Prepared for
Livingstone Shire Council
ABN: 95 399 253 048

AECOM

Livingstone Shire Industry Assessment

17 April 2025

Livingstone Industry and Centres Assessment

Delivering a better world

Livingstone Shire Industry Assessment

Client: Livingstone Shire Council

ABN: 95 399 253 048

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1	10-Feb-25	Draft	Matthew Rolley ANZ Practice Director, Urbanism + Planning	
2	17-Apr-2025	Final	Matthew Rolley Practice Director - Urbanism + Planning ANZ	

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Executive Summary

The Livingstone Shire local government area (LGA) is projected to experience continued residential and employment growth over the next 20 years. To support this growth and inform future reviews of the Livingstone Shire Planning Scheme 2018 (the planning scheme), Livingstone Shire Council (Council) is planning for future industrial land in the region.

Previous studies have identified demand for approximately 25 hectares of industrial land in Livingstone Shire to 2043. Council engaged AECOM to undertake an industrial land supply assessment to identify land within the Livingstone LGA that is suitable for industrial development to accommodate estimated demand.

Approach

A two-stage process was undertaken to identify land suitable for industrial development, comprising the following:

1. **Long-list** — Up to 100 ha of land suitable for industrial land was identified across the Livingstone Shire LGA. This included a review of vacant land within existing industrial areas in the LGA as well as identifying additional undeveloped land.
2. **Short-list** — A short-list of the land that best met the preferred location principles and provided an orderly sequence of development for accommodating the estimated demand was agreed through workshops with Council.

Separately, up to 50 ha of land suitable for industrial development was identified in the Northern Corridor. This does not contribute to the long-list as it is understood development in this location is unlikely based on the findings of the previous AEC Market Confidence Report (refer **Appendix A**) and AECOM Planning Letter (refer **Appendix B**) as described in Section 2.3.

Preferred Location Principles

The preferred location principles for industrial land described below guided the identification of land suitable for industrial development.

Infrastructure Provision

- Optimise existing infrastructure networks
- Serviceable sites

Accessibility

- Access to major ports, freight routes
- Access to skilled labour
- Access to urban areas

Developable land

- Avoid environment values
- Avoid natural hazards
- Avoid slope
- Large / amalgamated sites

Buffers to Sensitive Uses

- Medium impact industry not within 250 metres of sensitive uses and zones
- Separation of freight and residential traffic ideally

Figure 1: Preferred location principles to guide identification of industrial land

Short Listed Land for Industrial Development

The short-list prioritisation of land for industrial development was based on the following additional key considerations:

- Orderly progression of development
- Land that may be attractive to developers
- Co-location / clustering and focusing growth in existing corridors rather than establishing new industrial development fronts.

This resulted in a prioritised short-list of sites identified in Hidden Valley, Barmaryee and Bondoola.

Table 1: Prioritised short list of Industrial List

Suburb	Available Land	Priority
Hidden Valley (Gateway)	17.5 ha	1
Barmaryee (Pony Club site)	13 ha	2
Bondoola	21.7 ha	3

Sequencing

Two scenarios were considered for the take up of the identified land to ensure industrial land supply was sufficient to meet anticipated demand, as described below and illustrated in Figure 2 (see section 3.4 for larger figures).

- Base Growth Scenario: 1.25 hectares per year, leading to up to 25 hectares of industrial land over a 20-year period.
- Higher Growth Scenario: 2.5 hectares per year, leading to up to 50 hectares of industrial land over a 20-year period.

These scenarios consider up to 46ha of land that could become industrial land.

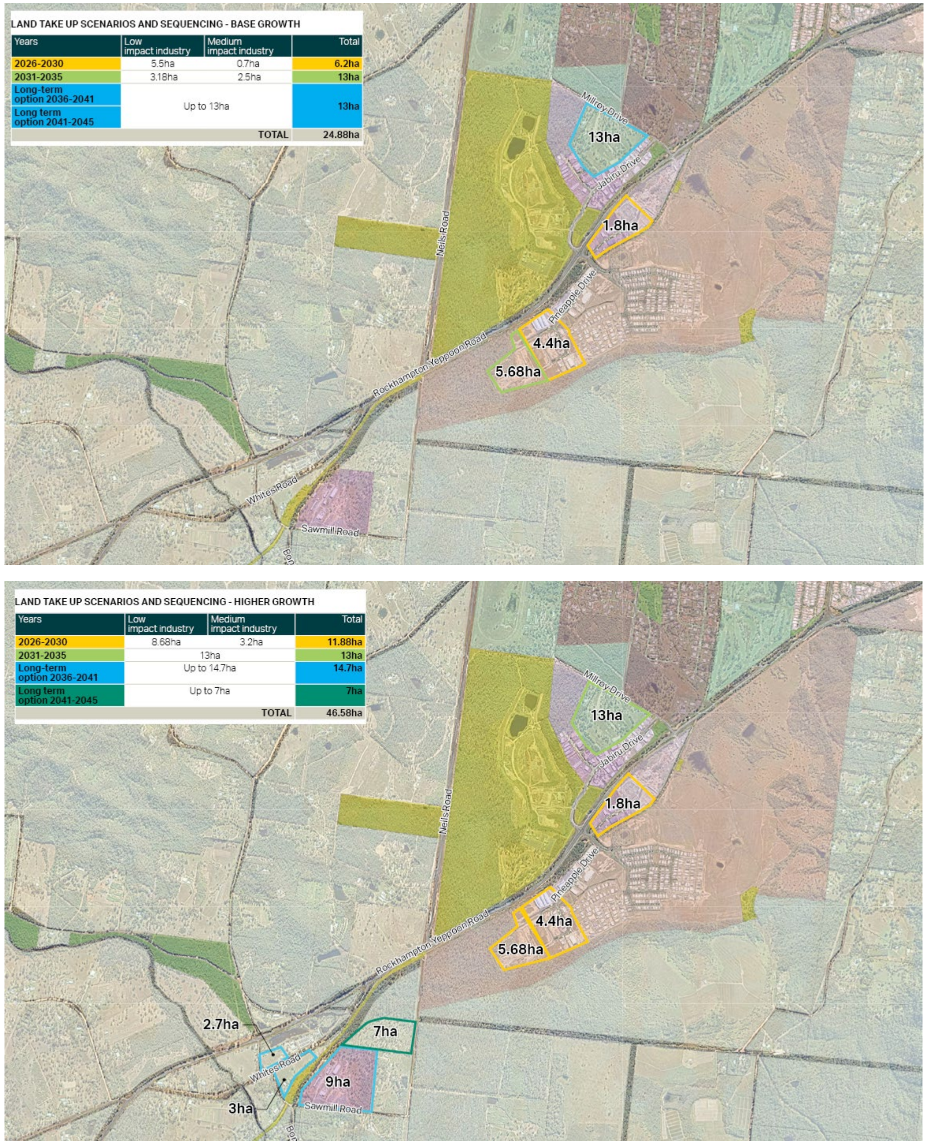

Figure 2: Industrial land sequencing scenarios

Planning Scheme Recommendations

The planning scheme has been reviewed to identify changes required to introduce the proposed industrial zoned land including any gaps in existing assessment benchmarks that limit the development potential of industrial land.

Recommended changes to the planning scheme to facilitate the additional industrial zoned land are outlined below.

Strategic Framework

- Where Industrial Places are defined, update the timing or remove timing to state that industrial land should be developed in sequence when demand is demonstrated to warrant additional development. If timing is required, the following is recommended:
  - Industrial places – prior to the year 2031
  - New industrial – beyond the year 2031
  - Future industrial – beyond the year 2036
- Add Bondoola as a Future Industrial area
- Investigation area 1 – this could be covered by “new industrial” to clarify that this is an immediate opportunity and referred to as New Industrial at Barmaryee
- Investigation area 2 (Emu Park) – remove OR include wording to state this is an opportunity beyond 2046
- Consider some flexibility to allow High impact or Special industry on a case by case basis where certain criteria are met
- No changes recommended in Northern Corridor.

Zoning

- Change Gateway area zoning to Medium impact industry *where meeting performance solutions (Low impact where not) to allow flexibility in the establishment of industrial activities
- Potential change to Pony club zoning – Medium impact industry – dependent on:
  - Progress of discussions with stakeholders
  - Council support
  - Timing of new planning scheme / amendments
- No change to Bondoola zoning – reflected in strategic framework as future land
- Demand and supply should be monitored through future planning scheme reviews before changing zoning of other land.

Tables of Assessment

- Medium impact industry - make code in Low impact industry zone if meeting separation distances or specific criteria
- Research and technology industry - make code or accepted in Low impact industry zone
- Renewable energy facility - consider making code in Low and Medium impact industry zones
- Indoor sport and recreation - consider GFA limit or impact in Low impact industry zone
- Food and drink outlet - consider GFA limit.

1.0 Introduction

1.1 Background and Purpose

The Livingstone Shire local government area (LGA) is projected to experience continued residential and employment growth over the next 20 years. To support this growth and inform future reviews of the Livingstone Shire Planning Scheme 2018 (the planning scheme), Livingstone Shire Council (Council) is planning for future industrial land in the region.

In January 2024, Livingstone Shire Council (Council) engaged AECOM Australia Pty Ltd (AECOM) and AEC Group Pty Ltd (AEC) to provide economic and planning advice regarding the Northern Corridor[1], including a Market Confidence Report by AEC which assessed demand for industrial land across the region (refer **Appendix A**). This study estimated that there is demand for approximately 25 hectares (ha) of developed industrial land in Livingstone Shire to 2043, averaging approximately 1.25ha per year. AECOM prepared a Planning Letter (refer **Appendix B**) based on this study, dated 12 June 2024, that found the Northern Corridor is not the most appropriate location to meet this demand.

In August 2024, Council engaged AECOM to undertake an industrial land supply assessment – this project. This project seeks to identify land within the Livingstone LGA that is suitable for industrial development to accommodate the estimated demand, as well as assessing the related timing and infrastructure requirements to support this.

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[1] The Northern Corridor is a locally used term for the area north of Rockhampton including the suburbs of Glenlee, Glendale, Rockyview, Etna Creek and The Caves.

1.2 Approach

The project was undertaken across five key stages as illustrated in Figure 3 and described in this section.

2. **Long-list** — Up to 100 ha of suitable industrial land was identified across the Livingstone LGA. This included a review of vacant land within existing developed industrial areas in the LGA as well as identifying additional undeveloped land. The suitability of additional undeveloped land was based on a series of high-level preferred location principles being Infrastructure provision, Accessibility, Developable land, and Buffers to sensitive uses.

   Separately, up to 50 ha of land suitable for industrial development was identified in the Northern Corridor. This does not contribute to the long-list as it is understood development in this location is unlikely based on the findings of the AEC Market Confidence Report (refer Appendix A).

3. **Short-list** — A short-list of the land that best met the preferred location principles and provide an orderly sequence of development for accommodating the estimated demand was agreed through workshops with Council.

4. **Timing** — Based on the industrial land demand and take up estimate in the AEC Market Confidence Report, the timing for supply of additional industrial land was assessed in five-year intervals aligned with the planning scheme's Local Government Infrastructure Plan (LGIP) timing.

5. **Infrastructure Requirements** — AECOM provided a theoretical yield for industrial development to Council staff who used this to identify likely infrastructure requirements to support the new industrial land identified.

6. **Planning Scheme Recommendations** — Based on the findings of the previous tasks, the planning scheme was reviewed and analysed to make recommendations relating to potential planning scheme changes required to support the introduction of the proposed industrial land.

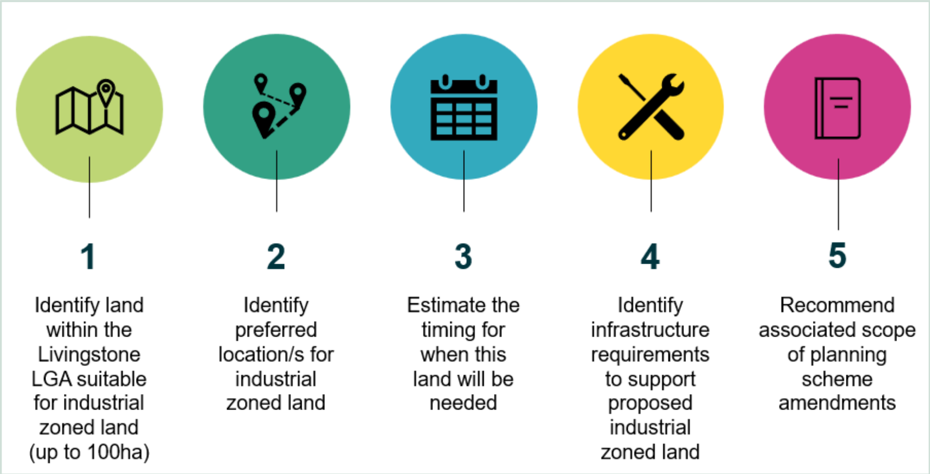


Figure 3: Industrial Land Assessment Approach

2.0 Context

2.1 Regional Context

Livingstone Shire is located on the coast of Central Queensland, adjoining Rockhampton, Gladstone and Isaac LGAs. Yeppoon, the major population and economic centre for Livingstone, is approximately 40 kilometres (km) north-east of Rockhampton City.

There are several established or emerging industrial areas within the Central Queensland Region that are significant at a regional or LGA level including:

- **Gladstone State Development Area (SDA)** – almost 27,000 ha of land dedicated for industrial development suited to large-scale, large-footprint industrial development and materials transportation infrastructure. The Gladstone SDA adjoins the Port of Gladstone and is strategically located for road, rail and air transportation[2].
- **Stanwell-Gladstone Infrastructure Corridor SDA** – supports the establishment of multiple underground pipelines between the Stanwell Energy Plant in Rockhampton and the Gladstone LGA[3].
- **Stanwell-Gracemere Industrial Area** – located 10 km west of Rockhampton with approximately 7,000 ha of land positioned to facilitate Low, Medium and High impact industry.
- **Shoalwater Bay Training Area and Port Alma** – used by Australia's defence forces for joint training exercises with delivery of dangerous goods through Port Alma and heavy equipment and defence ordnance through Rockhampton Airport.

The Central Queensland Regional Plan 2013 recognises the role these areas play in the region and specifies that it does not constrain local government planning for industrial land supply. It is noted that the regional plan is currently under review.

In terms of economic activity, the industrial land within Livingstone Shire generally serves the local market, rather than regional or export markets.

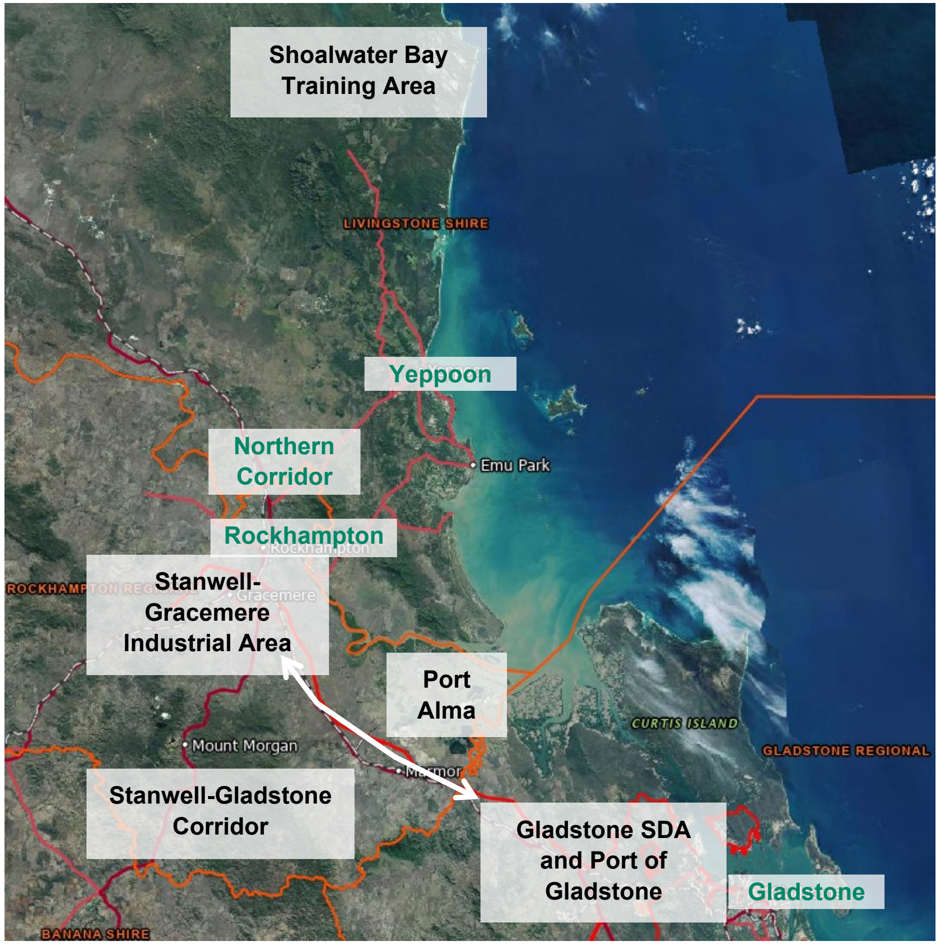


Figure 4: Major industrial areas in the surrounding region

[2] Source: https://www.statedevelopment.qld.gov.au/coordinator-general/state-development-areas/current/gladstone-state-development-area

[3] Source: https://www.statedevelopment.qld.gov.au/coordinator-general/state-development-areas/current/stanwell-to-gladstone-infrastructure-corridor-state-development-area

2.2 Local Context

Livingstone Shire's population projection shows a 51% increase in residents between 2023 and 2046 – an increase of nearly 21,500 people over 23 years[4]. The majority of this growth is expected to occur along the coast in the key Livingstone population centres of Yeppoon and Emu Park.

As stated in the AEC Market Confidence Report, the long-term growth rate for industrial employment across Livingstone and Rockhampton is estimated to be 0.6%. Industrial activity accounts for 13.5% of employment with manufacturing being the largest component of Industrial activity in Livingstone Shire (refer **Appendix A**).

Livingstone Shire currently has approximately 106 ha of land zoned as low impact industry (46 ha) or Medium impact industry (60 ha). Existing industrial areas are generally located close to the population centres of Yeppoon, Emu Park and Rockhampton. The majority of developed industrial land is located along Yeppoon Road in the suburbs of Yeppoon, Barmaryee, Bondoola and a recent Council driven development referred to as "The Gateway" in the suburb of Hidden Valley. Other areas include a small industrial area at Emu Park, a standalone meatworks in the suburb of Nerimbera close to the Rockhampton border and minor marine industry activities at Rosslyn Bay.

The Bruce Highway, Yeppoon Road and Emu Park Road are the key road connections for Livingstone Shire providing access to Rockhampton and other destinations north and south. Tanby Road acts as a heavy vehicle route between Yeppoon and Emu Park. Neils Road, Preston Road and Woodbury Road connect to Shoalwater Bay Training Area from Yeppoon Road.

2.2.1 Planning Scheme Strategic Framework

The planning scheme's Strategic Framework sets out the long-term strategic plan for Livingstone Shire. The planning scheme recognises the regional relationship with Rockhampton and does not contemplate High impact industry and Special industry activities as these are provided for in the Stanwell-Gracemere industrial area.

The industrial place types planned for in the strategic framework are described in Table 2 and mapped in Figure 5: Planned Industrial Places

Table 2: Industrial Place types of the planning scheme Strategic Framework

Place Type	Definition	Existing Locations	Investigation Areas (IA)
Industrial	Industrial places provide opportunities for a range of Low to Medium impact industrial activities up to the year 2026.	Barmaryee	
New industrial	New industrial places comprise land intended to provide for projected employment growth by accommodating the development of industrial activities beyond the year 2026 and up to the year 2031, subject to further investigations.	Barmaryee Hidden Valley Emu Park	Barmaryee (IA 1) Emu Park (IA 2)
Future industrial	Future industrial places may provide opportunities for projected employment growth by accommodating the development of industrial activities beyond the year 2031. These places require further investigation to determine their suitability for industrial development and are to be protected from development resulting in fragmentation.	Bondoola Hidden Valley	Bondoola (IA 11)

It is noted that Specialised Centre place types also cater for some low impact industry activities (service industry) along with large format retail and specialty businesses. Existing Specialised Centre land is located in Yeppoon close to Yeppoon Road and Tanby Road. While these areas can accommodate industrial activities, they have not been included in detail in the assessment of industrial land as they may be taken up by non-industrial uses.

[4] Queensland Government Statisticians Office (QGSO) (2023). *Projected population by local government area, Queensland, 2021 to 2041.*

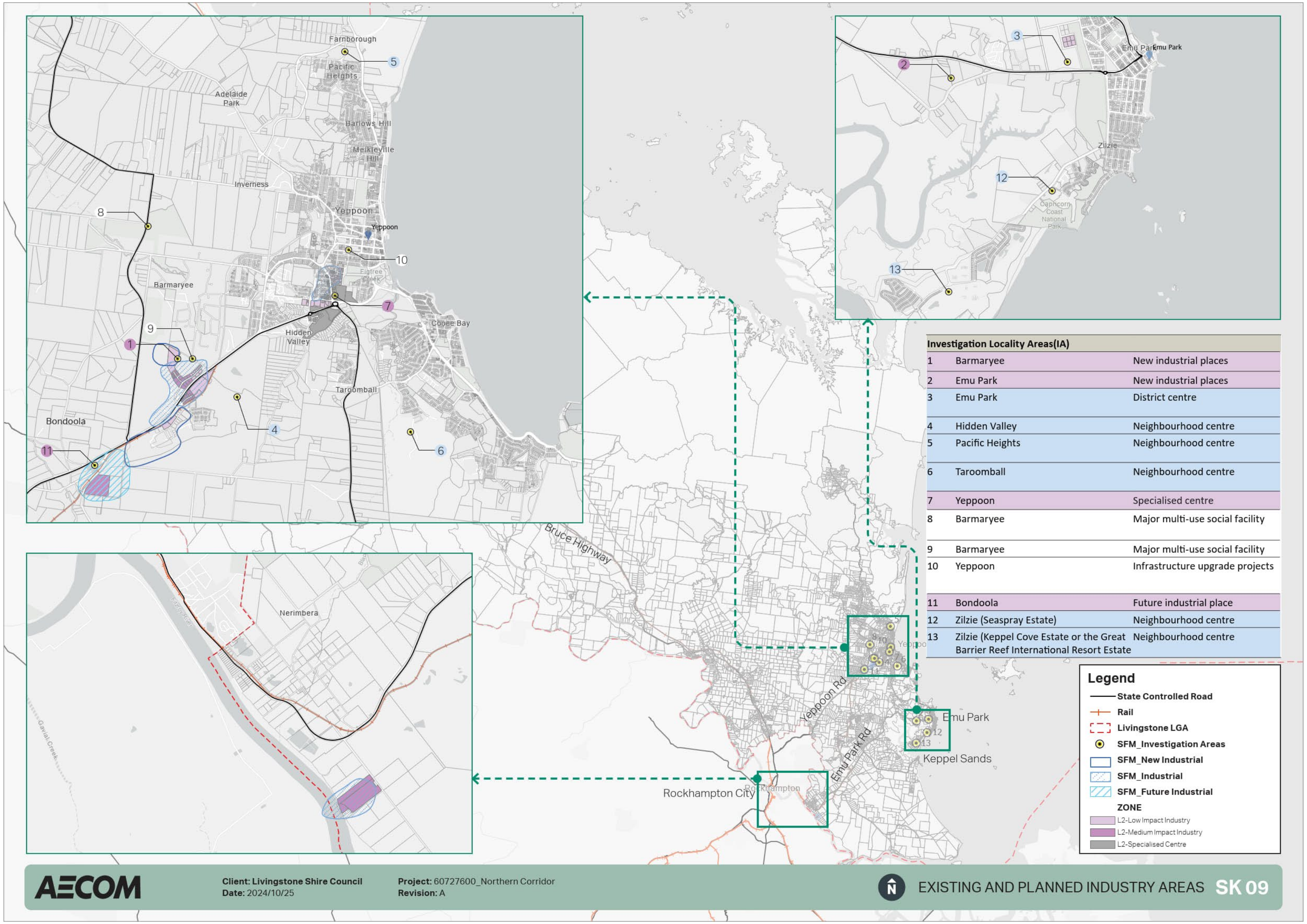


Figure 5: Planned Industrial Places

2.3 Demand Estimate

The AEC Market Confidence Report reviewed industrial demand across Rockhampton and Livingstone Shire LGAs in the following key sectors:

- Agribusiness
- Defence
- Tourism
- Industrial (manufacturing, wholesale trade, transport and logistics and maintenance and repairs industries).

The study found that approximately 70 ha of developed industrial land is likely required over the 20 years to 2043 for Livingstone and Rockhampton based on population, employment and industrial land uptake. Approximately 25 ha of this demand is expected to be required throughout Livingstone Shire. At an average, this equates to 1.25 ha of land per year over 20 years.

2.3.1 Application to the Northern Corridor

Based on the findings of the AEC Market Confidence Report (refer **Appendix A**), AECOM prepared a Planning Letter (refer **Appendix B**) assessing the need for structure planning to support industrial land planning in the Northern Corridor. Key findings of this letter are summarised below.

- Predicted demand for industrial land is low and a major tenant or operator is needed to increase traditional demand in the Northern Corridor.
- There is value for money in locating future industrial land proximate to existing urban areas and it is unlikely that constructing infrastructure in a greenfield location would result in a positive return on investment for Council.
- The Northern Corridor does not have unique locational attributes to warrant the need for further investment (e.g. access to port, airport etc) and there is a strong level of competition for industrial investment in Central Queensland. Notably, access to the Bruce Highway is not considered a unique advantage in the region.

As such, while this report considers potential land in the Northern Corridor for industrial development, this land does not form part of the main assessment in identifying land to meet the identified demand for developed industrial land.

3.0 Identifying Land for Industry

3.1 Approach

The review focuses on land for Low and Medium impact industry as indicated by types of activities with demand in the AEC Market Confidence Report and as supported in the planning scheme strategic framework.

Preferred location principles for industrial land (refer Figure 6) were developed based on previous studies into industrial development requirements, previous project experience, professional reasoning, and Council input.

Infrastructure Provision

- Optimise existing infrastructure networks
- Serviceable sites

Accessibility

- Access to major ports, freight routes
- Access to skilled labour
- Access to urban areas

Developable land

- Avoid environment values
- Avoid natural hazards
- Avoid slope
- Large / amalgamated sites

Buffers to Sensitive Uses

- Medium impact industry not within 250 metres of sensitive uses or zones
- Separation of freight and residential traffic ideally

Figure 6: Preferred location principles to guide identification of industrial land

These principles guided the land identification process which was undertaken in two stages:

3. **Long-list** — Up to 100 ha of land suitable for industrial land was identified across the Livingstone Shire LGA. This included a review of vacant land within existing industrial areas in the LGA as well as identifying additional undeveloped land.
4. **Short-list** — A short-list of the land that best met the preferred location principles and provided an orderly sequence of development for accommodating the estimated demand was agreed through workshops with Council.

Separately, up to 50 ha of land suitable for industrial development was identified in the Northern Corridor. This does not contribute to the long-list as it is understood development in this location is unlikely based on the findings of the previous AEC Market Confidence Report (refer **Appendix A**) and AECOM Planning Letter (refer **Appendix B**) as described in Section 2.3.

3.2 Long-list of Land for Industry

The long-list has considered:

- existing industry zoned land where it may be vacant
- areas surrounding existing industry zoned land
- industrial places and investigation areas identified in the strategic framework
- other land that is strategically located (e.g. access to key routes, serviceable etc).
- other areas put forward by Council.

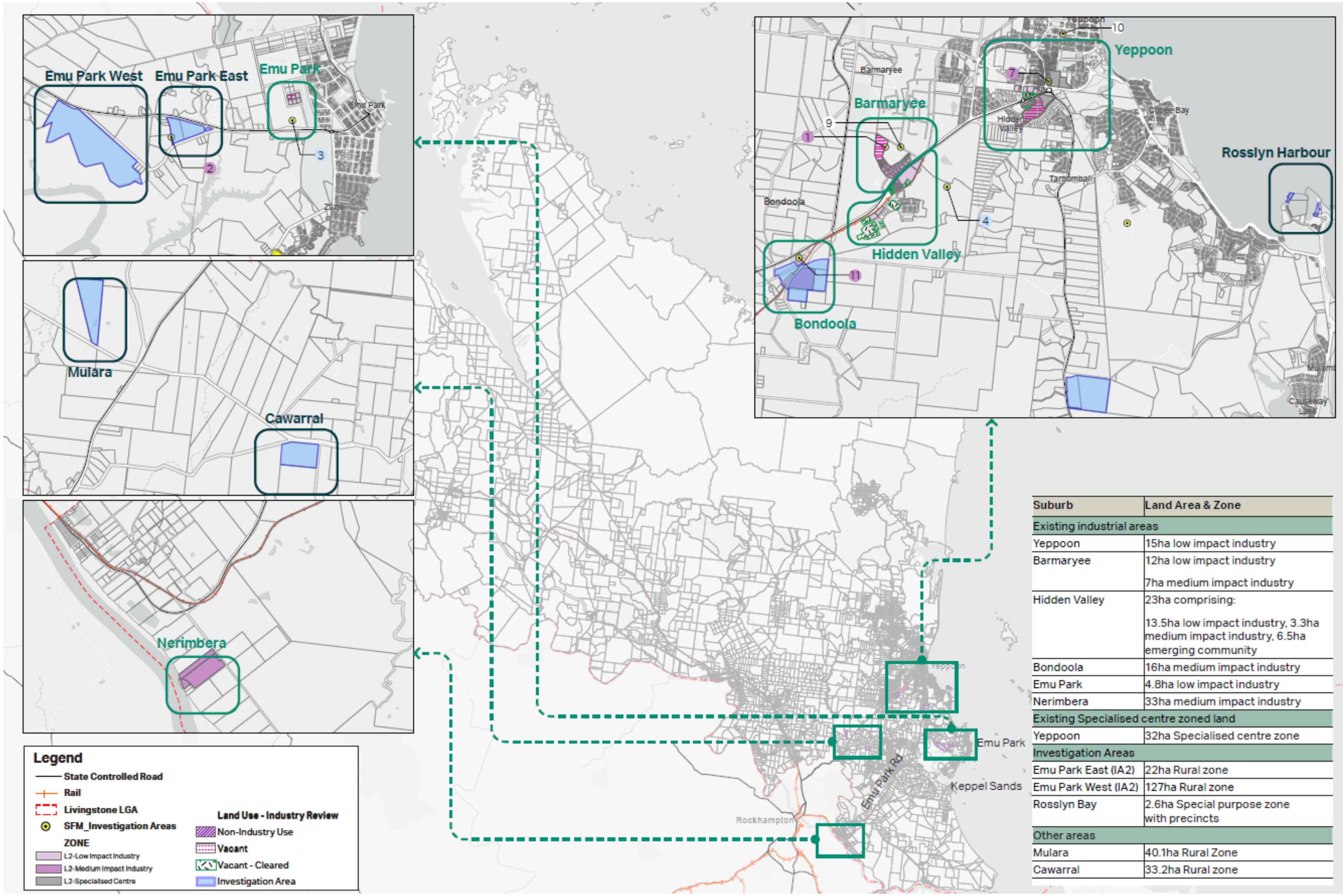
The long-list of land is shown in Figure 7 and detailed in Table 3 with a high-level assessment of each area against the preferred location principles. A traffic light assessment of the overall suitability is represented with green being the highest and red being the lowest suitability.

Table 3: Long list of Industrial Land

Suburb	Land Area & Zone	Description	Available Land Area	Assessment against preferred location principles		
				Pro	Con	Suitability
Existing industrial areas						
Yeppoon	15 ha Low Impact Industry Zone	• Well-established industrial area • Population serving industries • Non-industrial uses on Tanby Road	• 900 m² vacant land (single site)	• Within the Priority Infrastructure Area (PIA) and serviceable • Heavy Vehicle (HV) Route access via Yeppoon Road • Proximity to Yeppoon population and economic centre	• Available land is a single, small site • Directly adjoins residential areas	High
Barmaryee	12 ha Low Impact Industry Zone 7 ha Medium Impact Industry Zone	• Well-established industrial area • Mix of Low and Medium impacts, generally population serving industries	• Approximately 9 ha vacant (single site) in the low impact industry zone • Adjoining pony club site (13ha) may be appropriate for rezoning	• Within PIA and serviceable • HV Route access via Yeppoon Road • Proximity to Yeppoon population and economic centre • Distance from sensitive urban areas	• Vacant site is heavily vegetated and sloping • Significant development constraints	Medium
Hidden Valley	Approx. 23ha total comprising: 13.5 ha Low Impact Industry Zone 3.3 ha Medium impact industry zone 6.5ha Emerging Community Zone	• Emerging industrial area • Mix of Low and Medium impact industries • Population serving with some food distribution activities	• Approximately 17.5 ha remaining vacant and ready (2 ha already zoned industry + 15.5 ha in EC zone)	• Within PIA and serviceable • HV Route access via Yeppoon Road • Proximity to Yeppoon population and economic centre • Development ready land	• Close to residential area – some sites adjoin	High

<table>
<tr><th rowspan="2">Suburb</th><th rowspan="2">Land Area & Zone</th><th rowspan="2">Description</th><th rowspan="2">Available Land Area</th><th colspan="2">Assessment against preferred location principles</th><th></th></tr>
<tr><th>Pro</th><th>Con</th><th>Suitability</th></tr>
<tr><td>Bondoola</td><td>16 ha Medium Impact Industry Zone</td><td>• Single site with sawmill operation
• Previous proposals for industrial subdivision</td><td>• Surrounding area around Whites Road / Bondoola Road – more than 20 ha of land with limited development
• Potential future relocation / removal of sawmill</td><td>• Within PIA and serviceable
• HV Route access via Yeppoon Road
• Proximity to Yeppoon population and economic centre
• Distant from sensitive urban areas</td><td>• Significant slope in some areas
• Road access upgrades may be required
• Some biodiversity and bushfire constraints
• Some rural residential uses in the area</td><td>Medium</td></tr>
<tr><td>Emu Park</td><td>4.8 ha Low Impact Industry Zone</td><td>• Legacy industrial uses
• Population serving (car repair)</td><td>• Surrounding area has limited development
• Close to an Emu Park district centre investigation area</td><td>• Within or close to PIA
• Planned new road link
• Close to Emu Park resident population
• Existing zoned sites are relatively unconstrained</td><td>• Not currently serviced (approximately 500 metres from trunk infrastructure)
• Significant slope
• Distant from major population centres and key routes</td><td>Medium</td></tr>
<tr><td>Nerimbera</td><td>33 ha Medium Impact Industry Zone</td><td>• Single site with meatworks operation</td><td>• Surrounding area has limited development.</td><td>• HV Route access via Emu Park Road
• Proximity to Rockhampton & Bruce Hwy
• Limited nearby sensitive development</td><td>• Not within PIA and distant from any existing or planned infrastructure
• Flooding constraints in surrounding area</td><td>Low</td></tr>
<tr><td colspan="6">Existing Specialised centre zoned land</td><td></td></tr>
<tr><td>Yeppoon and Hidden Valley</td><td>32 ha Specialised Centre Zone</td><td>• Emerging large format retail area
• Some warehouse / service industry uses</td><td>• 25 ha vacant
• 2 ha of this is vacant and development ready
• Plans to relocate the Cordingley Street. Relocation site unknown.</td><td>• Development ready sites available
• Within PIA and serviceable
• HV Route access via Yeppoon Road
• Proximity to Yeppoon population and economic centre</td><td>• Significant development constraints through waterway area</td><td>Medium</td></tr>
<tr><td colspan="6">Investigation Areas</td><td></td></tr>
<tr><td>Emu Park East (IA2)</td><td>22 ha Rural Zone</td><td>• Minimal development – largely vacant land
• Historic proposal for industrial subdivision</td><td>• 22 ha</td><td>• Within PIA
• Nearby water and sewer infrastructure
• Access to Emu Park Road</td><td>• Distant from major population centres
• Some biodiversity and bushfire constraints</td><td>Medium</td></tr>
</table>

Suburb	Land Area & Zone	Description	Available Land Area	Assessment against preferred location principles		
				Pro	Con	Suitability
				• Close to Emu Park resident population	• Proximate to future residential growth areas	
Emu Park West (IA2)	127 ha Rural Zone	• Minimal rural development – largely vacant land	• 127 ha	• Close to Emu Park resident population • Access to Emu Park Road • Limited nearby sensitive development	• No existing planned trunk infrastructure • Not in PIA (though in close proximity) • Distant from major population centres • Flooding constraints • Coastal protection area constraints	Medium
Rosslyn Bay	2.6 ha Special Purpose Zone with precincts	• Marina and harbour that has a tourism / visitor focus • Limited existing marine industry	• Limited vacant land in precincts designated for marine industry	• Within PIA • Nearby sewer infrastructure	• Distant from major population centres and key routes • Specialised role and function of the area limits development potential for general industry • Coastal protection area constraints • Adjacent to Capricorn Coast National Park & high ecological value water area	Low
Other areas						
Mulara	40.1 ha Rural Zone	• Existing septic and waste management plant • Vacant land	• Vacant land surrounding plant	• Adjacent electricity transmission • Nearby water infrastructure • In proximity to Yeppoon Road • Limited nearby sensitive development	• Not within or close to PIA • Distant from major population centres • Slope and bushfire constraints	Low
Cawarral	33.2 ha Rural Zone	• Transport depot on rural land	• Transport depot footprint is limited, site largely vacant, though redevelopment may mean removal of transport depot.	• Limited nearby sensitive development	• Not within or close to PIA • Distant from major population centres • Slope, bushfire and biodiversity constraints	Low



Suburb	Land Area & Zone
Existing industrial areas	
Yeppoon	15ha low impact industry
Barmaryee	12ha low impact industry 7ha medium impact industry
Hidden Valley	23ha comprising: 13.5ha low impact industry, 3.3ha medium impact industry, 6.5ha emerging community
Bondoola	16ha medium impact industry
Emu Park	4.8ha low impact industry
Nerimbera	33ha medium impact industry
Existing Specialised centre zoned land	
Yeppoon	32ha Specialised centre zone
Investigation Areas	
Emu Park East (IA2)	22ha Rural zone
Emu Park West (IA2)	127ha Rural zone
Rosslyn Bay	2.6ha Special purpose zone with precincts
Other areas	
Mulara	40.1ha Rural Zone
Cawarral	33.2ha Rural zone

Figure 7: Long-list of land for industry location map

3.3 Short-Listed Land for Industry

The long-list was discussed in a Council workshop to identify the most appropriate land for industry based on the preferred location principles. The short-list prioritisation was based on the following additional key considerations:

- Orderly progression of development
- Land that may be attractive to developers
- Co-location / clustering and focusing growth in existing corridors rather than establishing new industrial development fronts.

This resulted in a prioritised short-list of sites as identified in Hidden Valley, Barmaryee and Boondoola.

Table 4: Prioritised short list of Industrial List

Suburb	Available Land	Priority
Hidden Valley (Gateway)	17.5 ha	1
Barmaryee (Pony Club site)	13 ha	2
Bondoola	21.7 ha	3

Hidden Valley

Hidden Valley offers a prime location for industrial development within the Livingstone Shire, with approximately 17.5 hectares of vacant and serviceable land available. This includes 2 hectares already zoned for industry and an additional 15.5 hectares within the Emerging Community (EC) zone, providing substantial potential for expansion and tailored industrial uses.

Strategically located, Hidden Valley benefits from direct access via the HV Route and Yeppoon Road, ensuring seamless transport and connectivity. Its proximity to Yeppoon, the region's primary economic and population centre, further enhances its attractiveness for industrial investment.

The site is located very close to new residential areas. A best practice benchmark for separation of High impact industry areas from sensitive land uses is a distance of 500m. As such, this area is suitable for Low and Medium impact industry only. A 250m separation distance from sensitive zones for Medium impact industry. Land within 250m of sensitive uses and zones is recommended to be included in the Low impact industry zone.

Hidden Valley is home to the Gateway Business and Industry Park, a six-stage master-planned industrial precinct developed by Livingstone Shire Council (see Figure 8). The park offers a range of lot sizes, from 2,000 square meters to 2.3 hectares, which are progressively delivered to the market based on demand. The park has already attracted a diverse range of businesses, including Young's Bus Services, Hodge Drilling, Tropical Pines, and JJ Richards, highlighting the area's ability to support a variety of industrial uses. Currently, Stage 5 of the Estate, is under Council assessment (D-393-2024) (see Figure 9: Stage 4 and 5 Plan - Gateway Business and Industry Park Figure 9 for Staging Plan).

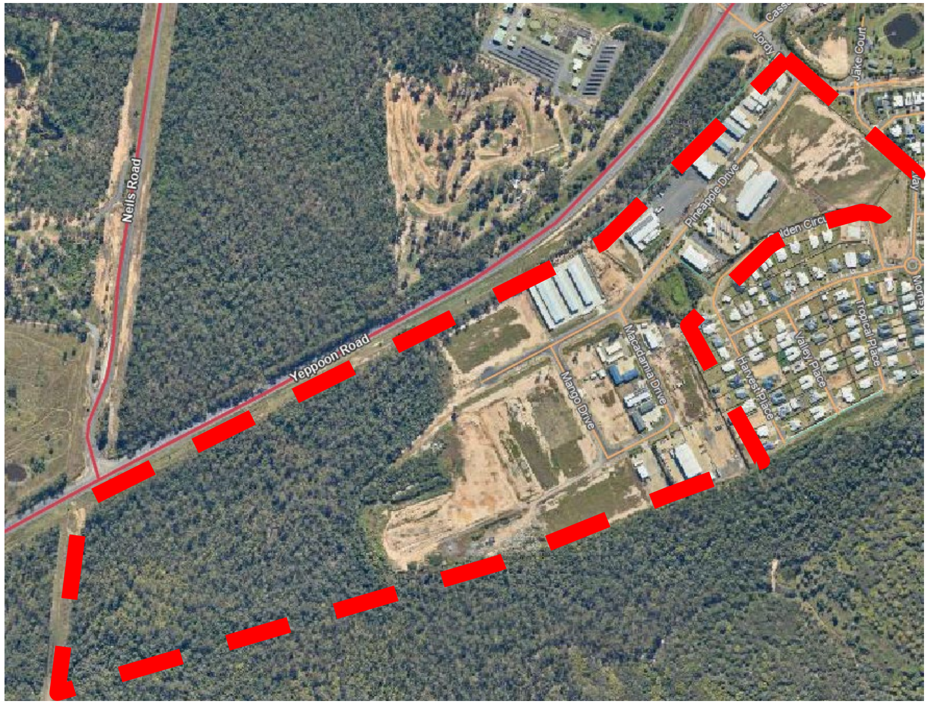


Figure 8: Aerial Photograph of the Gateway Business and Industry Park

Figure 9: Stage 4 and 5 Plan - Gateway Business and Industry Park

Barmaryee

The site at 2745 Yeppoon Road, Barmaryee QLD 4703, is owned by the Livingstone Shire Council. The site is approximately 13 hectares and is currently occupied by the Yeppoon Pony Club. This site is part of a larger parcel (L270SP281980) of approximately 142.5 ha which also includes the Yeppoon West Sewage Treatment Plant, and the Yeppoon Landfill. This site presents significant potential for industrial development, given its strategic location within a growing industrial precinct. Surrounded to the east, south, and west by existing industrial land, it is well-positioned to cater to the region's expanding industrial needs.

Figure 10: Aerial Photograph – The Pony Club

Informal access to the site is provided via Milroy Drive. Given the site's proximity to key transport routes, including the HV Route and Yeppoon Road, it offers excellent connectivity for businesses. The proximity of the site to the Gateway Business and Industry Park, as well as the adjoining suburb of Barmaryee and Hidden Valley, further enhances its attractiveness for industrial investment.

The site also adjoins rural residential uses to the north, where there may not be sufficient buffer to meet the required separation distances for Medium and High impact industry from sensitive uses. Additionally, to facilitate the transformation of this land for industrial use, the Yeppoon Pony Club will need to be relocated to another site.

Bondoola

The land under investigation includes three main sites, Bondoola Sawmill, located at 24 Kensington Road (L1 MPH3737), 49 Bondoola Road, and 56 Whites Road, Bondoola. All of the sites are privately owned[5]. The investigation area spans approximately 16 hectares.

One key consideration is the presence of biodiversity and bushfire constraints, which will require careful management during any future development. Additionally, the site has a slope that could pose challenges for certain types of development, necessitating detailed planning and potentially earthworks to ensure the land is benched and suitable for industrial use.

Given the site's proximity to key transport routes, including the HV Route and Yeppoon Road, it offers excellent connectivity for businesses to the local area and region.

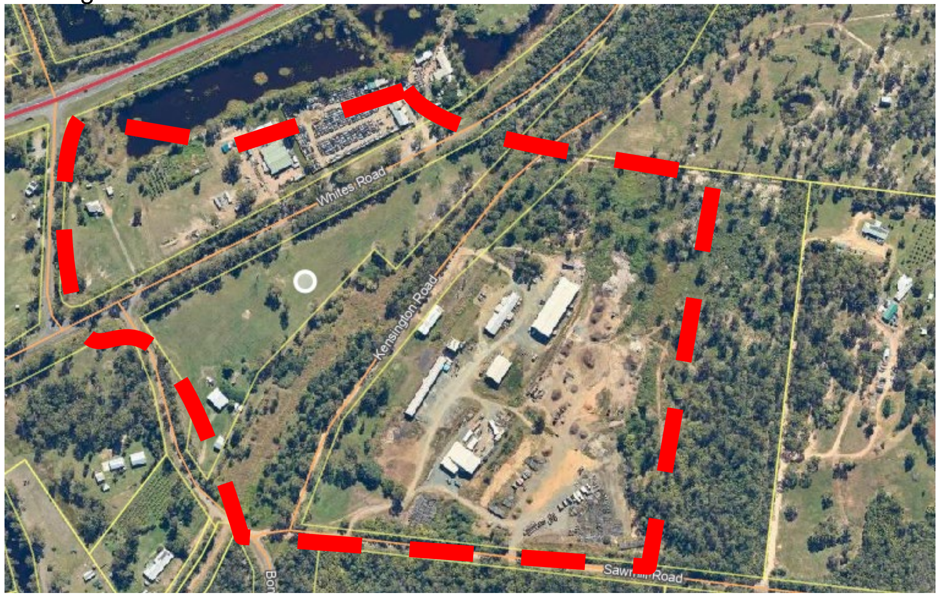


Figure 11: Aerial Photograph of Bondoola Investigation Area

3.4 Sequencing

Planning for future industrial land requires a strategic approach to sequencing development, ensuring that sites are brought online in a way that best meets key location principles and supports orderly progression.

This strategy is designed to provide a balanced mix of both Low and Medium-impact industrial land along the Yeppoon Road corridor, ensuring that the region can accommodate a diverse range of industries.

Two primary scenarios for sequencing industrial development have been outlined below:

Base Growth Scenario:

- 1.25 hectares per year, leading to up to 25 hectares of industrial land over a 20-year period.

Higher Growth Scenario:

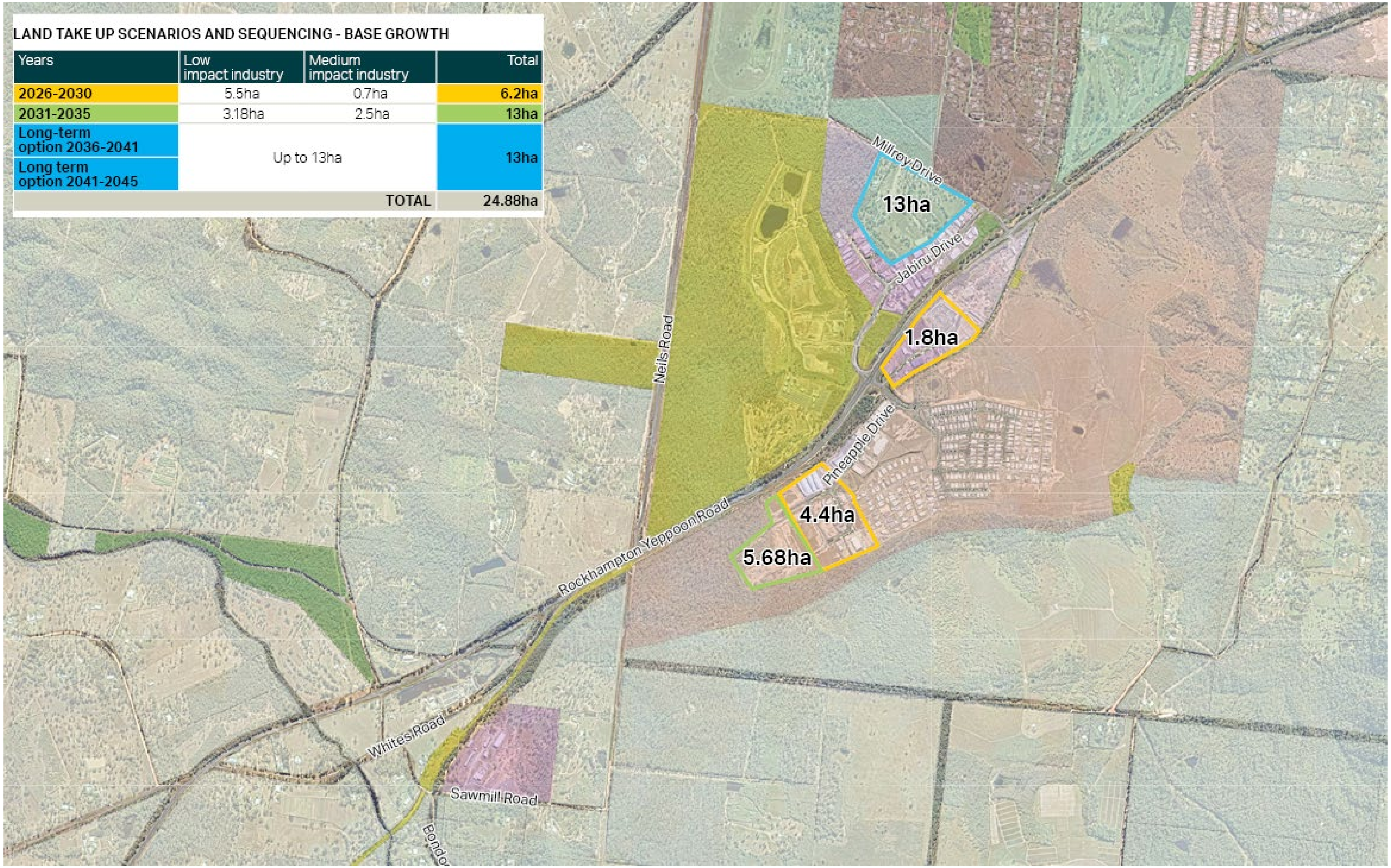
- 2.5 hectares per year, leading to up to 50 hectares of industrial land over a 20-year period.

These scenarios are illustrated in

Figure 12 and **Error! Reference source not found.** to show how demand may be accommodated over time in each scenario, detailing the hectares of land developed in each 5 year interval, along with the cumulative total.

It is recommended that Council monitor the take up of industrial land over time to ensure sufficient zoned land is identified in the planning scheme.

[5] Land owner details sourced from PriceFinder as at 07 February 2025



LAND TAKE UP SCENARIOS AND SEQUENCING - BASE GROWTH

Years	Low impact industry	Medium impact industry	Total
2026-2030	5.5ha	0.7ha	6.2ha
2031-2035	3.18ha	2.5ha	13ha
Long-term option 2036-2041	Up to 13ha		13ha
Long term option 2041-2045			
		TOTAL	24.88ha

Figure 12: Base Growth Scenario – Plan

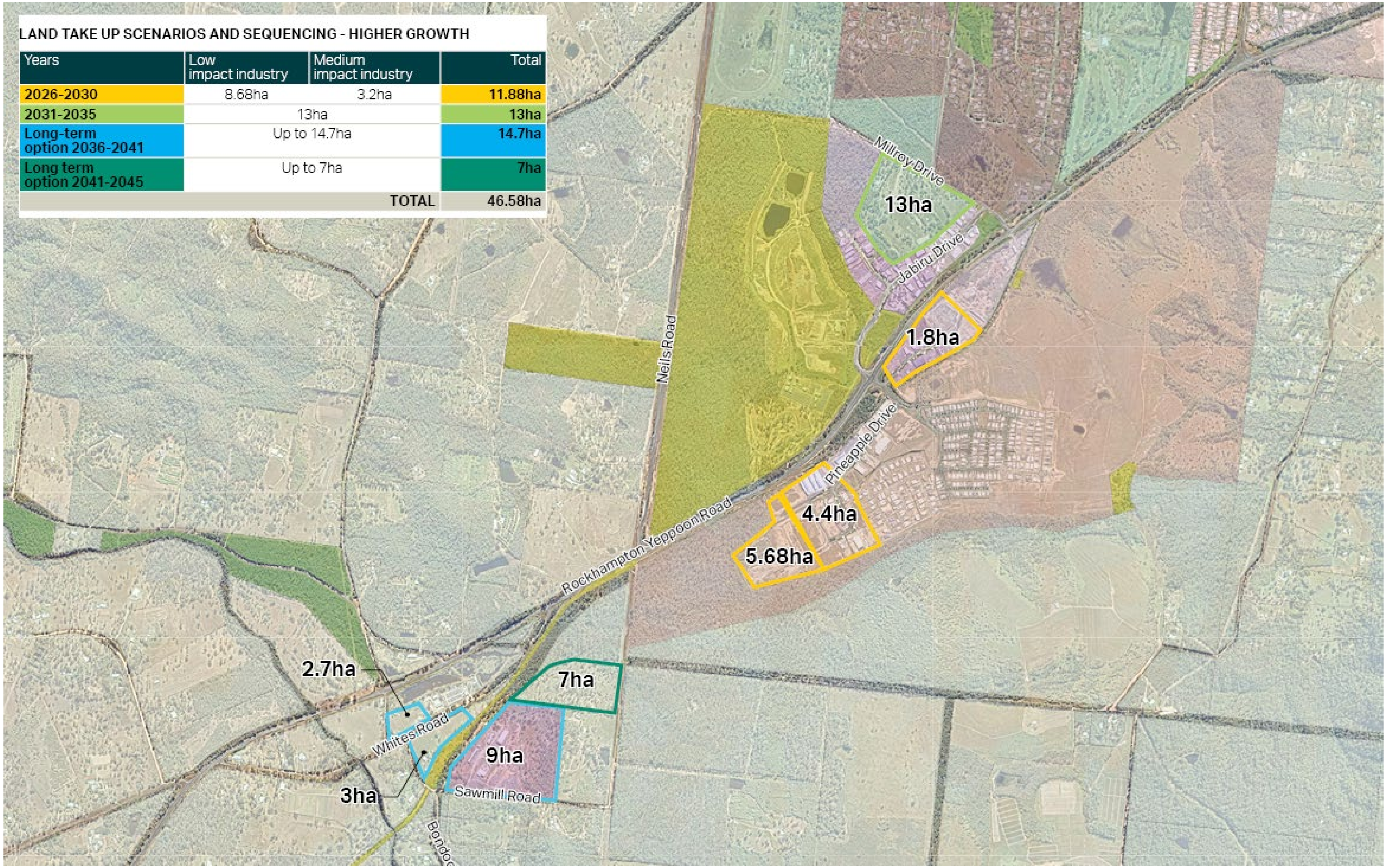


Figure 13: Higher Growth Scenario – Plan

3.5 Northern Corridor

The same preferred location principles were used to identify potential land for industrial development in the Northern Corridor. The area has been assessed at a corridor level against the preferred location principles as detailed below.

Infrastructure Provision	• Limited existing infrastructure • Relies on Rockhampton Regional Council services • Trunk water infrastructure along the Bruce Highway up to The Caves • No trunk sewer • Future trunk water and road infrastructure planned in Rockyview and Glenlee
Accessibility	• Good access to Bruce Hwy • Rail corridor, noting there are no existing sidings or stations in the area • Access to Rockhampton population and business hubs
Developable land	• Area impacted by flooding from the Fitzroy River to the west • Ecological corridor and mountain ranges east of Rockyview • Least constrained through the middle of the corridor
Buffers to Sensitive Uses	• Rural residential development in Rockyview and Glendale

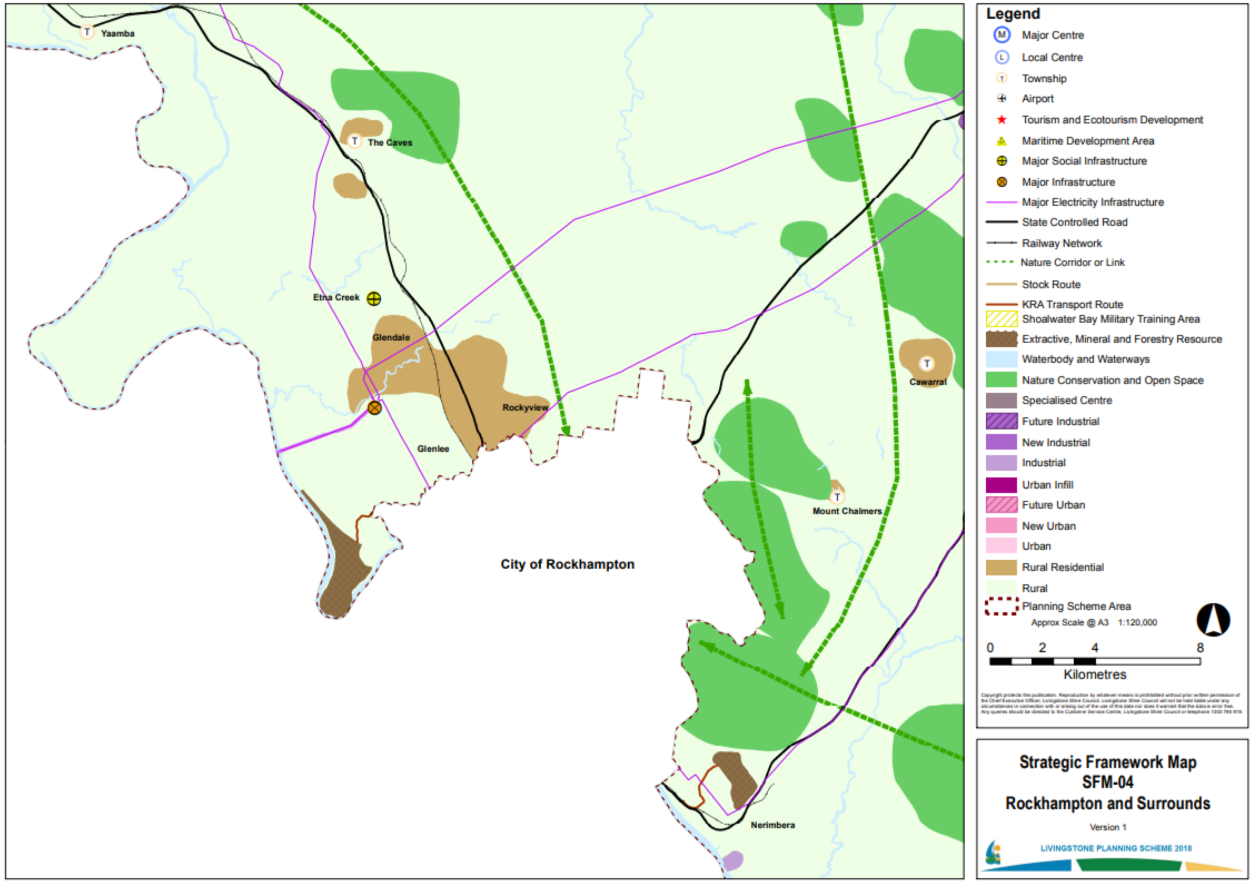


Figure 14: The Northern Corridor on the planning scheme Strategic Framework Map

3.5.1 Northern Corridor Conclusions and Recommendations

While the Northern Corridor is not recommended as a preferred location to accommodate the estimated demand for developed industrial land, the assessment has identified potential locations for future industrial land. Key findings are summarised below.

- Access to the Bruce Highway and separation from high concentrations of sensitive receptors are positive attributes for development of the Northern Corridor.
- The lack of infrastructure in the corridor and lack of opportunities for colocation with existing precincts are negative attributes for development of the Northern Corridor.
- There is no clear proposition for developed industrial land based on the unique competitive and/or locational advantages of the Northern Corridor.
- Estimated demand over the next 20 years can be accommodated in the Yeppoon Road corridor.
- The Dawson Road opportunity area may present a logical future extension to the settlement pattern from a location perspective. However, infrastructure will be critical, and the provision of infrastructure is unlikely to present a positive return on investment.
- No changes are recommended to the planning scheme to support development of industrial land in the Northern Corridor. It must be demonstrated that industrial development/land cannot be accommodated in existing local and regional industrial development areas before any changes are made to the planning scheme. Proposals or development applications for industrial activities in the Northern Corridor can be assessed on a case-by-case basis in line with the current planning scheme.

.

4.0 Implementation

4.1 Infrastructure Requirements

Infrastructure requirements have been considered by Livingstone Shire Council. This section presents Council's assessment of infrastructure requirements for the identified industrial land.

Hidden Valley / Gateway

The servicing for this area is being delivered as part of the current development.

Pony Club land

The site is located in Milroy Drive with access also available off Plover Drive. Frontage works and access works are required. Site is in proximity to a state-controlled road and may require DTMR approval.

Milroy Drive will require an upgrade to a 13-metre-wide carriageway in accordance with the Capricorn Municipal Development Guidelines (CMDG). It is the Department of Transport and Main Roads (TMR) preference that the intersection of Milroy Drive and Yeppoon Road is upgraded to a Left-In-Left-Out access in the future. Consequently, all traffic traveling towards Rockhampton will be required to use the Jabiru Drive signalised intersection for access. The proposed industrialisation of the Pony Club area could necessitate this upgrade, depending on timing of surrounding developments.

The site is in proximity to reticulated water and sewer networks. The site is located within the PIA boundary however no industrial infrastructure demand has been assumed for the site to date. To confirm infrastructure requirements, an infrastructure demand analysis should be undertaken based on an industrial development scenario.

In the short term, it is anticipated that an additional watermain needs to be constructed to spilt zones here as it sits at the very end of Yeppoon West high zone (pumped), similar to conditions of approval for development at the showgrounds. In the long term, an additional reservoir is required to service this area as well as Bondoola. Currently, master planning is underway reviewing this. The Rockhampton-Yeppoon pipeline cannot be relied upon in the long-term to supply reticulation services for these areas.

The site could be serviced via Millroy Drive Sewer Pump Station which most likely requires some upgrade for Millroy in the form of pumps, storage etc.

Bondoola

The Bondoola Road intersection is the only full-access connection from Rockhampton to this area. Any increase in development activity may trigger the need for an intersection upgrade, which would require a Traffic Impact Assessment (TIA) to determine appropriate improvements. Both Bondoola Road and Whites Road will require widening to a 13-metre carriageway in accordance with CMDG. These roads are situated in low-lying areas, posing potential challenges in achieving the required flood immunity.

There was potential for access from the future East-West Trunk Road; however, Council's strategic housing growth agenda has influenced its alignment further North. The southernmost location at which the Department of Transport and Main Roads (TMR) has indicated they would consider a signalised intersection is Neils Road, where the East-West trunk road is proposed to join Yeppoon Road.

The area is located outside of the Priority Infrastructure Area.

The site is in proximity to reticulated water. An analysis for connection and likely demand is required. An additional reservoir is likely required to service this area.

The site is not in proximity to reticulated sewer. Confirmation of ability to provide sewer and likely demand is required. The site likely requires all new network (Sewer Pump Station, rising mains, reticulation) to support development.

4.2 Delivery Roles

Council owns both the Hidden Valley (Gateway) land and the Pony Club land. For these sites, Council would be responsible for development planning and delivery of relevant infrastructure.

The Bondoola land is owned by private landholders and development would likely be led by the market. Infrastructure delivery could occur through an Infrastructure Agreement given that the area is outside the Priority Infrastructure Area.

4.3 Planning Scheme Recommendations

The planning scheme has been reviewed to identify changes required to introduce the proposed industrial zoned land including any gaps in existing assessment benchmarks that limit the development potential of industrial land.

Recommended changes to the planning scheme are outlined below.

Strategic Framework

- Where Industrial Places are defined, update the timing or remove timing to state that industrial land should be developed in sequence when demand is demonstrated to warrant additional development. If timing is required, the following is recommended:
  - Industrial places – prior to the year 2031
  - New industrial – beyond the year 2031
  - Future industrial – beyond the year 2036
- Add Bondoola as a Future Industrial area
- Investigation area 1 – this could be covered by “new industrial” to clarify that this is an immediate opportunity and referred to as New Industrial at Barmaryee
- Investigation area 2 (Emu Park) – remove OR include wording to state this is an opportunity beyond 2046
- Consider some flexibility to allow High impact or Special industry on a case by case basis where specific criteria are met
- No changes recommended in Northern Corridor

Zoning

- Change Gateway area zoning to Medium impact industry where meeting separation distances (Low impact where not) to allow flexibility in the establishment of industrial activities
- Potential change to Pony club zoning – Medium impact industry – dependent on:
  - Progress of discussions with stakeholders
  - Council support
  - Timing of new planning scheme / amendments
- No change to Bondoola zoning – reflected in strategic framework as future land
- Demand and supply should be monitored through future planning scheme reviews before changing zoning of other land.

Tables of Assessment

- Medium impact industry - make code in Low impact industry zone if meeting separation distances or specific criteria
- Research and technology industry - make code or accepted in Low impact industry zone
- Renewable energy facility - consider making code in Low and Medium impact industry zones
- Indoor sport and recreation - consider GFA limit or impact in Low impact industry zone
- Food and drink outlet - consider GFA limit.

Appendix A

AEC Market Confidence Report

Livingstone Shire Northern Corridor Market Confidence Report

Livingstone Shire Council | June 2024

aecgroupltd.com

one team – many experts

EXECUTIVE SUMMARY

This report presents an understanding of the economic opportunity, potential land use, and market appetite for developed land in the Northern Corridor. To estimate market appetite and forward demand for land AEC:

- Undertook one-on-one consultations with industry leaders in the region
- Benchmarked similar investments throughout Queensland
- Developed headline projections to support and interpret consultation findings.

Consultation indicates market interest for approximately 375ha of industrial land of over the next 20 years. Consultation findings indicate current demand for industrial land in the Northern Corridor, and Central Queensland more broadly, include agribusiness investment, a consistent supply of industrial buyers (such as manufacturing, wholesale trade, logistics, and maintenance and repairs industries), and strategic development opportunities to support the local Defence operations.

Of the 375ha land identified through consultation, 300ha is for a biofuel precinct and a further 50ha for Defence storage facilities to improve capability across Central Queensland.

Historic and projected land uptake, along with population projections, indicate traditional or incremental growth in industrial land required over the next 20 years will amount to 70ha of developed industrial land across the region.

Consultation and analysis suggests demand above the traditional land demand will rely on attracting a major tenant or operator to the region to act as a catalyst for additional service industries to drive this stepwise change from traditional uptake and will need sufficient areas identified and appropriately zoned land within the region to be realised.

CONTENTS

Disclaimer:

Whilst all care and diligence have been exercised in the preparation of this report, AEC Group Pty Ltd does not warrant the accuracy of the information contained within and accepts no liability for any loss or damage that may be suffered as a result of reliance on this information, whether or not there has been any error, omission or negligence on the part of AEC Group Pty Ltd or their employees. Any forecasts or projections used in the analysis can be affected by a number of unforeseen variables, and as such no warranty is given that a particular set of results will in fact be achieved.

CONSULTATION FINDINGS

Consultations found industrial land to be the predominant land use desired in the Northern Corridor with developed land required across three of the four sectors

Agribusiness

- Consultation indicates **up to 300ha of land** is required for a comprehensive investment, including development of a nursery and a biofuel plant.
- Anecdotal advice suggests there is extensive investment potential throughout the region if the proposed significant growth to agricultural research facilities in Livingstone and Rockhampton goes ahead.

Industrial[1]

- Consultation indicates there could be demand for **approximately 25ha** of developed industrial land over the next 20 years.
- Total demand for industrial land has ranged from 7,500sqm to 15,000sqm per annum, with a consistent market size of 10 to 15 buyers over the last few years. The average size of land required by buyers ranges from 500sqm to 1,500 sqm.

[1] 'Industrial' as a sector of interest includes manufacturing, wholesale trade, transport and logistics, and maintenance and repairs industries.

Defence

- The Northern Corridor is strategically located to service Defence supply chain requirements.
- Council indicated **up to 50ha** of land would be required to develop appropriately scaled storage facilities.

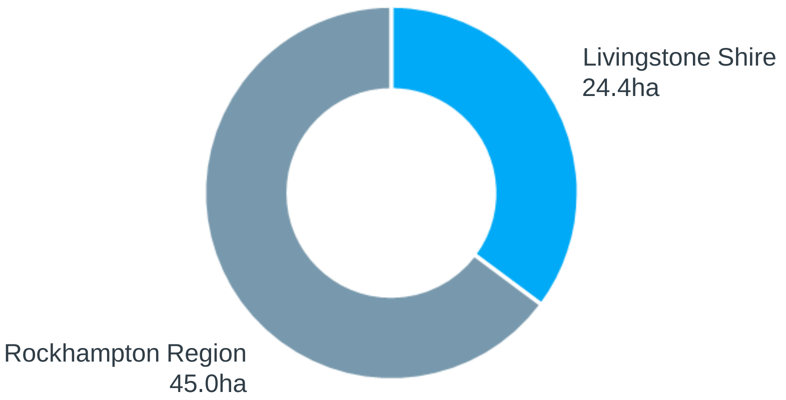
Tourism

- Stakeholders indicated the land requirements from the proposed Northern Corridor development is negligible.
- Tourism has been an increasingly important industry for Livingstone Shire Council, with significant growth evident over the last 10 years. Partnered with the increasing trend for farm-stay tourism, The Caves, as a part of the Northern Corridor, is well situated to grow and cater to this market.

GROWTH DRIVING DEMAND FOR LAND

Approximately 70ha of developed industrial land is likely required over the next 20 years for Livingstone and Rockhampton, based on population, employment, and industrial land uptake

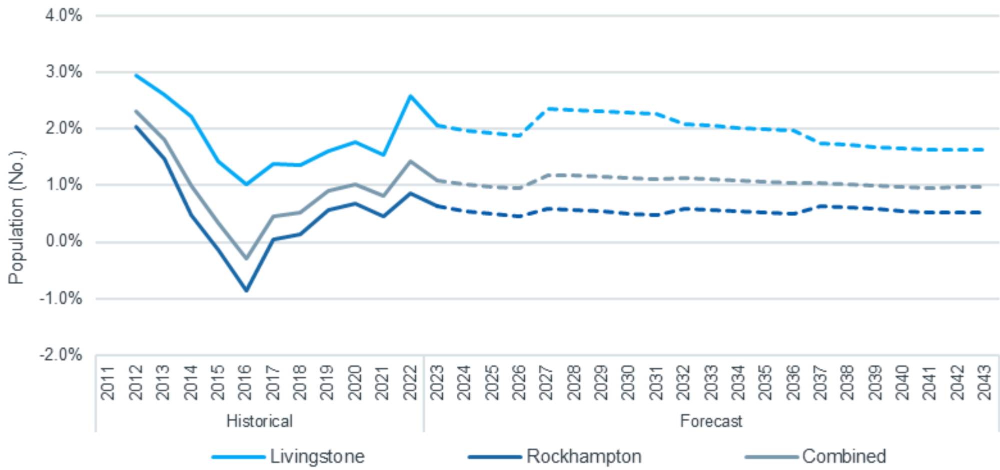
20 Year Industrial Land Projection



Note: Numbers may not add up due to rounding
Source: AEC

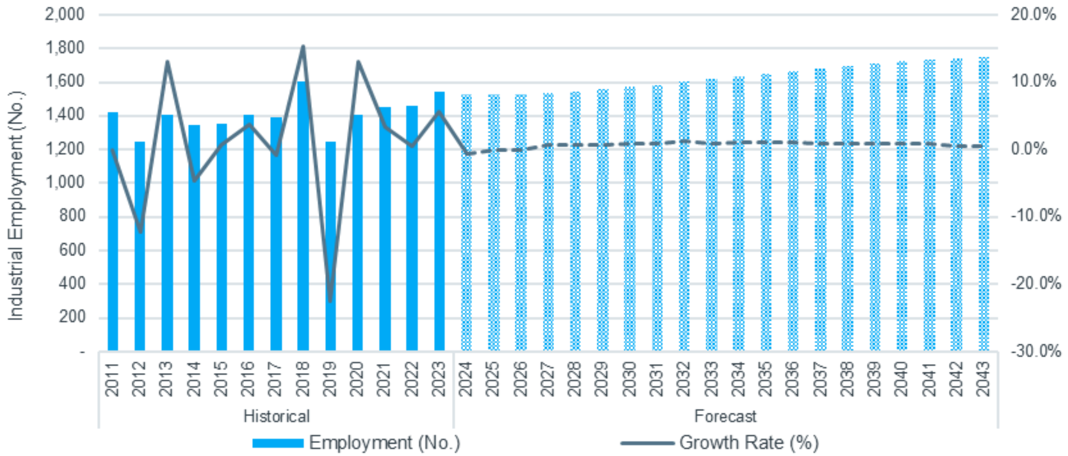
- Industrial land uptake in the Livingstone and Rockhampton region is estimated to be 69.4ha over the 20-year period from 2024 to 2043 with 24.4ha (35.2%) expected to be required throughout Livingstone Shire. The region's growth in demand for industrial land is expected to average 3.5ha each year over the 20-year forecast.
- Population projections for Livingstone Shire estimate average growth of 2.1% per annum over the 20-year forecast. This growth averages nearly 1,000 additional residents every year, more than double the projections for the Rockhampton region (485 new residents each year on average).
- Although the long-term growth rate for industrial employment is estimated to be 0.6%, total population growth indicates the potential for Livingstone Shire to increase the share of industrial land take up.

Regional Population Growth



Source: QGSO (2023)

Total Livingstone Industrial Employment



Note: Industrial employment includes industries such as manufacturing, wholesale, transport and logistics, and maintenance and repairs.
Source: AEC

LIVINGSTONE SHIRE ECONOMIC LANDSCAPE

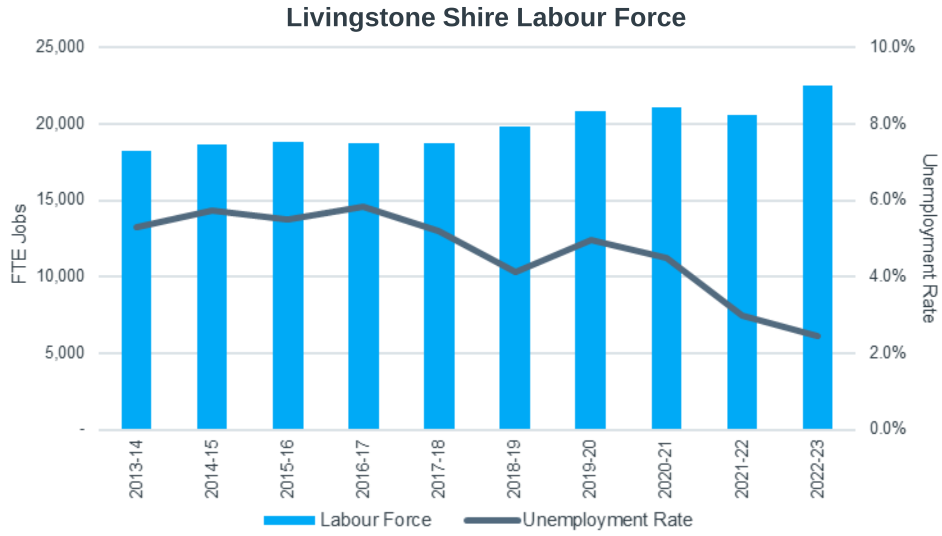
Livingstone Shire has a growing and strengthening economy to support land uptake in the Northern Corridor

Over the last 10 years **Livingstone Shire's economy has been growing and strengthening with increasing employment, a growing labour force and a falling unemployment rate**. The total labour force has grown from approximately 18,200 persons in 2013-14 to nearly 22,500 in 2022-23, which is a compound annual growth rate (CAGR) of 2.1%. Simultaneously, the total unemployment rate has fallen from approximately 960 persons in 2013-14 to approximately 550 persons in 2022-23.

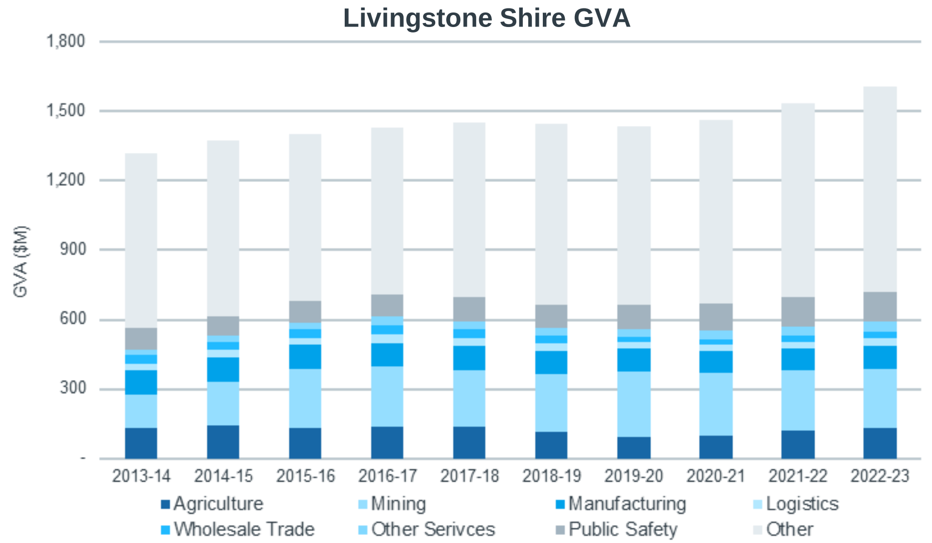
Over the 10 years to 2022-23, Livingstone's Gross Value Add (GVA) rose by 21.8% ($287.0 million) to reach $1.6 billion in 2022-23, which is equivalent to a CAGR of 2.0%. The seven industries of interest (agriculture, mining, manufacturing, logistics, wholesale trade, other services and public safety)[1] accounted for 55.0% of this growth, with manufacturing and wholesale trade negatively contributing to the growth. Of particular interest:

- Agriculture is a key employer in the Livingstone region and has contributed a relatively consistent GVA to the region's economy. In 2022-23 agriculture employed 4.3% of all employees in Livingstone and accounted for 8.2% of the region's GVA.
- Industrial activity accounts for 12.7% of GVA and 13.5% of employment (nearly double that of agriculture). Manufacturing is the largest component of the Industrial activity in Livingstone, accounting for 47.4% of Industrial GVA. Employment has grown marginally for Industrial activity over the last 10 years, driven by growth in the transport and logistics and other services industries.
- Public administration and safety (which includes Defence) has grown almost consistently since 2013-14 with a 3.4% CAGR. Similarly, employment in the sector has recorded a 3.1% CAGR to reach nearly 1,100 people (9.6%) of the labour force in 2022-23.

[1] Noting manufacturing, logistics, wholesale trade, other services are collectively considered Industrial for the purpose of analysis



Source: Jobs and Skills Australia (2024), ABS (2024)



Source: AEC

OPPORTUNITIES & LAND DEMAND

AGRIBUSINESS DEVELOPMENT

Consultation indicates market interest in up to 300 hectares for agricultural supply chain facilities over the next 20 years

Potential Opportunities

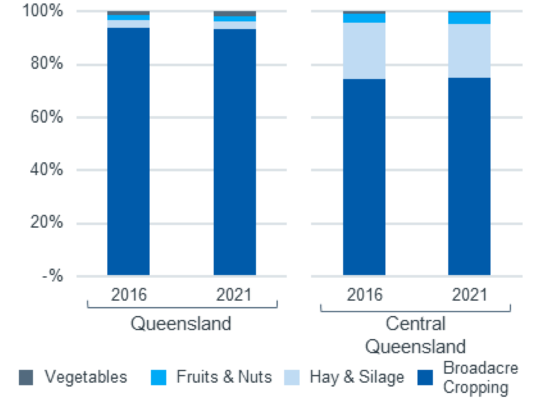
- **300 hectares of developed land is required in Central Queensland** for a known investment of a nursery, biofuel, and waste reproduction plant. However, consultation with the investor indicated this land is required imminently with establishment of the nursey anticipated before the end of 2024.
- Expansion of research and development facility throughout Central Queensland will **act as a catalyst for the industry** in the region (timeline 5+ years).
- Consultation has indicated desire for a local **produce distribution centre** to predominantly service Central and Northern Queensland, however consultation also suggested this development would only be commercially viable for high value commodities and located with close proximity to air transport.
- Consultation indicated development in the Northern Corridor could include a **small-scale abattoir** which is already being investigated by local councils throughout the region.

Development Requirements

- Consultation has indicated accessing the following infrastructure and services as critical to success for development across the agricultural supply chain:
  - Sewerage
  - Town water
  - Electricity
  - Local service station.

- Key agricultural production for Livingstone and Central Queensland are livestock, broadacre cropping, hay & silage, fruits & nuts, and vegetables.
- Excluding livestock, the production across Central Queensland has increased by 1.2% CAGR from 2016 to 2021 (the two latest Agriculture Census years).

Agricultural Commodity Proportion of Production



Source: ABS (2017, 2022)

- Nearly 95% of agriculture production (excl. livestock) across Queensland is broadacre cropping, while it only accounts for 75% of production in Central Queensland.
- Unsurprisingly, given the significance of livestock to the region, hay & silage accounts for approximately 20% of agricultural commodities in Central Queensland (compared to roughly 3% at the State level). Similarly, production of fruits & nuts is proportionately more significant in Central Queensland (4%) than across the State (2%).
- The two key constraints for production growth in Central Queensland is available land and available water. The Rookwood Weir water allocations is expected to increase irrigated farming which is expected significantly increase overall production of non-livestock agricultural commodities across Central Queensland.
- Over the past five years between 2016 and 2021, vegetable production in Central Queensland increased by 25.2% while overall production across the State decreased.

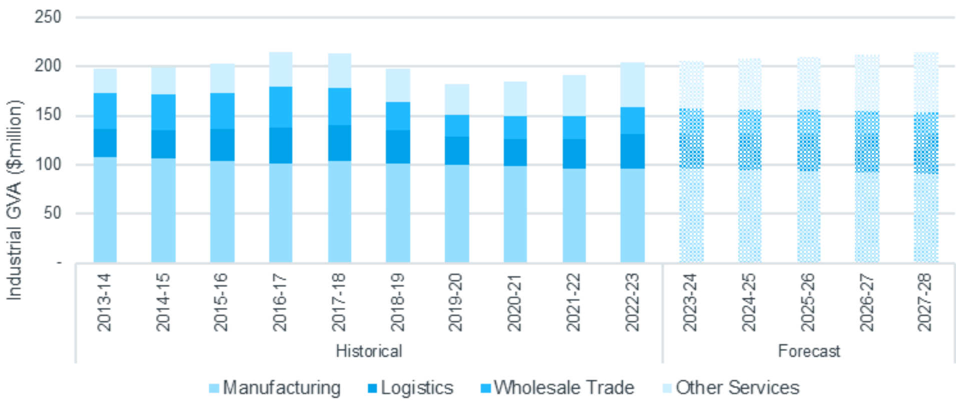
![AEC]

INDUSTRIAL DEVELOPMENT

Current stakeholder expectations is for demand to average 12,500sqm per year

- There are three key indicators of the potential future growth and current strength of Industrial activity within Livingstone:
  - Livingstone experienced slightly stronger growth in employment in the Transport and Logistics sector (CAGR of 3.3%) than the boarder Central Queensland region (CAGR of 3.0%) over the past decade.
  - Similarly, over the past decade, Livingstone experienced a stronger employment growth in Other Services, which is predominantly maintenance and repair services in the Central Queensland region. The CAGR of employment in Livingstone was 2.6% as opposed to 1.6% across Central Queensland more broadly.
  - Industrial employment has outpaced the growth in Industrial GVA across Livingstone over the last decade, with employment increasing 1.4% per annum. The drop to 0.6% projected employment growth rated reflects recent decreases in employment for wholesale trade.
- Given the consistent industrial land demand for manufacturing purposes across the Livingstone and Rockhampton regions, there is an opportunity for wholesale sector recovery and expansion throughout the region in the future.

Livingstone Industrial GVA by Sector



Source: AEC

Potential Opportunities

- Consultation indicates **consistent annual demand for developed industrial land** across both the Livingstone and Rockhampton. Total demand ranges **from 7,500 to 15,000sqm per annum**, with a market size of 10-15 buyers. Typical plot sizes demanded range from 500-1,500sqm.
- Specifically, buyers are seeking land with either developed sheds, or suitable for developing sheds, for the purpose of manufacturing (servicing plant and equipment) and construction wholesale.
- Consultations have alluded to the need to attract a major tenant to the region to successfully develop the Northern Corridor. Success of other industrial developments have been founded on a central or anchor tenant whereby support services/ suppliers follow suit and develop along side a major industrial tenant.

Development Requirements:

- Consultation indicated accessing the following infrastructure and services as critical to success for development across various industrial assets:
  - Sewerage
  - Town water
  - Electricity (three-phase power)
  - Local service station
  - Curbing and channelling
  - Telecommunications.
- Further, stakeholders have indicated various local government requirements throughout Central Queensland (e.g. detention basins for water run-off) to be onerous and a disincentive for investment in the region.

DEFENCE DEVELOPMENT

Shoalwater Bay Training Area is a key development opportunity to improve Defence capability across Central Queensland, needing approximately 50 hectares

Primary Opportunity

- Council indicated **up to 50ha of land** would be required to develop appropriately scaled storage facilities. The Northern Corridor is strategically located to service Defence supply chain and logistics requirements.
- In particular, the CQROC Defence Strategy (2022) sets out the possibly of, and intention for, establishing a School of Armour to house the Land 400 invest in Army's new armoured vehicles. These vehicles cannot use civilian roads which suggests the within Norther Corridor and adjacent to the Shoalwater Bay Training Area as a strategically ideal location for the development of a storage facility.

Economic Potential

- The public administration and safety GVA has an average annual growth rate of 3.4% since 2013-14 to 2022-23, mirroring employment which has had an average annual growth rate of 3.1%. The proposed School of Armour is estimated to directly create $294 million GRP and support 849 FTE jobs directly (CQROC, 2022). The School of Armour would grow the public administration and safety jobs by approximately 12.3% across Central Queensland.

Development Requirements

- Defence requires resilient logistics and supply chains so the key requirements of this sector are:
  - Land that is not flood affected
  - Direct access to the Bruce Highway
  - Adjacent to the Shoalwater Bay Defence Training Area.
- Consideration of security and safety should be taken into account when planning neighbouring land use.

TOURISM DEVELOPMENT

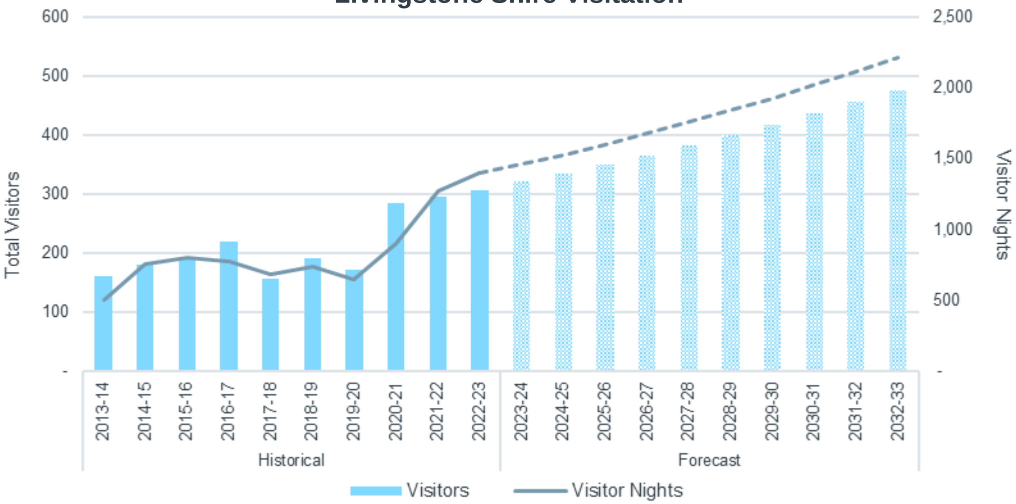
Livingstone's growing tourism sector and the increasing demand for farm-stay tourism presents a unique opportunity for the region, but needs little land set aside

Livingstone Shire tourism has experienced strong growth. **Total overnight visitors to Livingstone Shire has almost doubled over the past decade**, increasing from 161,700 visitors in 2013-14 to 307,500 in 2022-23 (CAGR of 6.0%). Overnight visitors stayed for an average of 3.9 nights over the 10 years to 2022-23, which, in line with the growth in visitors, has increased by 9.7% each year on average from 502,740 nights in 2013-14 to approximately 1.4 million nights in 2022-23.

Recent visitation growth (post-pandemic) to Livingstone and the growth in farm-stay tourism presents a compelling opportunity to build tourism activity throughout the region. Forecasting the next ten years based on the visitor and visitor night CAGR for the 2013-14 to 2022-23 period indicates **the region could attract nearly 500,000 visitors by 2032-33** with visitor nights exceeding 2.2 million.

Current estimates show total visitor spend to have been approximately $325,700 in 2022-23. Based on current spend patterns, this expenditure could exceed $583,000 by 2032-33.

Livingstone Shire Visitation



Source: TRA (2023a, b)

Primary Opportunity

- Based on feedback from stakeholders, **development for tourism opportunities should be led by private land holders.** Stakeholders recognise the growing trend for farm-stay preferences and consider The Caves are well positioned to build this niche tourism market.
- The Caves boasts proximity to a township, necessary transport infrastructure, remote ambiance, and tourism offerings in the Capricorn Caves.

Benchmark Example

- Mount Tamborine in the Scenic Rim is a tourist hub with similar contextual structures as The Caves (that is, located with relative proximity to major townships and providing natural attraction). Its emergence as a tourist hub involved minimal input from Local Government. Traditional B&B's and guest houses built by the private landowners in Mount Tamborine initially ignited tourism in the region.
- Mount Tamborine reportedly welcomes over a million visitors each year and is the most visited region within the Scenic Rim. Over the past decade, total overnight visitor expenditure in the Scenic Rim has increased by $270.6 million reaching $402.8 million in 2023 (year ending September).

Development Requirements

- Consideration of tourism accommodation potential throughout the region to be taken into account when zoning and developing land for industrial use.

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Regional Trade Distribution Centres in Cairns and Toowoomba

There are three identified major distribution centres in Queensland that are of significance to the State's agriculture supply chains, including, Brisbane Produce Market (which grades, packs and distribute fresh fruits and vegetables to registered buyers), Toowoomba Regional Trade Distribution Centre (RTDC) and Cairns RTDC (which exports fresh produce to international markets). The Toowoomba and Cairns RTDCs have been recently established to bolster Queensland's agricultural distribution and supply chain network and support agricultural growth in the long term.

The Brisbane Produce Market at Rocklea is Queensland's only Central Market playing a critical role in the State's fresh produce supply chains. The Central Market has more than 50 wholesalers that collect fresh products from more than 7,000 growers across Queensland and has more than 800 registered buyers. Over 700 million kilograms of produce valuing at more than $2.0 billion is traded at the Brisbane Produce Market annually, which was approximately 53.5% of Queensland's total fruit and vegetable production in 2021.

The Toowoomba RTDC, the State's largest fresh produce exporting facility with a gross floor area of 4,000 square meters, was officially opened in July 2021, specialising in exporting chilled meat, milk, eggs, brassicas, apples, apricots, strawberries, and avocados. The facility was setup to streamline the the distribution of agricultural commodities for graziers and growers across the Toowoomba and Downs regions.

The construction of the facility supported 170 workers and operations have supported jobs throughout the supply chains. Since the centre opened employment in the transport, postal and warehousing sector increased by 13.3% over the year to 2022-23 in the Toowoomba LGA while GVA of the sector increased 19.8%. Across the broader Darling Downs and Maranoa region the sector's GVA increased 15.5%. Simultaneously, agricultural output in the Toowoomba LGA and the broader Darling Downs and Maranoa region recorded a 10% increase over the years 2021-22 to 2022-2023.

The Cairns RTDC (2,400 square meters) was officially open in March 2023, currently specialising in fresh export produce comprising of fish and crustaceans, avocadoes, mangoes, melons, citrus, and blueberries. The facility was built to assist fresh produce exporters in Far North Queensland in delivering their products to national and international markets (Queensland Treasury, 2023; RTDC Cairns, 2023). The construction of the facility supported more than 200 workers and is expected to be promote

The Cairns Centre is located at the Cairns Airport, the Toowoomba Centre is established adjacent to the Wellcamp Airport and Business Park.

Given the already established RTDCs in both the north and south of Queensland, with the north facility having further capacity through expansion, the excess demand would need to be sufficiently significant to push for a new RTDC in Livingstone Shire or Central Queensland. Similarly, the establishment of a new distribution centre in Livingstone Shire would need to be supported by sufficient increase in agriculture production for it to be profitable. As agriculture GVA is growing with increased volume in the production of fruits and vegetables in the Livingstone Shire, this could be potential for future development.

Marquis Macadamias Processing Plant Bundaberg

The processing plant was built in 2011 with approved State funded expansion in 2021 to reach a processing capacity of 15,000 tonnes. The expansion was estimated to generate 40 new jobs in the Bundaberg region. The two main drivers of success of this facility are the dominated production in Bundaberg relative the overall State and the significant appetite globally for Australian macadamias. Bundaberg is Queensland's largest macadamia producer, producing 76% of the State's macadamias and 40% of the national production.

Following the completion of the Rookwood Weir project, Rural Management Fund are aiming to plant 800,000 macadamia trees over 2,500 hectares of orchards within the Fitzroy region to the west of Rockhampton. This increase is approximately 96.7% of total macadamia trees in Central Queensland in 2020-21 and translate to an expected increase in macadamia production of 7,500 tonnes per year. Given no macadamia processing plant is currently in the Rockhampton LGA or within the 300-kilometre radius of the Rookwood Weir Catchment Area, this presents a significant opportunity for a processing plant in Livingstone LGA should the newly expanded Marquis Macadamia facility not be able to fulfil the new level of production across Central Queensland.

Northern Oil Advanced Biofuels Pilot Plant Yarwun, Gladstone

The $16 million Northern Oil Advanced Biofuels Pilot Plant was Queensland's first commercial-scale advanced biofuels pilot plant was built in 2017, with an anticipated production of one million litres per annum over the first three years post operational commencement. The advanced biofuels production converts agricultural waste (such as green waste and bagasse) to be used to support the Australian Defence Force, US navy's field trials, Australian heavy road transport operators and potentially the aviation sector.

Following the success of this project, Gladstone was selected in 2022 for a new $500 million renewable diesel and sustainable aviation fuel biorefinery, expecting the generation of 60 direct jobs and 500 indirect regional jobs during the facility's development and operations. Renewable resources such as natural fats, vegetable oils and greases are used to produce renewable diesel, which provides 100% compatibility with the existing fuel infrastructure. The facility has a capacity to produce 350 million litres of biofuels per annum.

Southern Oil (the refinery who operates the biofuel and renewable diesel) has sited the Rockhampton regional as an ideal site for green-waste biofuel production field given the ingrained agriculture sector across Livingstone and Rockhampton. This presents an opportunity for a biofuel plant to be established in the Livingstone Shire.

Sunshine Coast Industrial Park

The Sunshine Coast Industrial Park was a greenfield industrial land developed by Economic Development Queensland. The first stage of development provided 73 lots across 78 hectares of industrial land and is estimated to provide 2,700 FTE (or 270 sqm per FTE) and contribute $544 million GRP per annum to the local economy once fully occupied (Queensland Government, 2019). The second stage, which currently under construction, will provide an additional 25.5 hectares of development, employing up to 943 FTE (assuming 270 sqm per FTE) to cater to the demand for new industrial land in Caloundra identified in late 2022.

The estate is built to suit a wide range of industries as well as to provide lands for large-scale industrial activities comprising of manufacturing, warehousing to more intensive uses industries. It is 3 kilometers away from Bruce Highway and 7 kilometers away from Caloundra CBD, with access to Sunshine Coast Airport (32 kilometers away) and the Port of Brisbane (within 100 kilometers). This provides great location access for businesses, specifically transport and logistic companies. The lots provided in the business park are also serviced with critical infrastructure such as water mains and sewer mains.

Factors such as availability of critical infrastructure (i.e., water mains and sewer mains) and proximity to freight infrastructure (i.e., sealed roads, port or airport) are key to success of an industrial development. Similar industrial estates across Queensland, such as the Warwick Industrial Estate, have been successful due to their provision of critical infrastructure and proximity to key trunk infrastructure.

AEC

OUTCOME DRIVEN

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Appendix B

AECOM Planning Letter

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12 June 2024

Our Reference
60727600

NORTHERN CORRIDOR STRUCTURE PLANNING – ECONOMIC AND STRATEGIC PLANNING REVIEW

Dear Sonia,

Thank you for engaging AECOM Australia Pty Ltd (AECOM) and AEC Group Pty Ltd (AEC) to provide economic and planning advice regarding the Northern Corridor i.e. land within the suburbs of Glenlee, Rockyview, Glendale, The Caves and Etna Creek.

To date AECOM and AEC have undertaken the following key tasks as part of our agreed scope[1]:

1. Task 1.1 – Inception
2. Task 1.2 – Background review (commenced but not completed)
3. Task 1.3 – Development Demand and Take Up Review

Upon the completion of the Draft Livingstone Shire Northern Corridor Market Confidence Report[2] (referred herein as the 'Draft Market Confidence Report'), the key deliverable of Task 1.3, AEC and AECOM concluded market appetite for land for commercial and industrial development, within the Northern Corridor is low and does not warrant the need for structure planning.

Based on the above, as well as follow-on discussions with Council, we acknowledge there is no need to progress structure planning within the Northern Corridor. However, we understand there may be the need for related investigations associated with the planning for future industrial areas within the Livingstone Council local government area (LGA) to meet predicted demand i.e. 25 hectares over a 20 year period[3].

The letter herein contains our key findings regarding market appetite for land for commercial and industrial development, and strategic planning considerations which support the conclusion to undertake no further structure planning within the Northern Corridor.

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[1] Refer to Northern Corridor Structure Planning Proposal (28 February 2024 – Version 3)
[2] AEC is in the process of finalising the Market Confidence Report based on an outstanding stakeholder interview with Queensland Government Regional State Development representative Kristy Gear. It is not anticipated this interview will alter the advice provided.
[3] as per Draft Market Confidence Report prepared by AEC.

1. Development Demand and Take Up Review

At the inception of the project AEC undertook a development demand and take up review, targeting potential economic and land use opportunities within the Northern Corridor. To estimate market appetite and forward demand for land within the Northern Corridor AEC undertook the following tasks:

1. one-on-one consultations with industry leaders in the region;
2. benchmarked similar investments throughout Queensland; and
3. developed headline projections to support and interpret consultation findings.

The above findings from the above tasks were documented in AEC's Draft Market Confidence Report.

Based on the findings of the report, as well as observations and strategic planning considerations provided by AECOM, it was concluded the market appetite for land for commercial and industrial development, within the Northern Corridor is low and does not warrant the need for structure planning.

The following points provide the rationale for this conclusion:

INDUSTRIAL DEVELOPMENT

- **Predicted demand for industrial land is low –** Approximately 25 hectares of industrial land is required over the next 20 years within the Livingstone Shire Council LGA i.e. approximately 7,500m² - 15,000m² per annum.

  Consultation and analysis suggests a major tenant or operator is needed to increase traditional land demand within the Livingstone Shire Council LGA, inclusive of the Northern Corridor. Without non-planning interventions such as Council advocacy and investment attraction it is unlikely demands will change from historical levels.

- **Value for money in locating future industrial land proximate to existing urban areas –** The predicted land demand for industrial development is of a scale which would be best located proximate to existing urban areas, leveraging Council's existing infrastructure networks.

  It is highly unlikely constructing new infrastructure, to service the predicted demand within a greenfield location, would result in a positive return on investment for Council.

  Further, the Northern Corridor does not include any unique locational attributes to warrant the need for investment within this location e.g. access to port, airport, supply chain etc.

- **Strong level of competition for industrial investment –** Based on recent market sounding activities for other industrial planning projects, large scale investors are not tied to specific locations and will assess a range of opportunities across the nation, state and region.

  There are case studies where nearby industrial markets have secured investment through government partnerships and investments. For example, the Queensland Government were able to secure the establishment of the Townsville Vanadium Battery Manufacturing Facility as part of the Industry Partnership Program.

  There are number of nearby Councils such as Rockhampton Regional Council, Townsville City Council and Gladstone Regional Council which have active and dedicated economic development teams which are tasked with advocating for their respective LGA's and attracting investment.

AGRIBUSINESS

- **No targeted demand for agribusiness within the Northern Corridor** – Anecdotal advice from consultations suggests there is investment potential across the Central Queensland region upon the expansion of research and development facilities throughout the region, coupled with the construction of the Rookwood Weir. However, consultations did not identify any specific opportunities within the Northern Corridor itself.

DEFENCE

- **Defence generally provides on-site infrastructure to service development** – Council have indicated up to 50 hectares of land would be required to develop appropriately scaled storage facilities to support the Shoalwater Bay Training Area. Despite this opportunity, The Department of Defence generally provide all on-site infrastructure for security reasons. Therefore, Council's role in infrastructure planning to support this outcome would likely be minimal.

TOURISM

- **Predicted demand for land to support tourism industry in Northern Corridor is negligible –** Whilst tourism has been a growing industry within the LGA e.g. visitors have increased by 9.7% each year on average between 2013-14 to 2022-23, consultations have indicated the land requirements for tourism associated development, within the Northern Corridor is negligible.

2. Conclusion

We trust our findings and conclusions support the change in direction for the project. We will be in contact shortly to discuss follow-on investigations related to the future planning of commercial and/or industrial growth across the Livingstone Council LGA.

For any further questions or clarifications regarding the above please contact me via the contact details below.

Kind regards,

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Attachment A – Draft Market Confidence Report