natural, scenic and cultural landscapes from the Airport along the river to Penrith Lakes, new business and employment opportunities may be supported by activities such as nature-based tourism, heritage and farm gate trails, accommodation options, sporting and recreational experiences, lifestyle activities, and Aboriginal cultural education experiences.

The Northern Road will connect the proposed Agribusiness precinct, on the western side of the Aerotropolis, with Penrith's northern rural lands. The Agribusiness precinct presents an opportunity for Penrith's agricultural production and agricultural supply chain businesses to expand and become more export oriented.

# 9. STRATEGIC DIRECTIONS AND ACTIONS

In addressing the challenges and planning for growth the Employment Lands Strategy sets out four Strategic Directions that are aligned to the vision and planning priorities of the Penrith LSPS.



## LSPS THEME: CONNECTED

A connected city is one where people can easily get to a greater variety of jobs within 30 minutes of travel by public transport or by walking or cycling. Planning better access by active and public transport to our existing employment areas from our city centres and advocating for better connections for freight transport away from residential

areas are some of the actions identified to help deliver a productive 30-minute city.

### **Strategic Direction 1 – Deliver a safe, efficient and sustainable 30-minute city**

There are considerable differences in the likelihood of people travelling to work by car or public transport depending on their industry and occupation. Typically, knowledge workers



are more likely to travel to work using public transport while construction and industrial workers are more likely to use private or service vehicles. Therefore, to deliver a 30minute city it will be important to concentrate knowledge and population serving employment in centres well-served by public transport and locate new industrial employment in precincts that are well served by road transport. It will still be important to deliver good active transport infrastructure and public transport services within and to all precincts to provide alternate transport options for workers.

Intended outcomes from Strategic Direction 1 are:

- 1.1 Better alignment of jobs alongside population growth.
- 1.2 Improved safety and connectivity for residents and businesses

Actions to help deliver a safe, efficient and sustainable 30-minute city include:

#### **ACTION 1**

##### **Preserving commercial space in Penrith's main centres within walking distance to rail stations**

Penrith and St Marys will both need to have sufficient commercial space to accommodate growth and diversity of employment. Centres are important as they offer an opportunity for greatest job density. For Penrith City Centre, this will involve ensuring sufficient employment capacity is the commercial core is retained while balancing demand for residential development close to the centre. Greater concentration of employment within easy access to rail can help reduce car travel and traffic congestion<sup>54</sup>.

In St Marys, where the town centre allows mixed use development, a recent LEP amendment to require retail and commercial development on the ground and first floors of the town centre will help to ensure jobs are delivered as the centre grows.

Available options, demand and capacity for co-working space, business hubs and decentralised

government agency working spaces could be further investigated in planning Penrith CBD and St Marys town centre.

We also need to plan for commercial space in new centres around Orchard Hills and Luddenham Road metro stations. Council will continue to work with State government on the planning for the areas around these metro stations to deliver commercial space within these future communities.

#### **ACTION 2**

##### **Advocating for rapid and frequent public transport services to our employment centres and health and education precincts in the East West Corridor supported by a network of safe, separated pathways for pedestrians and cyclists.**

Frequent and easy access to Penrith CBD and St Marys transport interchange will be critical to enhance the viability of The Quarter as a centre of health, education and research. A frequent turn-up-and-go bus service should be explored to provide readily accessible connections from Penrith Interchange and the future St Marys Metro Station to key locations within the precinct including the TAFE, University campuses and Hospitals. Council will also work with the State government to plan and deliver rapid bus services from Penrith to the Western Sydney Airport and the Aerotropolis that can also service our health and education precinct.

Appropriate walking and cycling infrastructure will support more short trips in the East West Corridor to be taken by bicycle as well as walking. To encourage more people to walk or cycling we will need to deliver safe, well-connected and accessible routes to the various destinations in the East-West Corridor. More people walking and cycling for short, everyday trips can improve transport network outcomes overall, in addition to delivering positive health and wellbeing, productivity, place, sustainability and environmental outcomes. The Green Grid Strategy provides a basis for considering how we can improve and prioritise walking and cycling links throughout our City.

54. *Mecone Atlas Urban Economics, 2021*

### **ACTION 3**

#### **Planning to provide for the safe and efficient movement of freight**

The movement of large vehicles for freight is an important consideration for industrial and commercial premises. To contribute to Greater Sydney's global competitiveness with the development of the Western Sydney Airport and Badgerys Creek Aerotropolis, it will be critical to secure the access to the airport and off-site industrial land for freight and logistics for 24/7 operations and supply chains. It will also be critical to plan and protect from encroachment the freight corridors that serve the airport and industrial lands. A dedicated freight rail connection from Port Botany to the Western

Parkland City is being investigated to increase the proportion of freight moved by rail.

Council is planning for growing demand for freight transport in line with Transport for NSW's Movement and Place framework.

### **ACTION 4**

#### **Identifying and advocating for upgrades to the State arterial road network upgrades to improve access to the future Western Sydney Freight Line and intermodal terminals**

Two intermodal terminals have been identified in Penrith LGA – one at St Marys and a second in the Mamre Road precinct. It will be important for to have easy access to major transport corridors such as the M4 Motorway via Mamre Road to ensure



efficient movement of heavy vehicles. It is equally important that access routes are kept away from residential areas and upgraded to reduce safety risks and lower noise impacts for communities.

A critical road upgrade for access to and from the St Marys intermodal terminal is the Werrington Arterial. Council will continue to advocate for the construction of the Werrington Arterial to help minimise impacts of the intermodal terminal on the surrounding communities. For the Mamre Road intermodal terminal, access will be well served by the Mamre Road upgrade, which Transport for NSW is currently planning.

#### **ACTION 5**

#### **Enhancing dispersed employment lands along the Great Western Highway and Northern Road as business and service hubs for local populations and trade**

The smaller dispersed business zoned lands along the Great Western Highway provide local communities and businesses with access to a range of urban service activities, like vehicle repairs, hardware and bulky goods retail. Ideally these would be enhanced to provide a greater variety of services and space for local retail and trades businesses to be established and grow. Enhancement may include, in the short term, consideration of permissible uses and development controls as part of Council's Local Environmental Plan and Development Control Plan reviews. In the longer term, consolidation of precincts or rezoning of land may be required.

#### **ACTION 6**

#### **Planning future employment land with good access to motorways**

To attract new mid-size enterprise and minimise conflicts in urban investigation areas in new release areas, such as Orchard Hills, there may be opportunities to plan for new general industrial areas along the M4 Motorway and around Patons Lane Resource Recovery Centre and Metro stabling yard. This will be further considered in the future planning process for the

Orchard Hills urban investigation area and be dependent on suitability and adequate servicing of the land.



#### **LSPS THEME: HEALTHY**

A healthy city is one where people have access to open green spaces and quality shopping, services, and community, recreational and cultural facilities. Health and wellbeing are also supported where people and natural environments are protected from the impacts of hazardous activities, heavy traffic, noise and pollution. Improving the amenity in our existing precincts and planning to preserve our natural environments within new employment lands are some of the actions to help improve the health and wellbeing of residents, workers and visitors to our employment lands.

#### **Strategic Direction 2 – Improve the health and wellbeing of residents, workers and visitors**

The preservation of our natural areas and the quality of amenity of our centres and precincts can directly impact on health and wellbeing of people who work and visit them. This has an impact on productivity and affects the attractiveness of precincts to new business. Where and how we plan new employment land for industrial and urban services has a direct impact on existing and new residential communities. A priority for development is to consider the compatibility of uses within precincts, as well as to minimise impacts of vehicles, noise, pollution generated in industrial precincts on workers, visitors and communities in nearby residential areas.

Intended outcomes from Strategic Direction 1 are:

- 2.1** Improved access to safe, inclusive green and public spaces in employment precincts.
- 2.2.** Improved amenity in employment precincts

Actions to help improve the health and wellbeing of residents, workers and visitors include:

## **ACTION 7**

### **Preserving the environmental value of the Scenic corridor**

The Scenic corridor including Mulgoa and Wallacia to Penrith Lakes and onto the Hawkesbury has significant environmental and scenic values which need protecting for the wellbeing and enjoyment of everyone who lives, works and visits Penrith. Many of these values were outlined in the draft Scenic and Cultural Landscapes Study that was prepared to support the Local Strategic Planning Statement. Following on from this, scenic and cultural landscape statements of significance are in preparation for key areas including the Mulgoa Valley and Wallacia which will help ensure these values are protected in the longer term. The statements of significance will focus only on scenic and cultural values, however, that other characteristics, like biodiversity, contribute to environmental value of our natural areas. Consideration of broader environmental values will guide development in existing and new employment lands. Our rural lands contribute to the health and wellbeing of communities. The development of the Airport and Aerotropolis precincts have significantly encroached on the rural and scenic lands in Penrith's south. Further research is required to identify the impact of this development of the Airport and Aerotropolis precincts on our scenic and rural lands in those areas. It will also be important to identify the role of our remaining rural lands for future production of fresh produce for local communities.

## **ACTION 8**

### **Protecting and enhancing environmentally sensitive areas within employment precincts in line with the Green Grid Strategy**

Access to natural areas, tree shading and open space creates a more liveable place for the whole community whether in residential, commercial centres or industrial precincts. Areas of environmental, cultural and scenic value need to be protected from adverse impacts of heavy and hazardous industrial land uses. The Green Grid Strategy has identified a number

of locations for enhancing our important blue and green grid networks. Implementation of the Green Grid strategy will help planning in both existing and future employment precincts.

## **ACTION 9**

### **Considering zoning for low impact businesses near centres and as a buffer between residential and industrial areas**

We will consider more light industry for low impact businesses near centres to reduce potential conflict between industrial uses and residential areas. As it is likely that the Aerotropolis and Mamre Road precincts will attract large freight and logistics operators, consideration should be given to ensuring there is sufficient separation between large floorplate industrial uses and nearby residential areas. Separation requirements set out in the WSEA SEPP aim to reduce adverse impacts on nearby residential areas. These types of requirements need to be safeguarded and applied consistently where new employment lands are identified in Aerotropolis precincts where more flexible enterprise zoning applies.

Additional light industrial areas may be considered in new urban investigation areas adjacent to planned large industrial precincts to create a buffer between these precincts, where there are more frequent heavy vehicle movements, and residential areas.

The changing nature of businesses within existing precincts has meant that in some precincts like Emu Plains and Jamisontown, population serving businesses, like gyms, indoor sports and dance studios are located next to vehicle servicing and repairs businesses. These create potential safety hazards for customers of these businesses, for example children attending dance classes nearby businesses requiring frequent truck deliveries.

A review of permitted uses across industrial and business zoning and potential rezoning of some existing general industrial land, such as in Jamisontown, could also be considered to help reduce conflict. Identification of suitable land for light industrial use near centres in new urban investigation areas may better accommodate



population serving businesses and separate them from impacts of general industrial.

**ACTION 10**

**Improving the amenity and public domain in our existing centres and industrial precincts**

As discussed in section 6, amenity in industrial precincts is equally important to maintain their attraction for new enterprise and skilled workers. Community engagement on this Strategy supported the view that public domain – especially access to roads, green space, quality footpaths and cycleways – is highly regarded by local business. Proximity to a variety of food services, retail and business service outlets was also noted as important to local businesses and workers.

Renewal of older employment precincts offers an opportunity to enhance amenity including improved walking and cycling infrastructure, street landscaping, access to recreational facilities and open space. For example, St Marys North – Dunheved is a major industrial precinct that has a lot of older factories, degraded buildings and streetscapes. Improving amenity in these precincts will make them more attractive to a range of new industries and provide health and wellbeing benefits for the people who work there.

For our existing centres, such as Penrith and St Marys, a number of projects have been completed or are underway to improve public domain amenity such as Triangle Park, City Park and the High Street upgrade in Penrith or Queen Street upgrade in St Marys. We are undertaking further urban design work in these centres to identify further upgrades that will enhance the amenity of these places.

For industrial precincts, a review of the Development Control Plan requirements to enhance amenity as development occurs should be undertaken. The Green Grid Strategy identifies places to concentrate our efforts to provide tree canopy throughout the LGA.



**LSPS THEME:  
INNOVATIVE**

An innovative city has a diverse range of jobs and industries that make the most of new technologies and ways of working and can adapt to changing economic conditions. Planning for a mix of lot sizes and reviewing height limits and development controls to offer greater flexibility in our employment lands are some of the actions that can help build on our existing strengths and support new businesses start up and scale up in Penrith.

### **Strategic Direction 3 – Build on our strengths and facilitate new enterprise**

Penrith's existing strengths lie in its main employing sectors of construction, health care, retail and manufacturing. Some synergies already exist between Manufacturing and Construction sectors and emerging sectors of Electricity, Gas, Water and Waste Services industries, such as manufacturing using recycled materials for construction.<sup>55</sup>

The Quarter, Health and Education precinct in Kingswood Werrington has been identified by the Greater Sydney Commission as a potential health and education precinct for future expansion to leverage significant investments in local health districts, hospitals and associated medical research and education. A 2018 review of globally significant innovation precincts found seven factors for success include market drivers, competitive advantage, collaboration, infrastructure, amenity, enterprise culture and leadership<sup>56</sup>. Penrith City Council has been actively engaged with stakeholders in the Quarter to support its development as an innovation precinct.

The Erskine Park precinct and nearby future employment lands developments in Mamre Road and the Aerotropolis are rapidly emerging as a specialised freight and logistics hub. Development and adoption of new digital technologies in these sectors among others are creating opportunities for new start up tech firms. Planning employment lands that accommodate a mix of lot sizes allows new local businesses to start and scale up close to other larger businesses that can be a market for their products.

Intended outcomes from Strategic Direction 3 are:

- 3.1** Higher levels of productivity through diversification, technological upgrading and innovation, including through a focus on high value added and labour-intensive sectors.

- 3.2.** Growth of micro-, small-, and medium-sized enterprises that support productive activities, decent job creation, entrepreneurship, creativity and innovation

#### **ACTION 11**

##### **Establishing complementary roles for Penrith and St Marys as major commercial centres supporting knowledge jobs as well as population serving sectors**

Penrith CBD has long been a major service centre for outer western Sydney and should continue to build on its role as the major centre for civic, cultural and arts and commercial and retail services. The existing commercial area should be largely retained to allow Penrith to continue to function this way into the future.

St Marys will evolve with the new Metro becoming an important interchange in the Greater Sydney transport network. Positioned at the apex of the North-South Corridor it can serve both residents and people in transit to and from the Western Sydney Airport and ultimately other employment locations. The future role of these important centres will be reinforced through the development of further complementary strategies as part of the broader strategic planning framework.

#### **ACTION 12**

##### **Encourage industries that offer higher employment densities in new precincts**

Mamre Road and the Aerotropolis precincts are ear-marked for large floorplate freight logistics and warehousing. These industries typically do not provide high employment densities. We will advocate for and encourage investment by businesses that offer higher employment densities like manufacturing in these precincts.

Council will also undertake research and analysis to support emerging industries to identify prospective industries for targeted investment attraction.

*55. Penrith City Council, 2019*

*56. NSW Innovation and Productivity Council 2018*





#### **ACTION 13**

##### **Planning a mix of lot sizes to allow local businesses to start-up and scale-up**

Rezoning of land nearby large logistics precincts for general industrial delivering a mix of lot sizes should be considered to allow local industries to scale up and locate close to global enterprises.

These new mid-sized precincts may be possible for example in the Northern Gateway or Mamre West. These precincts are close to the Aerotropolis and could provide suitable land for local mid-sized companies that form part of supply chains for larger corporations located in nearby large lot precincts like Erskine Park and Mamre Road.

#### **ACTION 14**

##### **Reconsidering business park outcomes to encourage greater employment diversity**

Analysis of market trends indicates that some businesses want to co-locate their head office and operations in business parks. We also want to encourage a greater diversity of employment in our existing business park in Werrington and expedite its development. A review of permissible uses in the business park area will

be undertaken to consider other uses that may deliver these outcomes. For example, allowing low impact advanced manufacturing in the business park would support job diversity may entice technology industries to The Quarter. We may consider an opportunity to masterplan the precinct in collaboration with the Western Sydney University and TAFE in an effort to maximise employment outcomes.

#### **ACTION 15**

##### **Reviewing zoning, height limits and development controls to offer greater flexibility for business operations while preventing land use conflicts, and ensuring controls are appropriate to lot size and location**

Recognising the changing demands of industry it is important that development controls in industrial precincts accommodate a variety of uses. Greater flexibility in height limits and development controls can help encourage new employment uses in existing precincts. We will review the controls in our industrial precincts to determine whether any changes may facilitate recent market trends. The review will consider adverse impacts on views, vistas and amenity of surrounding communities.



#### **ACTION 16**

##### **Collaborating with research, education and training institutions to support development of new digital technology and creative industries**

Penrith as one of the eight councils of the Western Parkland City has embarked on the adoption on many new digital technologies to improve quality of life for its communities. The increasing adoption of new 'smart city' technologies opens pathways for new business to develop. These 'start ups' will be encouraged to Penrith where there is high speed access to internet connections and good communications networks. Under the Western Sydney City Deal, Penrith City Council is collaborating with other councils and industry partners in the Western Parkland City to implement a smart city digital strategy. This collaboration aims to identify new opportunities to ensure digital connectivity supports growth in the region.

#### **ACTION 17**

##### **Investigating new opportunities related to the WSA associated with the Agribusiness precinct and our rural and tourism industries.**

Further investigation of opportunities for tourism and agribusiness associated with the WSA will be undertaken to identify and protect land in the Scenic Corridor from encroachment and other land uses which may have a detrimental impact.



#### **LSPS THEME: BALANCED**

A balanced city safeguards its future and uniqueness, balancing growth to protect its natural assets. The need for local jobs and growing the economy is to be balanced with the need for affordable and diverse housing, respect for the environment and an appreciation of flood risk, heatwaves and bushfires.

#### **Strategic Direction 4 – Balanced – Strengthen our resilience**

The transformation of the area of the size of the Aerotropolis and its precincts will present

new environmental challenges for the Western Parkland City. Protecting our environment is a high priority for our community. Penrith has experienced several emerging climate challenges of heat, bushfire and flood in recent years. Council has developed a Resilient Penrith Action Plan to build its capacity and ensure Penrith develops as a sustainable, efficient, liveable and resilient city.

Intended outcomes of Strategic Direction 4 are:

- 4.1** Substantially reduced waste generation through prevention, reduction, recycling, and reuse
- 4.2.** Precincts planned and designed for resource use efficiency, climate adaptation and resilience to disasters

Actions to help strengthen our resilience in planning our employment lands include:

#### **ACTION 18**

##### **Fostering a circular economy**

Building on our emerging cluster of waste management and recycling businesses already in Penrith, employment land in the North-South Enterprise Corridor can attract and cater for new businesses in a range of industries in the circular economy such as waste management and resource recovery, manufacturing of goods from recycled materials, renewable energy and waste water management. We will collaborate with neighbouring councils and State government agencies to develop the circular economy will be important to take advantage of regional economies of scale in these industries.

The concept and principles of the circular economy should also be fostered by other new and existing businesses/industries in identified employment lands, through embedding the circular economy in systems, processes, procedures, and policies to ensure resource efficiency.

#### **ACTION 19**

##### **Implementing Cooling the City and Resilient Action Plan**

The rapid redevelopment of once rural lands in the North-South Corridor and the Western

Sydney Airport is likely to increase the heat island effect in Penrith. Sustainable urban design and heat mitigation and adaptation initiatives, as identified in the Cooling the City Strategy and the Resilient Penrith Action Plan, must be implemented at the time of development to address the impacts of extreme heat and other climate-related effects. These initiatives need to be prioritised in existing and new employment lands.

Businesses will be encouraged to design their premises in ways that address urban heat, sustainability, and resilience. . Our goal will be to ensure that land use planning and development controls reduce community exposure to risks from known hazards, and that new development is designed to specifications that enhance resilience.

#### **ACTION 20**

##### **Working with local servicing agencies to ensure a pipeline of serviced employment land is available for timely and balanced development**

Community engagement for this Strategy highlighted the issue of availability of and demand for different types of employment land for different market segments. New employment areas have become available, and may be suitable for small to medium enterprise. However, the large areas of zoned employment lands Mamre Road Industrial precinct and in the Aerotropolis precincts will require considerable investment to upgrade transport infrastructure and provide new utilities (water, sewage, energy and telecommunications). The development and servicing of new employment lands consider design and operations that aim to minimise waste and use of energy, resources and water to maximise sustainable development outcomes.

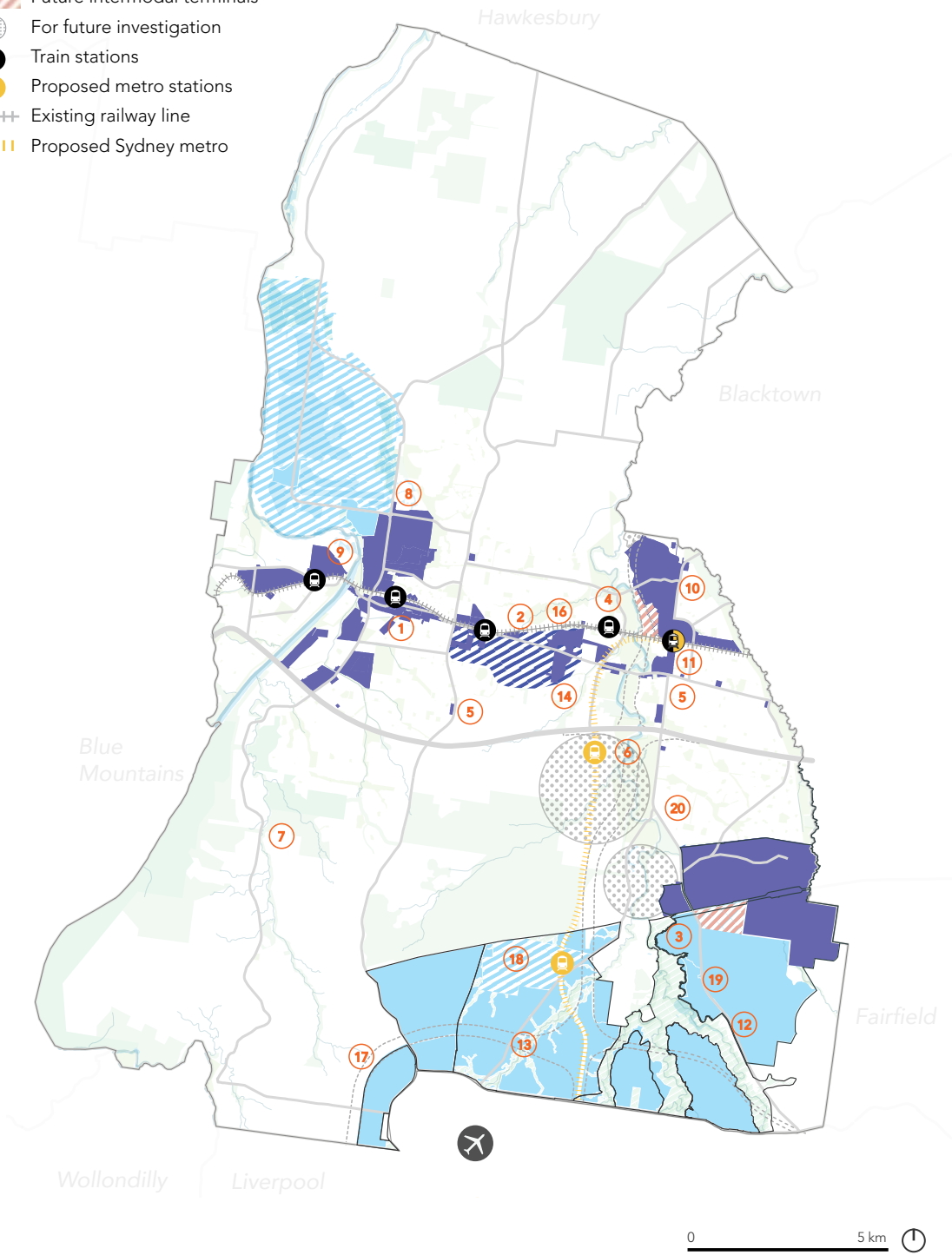
We will advocate for suitable timing of services to allow land to be ready for market to meet demand. The Council will continue to work closely with agencies to ensure that the development and servicing of land is balanced to provide reasonable certainty for developers and well-planned precincts for communities.

## SUMMARY OF ACTIONS

LSPS THEME	ELS STRATEGIC DIRECTIONS AND ACTIONS
<b>Connected</b>	<p><b>Deliver a safe, efficient and sustainable 30-minute city by</b></p> <ol style="list-style-type: none"> <li>1. preserving commercial space within Penrith’s main centres within walking distance of rail stations</li> <li>2. advocating for rapid and frequent public transport connections to our employment centres and health and education precincts in the East West Corridor supported by a network of safe, separated pathways for pedestrians and cyclists</li> <li>3. planning to provide for the safe and efficient movement of freight</li> <li>4. identifying and advocating for upgrades to the state arterial road network to improve access to the future Western Sydney Freight line and intermodal terminals</li> <li>5. enhancing dispersed fragmented employment lands along Great Western Highway and Northern Road as business and serve hubs for local populations and trade.</li> <li>6. planning for future employment land with good access to motorways</li> </ol>
<b>Healthy</b>	<p><b>Support the health and wellbeing of workers, residents and visitors by</b></p> <ol style="list-style-type: none"> <li>7. preserving the environmental value of the Scenic corridor</li> <li>8. protecting and enhancing environmentally sensitive areas within employment precincts in line with the Green Grid strategy</li> <li>9. consider zoning for low impact businesses near centres and as a buffer between residential and industrial areas</li> <li>10. improving the amenity and public domain in our existing centres and industrial precincts</li> </ol>
<b>Innovative</b>	<p><b>Build on our strengths and support new enterprise by</b></p> <ol style="list-style-type: none"> <li>11. establishing complementary roles for Penrith and St Marys as major commercial centres supporting knowledge jobs as well as population serving sectors</li> <li>12. encouraging industries that offer higher employment densities in new precincts</li> <li>13. plan for a mix of lot sizes to allow local businesses to start-up and scale-up</li> <li>14. reconsidering business park outcomes to encourage greater employment diversity</li> <li>15. reviewing zoning, height limits and development controls in existing precincts to offer greater flexibility for business operations while preventing land use conflicts, and ensure controls are appropriate to lot size and location</li> <li>16. collaborating with research, education and training institutions to support development of new digital technology and creative industries</li> <li>17. investigating new opportunities related to the WSA associated with the Agribusiness precinct and our rural and tourism industries</li> </ol>
<b>Balanced</b>	<p><b>Strengthen our resilience by</b></p> <ol style="list-style-type: none"> <li>18. fostering a circular economy</li> <li>19. implementing the Cooling the City strategy and the Resilient Penrith Action Plan</li> <li>20. working with local servicing agencies to ensure a pipeline of serviced employment land is available for timely and balanced development</li> </ol>

# MAP 5 Summary of actions

- ⑦ Action
- Existing Precincts
- Future Precincts
- Future intermodal terminals
- For future investigation
- Train stations
- Proposed metro stations
- Existing railway line
- Proposed Sydney metro



# 10. IMPLEMENTATION AND MONITORING

Council is required to plan and report on its performance through an Integrated Planning and Reporting (IP&R) framework under the Local Government Act 1993. This IP&R framework provides the basis for implementation of the Employment Lands Strategy. Under the IP&R framework, Council is required to prepare a number of plans including the Community Strategic Plan, a Delivery Plan and an Operational Plan to outline planned work and track progress on the commitments to achieve our community's vision for Penrith.



Implementation of the Employment Lands Strategy will be considered in the development of Council's next Community Strategic Plan and Delivery Program. This will allow a coordinated approach to the implementation of the strategy and monitoring of progress.

Existing Council strategies and plans provide the policy framework for the Employment Lands Strategy and its implementation needs to be considered in the context of what already exists. To this end, the actions included in Council's Local Strategic Planning Statement and Resilient Penrith Action Plan, as well as the activities of numerous Council departments, support the implementation of the Employment Lands Strategy. An Implementation Plan for the Employment Lands Strategy has been developed below to ensure that this Strategy is implemented over time.



## 10.1 IMPLEMENTATION PLAN

This section presents an Implementation Plan to realise the strategic directions and actions of the Strategy and guide its delivery. For each action, the Implementation Plan indicates Council's role, partners for collaboration, and the priority of the action.

### Council's Role

Penrith City Council will play different roles in the implementation of this Strategy. These will vary between the roles of Planner, Advocate, Collaborator, Deliverer, Facilitator/Educator and Regulator. A description of these various roles is provided below.

**Plan** – implementing strategic planning responsibilities

**Advocate** – representing community needs and interests to Commonwealth and State Governments and the private sector

**Collaborate** – working closely with businesses, industry, developers, investors, government departments and agencies and peak bodies

**Deliver** – coordinating delivery of community facility, service, works or product.

**Facilitate/Promote** – providing information to prospective investors, businesses and interest groups.

**Regulate** – ensuring that employment land meets urban planning, building and public health regulations and expectations.

### Timeframe

Actions have been categorised into short, medium and long term, or ongoing to be completed over the lifetime of the Strategy. Priorities should be periodically reviewed and reassessed in line with available budgets, resources and funding opportunities. The timeframe for completing actions is:

- **Short** – Action to occur over the next 1-2 years
- **Medium** – Action to occur over the next 2-4 years
- **Long** – Action to occur over the next 5+ years
- **Ongoing** – Action to be undertaken on an ongoing basis

**STRATEGIC DIRECTION 1 – CONNECTED - DELIVER A SAFE, EFFICIENT AND SUSTAINABLE 30-MINUTE CITY**

**Outcome 1.1: Better alignment of jobs**

No.	Action	Council's Role	Timeframe
1	Preserving commercial space within Penrith's main centres within walking distance of rail stations	Plan Regulator	Ongoing
2	Advocating for rapid and frequent public transport connections to our employment centres and health and education precincts in the East-West Corridor supported by a network of safe, separated pathways for pedestrians and cyclists	Advocate	Ongoing

**Outcome 1.2: Improved safety and connectivity for residents and businesses**

3	Planning to provide for the safe and efficient movement of freight	Advocate Collaborate	Medium
4	Implement the <i>Greater Penrith Place Strategy</i>	Advocate	Short
5	Enhancing dispersed employment lands along the Great Western Highway and Northern Road as business and service hubs for local populations and trade	Plan Advocate	Medium
6	Planning for future employment land with good access to motorways	Plan Advocate	Medium

**STRATEGIC DIRECTION 2 – CONNECTED - DELIVER A SAFE, EFFICIENT AND SUSTAINABLE 30-MINUTE CITY**

**Outcome 2.1: Improved access to safe, inclusive and accessible, green and public spaces**

No.	Action	Council's Role	Timeframe
7	Preserving the environmental values of the Scenic Corridor	Plan Advocate	Short
8	Protecting and enhancing environmentally sensitive areas within employment precincts in line with the Green Grid Strategy	Plan Advocate	Medium

**Outcome 2.2: Improved amenity for local workers**

9	Consider zoning for low impact businesses near centres and as a buffer between residential and industrial areas	Advocate	Medium
10	Improving the amenity and public domain in our existing centres and industrial precincts	Advocate	Short



**STRATEGIC DIRECTION 3 – INNOVATIVE – BUILD ON OUR STRENGTHS AND FACILITATE NEW ENTERPRISE**

**Outcome 3.1 - higher levels of productivity through diversification, technological upgrading and innovation, including through a focus on high value added and labour-intensive sectors**

No.	Action	Council's Role	Timeframe
11	Establishing complementary roles for Penrith and St Marys as major commercial centres supporting knowledge jobs as well as population serving sectors	Plan Facilitate	Medium
12	Encouraging industries that offer higher employment densities in new industrial precincts	Advocate Plan	Short

**Outcome 3.2 - Growth of micro-, small- and medium-sized enterprises that support productive activities, decent job creation, entrepreneurship, creativity and innovation**

No.	Action	Council's Role	Timeframe
13	Plan for a mix of lot sizes to allow local businesses to start-up and scale-up	Plan Regulate	Medium
14	Reconsidering business park outcomes to encourage greater employment diversity	Plan Regulate Collaborate	Medium
15	Reviewing height limits and development controls in existing precincts to offer greater flexibility for business operations while preventing land use conflicts, and ensure controls are appropriate to lot size and location	Plan	Short
16	Collaborating with research, education and training institutions to support development of new digital technology and creative industries	Plan Advocate	Medium
17	Investigating new opportunities related to the WSA and Agribusiness precinct for our rural and tourism industries.	Plan	Short



IMPLEMENTATION AND MONITORING

**STRATEGIC DIRECTION 4 – BALANCED – PROTECT OUR ENVIRONMENT AND STRENGTHEN OUR RESILIENCE**

**Outcome 4.1 Substantially reduced waste generation through prevention, reduction, recycling, and reuse**

No.	Action	Council’s Role	Timeframe
18	Fostering a circular economy	Plan Advocate	Long

**Outcome 4.2 Mitigation and adaptation to climate change and resilience to disasters**

19	Prioritise sustainable design, heat mitigation and resilience initiatives	Plan	Ongoing
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**Outcome 4.3 Precincts planned and designed for resource use efficiency and greater adoption of clean and environmentally sound technologies and industrial processes**

20	Working with local servicing agencies to ensure a pipeline of serviced employment land is available for timely, sustainable and balanced development	Plan Regulate	Medium
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## 10.2 MONITORING

Regular monitoring of indicators and baseline data to measure progress towards the outcomes identified in this Strategy will ensure we track and measure our delivery and performance.

The overarching measure of success of the Employment Lands Strategy will be its contribution to the economic development of Penrith as a productive and innovative city, while improving its sustainability and enhancing its liveability.

Key data sets available for performance monitoring of economic outcomes include:

- Gross Regional Product
- Employment land development status
- Employment land vacancy rates
- Business counts
- Employment, density and diversity

Each direction in the Strategy is aligned to the United Nations (UN) Sustainable Development Goals (SDGs) adopted in 2015 by nation states, including Australia, to address global challenges and provide a blueprint for a sustainable and resilient future. Applicable SDGs that have been identified in the Strategy have been used to

develop indicators for measuring progress of the Employment Lands Strategy.

Performance indicators for the Employment Lands Strategy have also been informed by the Greater Sydney Commission’s four overarching performance indicators used to measure progress on the implementation of the Region Plan and the district plans.

Currently, the four performance indicators for Greater Sydney are:

**PI 1 - Jobs, education and housing** - This indicator monitors the spatial aspects of Greater Sydney’s development, the places where jobs, education and housing are located.

**PI 2 - 30 minute city** - This measures the proportion of residents able to reach their nearest metropolitan centre/cluster, strategic or large local centre using public transport and/ or walking within 30 minutes. There is currently no equivalent for measuring connectivity for freight movements or efficient transport links to industrial and out of centre employment precincts. There are, however, a number of strategic freight performance targets in the NSW Freight and Ports Plan 2018-2023.

**PI 3 - Walkable city** - This indicator examines walking and cycling as modes of travel to enable access to schools, employment, shops and services, public transport and open space.

**PI 4 – Urban Heat** - This indicator helps to understand the value of green infrastructure such as tree canopy, vegetation and waterways in reducing the impact of extreme heat on people’s health and improving local amenity.

Data sets for each of these performance indicators are available on the Greater Sydney Dashboard, a single point of access to government data. Greater Sydney Dashboard is an interactive tool that provides links to a range of data sources to help monitor growth and change. It will continue to be developed as new and updated data becomes available. Data from the Dashboard and other data sources will be collated to keep track of progress against the performance indicators.

Penrith City Council is in the early stages of developing its own interactive data tool. It is one of the eight local councils in Western Parkland City to launch a public data sharing portal. Penrith Open data portal is a public data sharing portal established through the Western Sydney City Deal, Smart Western Sydney program. While much of this data on Penrith City Council’s data site is local in nature, it is similar to the data supplied by the other seven Councils of the Western Parkland City – which means that it can be combined with their data to provide meaningful regional insights.

### 10.3 REVIEW

We will regularly review progress of actions and outcomes in the the Employment Lands Strategy to ensure that it reflects the latest information and direction of our City. This will be important, particularly in view of



the Employment Zone Reform, the release of revised population projections, and the transformation our City is about to experience with the Western Sydney Airport and its associated infrastructure – all of which shape how the Penrith LGA will grow and change.

Updates of development in Penrith’s industrial precincts will occur with the release of the Employment Lands Development Monitor (EDLM) and other relevant data like the ABS Census data. Progress checks of the Employment Lands Strategy will be aligned with reviews of Penrith’s LSPS to ensure it remains up to date with the LSPS and the Greater Sydney Commission’s plans for Greater Sydney and the Western Parkland City. A strategic review of the Greater Sydney Region Plan and District Plans will commence in 2022 with new plans due to be finalised in 2023-24. A timeframe for monitoring and review is shown below.

A full review of the Employment Lands Strategy will be necessary once the Western Sydney Airport and Sydney Metro WSA rail link are operational, scheduled for 2026. Over time the investment in the new airport will transform

Penrith into a nationally significant trade and investment hub servicing the Asia-Pacific region. By 2036, with the review of the LSPS, there will be plenty of evidence to determine how successful we have been in meeting our community’s aspirations for Penrith as a connected, healthy, innovative and balanced city as well.

## 10.4 CONCLUSION

The Employment Lands Strategy sets out four directions for retaining, planning and managing employment lands in Penrith LGA. The transformation of Penrith from a largely local, population-serving economy to a region of national economic significance is already underway with the development of the Western Sydney International Airport and surrounding Aerotropolis. A measure of success of this transformation and this Employment Lands Strategy will be the degree to which it provides sustainable economic development and productive employment opportunities that contribute to the wellbeing of generations to come.

**Table 2:** Monitoring and review timeframes

COUNCIL IP&R REPORTING	COUNCIL ELECTIONS	COMMUNITY STRATEGIC PLAN 2022			COUNCIL ELECTIONS	COMMUNITY STRATEGIC PLAN 2026	
	Greater Sydney Region Plan (GSRP) strategic review	Census 2021 data release	New GSRP and District Plans		Western Sydney Airport and Sydney Metro WSA operational	Census 2026 data release	Census 2026 data release
2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28
Local Strategic Planning Statement 2020	Employment Lands Strategy 2021	ELDM Industrial Precinct Report update	ELS Progress Check	ELDM Precinct Report update	ELS Progress Check	ELDM Industrial Precinct Report update	ELS review and renew

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