

Mersey Leven Strategic Alliance Industrial Land Study

Prepared for the Mersey Leven Strategic Alliance consisting of
Central Coast, Devonport City, Latrobe and Kentish Councils



Prepared by Ethos Urban, a Colliers Company.

24 September 2025 | 3240365



'Gura Bulga'

Liz Belanjee Cameron

'Gura Bulga' – translates to Warm Green Country. Representing New South Wales.



'Dagura Buumarri'

Liz Belanjee Cameron

'Dagura Buumarri' – translates to Cold Brown Country. Representing Victoria.



'Gadalung Djarri'

Liz Belanjee Cameron

'Gadalung Djarri' – translates to Hot Red Country. Representing Queensland.

Ethos Urban acknowledges the Traditional Custodians of Country throughout Australia and recognises their continuing connection to land, waters and culture.

We pay our respects to their Elders past, present and emerging.

In supporting the Uluru Statement from the Heart, we walk with Aboriginal and Torres Strait Islander people in a movement of the Australian people for a better future.

We also acknowledge the palawa/pakana people as the Traditional Custodians of lutrawita (Tasmania).

We also respectfully acknowledge the Punnilerpanner tribe of the Northern Country of Tasmania, their continuing relationship to this land, and their ongoing living culture.

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24 September 2025

Version No.

Date of issue

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1.0 (WORKING DRAFT)

23/06/2025

BM, JG & SS

SS

2.0 (DRAFT)

13/08/2025

BM, JG & SS

SS

3.0 (FINAL)

24/09/2025

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Executive Summary

1. **The Mersey Leven Strategic Alliance comprises the Local Government Areas (LGAs) of Central Coast, Devonport City, Latrobe and Kentish.** The Alliance reflects the significant interdependence between each LGA in terms of economic, environmental and community outcomes, and that in combination the four Council areas account for approximately 60% of the population in the wider North-West and Western Tasmania region.
2. **This Industrial Land Study is focussed on the Mersey Leven Region and includes a review** of local, regional and State policies of relevance to planning for industrial land. The Study informs a more collaborative approach to industrial land use planning at the sub-regional level by the Mersey Leven Strategic Alliance Councils. This is with the objective of generating land use outcomes, including investment attraction and economic development, which is to the benefit of businesses and residents across the region.
3. **The Mersey Leven Region has a strategic location with accessibility to the balance of Tasmania and Sea/Air connections to the Australian mainland** which position it as a key location for industrial activities with the potential for future growth. Key pieces of infrastructure serving the Mersey Leven Region include the Port of Devonport, Devonport Airport, the Bass Highway and the Main Line of the TasRail network including an inter-modal hub at the Port of Devonport.
4. **Approximately 598.2 hectares (ha) of land in the Mersey Leven Region is designated for industrial use**, including 69.3ha in Central Coast, 221.8ha in Devonport, 177.4ha in Latrobe, and 129.7ha in Kentish. While Devonport and Latrobe account for the largest shares of industrial land, all four LGAs contain substantial industrial activities which collectively contribute to the economic infrastructure of the Mersey Leven Region.
5. **The Mersey Leven Region is currently expected to account for approximately 10% of population growth** in Tasmania between 2025 and 2041. This share has the potential to be higher subject to land use planning and development outcomes, including related employment growth and economic development.
6. **A substantial 79.5% of employed Mersey Leven Region residents** have a place of employment within the region, highlighting strong local employment opportunities and the interconnected nature of the regional economy. An investment pipeline of approximately \$2.2 billion has been identified for the Mersey Leven Region across a range of development projects.
7. **Approximately 91.4ha of vacant industrial land has been identified in the Mersey Leven Region**, including confirmed future supply, with a theoretical adequacy of supply of up to **17.6 years**. A clear need exists to identify and plan additional industrial land to ensure the industrial sector can:
 - Grow and service the needs of a growing population across the Mersey Leven Region.
 - Leverage economic development that is aligned to specialisations in the local economy such as agriculture and downstream food processing and manufacturing.
 - Provide support to major regional investment including for renewable energy infrastructure, a major new industrial user or upgrades to Port and Airport infrastructure, as appropriate.
8. **Feedback from industry stakeholders in the Mersey Leven Region** identified factors including:
 - The Mersey Leven Region has an identified shortage of light industrial land, particularly in the Devonport, Quoiba, East Devonport and Spreyton areas.
 - Due to the timeframe taken to both obtain statutory approvals and to undertake construction, the Mersey Leven Region was not seen as attractive to those industrial land users located outside the region including from mainland Australia.
 - A strategy setting out priorities and processes relating to both the supply and demand of industrial land in the Mersey Leven Region was seen as a positive step by those interviewed.
9. **Future demand for industrial land in the Mersey Leven Region will include a mix of:**
 - **Local population servicing industry** such as construction depots, self-storage, local automotive sale and repairs, and miscellaneous warehousing, and some trade supplies, showrooms and bulky goods etc.
 - **Industry aligned to local economic specialisations such as agriculture** (particularly fruit and vegetable production), aquaculture and downstream processing and manufacturing.
 - **Regional scale industrial occupiers, or high technology businesses**, who view the Mersey Leven Region as a strategic location from which to service Northern Tasmania and potentially well beyond. These uses

could be aligned to a number of sectors including, agriculture, transport and logistics, and infrastructure such as renewable energy.

10. **In assessing future industrial land requirements for the Mersey Leven Region, the following objectives have been identified:**
 - Consistency with State and Regional Policy Objectives.
 - Ensure that Industrial Land Supply is provided of a scale, location and nature which ensures that the availability of industrial land is sufficient to meet current, and future needs, for at least the next 20+ years.
 - Deliver a framework for industrial land supply which leverages off existing infrastructure and places the Mersey Leven Region “on the map” as an attractive and viable location for major investors.
11. **Key outcomes for the consideration of future industrial land supply across the Mersey Leven Region** is as follows:
 - Central Coast**
 - **Maskells Road** to the east of Ulverstone is the key opportunity for expansion of industrial land in Central Coast.
 - Devonport**
 - The future transition of the former **Australian Weaving Mill** site to a residential or mixed use development outcome will remove approximately 6.5 hectares of industrial land. No significant expansion of existing industrial land is likely in the **Don Road-Stony Rise Precinct** or in **Quoiba/Spreyton**.
 - The **Pardoe East** precinct which includes land previously identified in association with Latrobe Council for potential industrial development should be revisited for further investigation.
 - Latrobe**
 - Both **Latrobe** and **Port Sorell** have changes to their industrial land supply foreshadowed in the draft Structure Plans prepared for Council. In both instances, the changes reflect a balance between protecting environmental values while supporting incremental growth in industrial activity over time.
 - Latrobe Council can accommodate significant growth in industrial activity, including the potential to attract large-scale uses, in proximity to major infrastructure. This includes the expansion of intensification of activity at the **Wesley Vale** former mill site, as well as some incremental growth at **Piping Lane/Bellfield**.
 - From a strategic perspective, the investigation of the potential for **Pardoe East** (in association with Devonport City Council) and the **Mill Road** precinct to accommodate future industrial activity is advocated by this Industrial land Study.
 - Kentish**
 - The potential may exist for changes in industrial land to accommodate the future operational requirements of Cement Australia at **Railton**.
 - In **Sheffield**, investigate the extension to the south-west of the industrial precinct along Claude Road.
12. **To fully unlock the economic potential of the Mersey Leven Region, it is also essential to maintain and strengthen the key enablers that support industrial activity.** For the Mersey Leven region this includes:
 - Labour mobility across the region
 - Supply chain integration between industries and Council areas
 - Connected transport and infrastructure networks
 - A unified regional approach to governance and investment attraction.
13. **Key economic outcomes expected to be derived from a collective approach to industrial land use planning for the Mersey Leven Region include:**
 - Consistency with economic and land use policy objectives including State Industrial Land Study
 - Setting up the Mersey Leven Region as an investment destination, potentially including considering the combination of Pardoe East, Mill Park Precinct, Wesley Vale, Piping Lane/ Bellfield and Devonport Airport as a ‘Major Enterprise Precinct’ or similar
 - Enhanced leverage of key infrastructure to the economic benefit of the Mersey Leven Region including (although not limited to) roads, ports, airport, rail and renewable energy supply
 - Jobs and investment with the potential to deliver over 4,000 additional jobs in the next 20-30 years.

Introduction

Background

The Mersey Leven Strategic Alliance (the Alliance) comprises the Local Government Areas (LGAs) of Central Coast, Devonport City, Latrobe and Kentish.

An MOU was signed between the LGAs in September 2024 to enable collaboration on areas of mutual interest. The Alliance reflects the significant interdependence between each LGA in terms of economic, environmental and community outcomes, and that in combination the four Council areas account for approximately 60% of the population in the wider North-West and Western Tasmania region.

Reflecting the opportunity to undertake strategic analysis that is to collective benefit of the Mersey Leven Strategic Alliance, an Industrial Land Study (the Study) has been commissioned. The Study provides an analysis of:

- Mersey Leven Regions' current industrial sector and the potential to evolve and grow in the future both at the individual LGA level and collectively.
- Demand drivers for development of industrial zoned land across the Mersey Leven Strategic Alliance area.
- The existing provision of industrial supply and the ability to accommodate anticipated demand.
- Potential industrial supply options and site/development scheme requirements to meet future industrial land needs, having regard to the characteristics of potential sites, and expected users, lot sizes and take up rates etc.
- Opportunities for industrial land to be a driver for economic development, investment and job creation that is to the benefit of the Alliance.

The Study is informed by a review of local, regional and State policies of relevance to planning for industrial land. It is anticipated that the Project will inform a more collaborative approach to industrial land use planning at the sub-regional level by the Alliance Councils. Further, advocacy and discussions in regional and State planning processes regarding future planning for industrial land can also be informed by the Study.

As background to the Study, it is noted that:

- A State Industrial Land Study has been commissioned by the Department of State Growth and is currently being prepared by consultants SGS Economics and Planning.
- The Cradle Coast Regional Land Use Strategy (CCRLUS) is under review with an updated document expected in mid-late 2026.
- A Central Coast Industrial Land Use Analysis report was prepared in March 2025 and informs the outcomes of the Study as relates specifically to Central Coast Council, and both reports can be read concurrently.
- In the context of the above, the Study deals with sub-regional industrial land use planning for the Mersey Leven Strategic Alliance with detailed consideration of both local-level and sub-regional factors.
- The Study is intended to be complementary to regionally and State focussed strategic land use planning.

Project Team

Ethos Urban are the lead consultant for the delivery of The Project.

In addition, the project has benefitted from the input of **6ty** in relation to planning context, and Warren Moore of **Moore Consulting** who undertook a stakeholder engagement program which has informed project outcomes.

1.0 Mersey Leven Background and Context

Key findings

- The Mersey Leven Region covers the central parts of the north coast of Tasmania and includes the four Local Government Areas of Central Coast, Devonport City, Latrobe and Kentish. In total, the Mersey Leven Region has approximately 70,630 residents in 2025 or approximately 60% of the total population of north-west and western Tasmania.
- The Mersey Leven Region's strategic location, accessibility to the balance of Tasmania and Sea/Air connections to the Australian mainland position the region as a key location for industrial activities with the potential for future growth.
- Key pieces of infrastructure serving the Mersey Leven Region include the Port of Devonport, Devonport Airport, the Bass Highway and the Main Line of the TasRail network including an inter-modal hub at the Port of Devonport.
- The Mersey Leven Region makes a significant contribution to the economy of Tasmania, including the industrial and agricultural sectors.

1.1 Location Context

The Mersey Leven Region is comprised of the four Local Government Areas (LGAs) of Central Coast, Devonport City, Latrobe and Kentish who have signed a Memorandum of Understanding to establish a Strategic Alliance and collaborate on aligned areas of interest. All four LGAs have a close interdependence in terms of economic, social, and environmental outcomes, with the geographic proximity contributing to a collective responsibility for the prosperity and resilience of the community.

Located in central parts of Northern Tasmania (refer **Figure 1.1**), Mersey Leven is a region combining key coastal hubs with productive rural hinterlands and serviced by small urban areas. Collectively, Mersey Leven plays a key role in the state's economy, including the industrial and agricultural sectors.

Central Coast LGA has a coastline fronting Bass Strait and rural hinterland that supports some of Australia's most productive agricultural soils. Central Coast has approximately 23,470 residents who mostly live in key settlements, including Ulverstone and Penguin, which are located on or near the coast.

The **City of Devonport** is within the heart of the Mersey Leven Region and is bordered by Central Coast LGA in the west, Latrobe LGA in the east and Kentish LGA in the south. The City of Devonport is dominated by the Devonport urban area, including the peri-urban areas of Spreyton and Ambleside. The resident population of the City of Devonport is currently estimated at 27,170 residents.

Latrobe LGA incorporates a number of key urban centres including Latrobe, Port Sorell and Sassafras, as well as an extensive rural hinterland including high quality agricultural land. Latrobe incorporates Devonport Airport which is located on eastern fringe of urban Devonport. In 2025, the resident population of Latrobe LGA is estimated at 14,850 persons.

Kentish LGA is rural, characterised by a strong agricultural sector and high levels of tourist visitation. It has an estimated resident population of 6,990. Key townships include Sheffield, Railton, and Wilmot, with Cradle Mountain situated in the far south of the region.

1.2 Infrastructure

The Mersey Leven Region includes key infrastructure which has an important influence on the economic and social context, including in relation to the current and future use of industrial land. These include:

- **Port of Devonport** – is a key cargo port serving northern Tasmania and accommodating between 3 and 4 million tonnes of cargo each year, principally to/from Melbourne although also to other destinations in Australia (e.g King Island) and overseas (e.g. Singapore). The Port is directly served by high-quality road and rail infrastructure (see below). The Port of Devonport is the dominant containerised and general cargo port in Tasmania, accounting for 50% of total TEU (twenty foot equivalent) units entering and leaving the State.
- **Spirit of Tasmania Terminal** – located in East Devonport is the daily departure point for the Spirit of Tasmania ferry service which connects to mainland Australia at Geelong. The terminal is a key passenger and freight gateway, supporting both tourism and logistics. In the FY2024, the Spirit of Tasmania service transported over 400,000 passengers across over 900 sailings between Devonport and Geelong. The

terminal is currently undergoing an upgrade to offer nearly double the space of the current facility, with new vessels set to increase annual passenger capacity by 30%, lane metres for vehicles and freight by 60%, and cabin capacity by approximately 35%.

- **Devonport Airport** – is a regional airport located approximately 7 km east of the Devonport CBD, offering regular commercial services to Melbourne. The airport also supports air freight operations to King Island and Moorabbin and accommodates general aviation and emergency services. In FY2024 the Airport accommodated 3,758 commercial flights with 121,880 passengers, and 504 freight landings.
- **TasRail Intermodal Terminal** – is situated adjacent to the Port of Devonport and enables the efficient transfer of freight between road and rail. The terminal supports containerised freight movements across Tasmania has a vital role in reducing road congestion and improving logistics efficiency. In 2015 the terminal was reopened after an eight year hiatus, marking a significant investment and commitment to Devonport's port and freight capabilities.
- **Mersey Community Hospital** – a major regional public hospital in Latrobe servicing the north west Coast, the hospital provides emergency, elective and specialist health services. The hospital serves a catchment of more than 70,000 residents and is one of the largest employers in the region including a wide range of specialist medical practitioners.
- **The Bass Highway (National Highway 1)** – is the major arterial road route running directly through Central Coast, Latrobe and Devonport connecting the region to Burnie, Launceston, and Hobart. The highway supports commuter movement and logistics, including freight access to the Port of Devonport and other industrial precincts throughout the Mersey Leven Region.
- **Main Line** – Tasmania's principal rail freight route is operated by TasRail. The line connects Devonport to Burnie and Launceston, facilitating inter-regional goods transport and is critical to the movement of bulk commodities – including bulky cement between Railton and the Port of Devonport. The Main Line also links to southern Tasmania at Brighton and by road extension Hobart, making it a critical part of Tasmania's state-wide logistics network.
- **B Double Freight Network** – a designated road freight network that can accommodate high-capacity B-double trucks through parts of the Mersey Leven Region. This enables the movement of heavy freight between ports and industrial areas on sections of the Bass highway and connecting industrial roads.
- **Tasmanian Gas Network (TGN)** – an 837km natural gas distribution network for Tasmania which has been in operation since 2005 and currently serves approximately 46,500 customers across the state. The pipeline passes through the Mersey Leven Region. A connection to Ulverstone and the Simplot factory was recently delivered and reflects the potential to also deliver further connections to relevant industrial areas both in Central Coast and the balance of the Alliance.

In addition to these key pieces of infrastructure directly serving the Mersey Leven Region, other infrastructure in Northern Tasmania also influences industrial activities and overall economic activity – this includes:

- **Burnie Port** – Tasmania's largest cargo port and easily accessible from the Mersey Leven Region. The Port handles over 5 million tonnes of cargo annually, servicing regular domestic and international shipping routes. Burnie Port offers complementary port capacity to that provided by the Port of Devonport which means the Mersey Leven Region is highly accessible to sea-based transport and logistics to mainland Australia and further to world markets.
- **Launceston Airport** – the second busiest airport in Tasmania, Launceston offers broader national air transport connectivity around 1.5 hours' drive east of Devonport. Regular domestic passenger services are provided to major Australian cities (e.g. Melbourne, Sydney, Brisbane), as well as general aviation, air freight and charter services. A total of 1,295,173 people travelled through the airport in FY23 and in February 2023, work commenced on a \$4 million upgrade of Virgin Australia's Launceston Airport cargo facility. Virgin Australia use the modernised facility as the hub for all northern Tasmania cargo operations, with the ability to transport almost 500 tonnes of local product each year.
- **The University of Tasmania (UTAS)** – provides tertiary education, research, and community programs across a range of disciplines. It has two campuses in Launceston; Newnham and the newly developed Inveresk located approximately 62km direct distance southeast of Latrobe. The Cradle Coast Campus in Burnie is situated about 16km direct distance to the west of Penguin.

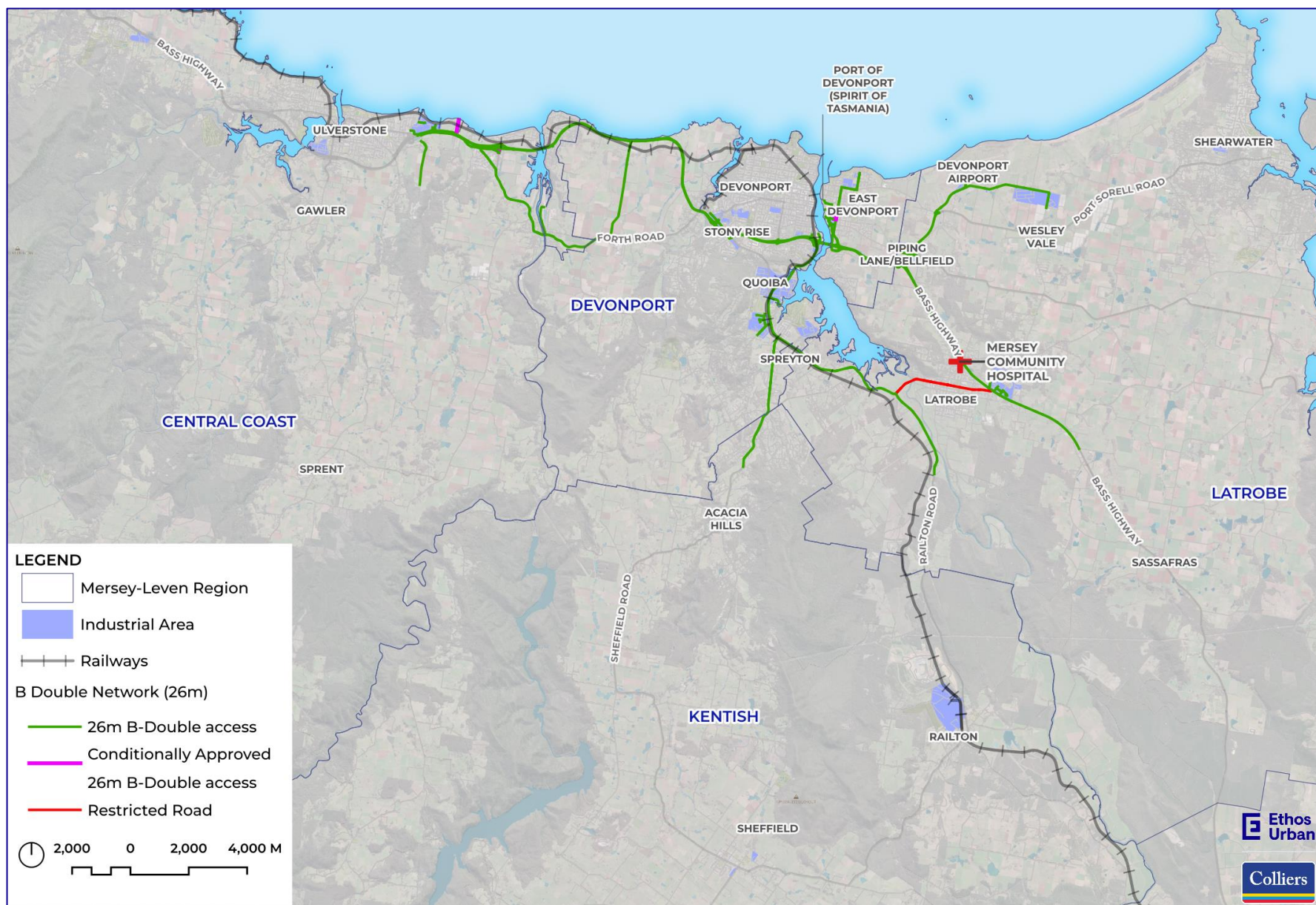


Figure 1.1 Regional Context Map

Source: QGIS, LIST, Ethos Urban

1.3 Key Industrial Business Overview

A reflection of the importance industrial activities in the Mersey Leven Region is the nature of key businesses across each LGA. These businesses serve a mix of local and national (or international) customers. In many instances businesses in industrial areas are key components of the overall economy, while others undertake sophisticated or niche activities which represent a significant value-add or a source of export income.

Industrial businesses will typically operate in an industrial zone (and these zones are the focus of this Study). Some logistics and packaging facilities in the Mersey Leven Region locate in the Agriculture Zone outside formal industrial zones, where they have a direct connection to supporting agricultural activities. Likewise, some important transport and logistics facilities are present in the Port and Marine Zone which applies to the Port of Devonport.

Below is a selection of key industrial businesses located in the Mersey Leven Region:

Central Coast

Food processing, food manufacturing and associated food export activities are a key component of the local economy. This is linked to Central Coast's very strong agriculture sector, particularly vegetable and fruit production supported by fertile alluvial soils.

Prominent industrial businesses operating in Central Coast include:

- **Simplot** – an international food manufacturing business. Simplot's Ulverstone manufacturing plant was established in 1943 and has made an important contribution to the local community and economy across subsequent decades.
- **Botanical Resources Australia** – a manufacturer of pyrethrin based insecticides, as well as stockfeed and biofuels.
- **Dobmac Agricultural Machinery** – a business specialising in the design, manufacture, supply and maintenance of bespoke agricultural machinery.
- **Degree C** – a multi-trade contracting company specialising in heating and cooling, solar, refrigeration, electrical services and metal fabrication and processing technologies.
- **Penguin Composites** – a manufacturer of a range of composite components including various polyesters, isothalics, vinylesters and epoxies.
- **Madar International** – a manufacturer of ambulances and other specialty vehicles, including exports to South East Asian customers.

Within the Agriculture Zone at Forth are intensive agricultural processing and logistics facilities operated by Sumich and Premium Fresh.

Devonport

Prominent industrial businesses in Devonport include:

- **PFD Food Services** – one of Australia's largest foodservice distributors, PFD Food Services operates a major distribution centre in Devonport.
- **Simplot** – the Simplot frozen vegetable processing facility is a key contributor to Tasmania's agribusiness sector.
- **Fonterra** – operate a significant dairy processing facility in Spreyton, manufacturing butter, other spreads and specialised milk products (including lactose free).
- **Delta Hydraulics** – a specialist manufacturer of hydraulic cylinders and systems, exporting globally from a production facility in Devonport.
- **Yum Tasmania** – a food manufacturer producing premium Tasmanian produce in East Devonport.

Within the Agriculture Zone at East Devonport is a Costa Fresh distribution and packaging facility, while the Port of Devonport includes important transport and logistics operators such as TT Lines (Spirit of Tasmania) and SeaRoad.

Latrobe

Within Latrobe prominent industrial businesses include:

- **BioMar** – a global aquafeed producer operating a production facility in Wesley Vale, Latrobe which underwent a major expansion in 2020 and now employs approximately 70 persons serving the aquaculture industry.
- **BridgePro Engineering** – a sophisticated engineering company delivering major civil and infrastructure projects across Tasmania and Australia, with a specialisation in bridges and marine-based infrastructure.
- **Sun Pharma** – one of the world's largest specialty pharmaceutical companies, operating a manufacturing plant in Latrobe focussed on opiate-based pain medications.
- **CLAAS Harvest Centre** – a key supplier of advanced agricultural machinery, including providing ongoing asset management and repair services.

Kentish

Kentish includes the following prominent industrial businesses:

- **Cement Australia** – the Railton plant, established in 1923, is one of the largest cement manufacturing sites in Australia with a direct rail spur access point to the Main Line of the TasRail network and operating a high-capacity kiln. An upgrade to the kiln is currently underway to allow for alternative fuel sources and to reduce embedded carbon in the construction industry.
- **Treloar Civil and Quarries** – this Sheffield-based company specialises in civil construction, quarry operations, and heavy machinery services.

2.0 Mersey Leven Industrial Land Overview

The industrial sector in the Mersey Leven Region has an important role of accommodating businesses in a range of sectors including manufacturing, transport/logistics, construction, agriculture, machinery and automotive sales and repairs. Food processing, food manufacturing and associated food export activities are also a key component of the local economy.

For this analysis, land zoned for industrial uses across the Mersey Leven Region which includes General Industrial and Light Industrial lands are analysed. This is apart from Rural and Particular Purpose zones in Bellfield Estate and Piping Lane Business Park which have also been considered with client agreement. The definition and permitted uses for each of these zones are listed below:

- **Light Industrial** – this zoning provides for traditional industrial uses like manufacturing, processing, repair, storage and the distribution of goods and materials where off site impacts are minimal or can be managed to minimise conflict with, or unreasonable loss of amenity to, any other uses.
- **General Industrial** – this zone provides for manufacturing, processing, repair, storage and the distribution of goods and materials where there may be impacts on adjacent uses.
- **Rural** – located outside of urban areas this zoning aims to provide land for agricultural use or uses that do not constrain or conflict with resource development. This zoning also supports the development for primary industry as well as environmental and landscape values.
- **Particular Purpose** – this zoning provides for land use where standard zoning requirements are not applicable, requiring a unique and robust land use provision in that area. The content for such zones will be prepared by the local planning authority as part of the Local Provisions Schedule.

2.1 Mersey Leven Zoned Industrial Land

Across the Mersey Leven Region are a range of precincts contributing to the operation of the industrial sector. In order to understand the nature and trends at a local level, while also understanding the context for the wider Mersey Leven Region, the precincts defined for each LGA are shown in **Figure 2.1**.

The Mersey Leven Region has approximately 598.2 hectares (ha) of land designated for industrial use, including 69.3ha in Central Coast, 221.8ha in Devonport, 177.4ha in Latrobe, and 129.7ha in Kentish.

Devonport and Latrobe in combination contain 66.8% of total industrial zoned land. In Latrobe, the Bellfield Estate and Piping Lane Precinct, though zoned as Rural and Particular Purpose, also support industrial activities and form part of the land available for industrial uses as assessed in this report.

More detailed descriptions of each precinct by LGA follows.

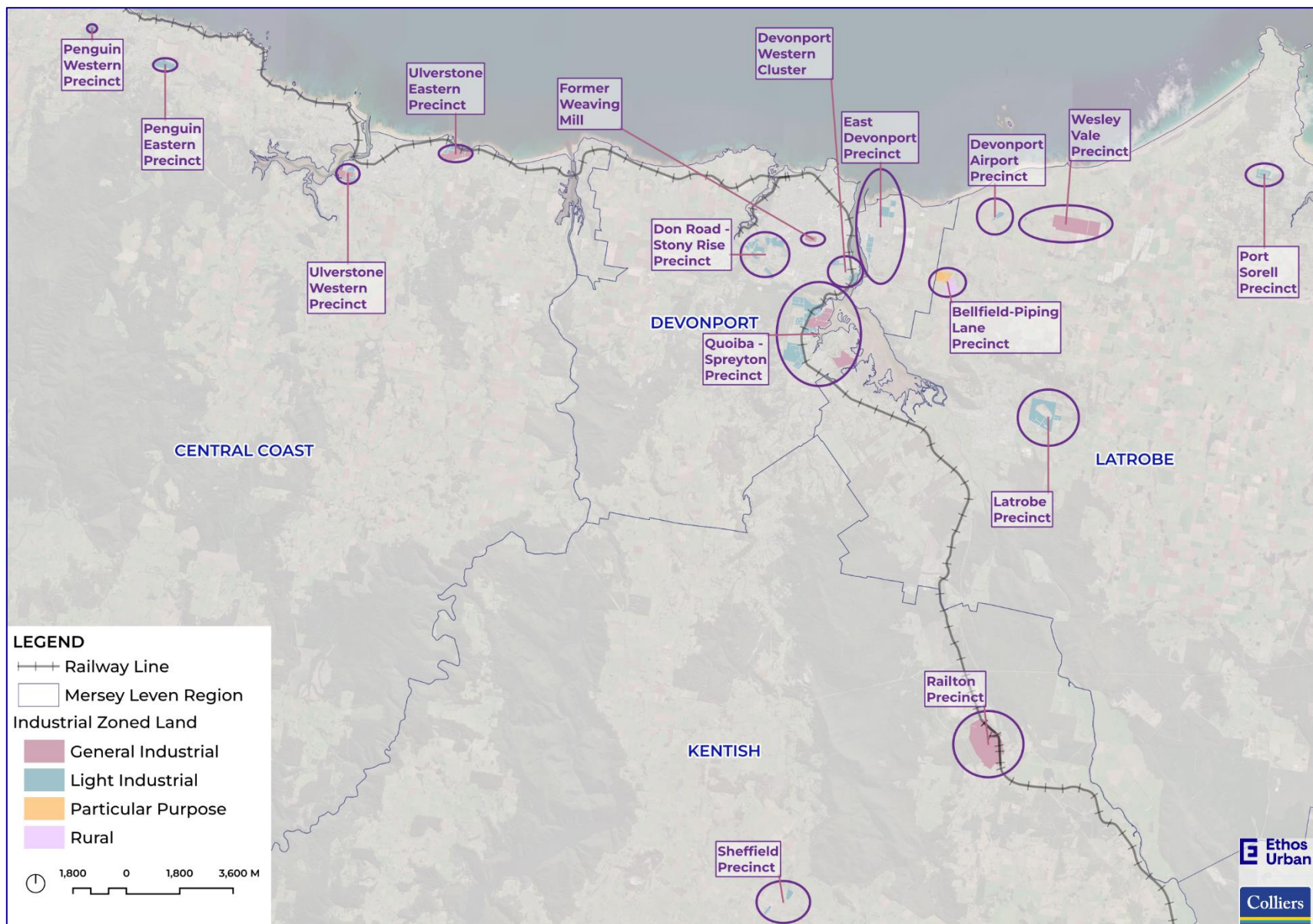


Figure 2.1 Key Industrial Precincts in the Mersey Leven Region

Source: Ethos Urban

Central Coast

Central Coast has approximately 69.3ha of industrial zoned land, comprising 32.4ha in the Light Industrial Zone and 36.9ha in the General Industrial Zone (refer to **Table 2.1** and **Figure 2.2**).

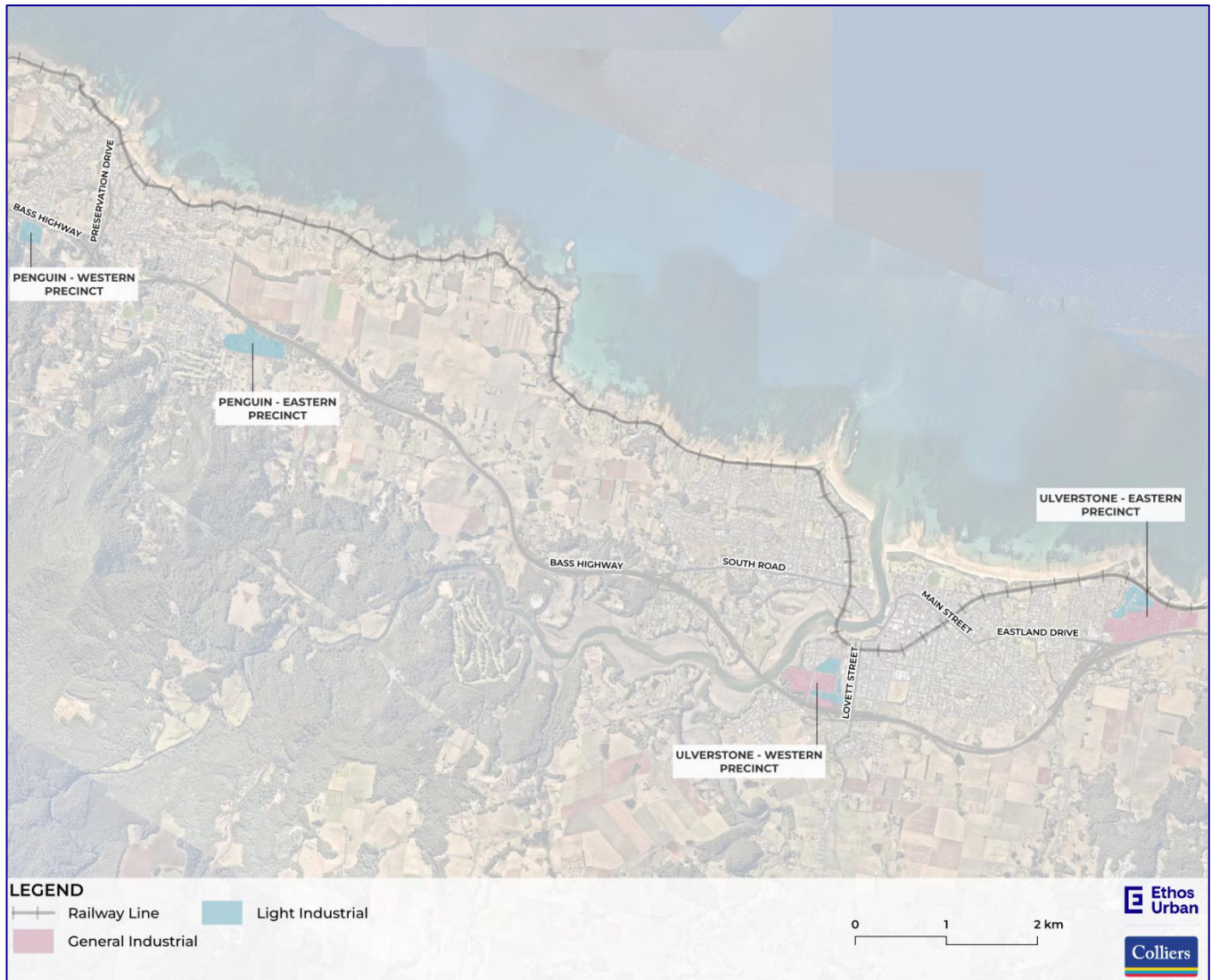


Figure 2.2 Central Coast Industrial Areas

Source: Ethos Urban, QGIS

Central Coast's two largest industrial precincts are located at Ulverstone:

- **Ulverstone Eastern Precinct**, located immediately north of the Bass Highway at the eastern approach to Ulverstone. This precinct includes approximately 30.9ha of industrial zoned land, comprising 24.4ha in the General Industrial Zone and 6.5ha in the Light Industrial Zone. The Eastern Precinct supports uses including construction and transport depots; automotive, machinery and engineering/fabrication; trade supplies, showrooms, manufacturing (such as the Botanical Resources plant), and miscellaneous local service industry. Council recently identified the potential for approximately 14ha of land immediately to the east - extending as far as Maskells Road - to be rezoned for industrial use which would represent a significant expansion of the Ulverstone Eastern Precinct.
- **Ulverstone Western Precinct**, situated adjacent to the River Leven, includes approximately 19.5ha of zoned industrial land, comprising 12.5ha in the General Industrial Zone and 7.0ha in the Light Industrial Zone. Simplot is the major business in the precinct with nearly 10 hectares of land, while other industrial uses include warehousing, transport, packaging, agricultural services, automotive activities, and miscellaneous local service industry.

Two smaller industrial precincts are located at Penguin: **Penguin Eastern Precinct** and **Penguin Western Precinct**. Both precincts are in the Light Industrial Zone.

Approximately 13.9ha of land in the Light Industrial land zone is in the Penguin Eastern Precinct and 5.0ha in the Western Precinct. The Eastern Precinct contains manufacturing plants for Mader International and Ron Gee Enterprises.

A range of principally local service industrial uses are in the Penguin Western Precinct.

Table 2.1 Zoned Industrial Land (ha), Central Coast

Central Coast Precinct	Light Industrial	General Industrial	Total Industrial
Penguin Eastern Precinct	13.9ha	-	13.9ha
Penguin western precinct	5.0ha	-	5.0ha
Ulverstone Eastern Precinct	6.5ha	24.4ha	30.9ha
Ulverstone Western Precinct	7.0ha	12.5ha	19.5ha
Total	32.4ha	36.9ha	69.3ha

Source: Ethos Urban; Tasmanian Planning Scheme – Zoning

Devonport

Devonport has approximately 221.8ha of industrial zoned land, comprising of Light Industrial zoned land of approximately 163.6ha and 58.2ha in the General Industrial Zone (refer to *Error! Reference source not found..2* and **Figure 2.3***Error! Reference source not found.*).

Table 2.2 Zoned Industrial Land (ha), Devonport

Devonport Precinct	Light Industrial	General Industrial	Total Industrial
Quoiba-Spreyton Precinct	88.8ha	51.5ha	140.3ha
Don Road-Stony Rise Precinct	34.4ha	-	34.4ha
Devonport Western Cluster	13.5ha	-	13.5ha
East Devonport Precinct	27.0ha	-	27.0ha
Former Weaving Mill	-	6.7ha	6.7ha
Total	163.6ha	58.2ha	221.8ha

Source: Ethos Urban; Tasmanian Planning Scheme – Zoning

The following industrial precincts have been identified in Devonport:

- **Devonport Western Cluster** – is 13.5ha of land in the Light Industrial Zone located on the western bank of the Mersey River and bisected by the major Bass Highway. It comprises two main sections, with the north primarily accommodating industries related to automotive services, hardware, and storage. In the southern section, Hydralink is a key tenant.
- **East Devonport Precinct** – on the eastern bank of the Mersey River, the East Devonport Precinct includes 27.0 ha of land in the Light Industrial Zone. The northern section is bounded by Brooke Street to the south and North Caroline Street to the east and is home to a packaging facility for Yum Tasmania, as well as depots for Maxfield Drilling and All Supply Direct. The southern section, located along Tarleton Street, features a finer grain of development and supports local service industries such as construction depots, automotive services, and miscellaneous warehousing.
- **Don Road-Stony Rise Precinct** – is land in the Light Industrial Zone with an area of 34.4ha including a wide range of primary service industry uses with a convenient location near the Bass Highway and on the western fringe of urban Devonport. Some of the major tenants operate in industries such as concrete manufacturing, hydraulics, and some tenants relying on exposure to Don Road such as trade and hardware supplies.
- **Quoiba-Spreyton Precinct** – is the largest industrial precinct in Devonport features a mix of land in the Light (88.8ha) and General (51.5ha) Industrial zones and is focussed on the Mersey Main Road corridor. This precinct includes vacant industrial zoned land, including a large undeveloped parcel of 12ha east of Stony Rise Road, as well as some land in Spreyton also available for future development. More recently industrial development has occurred at Marconi Court and at areas near the intersection of Mersey Main Road and Kelcey Tier Road. A variety of local service industries are supported in the precinct, alongside large manufacturing plants for Simplot situated in the northeast Quoiba and Fonterra situated to the southeast, which sit in the General Industrial Zone suited to larger-scale industrial activities.
- **Former Weaving Mill** – is located on Tasman Street in the heart of urban Devonport, this precinct is zoned General Industrial with a land area of 6.7ha. This zoning reflects the historical use of the land for the Australian Weaving Mill which closed in 2013. At present the land and buildings are currently under-utilised. Re-use of the site in its current format for a significant industrial use is not a preferred outcome for the City of Devonport, noting the presence of well-established residential uses on adjacent land. Nonetheless, the land

remains in an industrial zone for the time being, recognising the potential for the site to transition to an infill development in the future and subject to appropriate planning and development outcomes.

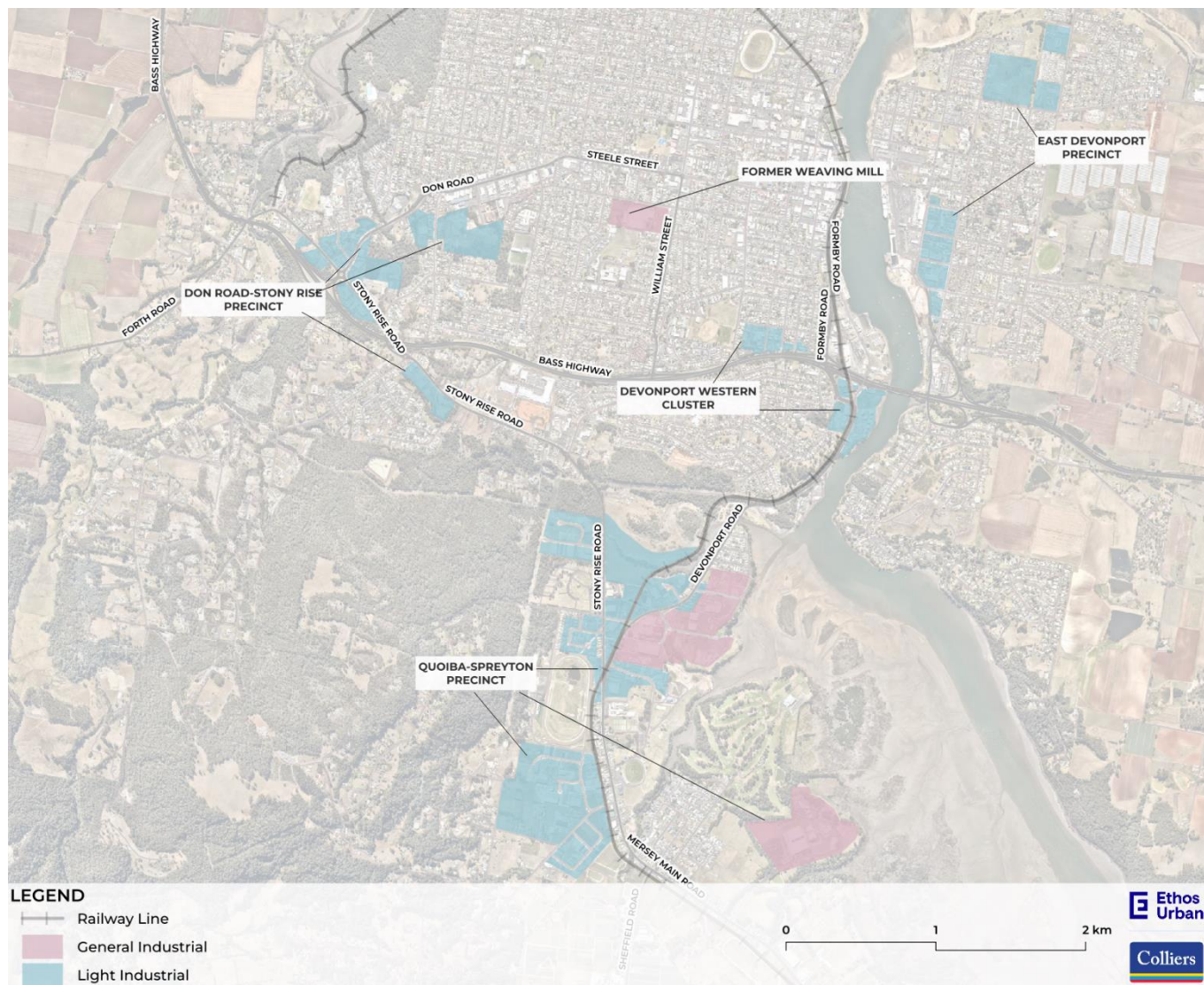


Figure 2.3 Devonport LGA Industrial Precincts

Source: Ethos Urban, QGIS

Latrobe

Latrobe has approximately 177.4ha of land area that supports industrial uses across five identified precincts. This comprises of 31.7ha in Particular Purpose and Rural zoned land that support industrial uses and other related business activities, some 71.4ha in the Light Industrial Zone and 74.3ha in the General Industrial Zone (refer to **Table 2.3** and **Figure 2.4** Error! Reference source not found.). The largest industrial precinct in Latrobe is at Wesley Vale.

An overview of each precinct is as follows:

- **Bellfield-Piping Lane Precinct** – located a short distance north of the intersection of the Bass Highway and Port Sorell Road is the Piping Lane Business Park (Particular Purpose Zone), and the Bellfield Estate (Rural Zone). The Piping Lane Business Park in the north-west has a 16-lot subdivision approved and can support a mix of industrial and business activities. The Bellfield Estate located immediately south-east of the Port Sorell Road/Frankford Road intersection supports a cluster of larger-footprint industrial uses that are primarily warehousing and logistics aligned, including depots for De Bruyn's Transport, Southcott Tasmania, and AFI Logistics. A draft amendment to expand this precinct by approximately 14 hectares is currently being considered by the Tasmanian Planning Commission.
- **Devonport Airport Precinct** – this 4.7ha precinct is located immediately south of the Devonport Airport in the Light Industrial Zone and pursuant to the Devonport Airport Master Plan 2035. The precinct accommodates depots for Simplot, and agricultural contracting and fibreglass manufacturing businesses.

- **Wesley Vale Precinct** – located along Mill Road this 74.9ha precinct is made up of two sections; a small Light Industrial Zone site approximately 700m east of Devonport Airport is fully occupied by Vale Timber Products. Land in the General Industrial zone including an area known as Mill Park is located 1km east of the Devonport Airport, spanning both sides of Mill Road; that previously accommodated the Wesley Vale Paper Mill (closed 2009) and the Wesley Vale Board Mill (closed 2012). Mill Park is an industrial park temporarily occupied by major tenants like Simplot, Costa and Visy with a possibility of future subdivision at the site. The balance of land in the General Industrial Zone includes a manufacturing facility for aqua feeds producer BioMar (at the former Board Mill site) with space for future expansion by BioMar.
- **Port Sorell Shearwater Precinct** – in the suburb of Shearwater, west of Alexander Street, the Port Sorell Industrial precinct is a 11.2ha area zoned for Light Industrial use. The precinct currently has some limited vacant land available for new industrial tenancies, with potential for expansion further south of Burgess Drive. Tenants in the area are primarily local service related and include HazelBros Concrete, Shearwater Storage Sheds, Tiny House Taswide, Fatbuilds Auto Parts store and Shearwater Mechanical Tyres.
- **Latrobe Precinct** – on the eastern edge of urban Latrobe is a precinct including 54.9ha of land in the Light Industrial zone which is strategically situated immediately north of the Bass Highway providing linkages across the region and beyond. A substantial portion of the area remains undeveloped and may not be available for development subject to future assessment of potentially threatened vegetation. Prominent tenants within the precinct include CLAAS Harvest Centre, Kart Magic Entertainment Centre (an entertainment use), Sun Pharmaceuticals, and Bridge Pro Engineering. A section of the precinct extends east of York Street and is currently fully occupied with the potential for further expansion north and south of this section along York Street identified in the Draft Latrobe Structure Plan.

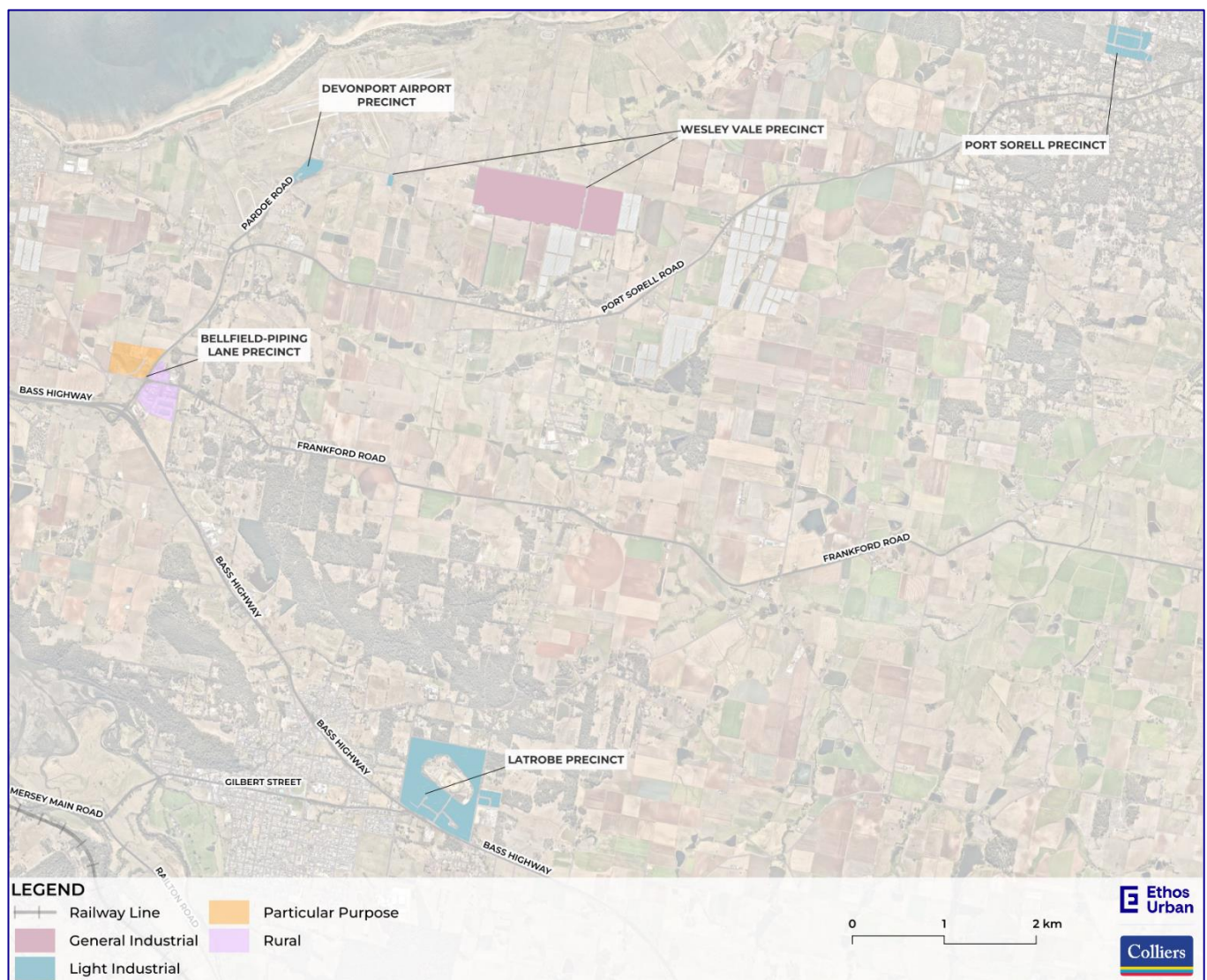


Figure 2.4 Latrobe LGA Industrial and Special-use Precincts

Source: Ethos Urban, QGIS

Table 2.3 Industrial Land (ha), Latrobe

Latrobe Precinct	Light Industrial	General Industrial	Particular Purpose	Rural	Total Industrial
Bellfield-Piping Lane Precinct	-	-	15.3ha	16.4ha	31.7ha
Devonport Airport Precinct	4.7ha	-	-	-	4.7ha
Latrobe Precinct	54.9ha	-	-	-	54.9ha
Port Sorell Precinct	11.2ha	-	-	-	11.2ha
Wesley Vale Precinct	0.7ha	74.3ha	-	-	74.9ha
Total	71.4ha	74.3ha	15.3ha	16.4ha	177.4ha

Source: Ethos Urban; Tasmanian Planning Scheme – Zoning

Kentish

Kentish has 129.7ha of industrial zoned land, comprising 7.3ha in the Light Industrial Zone and 122.3ha in the General Industrial Zone (refer to

Table 2.4 and **Figure 2.5**Error! Reference source not found.).



Figure 2.5 Kentish LGA Industrial Precinct

Source: Ethos Urban, QGIS

Kentish has a large amount of land in the General Industrial Precinct at Railton in association with the Cement Australia facility.

- **Railton Precinct** – this large 122.3ha precinct is zoned General Industrial and is conveniently located with a dedicated rail spur to the west of Latrobe Road. The site is fully occupied by Cement Australia, a longstanding tenant at this site which operates a substantial mineral extraction and manufacturing facility.

- **Sheffield Precinct** – zoned as Light Industrial, this precinct is divided into two distinct areas. The northern section is situated along East Victoria Street and is a waste transfer station operated by Council. The southern section runs along the north side of Claude Road and includes Treloar's Transport, one of Sheffield's major employers, and service industrial uses.

Table 2.4 Zoned Industrial Land (ha), Kentish

Kentish Precinct	Light Industrial	General Industrial	Total Industrial
Railton Precinct	-	122.3ha	122.3ha
Sheffield Precinct	7.3ha	-	7.3ha
Total	7.3ha	122.3ha	129.7ha

Source: Ethos Urban; Tasmanian Planning Scheme – Zoning

Summary

A summary of the distribution of industrial land across the Mersey Leven Region highlights the significant role each LGA has in supporting industrial activities and employment.

While Devonport and Latrobe account for the largest shares of industrial land, all four LGAs contain substantial industrial activities which collectively contribute to the economic infrastructure of the Mersey Leven region.

Table 2.5 Mersey Leven Region Industrial Summary

Mersey Leven Region	Light Industrial	General Industrial	Particular Purpose	Rural	Total Industrial	Share
Central Coast	32.4ha	36.9ha	-	-	69.3ha	11.6%
Devonport	163.6ha	58.2ha	-	-	221.8ha	37.1%
Latrobe	71.4ha	74.3ha	15.3ha	16.4ha	177.4ha	29.7%
Kentish	7.3ha	122.3ha	-	-	129.7ha	21.7%
Total	274.7ha	291.7ha	15.1ha	16.4ha	598.2ha	100.0%

Source: Ethos Urban; Tasmanian Planning Scheme – Zoning

3.0 Strategic Planning and Policy Context

3.1 Overview

Use and development of all land within Tasmania, including the Mersey Leven Region, is regulated by the Tasmanian Resource Management and Planning System (RMPS).

The primary role of the RMPS is to govern the sustainable use and development of land, including natural and physical resources and the built environment, within Tasmania.

Provision of appropriate land for existing and future industrial purposes is a component of the RMPS.

The Land Use Planning and approvals Act 1993 (LUPA Act) is the overarching legislation that underpins the RMPS, setting out the framework for the making, and implementation of, statutory land use instruments.

These statutory instruments are detailed in **Table 3.1**.

Table 3.1 Statutory planning instruments created by the LUPA Act

Statutory Instrument	Land Use Planning and Approvals Act 1993	
	Part	Section(s)
Tasmanian Planning Policies	2A	12A-12I
Regional Land Use Strategy	1	5A
Tasmanian Planning Scheme	2	9-12
State Planning Provisions	3	13-30T
Local Provisions Schedule	3A	31-35T

Within the context of Table 3.1, instruments listed at the top of the table provide the overarching strategic and policy context for the use and development of land. The instruments towards the bottom of the table provide specific details and statutory controls for the use and development of land.

In this regard, the RMPS is structured in a way that commences with broad objectives and principles at the State and regional levels. These are then narrowed and refined down to the local level through the implementation of use and development controls via corresponding planning schemes.

Any expansion of existing industrial (zoned) land or the creation of new industrial (zoned) land in the Tasmanian Planning Scheme (State Planning Provisions and Local Provisions Schedule), requires alignment with the higher order statutory instruments of the Tasmanian Planning Policies (when in effect) and the Regional Land Use Strategy.

The following sections provide details of each of the fundamental statutory instruments created by the LUPA Act that form the RMPS within the context of the Study.

3.2 Land Use Planning and Approvals Act 1993

The LUPA Act is the core piece of legislation that mandates the creation and application of planning policy and controls at State, regional and local (municipal) levels. Every statutory instrument created under the LUPA Act (listed in Table 3.1), including any subsequent amendments to applicable statutory instruments, is required to further the objectives of the RMPS which are distilled within Schedule 1 of the LUPA Act.

The objectives of the RMPS are reproduced in **Table 3.2**.

Table 3.2 Part 1 objectives of the Tasmanian Resource Management and Planning System

SCHEDULE 1 - Objectives	
PART 1 - Objectives of the Resource Management and Planning System of Tasmania	
1.	The objectives of the resource management and planning system of Tasmania are - a) to promote the sustainable development of natural and physical resources and the maintenance of ecological processes and genetic diversity; and b) to provide for the fair, orderly and sustainable use and development of air, land and water; and c) to encourage public involvement in resource management and planning; and d) to facilitate economic development in accordance with the objectives set out in paragraphs (a), (b) and (c); and e) to promote the sharing of responsibility for resource management and planning between the different spheres of Government, the community and industry in the State.
2.	In clause 1 (a), sustainable development means managing the use, development and protection of natural and physical resources in a way, or at a rate, which enables people and communities to provide for their social, economic and cultural well-being and for their health and safety while - a) sustaining the potential of natural and physical resources to meet the reasonably foreseeable needs of future generations; and b) safeguarding the life-supporting capacity of air, water, soil and ecosystems; and c) avoiding, remedying or mitigating any adverse effects of activities on the environment.

In addition to Part 1, Part 2 of Schedule 1 of the LUPA Act set out the objectives of the planning process established by the LUPA Act which are intended to support the key objectives of the RMPS. The planning process objectives are reproduced within **Table 3.3** below.

Table 3.3 Part 2 objectives of the Planning Process Established by the LUPA Act

SCHEDULE 1 - Objectives	
PART 2 - Objectives of the Planning Process Established by this Act	
The objectives of the planning process established by this Act are, in support of the objectives set out in Part 1 of this Schedule - a) to require sound strategic planning and co-ordinated action by State and local government; and b) to establish a system of planning instruments to be the principal way of setting objectives, policies and controls for the use, development and protection of land; and c) to ensure that the effects on the environment are considered and provide for explicit consideration of social and economic effects when decisions are made about the use and development of land; and d) to require land use and development planning and policy to be easily integrated with environmental, social, economic, conservation and resource management policies at State, regional and municipal levels; and e) to provide for the consolidation of approvals for land use or development and related matters, and to co-ordinate planning approvals with related approvals; and f) to promote the health and wellbeing of all Tasmanians and visitors to Tasmania by ensuring a pleasant, efficient and safe environment for working, living and recreation; and g) to conserve those buildings, areas or other places which are of scientific, aesthetic, architectural or historical interest, or otherwise of special cultural value; and h) to protect public infrastructure and other assets and enable the orderly provision and co-ordination of public utilities and other facilities for the benefit of the community; and i) to provide a planning framework which fully considers land capability.	

The objectives of the RMPS are necessarily broad. This allows for the refinement of policies, strategies and regulatory controls as strategic land use planning and development analysis moves from broad, overarching policy positions through to refined and focussed levels within a local context. This local context is expressed through planning schemes.

Sustainable development underpins the RMPS. Any changes to the location, amount and composition of industrial land within the Mersey Leven Region needs to be sustainable development in accordance with the objectives of the RMPS.

3.3 Tasmanian Planning Policies

The (draft) Tasmanian Planning Policies (TPPs), which have not yet been implemented, are a central component of the RMPS, providing strategic direction on land use planning matters. The purpose of the TPPs is to provide a consistent planning policy framework that will guide planning outcomes delivered through the strategic (regional land use strategies) and regulatory (planning scheme) elements of the RMPS.

In this regard, regional land use strategies and the Tasmanian Planning Scheme (TPS), comprising the State Planning Provisions (SPPs) and the Local Provisions Schedule (LPS), are all required to be consistent with the TPPs.

Section 12(B)(2) of the LUPA Act establishes a broad range of matters that a TPP may relate to under the following themes:

- The sustainable use, development, protection and conservation of land;
- Environmental protection;
- Liveability, health and wellbeing of the community; and
- Any other matter that may be included in a planning scheme or a regional land use strategy.

The TPPs include objectives, strategies and implementation statements to support the delivery of strategic land use planning outcomes. The TPPs currently include seven (7) policy topics which are supported with an objective and a suite of strategies. Some TPP policy topics include an implementation statement which specifies how the strategies ought to be implemented.

In addition to detailing the specific policy topics and strategies, the TPPs also include (provisional) application guidelines in accordance with section 12B(3) of the LUPA Act. This provides a series of principles which are intended to provide guidance when formulating all planning instruments, including amendments to LPSs. The principles help ensure that these local planning instruments are consistent with the TPPs.

Notably, the (provisional) application guidelines specify that there is no order or hierarchy associated with the application of the TPPs and that no single TPP policy or strategy should be read in isolation from another to imply a particular action or consequence.

As a result, where the application of the TPPs to a particular planning matter results in competing interests or conflicts between a TPP or specific strategy, the application guidelines call for resolution to be based on balance consideration and judgment. This will be derived from evidence, having regard to the overall purpose of the TPPs and the planning outcome that is being sought within the context of the broader strategic and regulatory land use and planning framework.

Furthermore, there will be instances where a TPP policy or strategy is not specifically relevant or applicable to a particular planning outcome which is being sought.

Strategies 4.5.3(1) and (2) of the Industry Policy requires a minimum of 15 years supply of industrial land within established urban growth boundaries of corresponding municipal areas. This is to ensure the sufficient availability of suitable industrial land to meet the existing and future needs of the community.

The Mersey Leven Industrial Land Study directly corresponds with the Sustainable Economic Development (Industry) Policy in this regard.

3.4 State Policies

State Policies are made under section 11, or come into operation under section 12, of the State Policies and Projects Act 1993 (the SPP Act). Current State Policies include:

14. State Policy on the Protection of Agricultural Land 2009;

15. State Coastal Policy 1996;

16. State Policy on Water Quality Management 1997.

3.4.1 State Policy on the Protection of Agricultural Land 2009

The Protection of Agricultural Land Policy 2009 (PAL Policy) seeks to conserve and protect all agricultural land so that it remains available for the sustainable use and development of agriculture, recognising the particular importance of prime agricultural land to the agricultural sector.

The PAL Policy introduces the term 'prime agricultural land' is defined as:

"agricultural land classified as Class 1, 2 or 3 land based on the class definitions and methodology from the Land Capability Handbook, Second Edition, C J Grose, 199, Department of Primary Industries, Water and Environment, Tasmania".

The PAL Policy comprises 11 principles which relate to the protection, conservation and administration of agricultural land. The principles are integrated into the current RMPS through the creation and application of the Rural and Agricultural zones of the TPS which have been prepared to be consistent with the PAL Policy.

Within the Mersey Leven Region, including land adjacent to established urban growth boundaries, are substantial areas of prime agricultural land zoned Rural or Agriculture under respective planning schemes.

Any expansion of existing industrial (zoned) land or the creation of new industrial (zoned) land that requires the conversion of agriculture (zoned) land will require consideration of, and demonstration of consistency with, the PAL Policy.

The PAL Policy shares similarities with Policy Topic 4.1 (Agriculture) of the (draft) TPPs which seeks to promote a diverse and highly productive agricultural sector. That is achieved by protecting agriculture land and the resources on which agriculture depends, while supporting the long-term viability and growth of the agricultural sector.

Consistency with the PAL Policy and Policy Topic 4.1 of the (draft) TPPs within the context of the Study will represent:

- Adaptive reuse of existing industrial land
- Reuse or infill development of existing urban growth areas
- Expansion of existing industrial estates where they adjoin less productive agriculture land (illustrated by the application of the Rural Zone of the Tasmanian Planning Scheme), and
- Expansion of creation of new industrial precincts within rural areas where it is demonstrated that the land has low productivity value or where there are no other practical or viable alternatives.

3.4.2 State Coastal Policy

The State Coastal Policy 1996 (SCP) defines the term 'coastal zone' as *"a reference to State waters and to all land to a distance of one kilometre inland from the high-water mark."*

Within the Mersey Leven Region numerous established industrial precincts are located within the coastal zone in the context of the SCP.

Any expansion of existing industrial (zoned) land or the creation of new industrial (zoned) land that is located within the coastal zone will require consideration of, and demonstration of consistency with, the SCP. This is as relates to:

- The protection of natural and cultural values of the coastal zone;
- Sustainable development of coastal areas and associated resources;
- Shared responsibilities for integrated management of coastal areas and resources; and
- Implementation, evaluation and review (of the SCP).

Components of the SCP are integrated into the current RMPS through the creation and application of coastal hazard overlays within the TPS and corresponding LPSs.

3.4.3 State Policy on Water Quality Management

The State Policy on Water Quality Management 1997 (SPWQM Policy) applies to all surface waters, including coastal waters and ground waters. It seeks to manage and, where possible, enhance the quality of surface and ground water systems through catchment management, monitoring and development control. The SPWQM Policy comprises a series of often technical objectives for the management of surface and ground water systems.

The objectives of the SPWQM Policy are integrated into the current RMPS within the applicable zone and code provisions of the TPS which relate to the management of watercourses and associated natural waterways and their catchments. Development controls within applicable parts of the TPS seek to minimise impacts on water quality including native riparian vegetation, watercourse condition and the natural and ecological function of watercourses and ground water systems.

Any expansion of existing industrial (zoned) land or the creation of new industrial (zoned) land that is located within the coastal zone will require consideration of, and demonstration of consistency with, the SPWQM Policy.

3.5 Cradle Coast Regional Land Use Strategy

The Cradle Coast Regional Land Use Strategy (CCRLUS) was established under section 5A of the LUPA Act. The CCRLUS is the regional plan for the nine (9) municipalities that comprise the Cradle Coast region. CCRLUS sets out the strategy and policy framework to direct, facilitate and manage change, growth and development within the region through until 2030.

Any changes to the LPS of corresponding municipalities require (the proposed change) to be (as far as practicable) consistent with applicable principles and policies of the CCRLUS. Such changes would include any expansion of existing industrial (zoned) land or the creation of new industrial (zoned) land within the context of corresponding LPSs, borne out of the Industrial Land Study.

The CCRLUS contains three (3) distinct parts:

1. Part A: About the Cradle Coast Regional Land Use Planning Framework
2. Part B: Knowing Our Place
3. Part C: The Cradle Coast Regional Land Use Strategy 2010-2030

Part C represents the functional part of the CCRLUS and is structured into five (5) policy groupings some of which have greater relevance to the allocation and distribution of industrial land. The policy groupings are:

1. Implementation: Making it happen, keeping it relevant.
2. Wise Use of Resources: Respect for what is valued.
3. Support for Economic Activity: A diverse and robust economy.
4. Places for People: Liveable and sustainable communities.
5. Planned Provision for Infrastructure: Support for growth and development.

Within the context of industrial land, policy groupings 3 and 5 are the most applicable.

The strategic outcomes for each policy grouping are reproduced in **Table 3.4** over page.

Table 3.4 Strategic Outcomes of Policy Groupings 3 and 5 of the CCRLUS.

Policy Grouping 3
Support for Economic Activity: A diverse and robust economy
3.2 Strategic Outcomes
Land Use Outcomes to Support Economic Activity
Prosperity and liveability of the Cradle Coast Region is achieved through economically, socially and environmentally sustainable development. Land use planning – • facilitates regional business through arrangements for the allocation, disposition and regulation of land use which promote diversification, innovation and entrepreneurship and avoid unnecessary restraint on competition and cost for compliance; • promotes use and development which maximises the Region's economic potential in key sectors with deep capacity and potential for sustained growth and economic return or a clear strategic advantage; • improves the social and environmental sustainability of the State and regional economy by allowing economic development and employment opportunities in a range of locations while respecting the link between a healthy environment and a healthy economy; • supports and grows liveable regional communities through coordinated action aligned with State and regional economic development plans specific to the issues, challenges and opportunities of the Region.
Policy Grouping 5
Planned Provision for Infrastructure: Support for growth and development
5.2 Strategic Outcomes
Land Use Outcomes for Integrated Land Use and Infrastructure Planning
Economic prosperity, liveable settlement and environmental health is underpinned by integrated land use and infrastructure planning to facilitate provision of adequate, appropriate and reliable infrastructure in a manner that – • ensures infrastructure is planned and available commensurate with the use and development of land; • prioritises optimum use of existing infrastructure over provision of new or expanded services; and • protects the function, capacity and security of existing and planned infrastructure corridors, facilities and sites.

Policy action 3.3.1(a) (Economic Activity) of the CCRLUS identifies that land use planning processes need to facilitate supply of employment land in all settlement areas for industrial use.

Policy action 5.3(c) and (f) of the CCRLUS identifies that land use planning processes need to promote compact and contained settlement areas, including employment based land, and for all use and development to optimise capacity and function in available and planned infrastructure services and facilities.

Notwithstanding this, each (other) policy grouping and policy action of the CCRLUS are interlinked and integrated. Accordingly, compliance or consistency with the overarching policy groupings relevant to industrial land use planning feed into the lower order or subsequent policy groupings or subsequent policy actions.

As such, the Industrial Land Study corresponds directly with the applicable policy groupings and key policy actions within the context of industrial land.

Importantly, the CCRLUS, coupled with the TPPs, compel municipal areas to ensure that there is sufficient and appropriately zoned land for industrial purposes to meet existing needs and future demand.

In this respect, the Industrial Land Study provides the basis in which to derive supply and demand requirements for industrial land within the municipal areas of the Alliance.

3.6 Tasmanian Planning Scheme

The Tasmanian Planning Scheme (TPS) is in effect in each of the municipal areas that form the Mersey Leven Region. The TPS for each municipal area includes their corresponding Local Provisions Schedule (LPS).

The TPS is integrated into the current RMPS. In this regard, the TPS (including corresponding LPSs) have been prepared to be consistent with, and reflect, the broader planning policy and strategic framework of, the CCRLUS, State policies and objectives of the RMPS as instructed by the applicable sections of the LUPA Act.

Existing Light and General Industrial zoned land within the Mersey Leven Region therefore align with the objectives and all applicable statutory instruments of the RMPS.

Any changes to the LPS of corresponding municipalities, including any expansion of existing industrial (zoned) land or the creation of new industrial (zoned) land, will require the application of either the Light Industrial or General Industrial land use zones of the TPS (which are derived from the State Planning Provisions).

Guidelines prepared under Section 8A of the LUPA Act require Light Industrial and General Industrial zones to be applied in the following circumstances:

Table 3.5 Application guidelines for the Light Industrial Zone

Zone Application Guidelines	
Light Industrial Zone	
Purpose:	To provide for manufacturing, processing, repair, storage and distribution of goods and materials where off-site impacts are minimal or can be managed to minimise conflict with, or unreasonable loss of amenity to, any other uses.
Application Guideline	Requirement
LIZ 1	The Light Industrial zone should be applied to land where there are likely to be minimal off site impacts.
LIZ 2	The Light Industrial Zone should not be applied to individual, isolated industrial uses, unless:
	(a) they are a use, or are of a scale, that is more appropriate for the Light Industrial Zone and there is strategic intention to maintain the use; or
	(b) there is a strategic intention to expand the existing industrial area in this locality consistent with the relevant regional land use strategy, or supported by more detailed local strategic analysis consistent with the relevant regional land use strategy and endorsed by the relevant council.
LIZ 3	The Light Industrial Zone should not be applied to areas that primarily accommodate, or are strategically intended to accommodate, large-scale, medium or high impact manufacturing, processing, storage, or transport activities (see General Industrial Zone).
LIZ 4	The Light Industrial Zone may be applied to land seaward of the high water mark where it includes existing, or is intended for, light industrial activities.

Table 3.6 Application guidelines for the General Industrial zone

Zone Application Guidelines	
General Industrial Zone	
Purpose:	To provide for manufacturing, processing, repair, storage and distribution of goods and materials where there may be impacts on adjacent uses; and To provide for use or development that supports and does not adversely impact on industrial activity.
Application Guideline	Requirement
GIZ 1	The General Industrial Zone should be applied to land that provides, or is intended to provide, for a range of larger-scale or medium and higher impact, manufacturing, processing, servicing, storage and transport and distribution uses. These are likely to include large industrial operations with actual or potential nearby off site impacts. These may be located in areas remote from land designated for other uses, such as residential use, in order to avoid land use conflicts.
GIZ 2	The General Industrial Zone should not directly adjoin land zoned for residential purposes unless:
	(a) separated by physical buffers such as a major road; or
	(b) for existing industrial areas that provide for larger-scale or medium and higher impact, manufacturing, processing, servicing, storage and transport and distribution uses.
GIZ 3	The General Industrial Zone should have access to freight transport routes and other utility infrastructure and services (e.g. electricity, water, sewerage) that is appropriate for the intended industrial use.
GIZ 4	The General Industrial Zone may be applied to land without connection to a reticulated sewerage system if:
	(a) for existing industrial areas that provide for larger scale or medium and higher impact, manufacturing, processing, servicing, storage and transport and distribution uses;
	(b) unnecessary for the intended industrial use; or
	(c) the area is capable of accommodating on-site waste water treatment systems suitable for the intended industrial use.
GIZ 5	The General Industrial Zone may be applied to port and marine facilities that are directly linked to specific higher impact manufacturing, processing, repair, servicing or storage uses.
GIZ 6	The General Industrial Zone may be applied to land seaward of the high water mark where it includes existing, or is intended for, industrial activities.

Local variations to the Light Industrial and General Industrial zones can be made in extenuating circumstances in the form of the preparation and application of Specific Area Plans (SAP), Particular Purpose Zones (PPZ) or Site Specific Qualifications (SSQ) subject to the following criteria:

- A PPZ may only be applied to a particular area of land where the intended planning outcome is unable to be achieved through the application of one or more of the SPP zones and, to a lesser degree, codes. For example, it may be applied to land that provides major facilities or sites which require a unique or tailored approach to both use and development standards such as a university campus, major hospital site, manufacturing or resource processing operation.

- SAPs are typically developed where a desired outcome is required across fragmented landownership or where specific use and development outcomes are desired for a certain area or precinct of land. Appropriately structured SAPs allow for the coordinated provision of service infrastructure across multiple lots and for the provision of road connectivity between separate lots. A SAP can also establish alignment of new sewer, water and stormwater infrastructure as well as road and active transport connectivity (walking and cycling paths or trails) in addition to providing sequencing of construction (or development) and equitable sharing of costs (where necessary and in circumstances where certain utility or service upgrades are required as a catalyst to initiate the development or land).
- Successful implementation of a PPZ, SAP or and SSQ requires:
 - a particular planning matter to which the PPZ, SAP or SSQ is of significant social, economic or environmental benefit to the State, region or municipal area; or
 - the area of land to which the PPZ, SAP or SSQ relates has particular environmental, economic, social or spatial qualities that require provisions, that are unique to the area of land, to apply to the land in substitution for, or in addition to, or modification of, the provisions of the SPPs.

3.7 Miscellaneous

3.7.1 Local and Sub-Regional Strategies

Although not statutory instruments under the LUPA Act, local or sub-regional strategies such as structure plans, economic plans and land use plans, are important instruments (or mechanisms) in the articulation and implementation of key strategies and policies within the context of the RMPS.

Local or sub-regional plans sit at the interface between the suite of strategic instruments of the RMPS including Tasmanian Planning Policies, State Policies and Regional Land Use Strategies and the statutory (land use enabling) instruments which primarily encompasses the Tasmanian Planning Scheme. This is particularly where the local and sub-regional strategies are developed to identify gaps between theoretical and practical land use and development. Further, local and sub-regional strategies can provide guidance which is consistent with and broadly reflects the high-level land use strategy and policy context, whilst concurrently aligning with specific statutory land use and development controls.

Local and sub-regional strategies absorb and synthesise the high-level policies and strategies to inform the (current) status and future application of land use zoning. They guide the development of other specific land use and development controls for a defined area (or issue) which are implemented under the Tasmanian Planning Scheme through municipal Local Provisions Schedules. In effect, these studies provide a local strategic analysis using the lens of the applicable regional land use strategy.

3.7.2 Municipal Strategic Plans

Whilst not a statutory planning instrument created under the LUPA Act, section 34(2)(f) requires municipal LPSs to have regard to the strategic plan of the corresponding Council, prepared under section 66 of the Local Government Act 1993.

Municipal strategic plans typically set out the strategic framework to identify and establish the vision and future direction of the Council to meet the needs and aspirations of the community. The vision and objectives of the strategies of relevant strategic plans are aspirational with a strong desire to encourage and facilitate economic development and create strong and empowered communities under the auspices of sustainable environmental stewardship.

Consideration of each municipalities strategic plan will therefore be required. At that time any changes proposed to an LPS may consider the current Mersey Leven Industrial Land Study.

4.0 Economic Overview

Key findings

- The Mersey Leven Region is currently expected to account for approximately 10% of population growth in Tasmania between 2025 and 2041, with the potential for this to be higher subject to land use planning and development outcomes, including related employment growth and economic development.
- Compared to Tasmania overall, the Mersey Leven Region can be characterised by lower incomes, an older age profile and a higher share of blue-collared employees that have a high rate of home ownership.
- Economic value added by what the ABS define as 'industrial activities' is higher in all four Mersey Leven Councils than the Tasmanian average of 30.2%; namely, Kentish (47.8%), Latrobe (35.3%), Devonport (39.9%) and Central Coast (33.8%).
- Output by industry data highlights the importance of Construction, Manufacturing, Agriculture, and Transport, Postal & Warehousing industries as key sectors in the Mersey Leven Region economy, contributing a significantly higher share of local output compared to Tasmania overall.
- A substantial 79.5% of employed Mersey Leven region residents have a place of employment within the Mersey Leven Region, highlighting strong local employment opportunities and the interconnected nature of the regional economy.
- An investment pipeline of approximately \$2.2 billion has been identified for the Mersey Leven Region across a range of development projects.

4.1 Population Trends and Forecast

Increased population growth is typically associated with an expansion of the construction sector which in-turn generates demand for industrial uses such as trade depots, trade supplies showrooms, construction materials plants etc. Increased population growth also increases local demand for retail and associated storage and distribution activities upstream in the supply chain.

Note that the rate and nature of future population growth is always uncertain. It is important from an economic development and business growth perspective that strategic land use planning can accommodate realistic levels of anticipated demand, including at the upper end of expectations.

It is also relevant that providing availability and choice of well-located industrial land is of itself a driver of investment and business attraction. This can flow through to delivering economic opportunity and encouraging the retention and attraction of new residents.

In this respect, the population forecasts identified below can be considered indicative, and we have based those for consistency across LGAs on the High series projections prepared by the State government in 2024. In our view, a successful economic development framework, including appropriate industrial land development, means that the potential for population growth can be even higher than indicated.

Recent Population Growth

The recent and future population growth for the Mersey Leven Region is summarised in **Table 4.1** and key findings for each LGA are summarised below.

Central Coast has approximately 23,470 residents in 2025 according to the latest ABS Estimated Residential Population (ERP) release. Since 2016, the population of the Central Coast has grown by +1,730 persons and this is expected to continue over coming years – including through targeted interventions such as the *Our Homes Our Future* project.

- From 2021 to 2025, the population increased by +210 persons. Between 2025 and 2041 the population is projected by the State Government to increase by +1,900 persons, representing an annual gain of +120 persons per annum.

Devonport has approximately 27,170 residents in 2025. Since 2016, the population of Devonport has consistently grown and is expected to continue rising in the coming years:

- From 2021 to 2025, the population increased by +270 persons. From 2025 to 2041 the population of Devonport is projected to increase by +2,090 persons, an annualised increase of +130 persons per annum.

Latrobe has approximately 13,390 residents in 2025 with strong growth anticipated in the future:

- From 2021 to 2025, the population increased by +690 persons, and from 2025 to 2041 the population is projected to increase by +3,750 persons, representing an annual gain of +230 persons per annum.

Kentish has approximately 6,920 residents in 2025. Since 2016, the population of Kentish has increased marginally, and some continued growth can be expected in the future:

- From 2021 to 2025, the population increased by +140 persons, and from 2025 to 2041 the population is projected to increase by +1,020 persons, an annual gain of +60 persons per annum.

The Mersey Leven Region, is expected to account for 10.7% of the population growth in Tasmania between 2025 and 2041 based on the Tasmanian Government High series projections.

Table 4.1 Population Growth Trends 2016 to 2041 (High Series)

Category	2016	2021	2025	2031	2026	2041	2025-2041
Population							
Central Coast	21,740	23,260	23,470	24,270	23,600	25,370	1,900
Devonport	25,130	26,900	27,170	28,050	27,310	29,260	2,090
Latrobe	10,930	12,700	13,390	14,850	13,630	17,140	3,750
Kentish	6,260	6,780	6,920	7,330	6,990	7,940	1,020
<i>Mersey Leven Region</i>	<i>64,060</i>	<i>69,640</i>	<i>70,950</i>	<i>74,500</i>	<i>71,530</i>	<i>79,710</i>	<i>8,760</i>
Tasmania	517,510	567,240	580,770	613,590	586,160	662,720	81,950
Average Annual Growth (no.)							
Central Coast		+300	+50	+130	+130	+120	+120
Devonport		+350	+70	+150	+150	+130	+130
Latrobe		+350	+170	+240	+240	+230	+230
Kentish		+100	+40	+70	+70	+60	+60
<i>Mersey Leven Region</i>		<i>+1,120</i>	<i>+330</i>	<i>+590</i>	<i>+590</i>	<i>+550</i>	<i>+550</i>
Tasmania		+9,950	+3,380	+5,470	+5,490	+5,100	+5,120
Average Annual Growth (%)							
Central Coast		1.4%	0.2%	0.6%	0.6%	0.5%	0.5%
Devonport		1.4%	0.2%	0.5%	0.5%	0.5%	0.5%
Latrobe		3.0%	1.3%	1.7%	1.7%	1.5%	1.6%
Kentish		1.6%	0.5%	1.0%	1.0%	0.9%	0.9%
<i>Mersey Leven Region</i>		<i>1.7%</i>	<i>0.5%</i>	<i>0.8%</i>	<i>0.8%</i>	<i>0.7%</i>	<i>0.7%</i>
Tasmania		1.9%	0.6%	0.9%	0.9%	0.8%	0.8%

Source: ABS Estimated Resident Population 2025, Tasmania Govt Department of Treasury 2024, Ethos Urban

Note: Figures Rounded

4.2 Socio-Economic Analysis

The socio-economic and demographic characteristics of Central Coast, Devonport, Latrobe and Kentish residents from the ABS Census in 2021 are summarised in **Table 4.2** and compared to Tasmania.

All four LGAs in the Mersey Leven Region can be characterised by the following:

Lower median incomes

All four LGAs in the Mersey Leven Region are characterised by lower median household incomes compared to the Tasmanian average of \$72,070. Latrobe had the highest among the four, with a median income of \$65,410. Despite these differences, all four areas are well-below the state benchmark.

Table 4.2 Socio-Demographic Profile

Category	Central Coast	Devonport	Latrobe	Kentish	Mersey Leven Region	Tasmania
Income						
Median individual income (annual)	\$33,090	\$32,830	\$33,660	\$31,480	\$32,950	\$37,030
<i>Variation from Tasmania median</i>	-10.6%	-11.3%	-9.1%	-15.0%	-11.0%	n.a.
Median household income (annual)	\$62,950	\$60,840	\$65,410	\$63,010	\$62,580	\$72,070
<i>Variation from Tasmania median</i>	-12.7%	-15.6%	-9.2%	-12.6%	-13.2%	n.a.
Age Structure						
0-4 years	4.4%	5.2%	4.6%	4.3%	4.7%	5.0%
5-19 years	16.9%	17.3%	16.0%	16.2%	16.8%	16.7%
20-34 years	14.9%	18.6%	14.6%	14.1%	16.2%	19.5%
35-64 years	39.0%	36.2%	37.6%	43.5%	38.1%	37.9%
65-84 years	21.9%	20.0%	24.6%	20.4%	21.5%	18.6%
85 years and over	2.8%	2.7%	2.7%	1.6%	2.7%	2.3%
Median Age (years)	47.4	42.4	48.5	48.2	46.3	41.6
Country of Birth						
Australia	89.9%	88.2%	89.2%	86.9%	88.8%	84.6%
Other Major English Speaking Countries	5.9%	5.1%	6.6%	7.9%	5.9%	6.2%
Other Overseas Born	4.2%	6.6%	4.3%	5.2%	5.3%	9.2%
Household Composition						
<i>Couple family with no children</i>	33.0%	28.1%	36.1%	36.6%	32.0%	30.1%
<i>Couple family with children</i>	24.0%	22.2%	24.4%	26.5%	23.6%	25.1%
Couple family - Total	57.0%	50.3%	60.6%	63.2%	55.5%	55.2%
One parent family	10.9%	13.9%	9.6%	8.5%	11.6%	11.3%
Other families	0.8%	1.0%	0.9%	0.7%	0.9%	0.8%
Family households - Total	68.6%	65.2%	71.1%	72.4%	68.0%	67.3%
Lone person household	29.5%	31.8%	27.0%	25.2%	29.5%	29.3%
Group household	1.9%	3.0%	2.0%	2.5%	2.4%	3.4%
Dwelling Structure (Occupied Dwellings)						
Separate house	90.4%	87.3%	93.2%	96.5%	90.2%	86.9%
<i>Occupancy rate</i>	92.6%	92.8%	88.2%	90.5%	91.7%	88.1%
Average household size	2.3	2.3	2.3	2.4	2.3	2.4
Tenure Type (Occupied Private Dwellings)						
Owned outright	44.0%	35.8%	44.1%	48.6%	41.2%	37.8%
Owned with a mortgage	33.5%	31.1%	32.1%	37.0%	32.6%	33.7%
Rented	21.0%	32.0%	22.1%	12.4%	24.8%	26.8%
Housing Costs						
Median monthly mortgage repayment	\$1,255	\$1,208	\$1,355	\$1,243	\$1,251	\$1,365
<i>Variation from Tasmania median</i>	-8.0%	-11.5%	-0.7%	-8.9%	-8.4%	n.a.
Median mortgage as a share of h'hold income	23.9%	23.8%	24.9%	23.7%	24.0%	22.7%
Median weekly rents	\$248	\$251	\$265	\$226	\$252	\$301
<i>Variation from Tasmania median</i>	-17.7%	-16.5%	-12.0%	-25.0%	-16.4%	n.a.
Occupation						
Managers	13.0%	10.2%	14.1%	14.6%	12.3%	13.0%
Professionals	16.9%	14.6%	14.5%	12.2%	15.1%	20.6%
Technicians and trades workers	15.9%	15.5%	16.4%	18.5%	16.1%	14.2%
Community and personal service workers	13.9%	15.6%	13.9%	12.1%	14.3%	13.9%
Clerical and administrative workers	10.4%	10.6%	10.2%	10.1%	10.4%	12.0%
Sales workers	8.6%	10.5%	9.8%	6.7%	9.4%	8.6%
Machinery operators and drivers	8.7%	7.6%	8.4%	10.5%	8.4%	6.4%
Labourers	12.6%	15.5%	12.7%	15.2%	13.9%	11.3%
Occupation Type						
Blue-collar	37.2%	38.5%	37.5%	44.2%	38.4%	31.9%
White-collar	62.8%	61.5%	62.5%	55.8%	61.6%	68.1%

Source: ABS Census of Population and Housing, 2021

Older age structure

The population across the Mersey Leven Region tends to be older than the Tasmanian average, which had a median age of 41.6 years in 2021. Latrobe recorded the highest median age at 48.5 years, closely followed by Kentish at 48.2 years and Central Coast at 47.4 years. Devonport (42.4 years) has the youngest population.

A higher share of blue-collar workers

A higher share of 'Blue-collar' workers are employed across the region, when comparing to Tasmania as a whole (31.9%), the highest share being in Kentish at 44.2%.

4.3 Economic Structure and Trends

Strong interlinkages exist between the economy of each LGA within the Mersey Leven Region, with key industries operating across municipal boundaries in terms of workforce, customer base, supply chain etc.

Employment

Central coast

Most jobs in the Central Coast during the 2021 census were in the industrial, population serving and health and education sectors which supported 86% of total jobs.

The industrial sector supported a total of 2,720 jobs in 2021, an increase of 350 persons and +0.1% of employment share from 2016. The largest share growth over that period was in the health and education sector, increasing by 2.5%.

Central Coast had a higher proportion of workers employed in the Industrial sector (27.9%) compared to the Tasmanian average of 21.7%. Central coast had a lower proportion of workers in the knowledge sector at only 6.8% compared to Tasmania's 10.4%.

Devonport

Most jobs in Devonport during the 2021 census were in the industrial, population serving and health and education sectors which supported 86% of total jobs.

The industrial sector supported a total of 2,880 jobs in 2021, an increase of 340 persons from 2016, and a small decline of -0.9% in overall employment share. The largest share growth over that period was in the health and education sector, increasing by 2.4%.

Devonport had a higher proportion of workers employed in the Industrial sector (26.4%) compared to the Tasmanian average of 21.7%. Devonport had a lower proportion of workers in the knowledge sector at only 6.7% compared to Tasmania's 10.4%.

Latrobe

Most jobs in Latrobe during the 2021 census were in the industrial, population serving and health and education sectors which supported 87% of total jobs.

The industrial sector supported a total of 1,600 jobs in 2021, a small increase of 230 persons from 2016, and a decline of -1.9% in overall employment share. The largest share growth over that period was in the health and education sector, increasing by 2.5%.

Latrobe had a higher proportion of workers employed in the Industrial sector (29.9%) compared to the Tasmanian average of 21.7%. Latrobe had a lower proportion of workers in the knowledge sector at only 5.4% compared to Tasmania's 10.4%.

Kentish

Most jobs in Kentish during the 2021 census were in the industrial, population serving and health and education sectors which supported 87% of total jobs.

The industrial sector supported a total of 900 jobs in 2021, a small increase of 120 persons from 2016, and a small decline of -0.3% in overall employment share. The largest share growth over that time was in the health and education sector, increasing by 0.7%.

Kentish had a higher proportion of workers employed in the Industrial sector (33.3%) compared to the Tasmanian average of 21.7%. Kentish had a lower proportion of workers in both the knowledge sector at only 5.2% compared to Tasmania's 10.4% and the health and education sectors at 19.6% compared to Tasmania's 26.6%.

Table 4.3 Broad Industry of Employment, 2016 and 2021

Broad Industry Classification	2016		2021		Change 2016-2021	
	no.	%	no.	%	no.	%
Central Coast						
Industrial	2,370	27.8%	2,720	27.9%	+350	+0.1%
Population Serving	2,760	32.4%	3,070	31.5%	+310	-0.9%
Knowledge Workers	690	8.1%	660	6.8%	-30	-1.3%
Traditional Office	630	7.4%	680	7.0%	+50	-0.4%
Health and Education	2,070	24.3%	2,610	26.8%	+540	+2.5%
Total	8,520	100.0%	9,740	100.0%	+1220	+14.3%
Devonport						
Industrial	2,540	27.3%	2,880	26.4%	+340	-0.9%
Population Serving	3,200	34.4%	3,730	34.3%	+530	-0.2%
Knowledge Workers	660	7.1%	730	6.7%	+70	-0.4%
Traditional Office	800	8.6%	840	7.7%	+40	-0.9%
Health and Education	2,090	22.5%	2,710	24.9%	+620	+2.4%
Total	9,290	100.0%	10,890	100.0%	+1600	+17.2%
Latrobe						
Industrial	1,370	31.8%	1,600	29.9%	+230	-1.9%
Population Serving	1,380	32.0%	1,740	32.5%	+360	+0.5%
Knowledge Workers	250	5.8%	290	5.4%	+40	-0.4%
Traditional Office	340	7.9%	380	7.1%	+40	-0.8%
Health and Education	970	22.5%	1,340	25.0%	+370	+2.5%
Total	4,310	100.0%	5,350	100.0%	+1040	+24.1%
Kentish						
Industrial	780	33.6%	900	33.3%	+120	-0.3%
Population Serving	780	33.6%	920	34.1%	+140	+0.5%
Knowledge Workers	150	6.5%	140	5.2%	-10	-1.3%
Traditional Office	170	7.3%	210	7.8%	+40	+0.5%
Health and Education	440	19.0%	530	19.6%	+90	+0.7%
Total	2,320	100.0%	2,700	100.0%	+380	+16.4%
Mersey Leven Region						
Industrial	7,060	28.9%	8,100	28.2%	+1040	-0.6%
Population Serving	8,120	33.2%	9,460	33.0%	+1340	-0.2%
Knowledge Workers	1,750	7.2%	1,820	6.3%	+70	-0.8%
Traditional Office	1,940	7.9%	2,110	7.4%	+170	-0.6%
Health and Education	5,570	22.8%	7,190	25.1%	+1620	+2.3%
Total	24,440	100.0%	28,680	100.0%	+4240	+17.3%
Tasmania						
Industrial	45,970	22.0%	52,840	21.3%	+6870	-0.6%
Population Serving	68,710	32.8%	79,970	32.3%	+11260	-0.5%
Knowledge Workers	24,440	11.7%	25,860	10.4%	+1420	-1.2%
Traditional Office	19,290	9.2%	23,130	9.3%	+3840	+0.1%
Health and Education	50,790	24.3%	65,780	26.6%	+14,990	+2.3%
Total	209,200	100.0%	247,580	100.0%	+38,380	+18.3%

Source: ABS Census of Population and Housing 2016,2021

Note: Figures Rounded

Value Added

Another important measure of economic structure and performance is economic value added. This expresses the net value generated by an economic activity based on the difference between the final value of goods, and the cost of materials or supplies that are used to produce them.

In 2023, approximately \$710 million in value add was generated by workers in Central Coast (**Table 4.4**). The largest sub-sector for value added was health care and social assistance (19.7% of total value added), followed by construction (16.9%). Sectors comprising land uses that typically locate in industrial precincts (highlighted in blue in table 3.4) contributed approximately 33.8% of total value added to the Central Coast economy.

In 2023, approximately \$1,630 million in value add was generated by workers in Devonport. The largest sub-sector for value added was health care and social assistance (17.8% of total value added), followed by Transport, postal and warehousing (15.3%) and manufacturing (10.4%). Sectors comprising land uses that typically locate in industrial precincts contributed approximately 33.9% of total value added to the Devonport economy.

In 2023, approximately \$650 million in value add was generated by workers in Latrobe. The largest sub-sector for value added was Health care and social assistance (23.1% of total value added) Agriculture, Forestry and Fishing (18.5%), followed by construction (13.8%). Sectors comprising land uses that typically locate in industrial precincts contributed approximately 35.4% of total value added to the Latrobe economy.

In 2023, approximately \$230 million in value add was generated by workers in Kentish. The largest sub-sector for value added was Manufacturing and Agriculture, Forestry and Fishing (both industries comprising of 17.4% of total value added), followed by construction (13.0%). Sectors comprising land uses that typically locate in industrial precincts contributed approximately 47.8% of total value added to the Kentish economy.

Table 4.4 Value Added by Industry in the Mersey Leven Region by LGA

Industry	Central Coast		Devonport		Latrobe		Kentish	
	\$m	%	\$m	%	\$m	%	\$m	%
Agriculture, Forestry and Fishing	70	9.9%	40	2.5%	120	18.5%	40	17.4%
Mining	-	0.0%	10	0.6%	20	3.1%	10	4.3%
Manufacturing	70	9.9%	170	10.4%	30	4.6%	40	17.4%
Electricity, gas, water and waste services	-	0.0%	80	4.9%	-	0.0%	10	4.3%
Wholesale trade	30	4.2%	60	3.7%	30	4.6%	-	0.0%
Transport, postal and warehousing	20	2.8%	250	15.3%	60	9.2%	20	8.7%
Construction	120	16.9%	80	4.9%	90	13.8%	30	13.0%
Retail trade	50	7.0%	120	7.4%	30	4.6%	10	4.3%
Accommodation and food services	20	2.8%	40	2.5%	10	1.5%	20	8.7%
Arts and recreation services	10	1.4%	10	0.6%	-	0.0%	-	0.0%
Other services	30	4.2%	60	3.7%	20	3.1%	-	0.0%
Information Media and Telecommunications	-	0.0%	40	2.5%	-	0.0%	-	0.0%
Financial and insurance services	10	1.4%	80	4.9%	-	0.0%	-	0.0%
Public administration and safety	30	4.2%	80	4.9%	20	3.1%	10	4.3%
Rental, Hiring and Real Estate Services	10	1.4%	30	1.8%	20	3.1%	-	0.0%
Professional, scientific and technical services	30	4.2%	50	3.1%	10	1.5%	-	0.0%
Administrative and support services	10	1.4%	50	3.1%	10	1.5%	10	4.3%
Education and training	60	8.5%	90	5.5%	30	4.6%	10	4.3%
Health care and social assistance	140	19.7%	290	17.8%	150	23.1%	20	8.7%
Total Industry	710	100.0%	1,630	100.0%	650	100.0%	230	100.0%

Source: Forecast.ID 2023/2024 data release, Ethos Urban

Note: Sectors that typically include a share of workers in industrial precincts are highlighted in light blue

Note: Figures Rounded

Industrial value added is higher in all four Mersey Leven Councils than the Tasmanian average of 30.2% (**Table 4.5**), when considering sectors comprising land uses that typically locate in industrial precincts. It can also be noted that in almost all the industries typically located in industrial precincts the value-added as a percentage is higher in the Mersey Leven Region than in Tasmania overall.

Table 4.5 Value Added by 'Industrial Sectors' in Mersey Leven and Tasmania (2023-2024)

Industry	Mersey Leven Region		Tasmania	
	\$m	Share (%)	\$m	Share (%)
Mining	40	1.2%	1,710	4.9%
Manufacturing	310	9.6%	1,900	5.5%
Electricity, gas, water and waste services	90	2.8%	980	2.8%
Wholesale trade	120	3.7%	960	2.8%
Transport, postal and warehousing	350	10.9%	1,990	5.7%
Construction	320	9.9%	2,950	8.5%
Total Industry	1,230		10,490	

Source: Forecast.ID 2023/2024 data release, Ethos Urban

Note: Sectors included are those that typically locate in industrial precincts.

Note: Figures Rounded

*% of total value added from all industry sectors

Industry Output

Output by industry considers the relative importance of each industry sector in the total output for each LGA and Tasmania as a whole, this is summarised in below.

Table 4.6 Output by Industry, 2023-2024

Industry	Central Coast		Devonport		Latrobe		Kentish		Tasmania	
	\$m	%	\$m	%	\$m	%	\$m	%	\$m	%
Agriculture, Forestry and Fishing	160	10.5%	80	2.4%	270	18.9%	80	14.0%	7,760	10.9%
Mining	-	0.0%	30	0.9%	30	2.1%	20	3.5%	2,860	4.0%
Manufacturing	260	17.0%	560	17.1%	140	9.8%	110	19.3%	6,830	9.6%
Electricity, gas, water and waste services	10	0.7%	230	7.0%	10	0.7%	50	8.8%	3,120	4.4%
Wholesale trade	40	2.6%	110	3.4%	60	4.2%	-	0.0%	2,020	2.8%
Transport, postal and warehousing	50	3.3%	520	15.9%	130	9.1%	50	8.8%	4,820	6.8%
Construction	420	27.5%	310	9.5%	320	22.4%	110	19.3%	10,650	15.0%
Retail trade	80	5.2%	190	5.8%	40	2.8%	10	1.8%	2,860	4.0%
Accommodation and food services	40	2.6%	80	2.4%	30	2.1%	40	7.0%	1,970	2.8%
Arts and recreation services	10	0.7%	20	0.6%	10	0.7%	10	1.8%	850	1.2%
Other services	40	2.6%	90	2.7%	20	1.4%	10	1.8%	1,110	1.6%
Information Media and Telecommunications	-	0.0%	60	1.8%	-	0.0%	-	0.0%	1,830	2.6%
Financial and insurance services	10	0.7%	120	3.7%	10	0.7%	-	0.0%	3,310	4.7%
Public administration and safety	50	3.3%	140	4.3%	30	2.1%	10	1.8%	4,930	6.9%
Rental, Hiring and Real Estate Services	10	0.7%	30	0.9%	30	2.1%	-	0.0%	750	1.1%
Professional, scientific and technical services	60	3.9%	100	3.0%	20	1.4%	10	1.8%	2,460	3.5%
Administrative and support services	20	1.3%	80	2.4%	10	0.7%	20	3.5%	1,200	1.7%
Education and training	80	5.2%	130	4.0%	40	2.8%	20	3.5%	3,400	4.8%
Health care and social assistance	190	12.4%	400	12.2%	230	16.1%	20	3.5%	8,390	11.8%
Total Industry	1,530	100%	3,280	100%	1,430	100%	570	100%	71,120	100%

Source: Forecast.ID, Ethos Urban

Note: Sectors that typically locate in industrial precincts are highlighted in light blue

Note: Figures Rounded

Notably, the construction industry has the highest percentage output in Central Coast (27.5%), Latrobe (22.4%) and Kentish (19.3%), and all are significantly higher than the percentage output for the total construction industry in Tasmania (15%). This indicates that construction is an important sector for the economy in the Mersey Leven Region.

Manufacturing can also be considered a key industry, with it being a significant contributor to total output in all four LGAs, 17% in the Central Coast, 17.1% in Devonport, 9.8% in Latrobe and 19.3% in Kentish, all above the 9.6% contribution to output in Tasmania as a whole.

Agriculture, Forestry and Fishing is also an important industry for Latrobe (18.9%), Kentish (14%) and the Central Coast (10.5%), close to or above the industry contribution to Tasmania (10.9%).

The transport, postal and warehousing industry is another key industry for Devonport, the second largest in terms of output for the LGA, contributing to 15.9% of output, significantly higher than the 6.8% of output for Tasmania. This reflects the presence of the Port of Devonport and the substantial related transport and logistics activities. In the future, additional activity can be expected to be generated by the QuayLink project and expansion to the capacity of Spirit of Tasmania services expected in late 2026.

The output by industry data highlights the importance of construction, manufacturing, agriculture, and transport, postal and warehousing as key sectors in the Mersey Leven Region, with these industries contributing a significantly higher share of local output compared to Tasmania overall.

Employment Self-Containment and Place of Work

Employment self-containment refers to the proportion of persons living and working in the same defined region. A higher self-containment rate indicates a greater availability of local job opportunities for residents, reducing the need for residents to travel elsewhere to find work.

A substantial 79.5% of Mersey Leven Region residents are employed geographically within the Mersey Leven Region, highlighting strong local employment opportunities and the interconnected nature of the regional economy. (refer **Table 4.7**). This is relevant to most sectors, including those typically located in industrial precincts, with the exception being mining, which reflects the low level of mining activity within the region.

Employment self-containment within the Mersey Leven Region is highest in Devonport at 62.4%, particularly within the Electricity, gas, water and waste services industry (88.4%), highlighting strong internal employment opportunities within this sector.

Table 4.7 Employment Self-Containment Rates by Industry

Industry	Central Coast	Devonport	Latrobe	Kentish	Mersey-Leven Region
Agriculture, forestry and fishing	69.5%	34.2%	70.4%	53.3%	85.4%
Mining	4.3%	9.9%	17.1%	10.0%	13.1%
Manufacturing	51.2%	55.5%	24.6%	35.1%	85.0%
Electricity, gas, water and waste services	8.1%	88.4%	5.6%	13.6%	87.7%
Wholesale trade	33.6%	62.3%	28.4%	13.1%	73.2%
Transport, postal and warehousing	26.0%	61.9%	31.6%	28.5%	77.4%
Construction	46.7%	58.7%	22.8%	29.6%	74.0%
Retail trade	54.6%	79.4%	37.7%	24.3%	90.3%
Accommodation and food services	67.5%	76.6%	51.4%	72.4%	92.9%
Arts and recreation services	71.6%	63.3%	41.8%	41.7%	91.2%
Other services	57.5%	72.0%	39.2%	32.5%	84.5%
Information Media and Telecommunications	16.7%	63.0%	9.4%	36.4%	68.7%
Financial and insurance services	12.2%	73.8%	7.7%	60.0%	75.1%
Professional, scientific and technical services	55.1%	78.4%	32.7%	43.8%	81.1%
Rental, Hiring and Real Estate Services	49.2%	72.6%	60.0%	0.0%	83.1%
Administrative and support services	39.1%	60.4%	18.7%	37.7%	67.4%
Public administration and safety	33.1%	59.8%	26.5%	25.2%	71.6%
Health care and social assistance	33.5%	54.4%	38.1%	23.2%	74.2%
Education and training	42.5%	62.7%	38.4%	32.1%	81.4%
Total self- containment	45.1%	62.4%	36.2%	35.9%	79.5%

Source: ABS Census of Population and Housing, 2021; Ethos Urban

Note: Sectors that typically locate in industrial precincts are highlighted in light blue

Note: Figures Rounded

Importance of Agriculture to the Industrial Sector

All four LGAs in the Mersey Leven Region accommodate high-value agricultural production. The Mersey Leven Region is characterised by fertile soils and strong infrastructure supporting agricultural production, processing and distribution.

Across the region, key activities include dairy, beef, and sheep farming, alongside significant crop production such as vegetables, cereals, pyrethrum, and premium fruits. Local industry plays a critical role in supporting this, with manufacturers contributing both upstream, through inputs like packaging and equipment, and downstream via food processing and distribution.

Central Coast has a larger agricultural sector than the other LGAs in the region, in terms of jobs supported, land used for agriculture, and gross value generated by agriculture activities (refer **Table 4.8** and **Table 4.9**).

Table 4.8 *Agricultural Establishments and Area of Holding, 2016 to 2021*

	2016	2021	Change	Annual Average Growth Rate 2016-2021
<u>Agricultural Establishments</u>				
Central Coast	155	179	+24	+3.0%
Devonport	30	41	+11	+6.6%
Kentish	88	106	+18	+3.7%
Latrobe	88	108	+20	+4.1%
Mersey Leven Region	360	443	+73	+3.7%
<i>Tasmania</i>	<i>2,330</i>	<i>2,544</i>	<i>+214</i>	<i>+1.8%</i>
<u>Area of Holding</u>				
Central Coast	20,200	20,950	+750ha	+0.7%
Devonport	2,410ha	4,240ha	+1,830ha	+12.0%
Kentish	11,270ha	12,830ha	+1,570ha	+2.6%
Latrobe	15,910ha	20,160ha	+4,250ha	+4.8%
Mersey Leven Region	49,790ha	58,180ha	+8,390ha	+3.2%
<i>Tasmania</i>	<i>1,459,080ha</i>	<i>1,503,080ha</i>	<i>+44,000ha</i>	<i>+0.6%</i>

Source: ABS, Agricultural Commodities, Australia, Financial Years 2015-16 and 2020-2021

Note¹: Figures rounded

Between 2016 and 2021 all 4 LGAs in the Mersey Leven Region have seen an increase in both agricultural establishments and holding area. Further, the gross value added of agriculture has increased in all 4 LGAs. This is particularly in Latrobe where the gross value added from agricultural activity experienced an increase of +83.9 million or +18.7% in the five-year period.

Vegetable and fruit production is important in all four LGAs and contributes most of the gross value generated by agriculture in Central Coast (64%), Devonport (92%), and Latrobe (77%), while still being a significant contributor for Kentish (32%). Livestock products is also a significant share of agricultural gross value generation in Kentish, at 35%.

In the Mersey Leven Region, the largest businesses within industrial zoned land which are directly involved in primary production include:

- **Costa Group**, a national grower and processor of vegetables and fruits, who operate several berry farms in northern Tasmania including a substantial holding to the south of Sulphur Creek (9 Mile Berry Farm).
- **Harvest Moon**, a producer of vegetables (carrots, onions, broccoli, cauliflower, spinach, beans etc) founded at Forth in Central Coast with facilities in Victoria, New South Wales and Queensland. The extensive facility at Forth remains the company's headquarters and supports growing and packing operations that generate employment for some 300 persons (onsite) at peak production.
- **Fonterra**: A significant dairy processing facility in Spreyton, manufacturing butter, other spreads and specialised milk products (including lactose free).
- **BioMar** (Latrobe) is an aquaculture company that have a worldwide clientele and operate in production facilities across the world.
- **Simplot** operate major processing and packaging operations in both Ulverstone (potatoes) and Devonport (frozen vegetables). The potential for expansion of the Devonport facility has been identified publicly by Simplot.

The role played by the agriculture sector in supporting downstream processing, packing and export activities is an important feature of the Mersey Leven economy and generates demand for industrial land to accommodate manufacturing and processing facilities etc.

In the Mersey Leven Region, the share of food manufacturing as a share of total manufacturing jobs in Latrobe (74.3%), Central Coast (63.2%), and Devonport (44.7%) is higher than the Tasmanian average of 33.2%. In contrast, Kentish has a strong concentration in non-metallic mineral product manufacturing, accounting for 63.6% of the manufacturing sector, compared to just 3.5% across Tasmania.

Table 4.9 Gross Value of Agricultural Production, 2016 to 2021

	2016	2021	Change	AAGR 2016-2021
<u>Vegetables, Fruit (Excluding Grapes) and Nuts</u>				
Central Coast	\$46.4m	\$67.6m	+\$21.1m	+7.8%
Devonport	\$21.7m	\$46.9m	+\$25.2m	+16.6%
Kentish	\$2.6m	\$12.6m	+\$10.0m	+37.3%
Latrobe	\$39.6m	\$111.9m	+\$72.2m	+23.1%
Mersey Leven Region	\$110.3m	\$238.9m	+\$128.5m	+16.7%
<i>Tasmania</i>	<i>\$386.8m</i>	<i>\$792.7m</i>	<i>+\$405.9m</i>	<i>+15.4%</i>
<u>All Other Crops</u>				
Central Coast	\$6.0m	\$8.1m	+\$2.1m	+6.1%
Devonport	\$0.7m	\$1.0m	+\$0.2m	+5.5%
Kentish	\$2.3m	\$3.9m	+\$1.7m	+11.5%
Latrobe	\$4.8m	\$6.0m	+\$1.2m	+4.4%
Mersey Leven Region	\$13.9m	\$19.0m	+\$5.1m	+6.5%
<i>Tasmania</i>	<i>\$162.5m</i>	<i>\$224.6m</i>	<i>+\$62.0m</i>	<i>+6.7%</i>
<u>Livestock Slaughtering</u>				
Central Coast	\$10.3m	\$12.9m	+\$2.6m	+4.5%
Devonport	\$0.7m	\$1.7m	+\$1.0m	+18.4%
Kentish	\$6.2m	\$9.0m	+\$2.8m	+7.8%
Latrobe	\$12.4m	\$21.9m	+\$9.4m	+12.0%
Mersey Leven Region	\$29.7m	\$45.5m	+\$15.8m	+8.9%
<i>Tasmania</i>	<i>\$437.8m</i>	<i>\$517.7m</i>	<i>+\$79.9m</i>	<i>+3.4%</i>
<u>Livestock Products</u>				
Central Coast	\$14.4m	\$17.4m	+\$3.0m	+3.9%
Devonport	\$0.2m	\$1.6m	+\$1.4m	+48.1%
Kentish	\$8.9m	\$13.7m	+\$4.8m	+9.1%
Latrobe	\$4.8m	\$5.9m	+\$1.1m	+4.1%
Mersey Leven Region	\$28.3m	\$38.6m	+\$10.3m	+6.4%
<i>Tasmania</i>	<i>\$497.8m</i>	<i>\$578.5m</i>	<i>+\$80.7m</i>	<i>+3.1%</i>
<u>Total Agriculture</u>				
Central Coast	\$77.2m	\$106.0m	+\$28.8m	+6.5%
Devonport	\$23.4m	\$51.2m	+\$27.8m	+16.9%
Kentish	\$19.9m	\$39.3m	+\$19.3m	+14.5%
Latrobe	\$61.7m	\$145.7m	+\$83.9m	+18.7%
Mersey Leven Region	\$182.3m	\$342.1m	+\$159.8m	+13.4%
<i>Tasmania</i>	<i>\$1,484.9m</i>	<i>\$2,113.5m</i>	<i>+\$628.6m</i>	<i>+7.3%</i>

Source: ABS, Value of Agricultural Commodities Produced, Australia, Financial Years 2015-16 and 2020-2021

4.4 Investment Outlook

This section considers the investment pipeline in the Mersey Leven Region using the Cordell Connect database, this information was correct as of July 2025. Approximately \$2.2 billion of investment activity in the pipeline has been identified.

The Tasmanian Government has very recently made a formal commitment to the Marinus Link project, a proposed undersea and underground electricity and data interconnector between North West Tasmania and the Latrobe Valley in Victoria. This project can be expected to generate significant additional economic stimulus to the Study Area, with potentially positive implications for industrial land demand for the Mersey Leven Region (although this has not been specifically factored into the analysis in this Study).

Central Coast Investment Pipeline

Central Coast has a pipeline of approximately \$67 million of investment activity according to Cordell Connect (refer **Figure 4.1**). Industrial type investment activity accounts for approximately \$12.7 million (or 19.0% of the total).

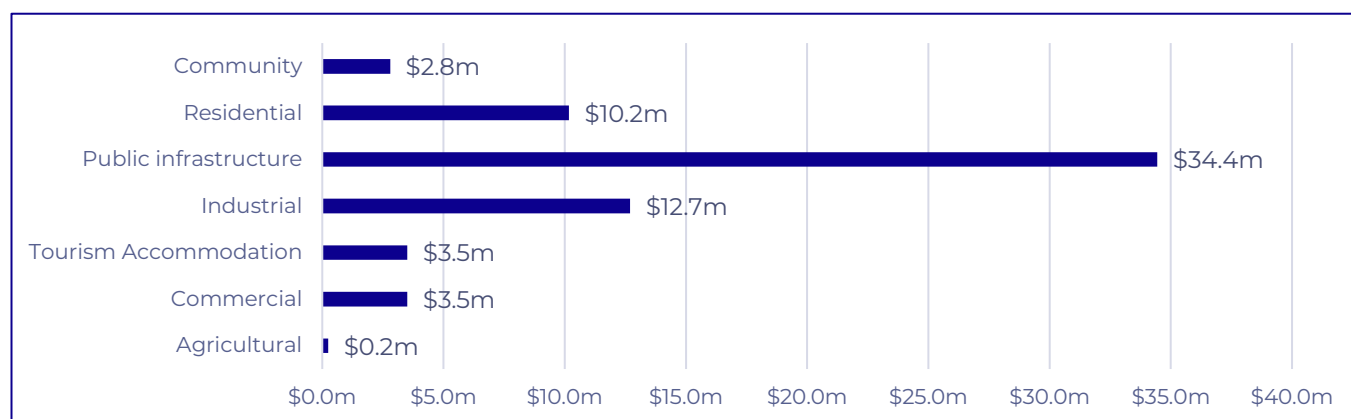


Figure 4.1 Investment Pipeline in Central Coast

Source: Cordell Connect, Ethos Urban

The highest value projects in the Central Coast pipeline include:

- **Dial Park Regional Sporting Complex Penguin (Community)** – the Tasmanian Government committed \$13.5 million to upgrade the facility to AFL Tier 4 Venue Standards.
- **Ironcliffe Road Penguin Upgrade (Public Infrastructure)** – refers to the detailed designed & documentation services for the road upgrade at Ironcliffe Road which is anticipated to cost in the order of \$9.5 million.
- **UCI Ulverstone Warehouse Buildings and Workshop (Industrial)** – UCI – a national commercial furniture and workspace manufacturer – is planning to build a \$6 million manufacturing facility at Ulverstone. The proposed development will include a factory and joinery workshop, warehouse, storage, and a 1,230 square metre two-storey showroom and office.

Devonport Investment Pipeline

Devonport has approximately \$863 million of investment activity in its development pipeline according to Cordell Connect (refer **Figure 4.2**). Industrial type investment activity accounts for approximately \$30.3 million (or 3.5% of the total).

The highest value projects in Devonport include:

- **Quaylink Devonport East development** – improvements to the port precinct including new terminals to support the arrival of larger vessels, expected to cost around \$490.0 million. The larger vessels expected to use the Port of Devonport includes new and larger Spirit of Tasmania vessels expected to begin operations in late 2026.
- **Devonport showgrounds residential development** – a proposed development of the Devonport Showgrounds into a 200-lot mixed housing subdivision with central park, lake & health precinct, expected to have an investment value of \$75.0 million.
- **Devonport Oval Sports Complex** - construction of a sports complex in Devonport, including several indoor and outdoor courts and multi-sport training facilities. This is expected to cost \$60.0 million.

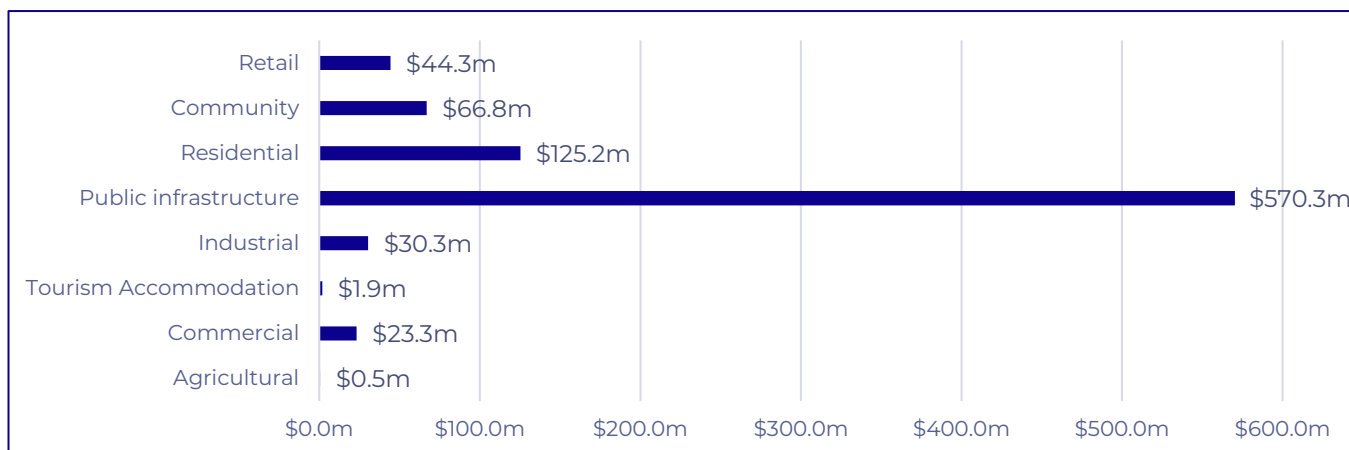


Figure 4.2 Investment pipeline in Devonport

Source: Cordell Connect; Ethos Urban

Latrobe Investment Pipeline

Latrobe has approximately \$45.0 million of investment activity in its pipeline according to Cordell Connect (refer **Figure 4.3** Industrial type investment activity accounts for approximately \$13.4 million (or 29.8% of the total).

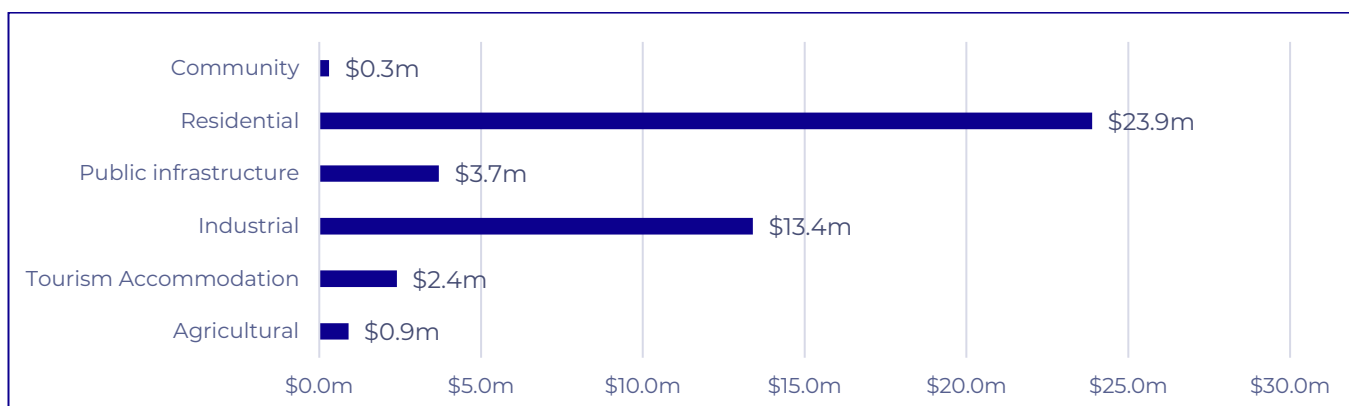


Figure 4.3 Investment pipeline in Latrobe

Source: Cordell Connect; Ethos Urban

The highest value projects in the Latrobe investment pipeline include:

- **Wesley Vale Solar Farm** – construction of a solar farm and associated infrastructure, located at Mill Road, Wesley Vale.
- **Hawk Hill Road & Burgess Drive subdivision** – located in Latrobe this development will result in reconfiguration of existing lots into 75 residential lots, with an approximate initial investment of \$3.4 million.
- **Burgess Drive residential subdivision** – this development is in Shearwater and will result in the subdivision of an existing single lot into 70 residential lots as well as plans to improve connectivity to the site.

Kentish Investment Pipeline

Kentish has a \$1.2 billion investment pipeline according to Cordell Connect (refer **Error! Reference source not found.**). Industrial type investment activity accounts for approximately 83.4% of the total.

The highest value projects in the Kentish pipeline include:

- **Lake Cethana pumped hydro energy storage** – this development will result in the construction of a pumped hydro energy storage facility in the vicinity of Lake Cethana, with an approximate investment value of \$1.0 billion and is expected for completion in 2030. The recent Government commitment to the Marinus Link is a key outcome which will be attractive to further investment in pumped hydro.
- **North West Transmission Developments** – this development will result in the construction of a 180km transmission line and upgrades to existing substations.

- **Dulverton Organics Transformation** – construction of recycling and waste facility that will produce approximately 16,900 tonnes of finished compost at Railton. This development has an estimated investment of \$13 million.

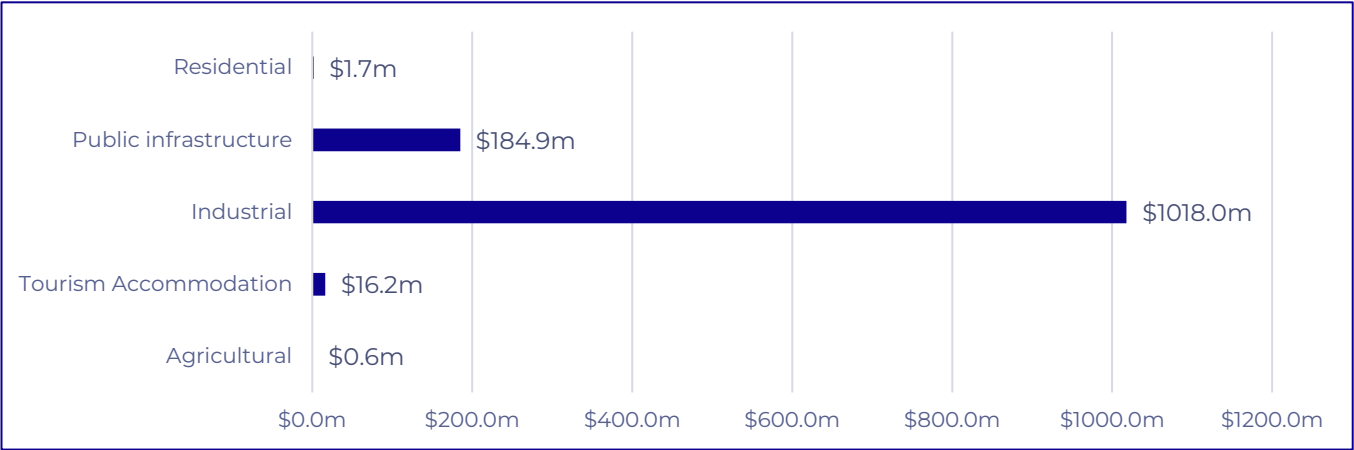


Figure 4.4 Investment pipeline in Kentish

Source: Cordell Connect; Ethos Urban

5.0 Industrial Supply and Market Analysis

Key Findings

- The Mersey Leven Region recorded some \$118.4m of industrial-related building approvals, primarily within warehouses (\$61.1m) and factories and secondary buildings (\$39.8m) between 2019 and 2024.
- Between 2023 and 2025 the price of vacant industrial zoned land seems to have substantively increased in Devonport. Outside Devonport few sales have occurred in recent years due to a limited supply of vacant industrial land - especially in Kentish and Central Coast – with no new estates or subdivisions being developed in those LGAs.
- The Mersey Leven Region has **91.4ha** of vacant industrial land and confirmed future supply with a theoretical adequacy of supply of up to approximately **17.6 years**. The availability of supply is impacted in some circumstances where land is occupied although under-utilised, and where unimproved industrial land has been identified as unlikely to be developed for an industrial use.
- A **clear need exists to identify and plan additional industrial land** to ensure the industrial sector can:
 - Grow and service the needs of a growing population across the Mersey Leven Region.
 - Leverage economic development that is aligned to specialisations in the local economy such as agriculture and downstream food processing and manufacturing.
 - Provide support to major regional investment including for renewable energy infrastructure, a major new industrial user or upgrades to Port and Airport infrastructure, as appropriate.
- Overall, it is prudent if **strategic consideration of industrial land supply is equivalent to more than 20-years of anticipated demand and potentially 30-years or further**. This ensures a sufficient buffer to the minimum 15-year demand threshold and allows for the flexibility to accommodate a large-scale industrial user if, and when, such an opportunity arose.

5.1 Industrial Development Trends and Activity

Recent Industrial Building Approvals

Between 2019 and 2025 (with data for 2025 covering the incomplete year ending in March), industrial-related building approvals in the Mersey Leven Region totalled approximately \$118.4 million (see **Figure 5.1**). This equates to an average annual approval value of \$16.9 million over the period. A significant portion of these approvals (51.6%) were for warehouse developments, while agricultural and aquacultural buildings accounted for 33.6% of the total approvals between 2019 and 2025. This trend reflects the region's growing emphasis on industrial activity supporting primary production, as well as enhanced transport and supply chain capabilities.

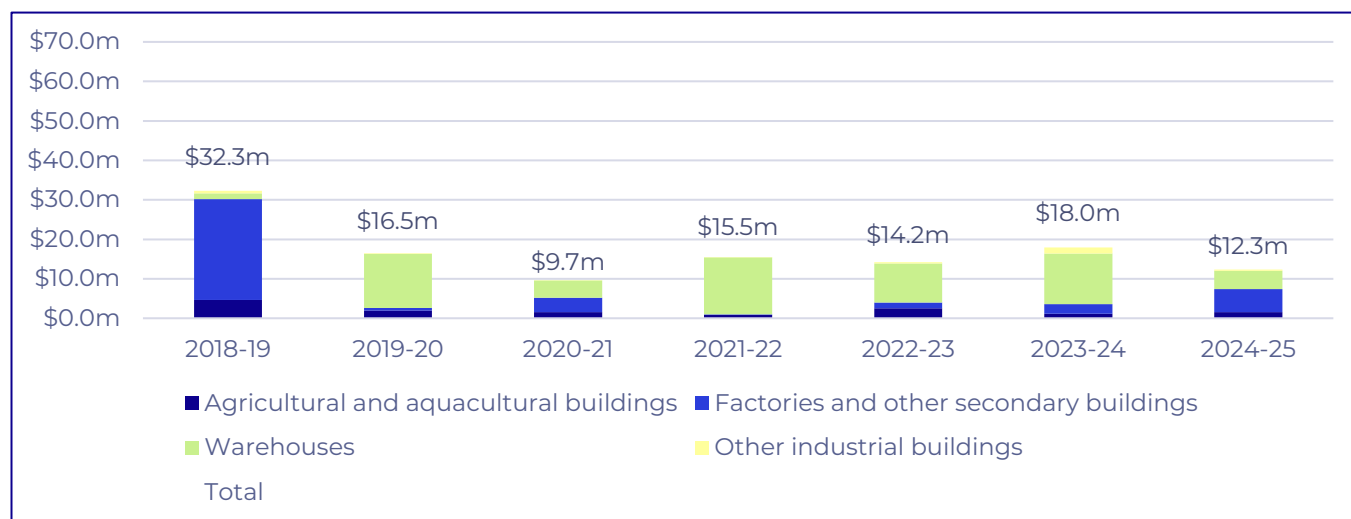


Figure 5.1 Industrial Building Approvals, by Value (in \$millions) 2019 to 2025

Source: ABS Building Approvals; Ethos Urban

Note: 2024-2025 is an incomplete year using data between July 2024 - March 2025, all other years are complete (July-June)

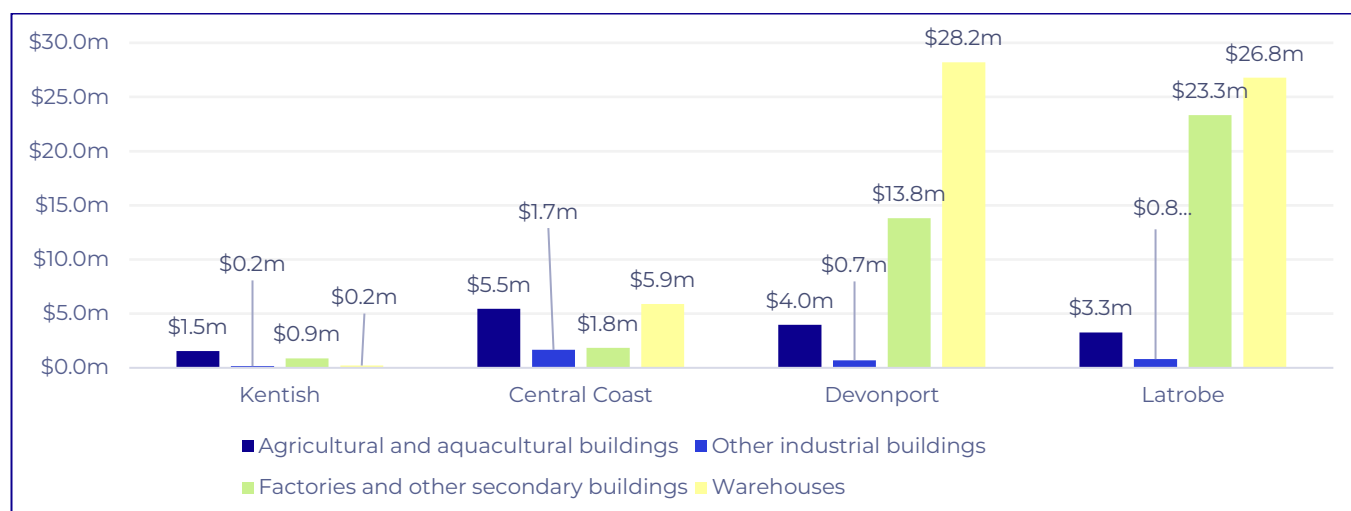


Figure 5.2 Total Industrial Building Approvals by Value ((in \$millions) between 2019 and 2025

Source: ABS Building Approvals; Ethos Urban

Note: 2024-2025 is an incomplete year using data between July 2024 - March 2025, all other years are complete (July-June)

5.2 Industrial Land Sales

Central Coast

Central Coast's industrial land is limited in terms of supply available to the market. No new industrial estates or subdivisions have occurred for some time, which limits the amount of industrial land sales data in Central Coast.

Since July 2014, Central Coast has recorded approximately nine industrial land sales (refer **Table 5.1**), all of which are in the Eastern Precinct at Ulverstone.

With limited sales data, it is difficult to interpret historic price trends and movements. Despite this, it is evident that from the most recent sale of 23-25 Fieldings Way compared to the two sales along Export Drive in 2022, industrial land values in Ulverstone have increased. Although slightly smaller in land size, 23-25 Fieldings Way and 8-10 Export Drive are also recent sales demonstrating an elevated price point of at, or over, \$100/m².

Sharp price increases in property markets are typically an indicator of insufficient supply relative to demand.

Table 5.1 Central Coast Industrial Land Sales, July 2014 to May 2025

Address	Precinct	Sale Date	Sales Price	Land Area (sqm)	Price per sqm
23-25 Fieldings Way	Ulverstone	Jul-23	\$705,000	3,767	\$187
8 Export Drive	Ulverstone	Nov-22	\$527,000	5,270	\$100
10 Export Drive	Ulverstone	Apr-22	\$495,000	4,646	\$107
5 Kilowatt Court	Ulverstone	Jul-19	\$231,000	1,837	\$126
27 Fieldings Way	Ulverstone	Apr-18	\$125,000	1,379	\$91
41 Fieldings Way	Ulverstone	Aug-17	\$210,000	4,160	\$50
Lot 1 Industrial Drive	Ulverstone	Aug-17	\$608,640	12,680	\$48
7 Kilowatt Court	Ulverstone	Jan-16	\$220,000	1,749	\$126
38 Fieldings Way	Ulverstone	Oct-15	\$175,000	2,439	\$72

Source: Ethos Urban; Rp Data

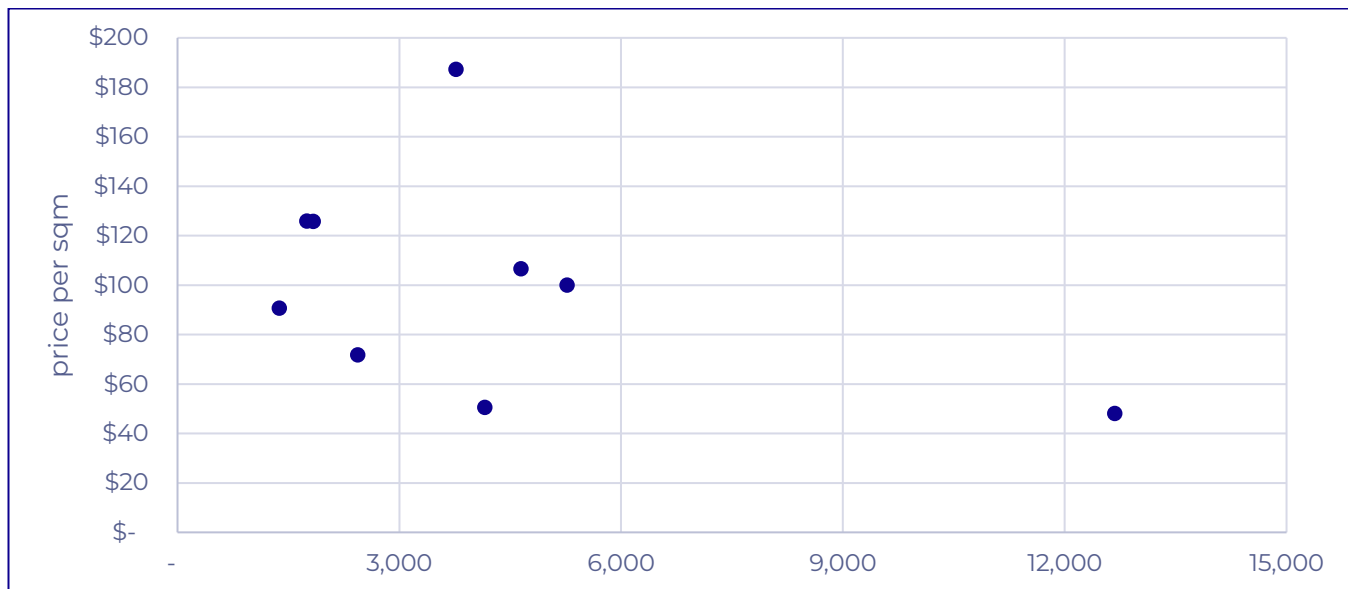


Figure 5.3 Central Coast Price Analysis, July 2014 to May 2025

Source: Ethos Urban; Rp Data

Devonport

Devonport has available supply supported by recent rezonings and sub-division, such as Marconi Court.

Since July 2014, Devonport has recorded approximately 57 industrial land sales (refer **Figure 5.4**), the majority of which were vacant lots. Notably, a substantial proportion (86.0%) of these transactions have occurred within the Don Road–Stony Rise and Quoiba–Spreyton precincts, reflecting the strategic importance of this area in delivering new industrial land supply in Devonport.

Many of the high-value sales since 2023 have taken place within the East Devonport precinct, particularly along Stephen Street. This area has seen elevated land values very recently, with prices exceeding \$900/m², indicating strong market demand for land in direct proximity to the Port of Devonport.

More recently, vacant industrial land sales in the balance of Devonport have often exceeded \$150/m².

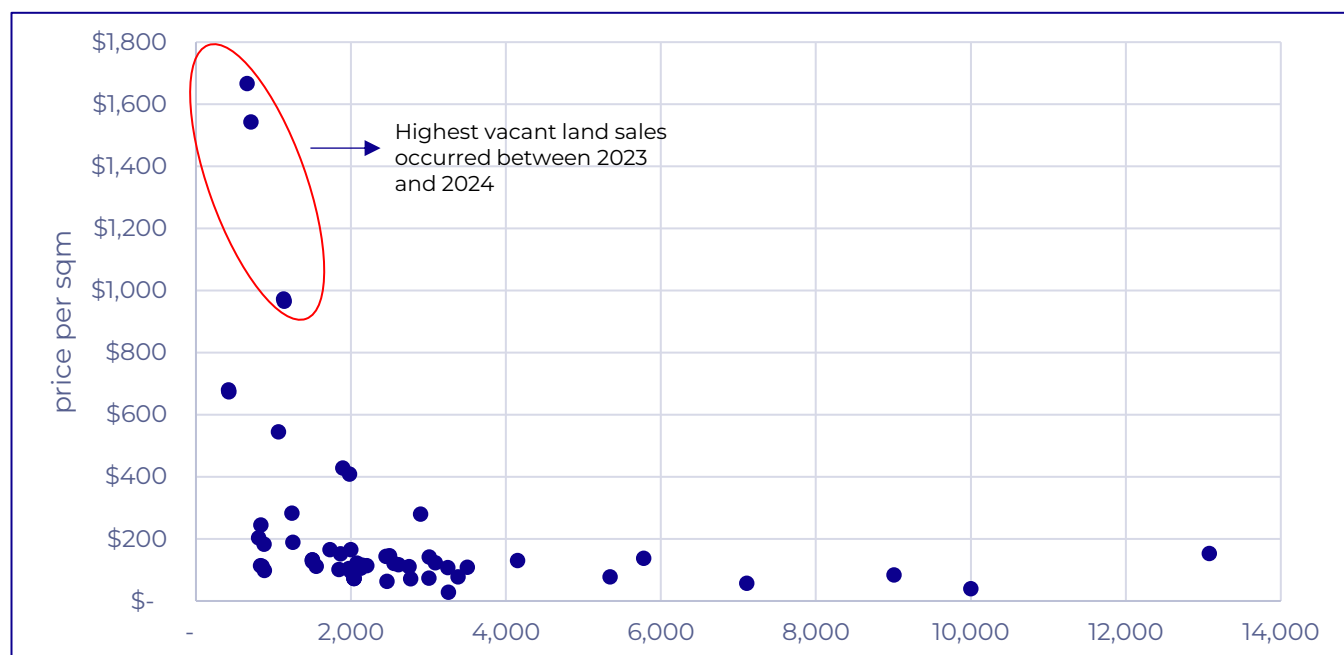


Figure 5.4 Devonport Price Analysis, July 2014 to May 2025

Source: Ethos Urban; Rp Data

Latrobe

Since July 2014, approximately twenty transactions involving the sale of vacant industrial land have been recorded across various precincts in Latrobe (refer **Figure 5.5**). The highest-valued land sale occurred in October 2023, at a price of \$137/m². This was followed by another significant transaction in January 2024, where land sold at an average price of \$134 /m². Similar to Central Coast, the value of vacant industrial land now seems to exceed \$100/m², although this remains marginally below vacant land values being achieved in Devonport.

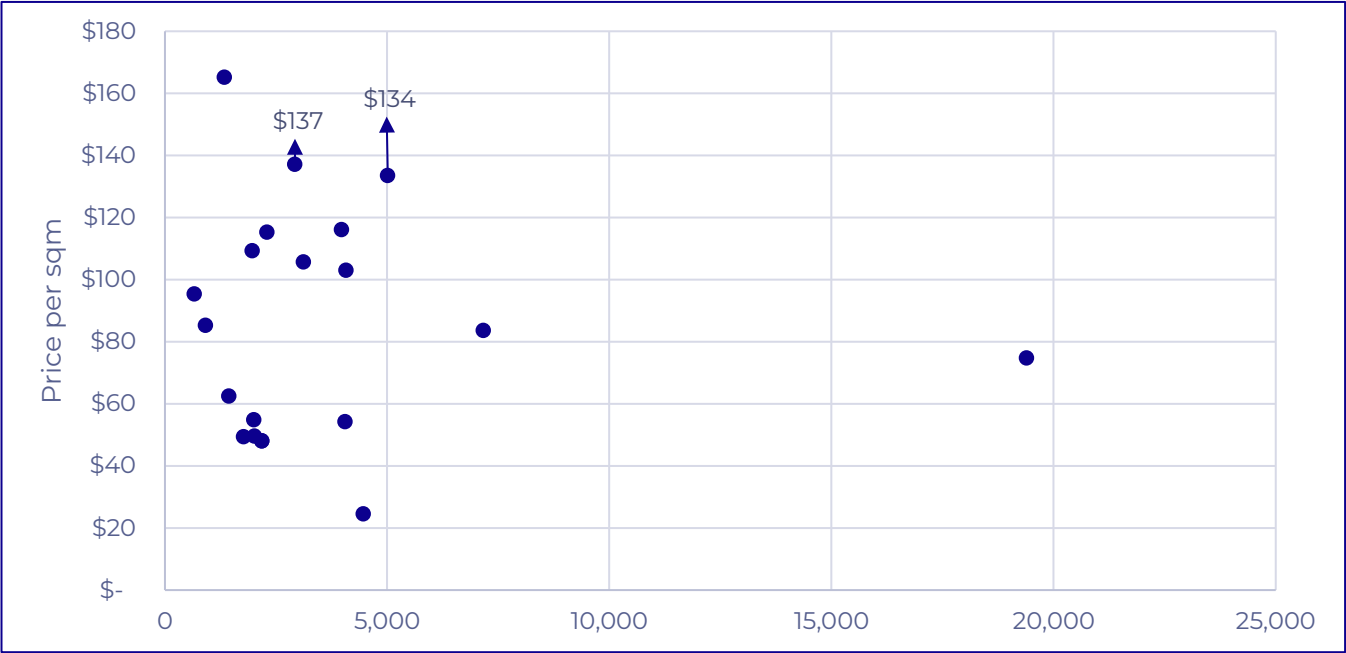


Figure 5.5 Latrobe Price Analysis, July 2014 to May 2025

Source: Ethos Urban; Rp Data

Kentish

Over the past 10 years, Kentish has recorded just three transactions involving the sale of vacant industrial land (refer **Table 5.2**) This highlights the very limited availability of new or vacant land designated for industrial-specific uses, as most of the available land is already fully occupied.

Table 5.2 Central Coast Industrial Land Sales, July 2014 to May 2025

Address	Precinct	Sale Date	Sales Price	Land Area (sqm)	Price per sqm
6 Claude Road	Sheffield	Mar-22	\$ 1,300,000	1,745	\$745
2/36 Claude Road	Sheffield	May-19	\$ 125,000	1,616	\$77
4/36 Claude Road	Sheffield	May-19	\$ 125,000	1,631	\$77

Source: Ethos Urban; Rp Data

5.3 Current Zoned Industrial Land Supply

An exact measure of supply – land that can be developed or even re-developed for future industrial use – can be difficult to accurately measure. This is because the exact nature of ownership and use, including owner intentions, is not always known.

Further, some occupied sites may be used for an interim or occasional use, for example properties that are used for the storage of materials or vehicles. These sites may be under-utilised and are able to accommodate a more intensive industrial use such as warehouses/enterprise tenancies when demand arises. However, this is entirely up to the objectives and circumstances of the owner of the land. Moreover, when industrial sites are redeveloped, the previous industrial use may be displaced and require a replacement site.

As such, any industrial land supply and demand analysis is necessarily indicative and represents a ‘best estimate’ of existing and forecast market conditions, and the intentions of numerous business and property owners.

In this regard, this analysis accounts for vacant zoned industrial land that has no clear existing use.

The assessment of supply is based on a review of the latest available Nearmap Aerial imagery dated March 2025, further informed by field observations and consultation with the Mersey Leven Strategic Alliance Councils.

Table 5.3 Mersey Leven Vacant Industrial Land Summary

Mersey Leven Region	Vacant	Total Industrial Land	Share of Vacant Remaining
Central Coast	1.8ha	69.3ha	2.6%
Devonport	33.0ha	221.8ha	14.9%
Latrobe	32.4ha	177.2ha	18.3%
Kentish	-	129.7ha	0.0%
Total	49.2ha	598.2ha	8.2%

Source: Ethos Urban

Central Coast Key Findings

Key findings (refer **Table 5.4**) include:

- Central Coast has approximately 1.8ha of vacant zoned industrial land or approximately 2.6% of total zoned industrial land.
- Most of the remaining industrial supply is in Penguin's Eastern Precinct (1.7 ha) with the balance (0.1ha) situated in Ulverstone's Eastern Precinct. The identified supply in Penguin's Eastern Precinct (1.7ha) relates to one parcel at the north-western edge of the precinct that is bisected by Myrtle Creek and therefore may not be a credible option for future industrial development.

A visual representation of available supply in the Ulverstone Eastern Precinct and Penguin Eastern Precinct are provided in Error! Reference source not found..

Overall, the analysis indicates that at the current time **Central Coast has a significant shortage of industrial land supply**. The current availability of industrial land is at a level which undermines the ability of Central Coast to attract, and retain, businesses which might otherwise locate in the LGA. This is at a cost to the community in terms of foregone economic opportunity and business development.

Table 5.4 Central Coast Industrial Supply (ha), 2024

Precinct	Vacant	Total Zoned	Share of Vacant Remaining
Ulverstone Eastern Precinct	0.1ha	30.9ha	0.2%
Ulverstone Western Precinct	<u>0.0ha</u>	19.5ha	<u>0.0%</u>
Penguin Eastern Precinct	1.7ha	13.9ha	12.8%
Penguin Western Precinct	<u>0.0ha</u>	5.0ha	<u>0.0%</u>
Total	1.8ha	69.3ha	2.6%

Source: Ethos Urban

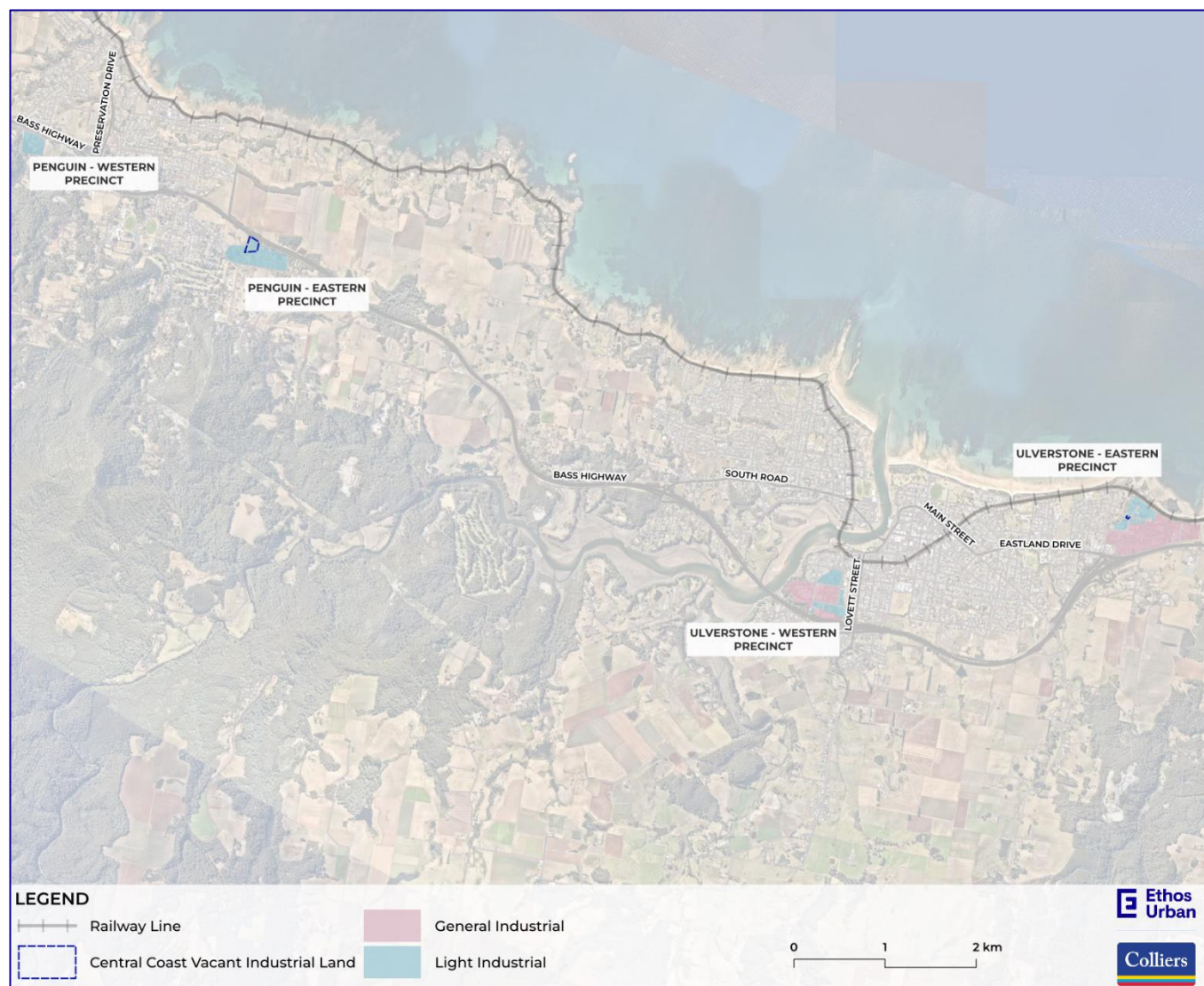


Figure 5.6 Central Coast Vacant Industrial Land

Source: QGIS, Nearmap 2025, Tasmanian Planning Scheme – Zoning, Ethos Urban

Devonport Key Findings

Key findings (refer **Table 5.5**) include:

- Devonport has the Mersey Leven Region's most significant supply of vacant industrial land of approximately 33.0ha, or approximately 15.3% of total zoned industrial land in the municipality.
- A vacancy rate of 19.3% is in the Quoiba-Spreyton Precinct because of the recent Marconi Court subdivision, vacant land near Kelcey Tier Road and the vacant block of industrial land along Stony Rise Road near Horsehead Creek.
- Some 2,200 m² of Light Industrial zoned land within the Don Road-Stony Rise precinct has been excluded from effective supply as it forms part of the Devonport General Cemetery. Likewise, some small lot residential uses occupy land near the intersection of Devonport Road and Saleyard Road which on balance cannot be considered part of available industrial land supply.

Table 5.5 Devonport Industrial Land Supply (ha), 2025

Precinct	Vacant	Total Industrial Land	Share of Vacant Remaining
Quoiba-Spreyton Precinct	27.1	140.4	19.3%
Don Road-Stony Rise Precinct	0.1	34.4	0.4%
Devonport Western Cluster	1.1	13.5	8.2%
Eastern Devonport Precinct	4.6	27.0	17.2%
Former Weaving Mill	0.0	6.7	0.0%
Total	33.0	221.8	14.9%

Source: Ethos Urban

A large vacant site is located on Brooke Street in East Devonport. This forms the only supply able to accommodate a large-scale industrial user in direct proximity of both the Port of Devonport and the Airport.

For the purposes of the industrial land analysis, the former Australian Weaving Mill site is considered fully occupied, notwithstanding open space located adjacent to the former factory building and that the building itself is under-utilised. This also has regard to the potential for this site to be used for a non-industrial use in the future, as identified previously in Chapter 2.

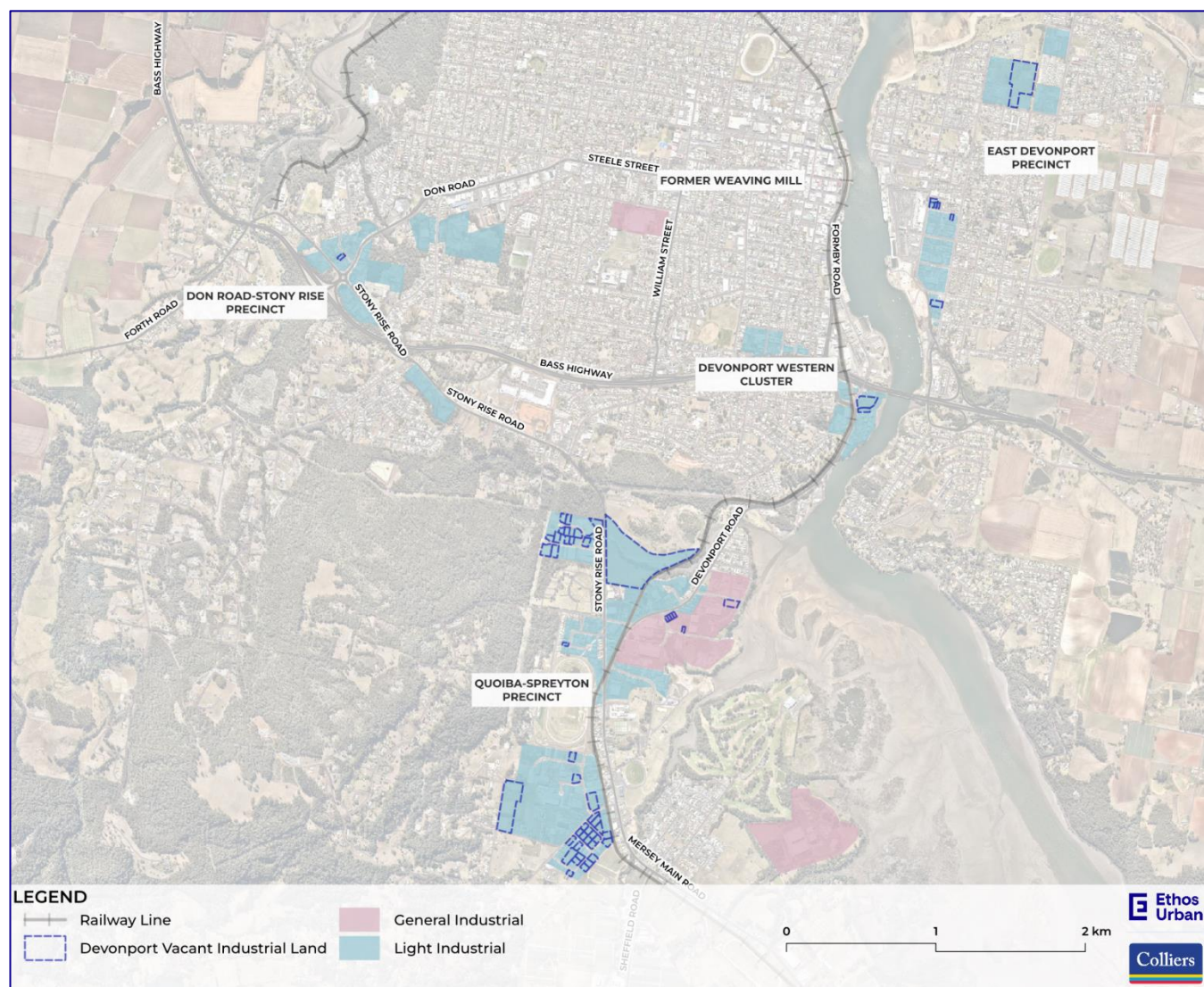


Figure 5.7 Devonport vacant Industrial Land

Source: QGIS, Nearmap 2025, Tasmanian Planning Scheme – Zoning, Ethos Urban

Devonport has the most significant supply of industrial land in the Mersey Leven Region, with approximately **33 hectares or 15% of industrial land** identified as vacant. A significant supply of industrial land is available in the Quoiba-Spreyton precinct, while some limited vacant land is also available in East Devonport including a large single site on Brooke Street. The Don Road -Stony Rise precinct is effectively at full capacity.

Latrobe Key Findings

Key findings (refer **Table 5.6** and **Figure 5.8**) include:

Latrobe has 32.4ha of vacant land available for industrial use, primarily concentrated in the Bellfield–Piping Lane, Wesley Vale, and Port Sorell Precincts. While this land represents potential for future industrial development, not all of it is immediately available for industrial purposes.

The Bellfield–Piping Lane Precinct accounts for approximately 9.8ha of vacant land. Although this land is not yet available for immediate use, it forms part of the longer-term industrial land supply pipeline. Land is expected to be brought to market progressively through the staged subdivision of the Piping Lane Business Park. Importantly, this precinct will accommodate a mix of industrial and other business-related activities.

Table 5.6 Latrobe Industrial Land Supply

Precinct	Vacant	Total Industrial Land	Share of Vacant Remaining
Bellfield-Piping Lane Precinct	9.8ha	31.7ha	30.8%
Devonport Airport Precinct	0.0	4.7ha	0.0%
Latrobe Precinct	0.7ha	54.9ha	1.3%
Port Sorell Precinct	1.9ha	11.2ha	17.1%
Wesley Vale Precinct	20.0ha	74.9ha	26.7%
Sub-total	32.4ha	177.4ha	18.3%

Source: Ethos Urban

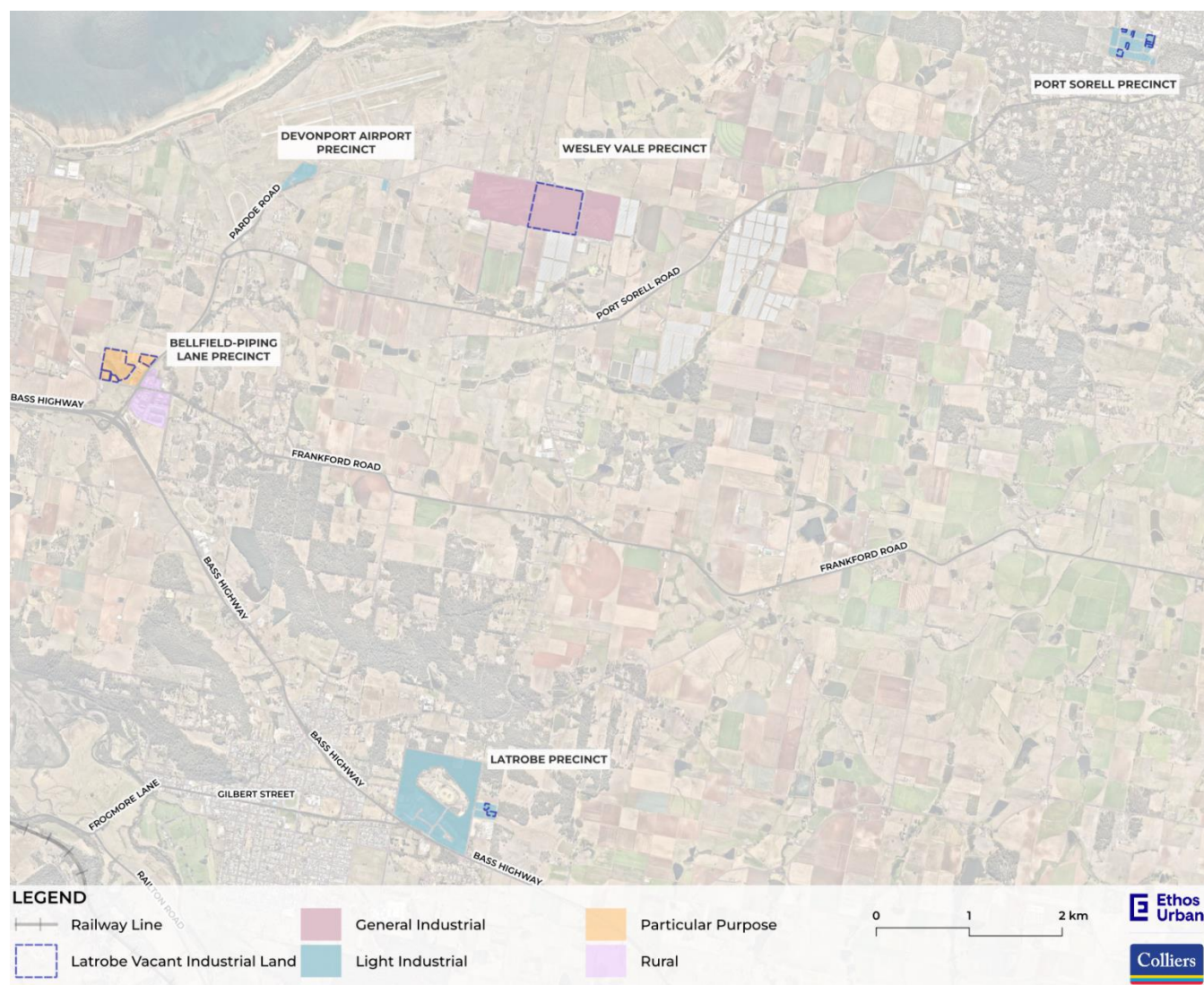


Figure 5.8 Latrobe vacant industrial land

Source: QGIS, Nearmap 2025, Tasmanian Planning Scheme – Zoning, Ethos Urban

The Piping Lane subdivision will yield larger allotments (ranging from 4000m² to 2.88ha) and has strategic location advantages, particularly with proximity to the Devonport Airport and direct access to the Bass Highway via Port Sorell Road.

In the Wesley Vale Precinct, an estimated 20.0ha of vacant industrial land located at the eastern end of the former pulp mill site. This area may undergo subdivision soon for large industrial lots, able to accommodate industrial users of significant scale.

The remainder of the former pulp mill site is currently occupied by a mix of national and other tenants occupying legacy buildings from the former pulp mill. However, this may indicate the potential for future re-development - including adaptive re-use - to accommodate larger-scale or more intensive industrial operations able to benefit from the infrastructure delivered to support the previous pulp mill operations.

Further, the Port Sorell Precinct includes approximately 1.9ha of currently vacant land, with a number of active development applications currently being assessed by Latrobe Council.

Note that industrial land supply in the town of Latrobe is more limited by the expectation of Council that selected undeveloped areas within the industrial zone surrounding the speedway do not form part of 'effective supply' due to environmental and other constraints likely to limit development outcomes.

A small parcel of industrial land in Port Sorell has also been identified as not being part of effective industrial land supply. For the Latrobe LGA this is equivalent to 3.1ha of industrial land which has been removed from estimates of available land supply.

Latrobe has substantial industrial land supply of **32.4 ha which is equivalent to 18.3% of total industrial land**. Importantly 20 hectares or over 60% is associated with the former Wesley Vale Pulp Mill which can attract large-scale users with particular servicing and infrastructure requirements. Mid-scale development of up to 2 ha can be accommodated in the Piping Lane precinct, with service industrial land available at Port Sorell.

Kentish Key Findings

- Kentish has approximately 129.7ha of industrial zoned land that is currently fully occupied with no available vacant land supply.
- Industrial land in Kentish is dominated by the very large area of zoned industrial land supporting the Cement Australia facility.

Table 5.7 Kentish Industrial Land Supply (ha), 2025

Kentish Precinct	Vacant	Total Industrial Land	Share of Vacant Remaining
Railton Precinct	0.0	122.3ha	0.0%
Sheffield Precinct	0.0	7.3ha	0.0%
Sub-total	0.0	129.7ha	0.0%

Source: Ethos Urban

Kentish has effectively no industrial land supply available. Thus, the ability of the local economy to accommodate the expansion of existing businesses, or to attract new industrial activities to the LGA is for practical purposes almost non-existent – except for existing users who may use their land more intensively over time.

Consideration of Underutilised Sites

Underutilised industrial land is defined as land available for industrial uses where an existing use is present on the parcel of land, however:

- A significant proportion of the site is vacant, and/or
- The nature of the land use is very low intensity such as occasional storage of some machinery.

Although some industrial land may look vacant in aerial imagery, it may be part of a larger parcel that has significant infrastructure onsite. Likewise, even occasional use of a site for a low intensity purpose may be crucial to economic activity and supply chains, for example land may be used to store and repair agricultural equipment outside of peak harvesting periods.

Accordingly, underutilised land is not considered as available supply although potential for existing occupants to more intensively utilise this land for industrial purposes may exist.

Across the Mersey Leven Region a high availability of underutilised land has been identified in Devonport and Latrobe, some of which could potentially be used more intensively in future. Examples include selected sites in Latrobe used principally for occasional storage of vehicles and machinery.

In the Central Coast underutilised industrial land is less prevalent and reflects a far more limited supply of vacant land.

5.4 Industrial Land Take-up

Take-up is defined as the amount of industrial land that transitions from vacant to occupied over a given period.

- **Vacant** is defined as industrial zoned land with no evidence of a productive use or capital investment, and which has not been excluded from effective supply due to known environmental or other constraints which have been identified by the relevant Council as input to the Project.
- A site is defined as **occupied** if some evidence exists of the use of the land for a productive economic purpose. This includes buildings, hardstand storage areas, carparks, partly constructed buildings, etc.

Take-up, also referred to as consumption or developed, is typically used in supply and demand analysis to understand demand trends.

This analysis reviews all industrial zoned land (General Industrial and Light Industrial) in Central Coast, Devonport, Latrobe and Kentish LGAs as of 2025. This is except for the Piping Lane Business Park and Bellfield Estate that sit in Particular Purpose and Rural zones which have also been included in the analysis due to the nature of activities present, and proposed, in this area.

The calculation of take-up is based on analysis of available Nearmap aerial imagery dated February 2015 and March 2025 for Central Coast, Devonport and Latrobe and October 2022 and March 2025 for Kentish.

Central Coast

In **Central Coast** approximately 5.2 ha of industrial land was taken up between 2015 and 2025, all within the Ulverstone Eastern Precinct. This equates to an average take-up of 0.6ha per annum. Out of the total zoned industrial land, 1.8ha is currently vacant (refer **Table 5.8**).

Over the period 2015 to 2025, take-up of land was for a range of industrial uses, including industry serving the local population and some occupiers who potentially trade to a regional customer base.

The main categories include:

- **Transport:** Three lots averaging approximately 4,700m² were taken up by truck depots and similar uses.
- **Automotive and machinery sales:** Two lots in Ulverstone's Eastern Precinct with exposure to the Bass Highway were developed for motorcycle dealership and mower and chainsaw businesses. The average size of the lots was approximately 3,300m².
- **Self-storage:** Two lots average around 3,600m² were developed for self-storage: one for conventional self storage and the other for caravan and RV storage.
- **Miscellaneous warehousing:** Two lots were occupied by miscellaneous warehousing including a 1,700m² lot and a much larger 12,600m² lot that is potentially underutilised.

Lots were also developed for factoryettes/enterprise units and miscellaneous commercial uses. The occupiers of newly developed factoryettes include:

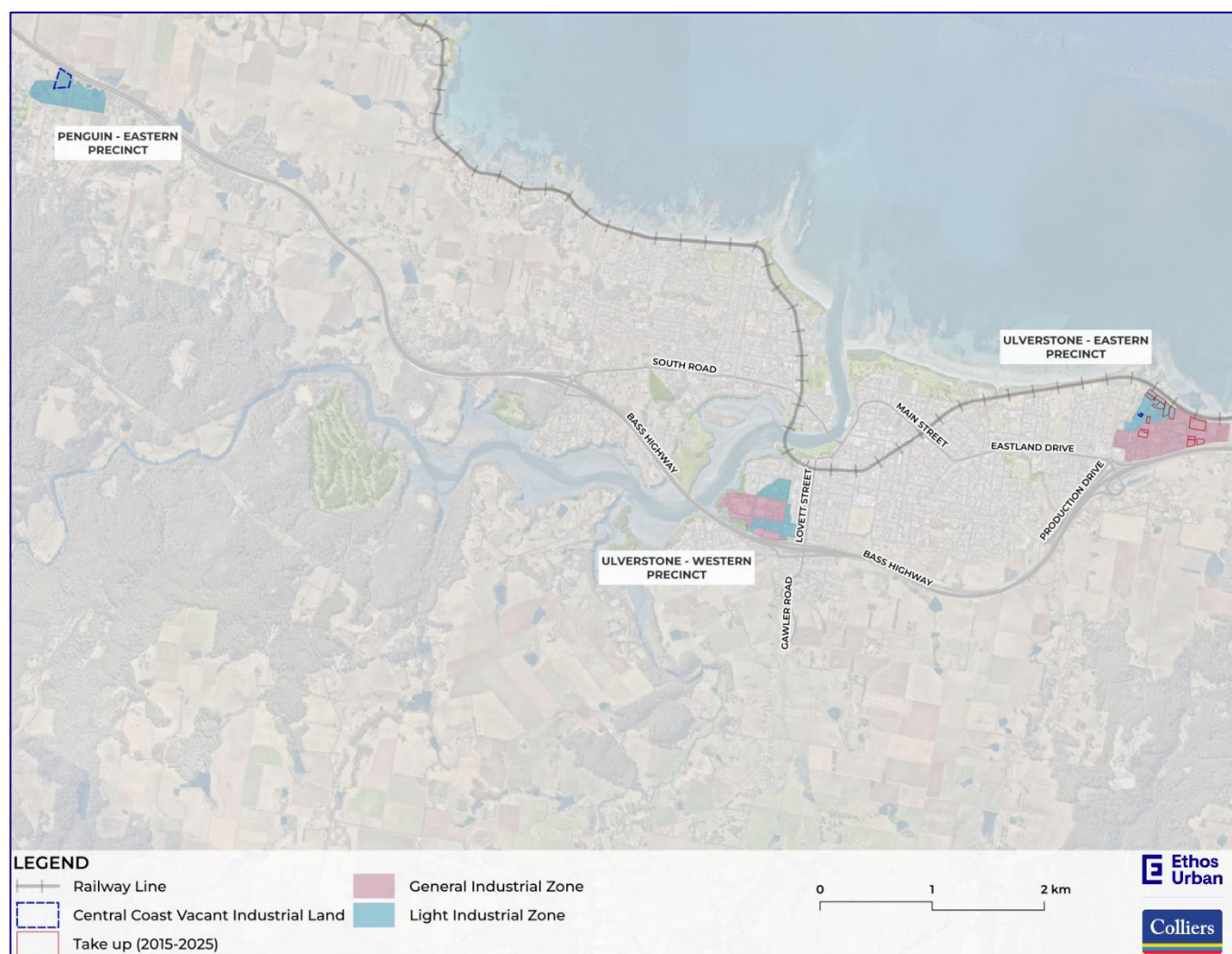
- A fitness centre
- Manufactured homes
- Mechanic and
- Property maintenance business.

Table 5.8 Central Coast Industrial Land Take-up Summary

Precinct	Total Industrial Land 2025	Vacant 2025	Take Up 2015-2025
Ulverstone Eastern Precinct	30.9ha	0.1ha	5.2ha
Ulverstone Western Precinct	19.5ha	-	-
Penguin Eastern Precinct	14.0ha	1.7ha	-
Penguin Western Precinct	4.9ha	-	-
Sub-total	69.3ha	1.8ha	5.2ha

Source: Ethos Urban

Figure 5.9 Central Coast take up



Devonport

Between 2015 and 2025, approximately 18.2ha of land was taken up in **Devonport**, averaging 1.8ha annually. A significant portion of this growth occurred within the Quoiba-Spreyton Precinct, which accounted for 17.6ha, largely driven by recent subdivisions and rezonings along Stony Rise Road. These developments have successfully attracted a growing number of industrial occupants – indicating the ability of delivering high quality industrial land supply to be a catalyst for industrial investment in Devonport. A large site in Turners Lane has also been taken up for the storage of machinery.

The land take-up between 2015 and 2025 in the Quoiba-Spreyton precinct includes the Marconi Court subdivision, alongside the establishment of mid-sized factories and warehouses in Spreyton near Kelcey Tier Road. Key industries taking up space in these areas include logistics, storage, machinery supply, engineering, and automotive and machinery sales.

Table 5.9 Devonport Industrial Land Take-up Summary

Precinct	Total Industrial Land 2025	Vacant 2025	Take Up 2015-2025
Quoiba-Spreyton Precinct	140.3ha	27.1ha	17.6ha
Don Road-Stony Rise Precinct	34.4ha	0.1ha	0.3ha
Devonport Western Cluster	13.5ha	1.1ha	0.1ha
East Devonport Precinct	27.0ha	4.6ha	0.2ha
Former Weaving Mill	6.7ha	-	-
Sub-total	221.8ha	33.0ha	18.2ha

Source: Ethos Urban

Note: Some areas zoned for industrial use in 2025 were not designated for such purposes in 2015.

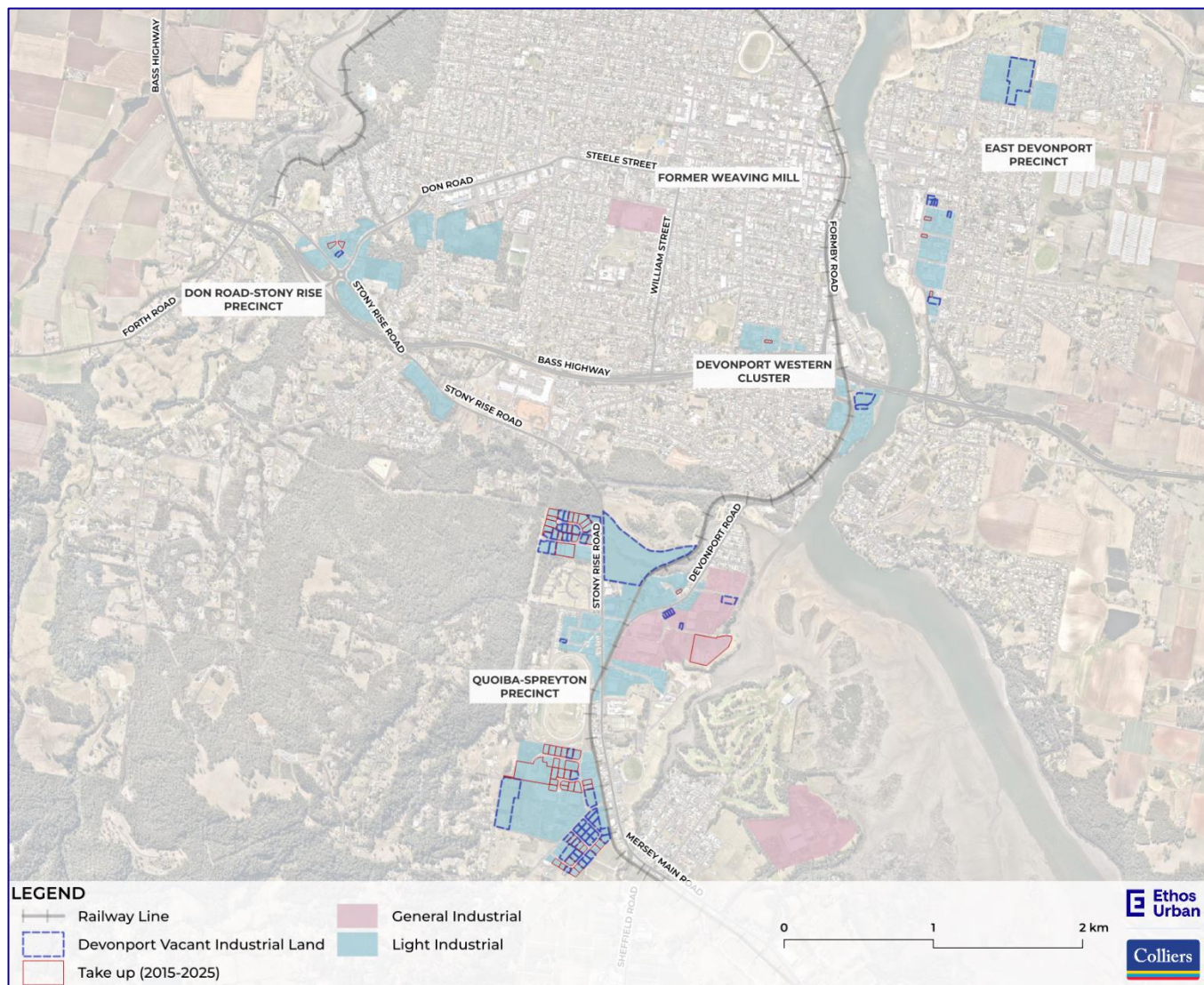


Figure 5.10 Devonport take-up

Source: Nearmap, QGIS, Ethos Urban

Latrobe

Between 2015 and 2025, approximately 21.3ha of industrial land was taken up across Latrobe LGA, with most of this activity occurring within the Bellfield-Piping Lane Precinct, and to a lesser extent the Latrobe and Port Sorell Precincts.

The Bellfield-Piping Lane Precinct experienced significant uptake primarily from logistics and freight operators, as well as large-format farm equipment and machinery sales. This trend reflects the precinct's strategic location and its appeal to businesses requiring larger lots and excellent transport connectivity.

Currently, the 16-lot subdivision at Piping Lane Business Park is in its early development stages. Once complete, it can contribute to the future supply of an additional 9.8 ha of industrial land in the area, offering new opportunities for industrial and business-related development.

Additionally, potential exists for further land to be rezoned to the south of Bellfield Estate, with this currently being implemented into the planning scheme. This can provide an additional 13.9ha of land for industrial use and related business activity.

In Latrobe and Port Sorell Precincts, land take-up between 2015 and 2025 has included storage and warehousing, civil contracting services, automotive repair, and showrooms. These uses reflect the continued demand for flexible, service-based industrial spaces for general business activities.

The recently released draft Latrobe Structure Plan identifies 10 hectares of vacant land adjacent to the existing industrial area which will form a part of future industrial land supply once implemented through the planning

scheme. Further, the draft Port Sorell Structure Plan also identifies the potential for industrial land to be located immediately south of the existing industrial area.

Table 5.10 Latrobe Industrial Land Take-up Summary

Precinct	Total Industrial Land 2025	Vacant 2025	Take Up 2015-2025
Bellfield-Piping Lane Precinct	31.7ha	9.8ha	11.6ha
Devonport Airport Precinct	4.7ha	-	-
Latrobe Precinct	54.9ha	0.7ha	4.2ha
Port Sorell Precinct	11.2ha	1.9ha	4.0ha
Wesley Vale Precinct	74.9ha	20.0ha	0.7ha
Sub-total	177.4ha	32.4ha	20.5ha

Source: Ethos Urban

Note: Some areas zoned for industrial use in 2025 were not designated for such purposes in 2015.

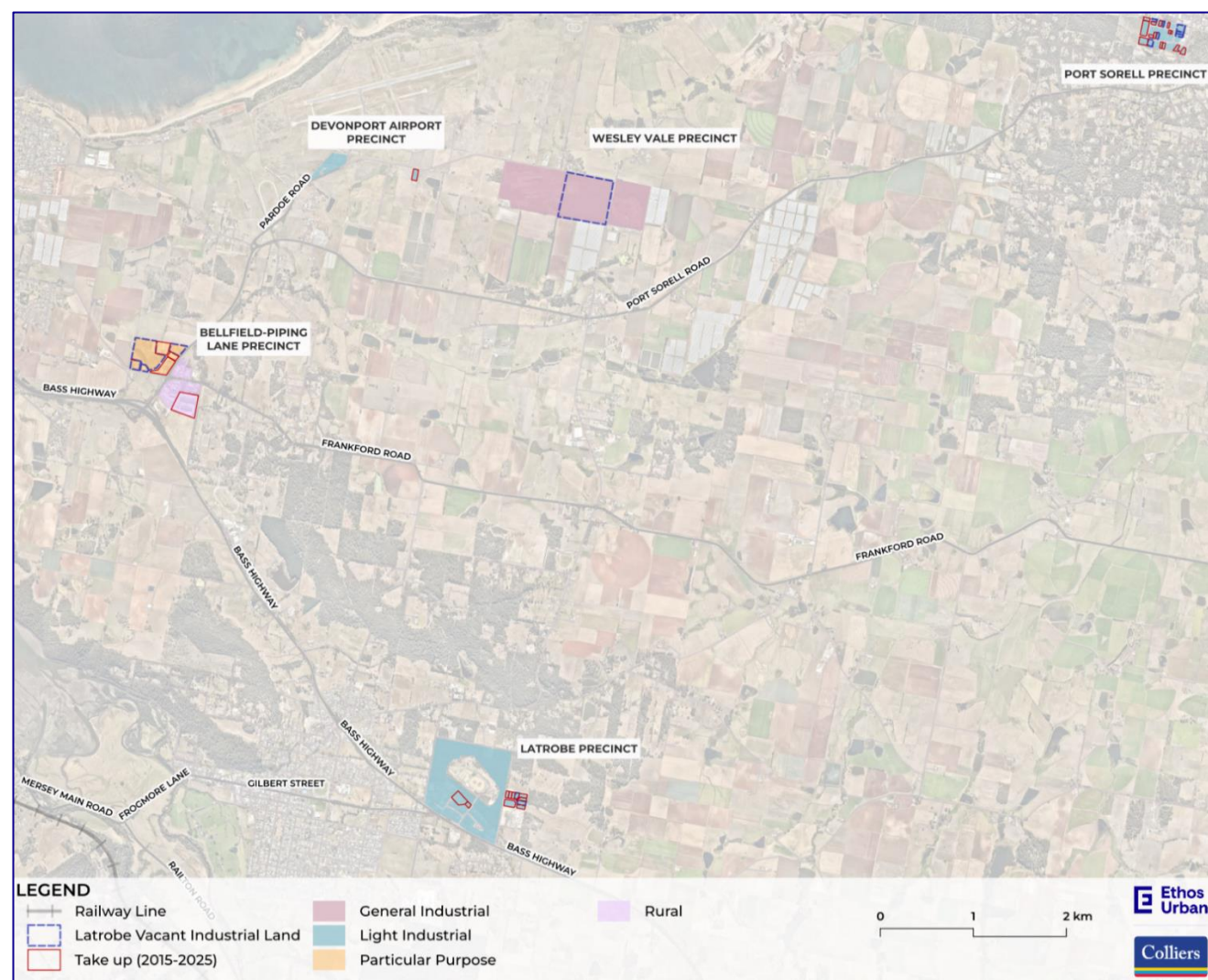


Figure 5.11 Latrobe take up

Source: QGIS, Ethos Urban

Mersey Leven Region

Within the Mersey Leven Region, Devonport LGA has recorded the highest take-up of industrial-zoned land over the period, largely driven by recent subdivisions and rezoning that have attracted and accommodated new development opportunities. This has been followed by Latrobe LGA, which has also seen substantial uptake of land for both industrial uses and related business activities, reflecting strong demand in strategically positioned areas with available land supply.

In contrast, no industrial land take-up has occurred in Kentish since October 2022 (latest available satellite imagery). This is due to the limited (effectively zero) availability of zoned industrial land despite the potential for ongoing demand.

Table 5.11 Mersey Leven Region Industrial Land Take-up Summary

Mersey Leven Region	Total Industrial Land 2025	Vacant 2025	Take up 2015-2025
Central Coast	69.3ha	1.8ha	5.2ha
Devonport	221.8ha	33.0ha	18.2ha
Latrobe	177.4ha	32.4ha	20.5ha
Kentish	129.7ha	-	-
Total	598.2ha	67.2ha	44.7ha

Source: Ethos Urban

Note: Some areas zoned for industrial use in 2025 were not designated for such purposes in 2015

5.5 Adequacy of Supply

Take-Up Rate

The adequacy of supply has been assessed having regard to a forecast take-up rate for each LGA. This is based on a mix of historical take-up rates and allowing for clear support from the Mersey Leven Strategic Alliance for economic development outcomes achieved through the timely supply of appropriately located industrial land. The forecast take up rates should be considered an indicative, although realistic, assessment of industrial land demand, and are as follows:

- 0.9ha as annual take-up for Central Coast as in the Industrial Land Analysis Report
- 2.0ha as annual take up for Devonport
- 2.2ha as annual take-up for Latrobe
- 0.1 ha annual demand in Kentish (nominal).

For both Devonport and Latrobe the forecast take-up rate is the average for the past 10-years plus 10% to reflect what can be expected to be stronger demand conditions. A nominal 0.1 ha per annum has been applied to Kentish, reflecting latent demand unable to be met by the lack of any effective land supply.

To be clear, the above take-up rate is principally determined by historic market conditions which has included some supply constraints and potential mis-match between the availability of industrial land and the preferences of potential users.

A proactive approach by the Mersey Leven Strategic Alliance to collectively ensure a significant pipeline of appropriately located and serviced industrial land supply that attracts industrial users can mean a take-up rate higher than indicated above is achieved.

Additional Supply

In calculating the adequacy of supply, it is important to include both vacant land and new supply which will be enabled by current planning processes in Latrobe, namely:

- **Bellfield-** Expansion of the Bellfield Estate to the south which will deliver an additional **13.8 hectares** of industrial land supply.
- **Latrobe-** Delivery of an additional **10 hectares** of vacant industrial land at Latrobe as enabled by the draft Structure Plan.

Although not formally included in the additional supply calculations due to the preliminary nature of planning, the **Maskells Road** precinct at Ulverstone East may enable expansion of industrial land in Central Coast. This precinct in nominal terms may deliver an additional up to 14 hectares of industrial land, although the actual supply may be less than this subject to detailed site investigations. A more likely outcome is in the order of 10 hectares of additional supply from Maskells Road – again noting the uncertainty around actual outcomes.

Years of Supply Availability

From the above average annual take-up estimate adequacy of supply for the precincts are as follow:

- **Central Coast:** between two years based on average take-up of 0.9ha per annum.
- **Devonport:** 16 years
- **Latrobe:** 26 years
- **Kentish:** No take-up due to lack of supply.

Across the entire Mersey Leven Region, the supply of industrial land is generally equivalent to 18 years of supply based on the above indicative analysis.

It is generally considered best practice land use planning to **ensure industrial zoned supply is equivalent to at least 15-years of demand**. This allows the operation of a competitive land market and provides sufficient time for additional land to be identified, planned, serviced and developed.

In regional markets it is typically prudent to plan for an industrial supply of **20+ years**, and on a proactive in the order of 30-years, to ensure sufficient space for a large regionally significant occupier/investor (e.g. Simplot or another major industrial user). It is difficult to predict when demand from such large users will occur, although it is vital that provision is made to accommodate them, as and when the opportunity arises, as a means of enabling economic growth and prosperity.

On this basis, the Mersey Leven industrial market is severely supply constrained in Kentish and Central Coast with supply constraints emerging for Devonport.

Latrobe has a more significant theoretical supply of available industrial land, including the imminent Bellfield rezoning and implementation of new industrial land in the draft Latrobe Structure Plan. However, supply constraints in the other LGAs means the strong potential for demand to 'transfer' to Latrobe if no other local supply options are found.

A clear need exists to identify and plan additional long-term industrial land supply to ensure that the Mersey Leven industrial sector can:

- Service the needs of a growing population.
- Leverage economic development opportunities that are aligned to specialisations in the local economy such agriculture and downstream food processing and manufacturing.
- Capitalise on significant regional investment in renewable energy infrastructure where appropriate
- Maximise the benefits of growth in the transport and logistics sector including investments at the Port of Devonport (Quaylink), Devonport Airport and any other future improvement to transport and infrastructure.
- Be a valid option to other major population centres for major investment by key investors seeking a high quality industrial land option in Tasmania.

Table 5.12 Adequacy of Supply (Indicative only)

Category	Central Coast	Devonport	Latrobe	Kentish	Mersey Leven Region
Annual Take-up (ha)	0.9	2.0	2.2	0.1	5.2
Current and Future Confirmed Supply (ha)	1.8	33.0	56.6	0.0	91.4
Adequacy of Supply (years remaining)	2.0	16.5	25.7	0.0	17.6

Source: Ethos Urban

Note above is principally based on historic take-up rates which may be exceeded by delivering within the Mersey Leven Region a substantial pipeline of appropriately located and serviced industrial land which attracts additional investment than would otherwise be achieved.

5.6 What We Have Heard from Industrial Stakeholders

A series of interviews were undertaken with a range of stakeholders within the industrial sector of the Mersey Leven Region. These interviews were undertaken by Moore Consulting, with key findings as follows:

1. Stakeholders interviewed indicated that the Mersey Leven Region has an identified shortage of light industrial land, particularly in the Devonport, Quoiba, East Devonport and Spreyton areas.

2. Some stakeholders indicated that, due to the timeframe taken to both obtain statutory approvals and to undertake construction, the Mersey Leven Region was not seen as attractive to those industrial land users located outside the region including from mainland Australia.
3. As a result, most users of industrial land in the Mersey Leven Region are owner occupiers who are purchasing land for speculative purposes.
4. A conclusion that may be drawn from this is that if the Mersey Leven Region is to become more attractive to developers (in addition to owner occupiers), then the time taken to obtain statutory approvals must be shorter and efforts made to minimise construction costs. A strategy setting out priorities and processes relating to both the supply and demand of industrial land in the Mersey Leven Region was seen as a positive step by those interviewed.
5. What the consultants were unable to determine during this stakeholder consultation stage is the extent to which potential land users (and developers) who are currently not operating existing businesses but may be currently looking for land in locations like the Mersey Leven area.
6. Furthermore, some stakeholders interviewed are seeking guidance as to the preferred block sizes for development, an initial view is that there is a shortage of industrial blocks over 10,000m².
7. A number of stakeholders who are involved with food processing indicated ongoing difficulties negotiating either access to water for processing or access to sufficient facility to process waste water.

5.7 Overview of Industrial Demand

In summary, the following provides an overview of the industrial land assessment relevant to the wider Mersey Leven Region:

- The availability of large vacant industrial zoned sites is limited to Latrobe (Wesley Vale), a large vacant site in East Devonport and, subject to an appropriate planning process, any future investment for Simplot and Fonterra in Spreyton.
- Existing industrial lots are tightly held, and the price of industrial land has become more expensive in recent years.
- The availability of vacant industrial land is constrained in some instances by the presence of protected vegetation or other limitations.
- At the current time, both Central Coast and Kentish have effectively little or no available industrial land supply, in contrast to more substantial supply available in Devonport and Latrobe
- Additional supply will be delivered in Latrobe LGA through the Latrobe Structure Plan (10 hectares) and expansion to the Bellfield precinct (13.8 hectares), the potential also exists for additional supply in Maskells Road (up to 14 hectares).

Industrial Land Demand Profile

Future demand for industrial land in the Mersey Leven Region will include a mix of:

- **Local population servicing industry** – such as construction depots, self-storage, local automotive sale and repairs, and miscellaneous warehousing, and some trade supplies, showrooms and bulky goods etc.
- **Industry aligned to local economic specialisations** – such as agriculture (particularly fruit and vegetable production), aquaculture and downstream processing and manufacturing.
- **Regional scale industry** – industrial occupiers who view the LGAs in Mersey Leven Region as a strategic location from which to service Central Northern Tasmania and potentially beyond. These uses could be aligned to a number of sectors including, agriculture, transport and logistics, and infrastructure such as renewable energy.

To accommodate this mix, new industrial subdivisions will need to provide lots in a range of sizes that suit the requirements of a broad range of occupiers. In particular:

- The majority of lots are expected to be in the order of 1,500m² to 3,000m².
- Options for a larger occupier to have a site of 1ha to 5ha (or even larger in some circumstances) with actual size dependent on operational requirements.

Importantly, flexibility will need to be maintained to the maximum extent possible to ensure that land and lot sizes can be market responsive.

A further key consideration is proximity and access to key infrastructure. This includes the Bass Highway, Port of Devonport, Tas Gas Network etc. For some users, access to the B Double freight network or TasRail network is also a relevant consideration.

Industrial Land Supply Provision

Overall, it is prudent if strategic consideration of industrial land supply is equivalent to more than 20-years of anticipated demand across the Mersey Leven Region, with a 30-year pipeline at least identified on a strategic basis. This ensures a sufficient buffer to the minimum 15-year demand threshold and allows for the flexibility to accommodate a large-scale industrial user if, and when, such an opportunity arises.

At present, the Mersey Leven Region falls short of 20-years confirmed supply indicating the opportunity to explore longer-term industrial land supply options.

6.0 Supply Options Assessment

6.1 Assessing Industrial Land Supply Options

Key Objectives

In assessing future industrial land requirements for the Mersey Leven Region, the following objectives have been identified.

1. **Consistency with State and Regional Policy Objectives.** The land supply options must be consistent with the achievement of State and Regional policy objectives as relates to industrial land and economic development and is also balanced against other relevant policy considerations. In particular, the recommendations should complement the *Statewide Industrial Land Study – Draft Strategic Framework for the Cradle Coast Region* recently released to the Mersey Leven Strategic Alliance Councils.
2. **Ensure that Industrial Land Supply is provided of a scale, location and nature which ensures that the availability of industrial land is sufficient to meet current, and future needs, for at least the next 20+ years.** That is, this Industrial Land Study provides the opportunity to deliver a policy framework which means that the lack of industrial land supply is NOT an issue which will undermine appropriate industrial development and employment growth within the Mersey Leven Region for the foreseeable future.
3. **Deliver a framework for industrial land supply which leverages off existing infrastructure and places the Mersey Leven Region “on the map” as an attractive and viable location for major investors.** That is, collectively the Mersey Leven Region has the potential to position itself as a viable choice for major industrial users, including high value activities, which might otherwise locate elsewhere in major cities of Tasmania or mainland Australia.

Methodology

In assessing potential industrial supply options, the following steps are adopted:

1. Candidate sites are identified based on existing strategic policy settings, as well as in discussion with Council officers identifying locations with potential strategic merit for further consideration on the basis of:
 - Potential for urban development may exist based on a high-level review of overlapping constraints and enablers.
 - Have merit to be shortlisted as potential industrial options based on the consultant’s judgement of high-level considerations of the attributes for industrial development, including attractiveness for potential users.
2. A set of shortlisted sites have been evaluated reflecting the following key success factors for industrial precincts:
 - Location and accessibility.
 - Infrastructure and utilities servicing.
 - Heavy vehicle accessibility.
 - Ownership pattern/existing use.
 - Critical mass.
 - Potential to impact sensitive land uses.
 - Exposure to passing trade.
 - Site constraints (as identified on a preliminary basis).
3. A strategic framework for the future of industrial land in the Mersey Leven Region has been prepared to inform future detailed investigations and potential rezonings.

Note that each municipality in the Alliance has individual recommendations in relation to future industrial land development. However, the framework has been prepared on a holistic basis with reference to the industrial land analysis for the Mersey Leven Region provided in previous Chapters of this Industrial Land Study.

It is also noted that although the assessment is only considering industrial land, future detailed site investigations and market demand for investigation areas may identify the potential for some land in other

complementary zones. For example, allowance for some land in a commercial zone where appropriate and justified.

6.2 Future industrial land supply options

Central Coast

Central Coast Council undertook the *Central Coast Industrial Land Analysis* in March 2025 which identifies a long-term framework for the future of industrial land in the municipality.

As identified in the *Central Coast Industrial Land Analysis*, a total of seven candidate sites for potential industrial expansion were identified and assessed.

Maskells Road

Overall, Site 1 (Maskells Road) is identified in the Industrial Land Analysis as the highest and best candidate option for industrial rezoning and subsequent development, subject to more detailed investigations, including environmental aspects.

In particular, the Industrial Land Analysis notes that the Maskells Road land (Page 59):

- Is a natural extension of the existing Ulverstone Industrial Eastern Precinct.
- Has strong accessibility to Bass Highway and exposure to passing traffic
- Is large enough to support a variety of industrial users including large occupiers.
- Is in single ownership (the land is owned by Council)
- Is relatively unconstrained, although noting that an area of the site is covered by the Waterway Protection Area overlay.

Subsequently, Central Coast Council has confirmed that Maskells Road has been identified as a priority rezoning opportunity.

Initial site investigations suggest approximately 14ha of additional industrial land can become available directly adjacent to the existing Ulverstone Eastern Precinct.

Owned by the Central Coast Council, the Maskells Road site represents a logical and efficient extension of the current industrial footprint. Proximity to the Bass Highway ensures excellent freight and transport connectivity, which is vital for industrial operations. The size and location of the Maskells Road site make it suitable for a diverse mix of industrial users, including larger-scale businesses seeking space for manufacturing, logistics, or warehousing.

Other

In addition to Maskells Road, the *Central Coast Industrial Land Analysis* has identified 1 other potential sites that could serve as the next phase of industrial expansion. This is with the intention of providing flexibility and scalability for the region's long-term industrial land needs.

Discussions with Council indicate that at some time in the future when Maskells Road is approaching full development the potential for other candidate sites identified in the Industrial Land Analysis may be re-visited. However, each of the non-preferred precincts identified have identified challenges to accommodating industrial land which may, or may not, be overcome. On this basis, no specific further supply in Central Coast is identified for the purposes of the Mersey Leven Industrial Land Study.

Central Coast Summary

Maskells Road to the east of Ulverstone is the key opportunity for expansion of industrial land in Central Coast.

The potential for additional future industrial land is uncertain, with some potential sites for future investigation identified in the Central Coast Industrial Land Study. These sites, may or may not, be appropriate for future industrial land development and their future availability cannot be relied upon.

As such, over the longer-term industrial land demand generated from within the Central Coast may be met with supply delivered across the wider Mersey Leven Region. This recognises the strong inter-linkages between Central Coast and the balance of the Mersey Leven Region as identified in Chapter 4 of this report.

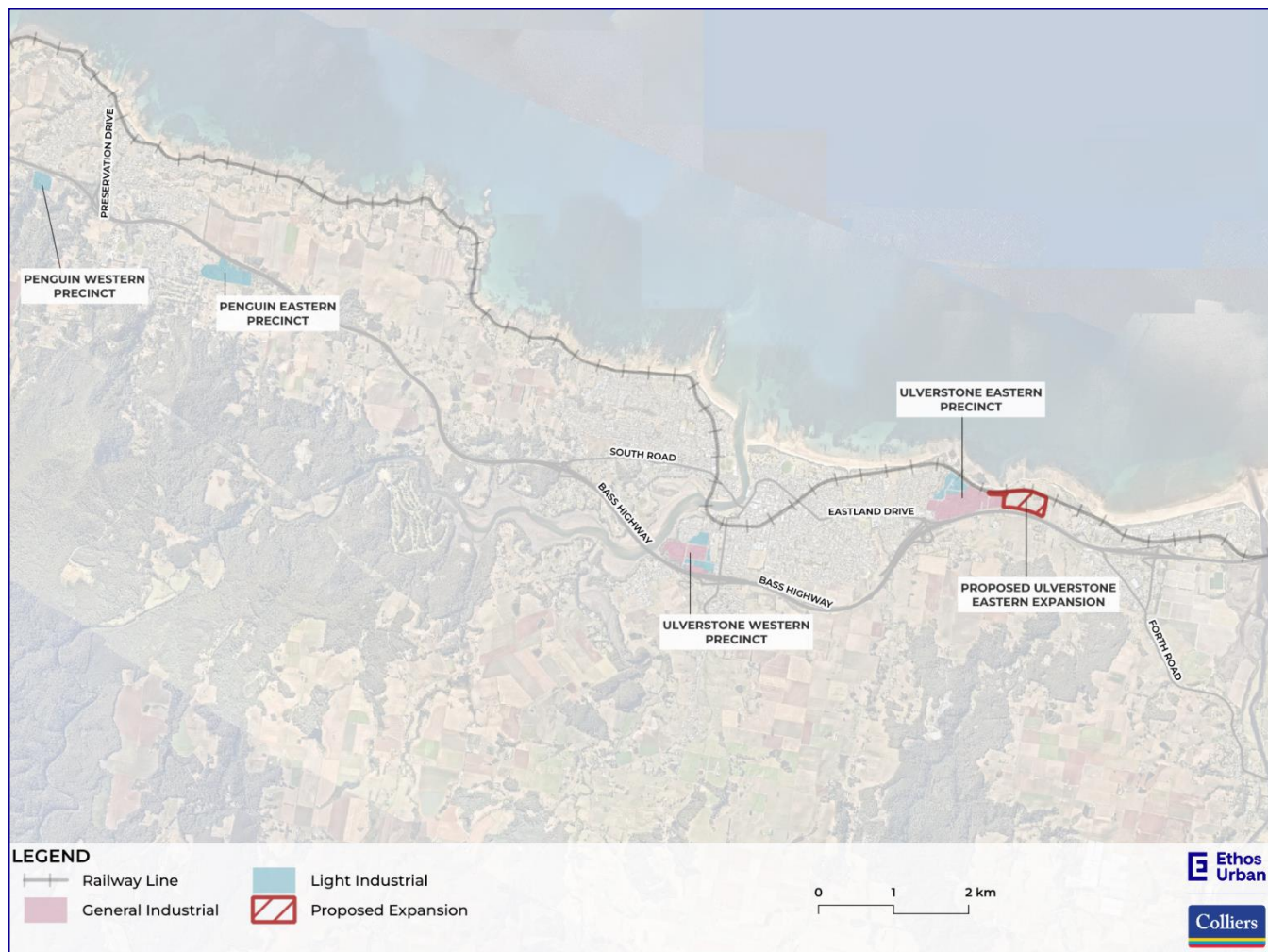


Figure 6.1 Central Coast future industrial expansion site

Source: Ethos Urban, QGIS

Devonport

For Devonport, the future of industrial land development has regard to factors including:

- **Infrastructure.** Opportunities potentially remain unrealised to maximise the leverage from investment in key infrastructure including the Port of Devonport and Devonport Airport, as well as access to rail and heavy vehicle transport networks. No significant capacity for expansion of the existing industrial land at East Devonport has been identified which might otherwise benefit from proximity to Port and Airport facilities.
- **Don Road – Stony Rise.** The Don Road-Stony Rise Precinct is effectively at full capacity and future small and medium scale light industrial activities will need to locate in other parts of Devonport (principally Quoiba-Spreyton) or the wider Mersey Leven Region.
- **Quoiba-Spreyton.** That although the Quoiba-Spreyton Precinct contains vacant industrial land, this includes smaller lots and to a degree fragmented sub-precincts not well suited to large-scale industrial uses. The future of Simplot and Fonterra factories in Quoiba-Spreyton need to be supported, although the ability to accommodate a third major industrial facility in this precinct is not considered likely.
- **Limited Expansion Potential in Quoiba-Spreyton.** No obvious or logical expansion of industrial land has been identified in Quoiba-Spreyton. This provides only limited opportunity for the cohesive expansion of industrial activities over time.
- **Australian Weaving Mill.** The future of the former Australian Weaving Mill as a location for industrial activity is uncertain. Previous proposals to transition this precinct to a residential or mixed-use outcome have been supported in principle by Council. This would remove substantial industrial land supply from Devonport and reduces the ability to accommodate any major industrial investor.

Pardoe East

In the context of the above considerations, the reality is that despite some available industrial land supply in Devonport, this is of a nature that is best suited to small and mid-scale industrial users. These are businesses serving ‘population-based industries’ with customers principally (although not exclusively) in the immediate Mersey-Levern Region, and to a lesser extent the balance of Tasmania.

That is, Devonport has a strategic priority to find the potential for expansion of industrial land which:

- Can accommodate larger scale industrial users
- Can represent an overflow of supply as Quoiba-Spreyton approaches capacity
- Can leverage off major infrastructure including the Port of Devonport, Devonport Airport, Bass Highway, heavy rail networks, heavy truck routes etc.

On this basis, it is appropriate to revisit the ‘Pardoe East Precinct’ as the only substantive option for future industrial expansion in Devonport. This Mersey-Leven Industrial Land Study identifies Pardoe East as a preferred “Investigation Area” for unlocking future industrial development.

This is effectively the same precinct as previously identified in the *Mersey Regional Industrial Area Planning Study* (June 2008) which straddles the boundary between the Devonport and Latrobe Council areas. The previous proposal was backed by both Councils as a strategic location for joint regional development. This is in a manner consistent with the current objectives for the Alliance.

Currently, the Pardoe East precinct contains a mix of agricultural and other land uses. Multiple planning zones also apply including Rural, Environmental Management, Utilities, and Agriculture.

Although much of the precinct is agricultural or vacant, it does contain an existing Costa Group agricultural distribution facility with another distribution facility under-construction. The Pardoe Water Treatment Plant is also located in the north.

Key strategic factors supporting the Pardoe East precinct for investigation of future industrial development include:

- Flat and easily developable
- Proximity to key infrastructure (Port, Airport, Highway, Heavy Vehicle route etc)
- Proximity and accessibility to Mersey Leven regional workforce
- Ability to masterplan a large-scale industrial precinct potentially including a mix of General and Light industrial areas
- Benefits from substantial previous strategic work
- Deliver a cross-Council integrated industrial precinct to the wider benefit of the Mersey Leven Region
- Ability to accommodate large-scale industrial users, noting existing presence of Costa Group logistics facilities in the precinct
- Proximity to reticulated waste water systems including the adjacent Pardoe Water Treatment Plant.

Across the wider Pardoe East precinct is the potential to unlock up to 143 hectares of industrial land, with approximately 47 hectares within the City of Devonport. This is according to the site area identified in the original *Mersey Regional Industrial Area Planning Study* and may be subject to change with more detailed and up-to-date investigations.

It is likely the net available industrial land available in the Devonport component of the precinct is substantially less than 47 hectares – perhaps in the order of 30 hectares although this is a high-level estimate only.

Devonport Summary

The future transition of the former **Australian Weaving Mill** site to a resident or mixed use development outcome will remove approximately 6.5 hectares of industrial land. No significant expansion of existing industrial land is likely in the **Don Road-Stony Rise Precinct** or in **Quoiba/Spreyton**. The future operation of the Simplot and Fonterra factories should be supported and enabled as key employers with deep supply chain linkages in the Mersey Leven economy.

The **Pardoe East** precinct which includes land previously identified in association with Latrobe Council for potential industrial development should be revisited for further investigation. That land within Devonport is well-located relative to key infrastructure and has the potential to be masterplanned as a high-quality industrial estate (subject to more detailed investigation).

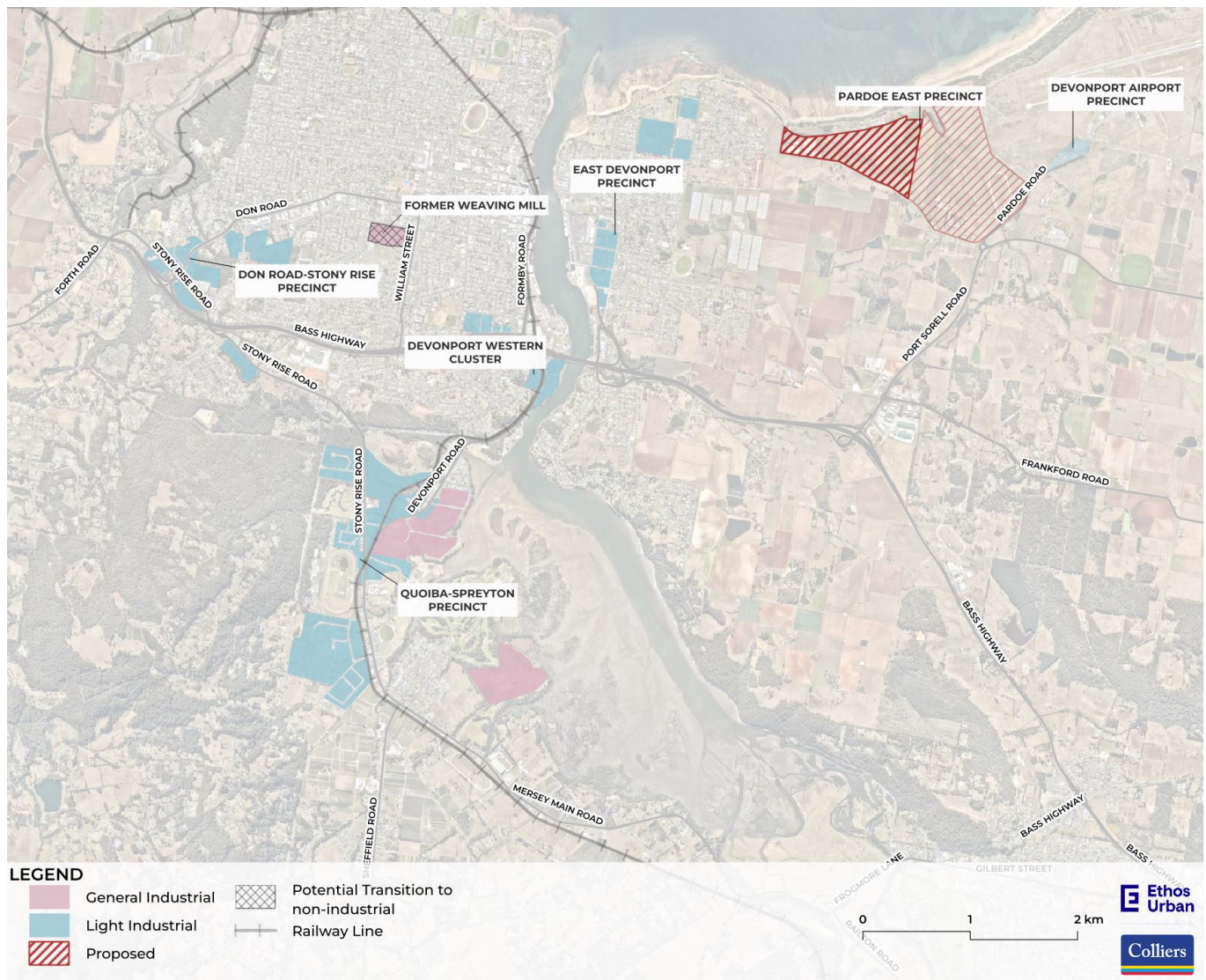


Figure 6.2 *Devonport potential future change in industrial land*

Source: Ethos Urban, QGIS

Latrobe

Latrobe Council is experiencing strong rates of population growth.

A strategic response has been the preparation of Draft Structure Plans for Latrobe and Port Sorell townships which include the identification of potential locations for additional industrial land.

Also relevant for Latrobe is the presence of the former Wesley Vale pulp mill site which is in the General Industrial Zone and has substantial existing infrastructure associated with the former mill.

The ability for Latrobe to also accommodate further industrial land in proximity to the Airport and in the Bellfield-Piping Lane precinct has also been assessed.

Overall, Latrobe has the greatest opportunity of any Council in the Alliance to accommodate substantial new industrial development.

Importantly, this includes the potential to attract major industrial uses which might otherwise locate elsewhere in Tasmania or Australia, thus making a significant contribution to the economic well-being of the wider Mersey Leven Region.

Latrobe

The Latrobe Structure Plan identifies land with the potential to be rezoned to Light Industrial at, and slightly north of the intersection of York Street and Bass Highway. This potential expansion of industrial land as identified under the structure plan will increase the supply by 14.5ha (gross) within this precinct.

In addition, the Structure Plan also identifies some existing vacant and undeveloped industrial land with natural values including threatened vegetation and crucial habitat. This comprises approximately 27 hectares of land which the Structure Plan foreshadows is likely to transition away from the Light Industrial Zone.

In effect, the changes proposed by the draft Latrobe Structure Plan represent a sensible re-positioning of the industrial precinct to better accommodate future industrial land requirements, while being sensitive to environmental constraints. In the future, the Latrobe industrial precinct can be expected to continue to accommodate, and attract, a mix of small and mid-scale industrial uses principally, although not exclusively, meeting localised demand.

Port Sorell

The draft Port Sorell Structure Plan identifies additional land to be rezoned for Light Industrial uses along Alexander Street, immediately south of the existing Port Sorell industrial precinct. This potential rezoning will result in approximately an additional 18ha (gross) of land for industrial uses.

The net developable area for industrial land will be less than 18 hectares due to a number of development constraints which will require an appropriate response when detailed design is undertaken.

The existing Port Sorell precinct is nearing capacity with a few smaller lots available. Future demand for industrial land in Port Sorell can be expected to be primarily a continuation of small-scale industrial activities principally serving the local population. This includes trade supplies and factoryette's.

Piping Lane/ Bellfield

The Piping Lane Business Park, which is zoned for Particular Purpose, is expected to undergo future subdivision that will provide for a more diversified mix of industrial and business activities.

The potential rezoning of approximately 14 hectares of land for industrial use immediately south of the existing Bellfield Industrial Estate provides additional scope to deliver industrial activities in a highly strategic location in proximity to the Bass Highway.

In the future, the potential for some limited 'logical expansion' of industrial land and activities at Piping Lane/Bellfield may be envisaged as a long-term supply response (likely 10+years). However, no specific location or scale of any such expansion is identified in this Industrial land Study.

Any such expansion at Piping Lane/Bellfield would be subject to:

- Future market interest for industrial land in the precinct
- The availability, or otherwise, of adjacent land with regard to other relevant planning considerations.

Wesley Vale

The Wesley Vale Precinct has approximately 20ha of vacant land available for industrial development at the eastern end of the site. This land is strategically located to accommodate larger industrial uses noting:

- The scale of available land
- Existing location in the General Industrial Zone
- The flat and easily developable nature of the site
- The demonstrated market interest in operating larger scale industrial facilities in this location (BioMar)
- Access to heavy vehicle route and proximity to Airport, Port and Bass Highway
- Access to other existing infrastructure associated with the previous use as a mill.

The portion of the Wesley Vale precinct that is currently occupied includes tenants like Costa, Visy and Booth transport, as well as smaller businesses which are still using the former mill infrastructure.

In the future, the redevelopment and more intensive use of this land for a range of mid and larger-scale industrial uses can be anticipated. Access to reticulated wastewater infrastructure would be beneficial to the attractiveness of the site for some potential industrial uses.

Wesley Vale is an important opportunity to create a precinct that accommodates significant business activity and employment opportunities. This can, subject to future investigation, be potentially complemented by industrial development a short distance to the west at Pardoe East and the Mill Road precincts.

Pardoe East

Pardoe East Precinct, as also identified for the City of Devonport, is an opportunity for the long-term supply of industrial land serving the wider Mersey Leven Region. This is in a favourable location relative to key infrastructure.

The portion of the precinct within the Latrobe Council area is approximately 96 hectares out of a total across both Council areas of 143 hectares – recognising net developable area will be lower than this and subject to future detailed investigations.

The Latrobe component of Pardoe East borders the Devonport Airport allowing for complementary development. Likewise, the site is near the existing area of industrial land adjacent to Devonport Airport, as well as the Mill Road investigation area. The potential for reticulated waste water is also available.

Pardoe East provides a relatively unique opportunity for two Councils, Latrobe and Devonport, to deliver an integrated precinct. This will be of a nature and scale that can be a catalyst for substantial investment and economic growth which benefits both Councils, and the community across the wider region.

Mill Road

A further opportunity for potential expansion of industrial land is what has been called the Mill Road Precinct.

This is approximately 85 hectares of land located immediately south-east of the Devonport Airport – although the exact boundary of this area can be determined through future consideration of site suitability.

It is understood that at least part of this land has previously been identified as having low agricultural value, as identified in a previous proposal for an equine facility. The balance of this land also includes non-agricultural uses including a bus depot and a caravan hire operator.

The Mill Road area has also been identified as a location for future investigation of potential industrial activities, recognising the proximity to key infrastructure and potential to complement Wesley Vale, Pardoe East and Bellfield-Piping Lane.

The identification of the Mill Road precinct as an investigation area can help ensure the ongoing delivery of industrial land that is 'investment ready', as and when market conditions allow.

Latrobe Summary

Both **Latrobe** and **Port Sorell** have changes to their industrial land supply foreshadowed in the draft Structure Plans prepared for Council. In both instances, the changes reflect a balance between protecting environmental values while supporting incremental growth in industrial activity over time.

Latrobe Council can accommodate significant growth in industrial activity, including the potential to attract large-scale uses, in proximity to major infrastructure. This includes the expansion and intensification of activity at the **Wesley Vale** former mill site, as well as some incremental growth at Piping Lane/Bellfield.

From a strategic perspective, the investigation of the potential for **Pardoe East** (in association with Devonport City Council) and the **Mill Road** precinct to accommodate future industrial activity is advocated by this Industrial Land Study. Both precincts have, on a first principles basis, merit for consideration of industrial activities in a manner that integrates with complementary infrastructure, and which can be the catalyst for new investment and economic activity which is of benefit to the entire Mersey Leven Region.

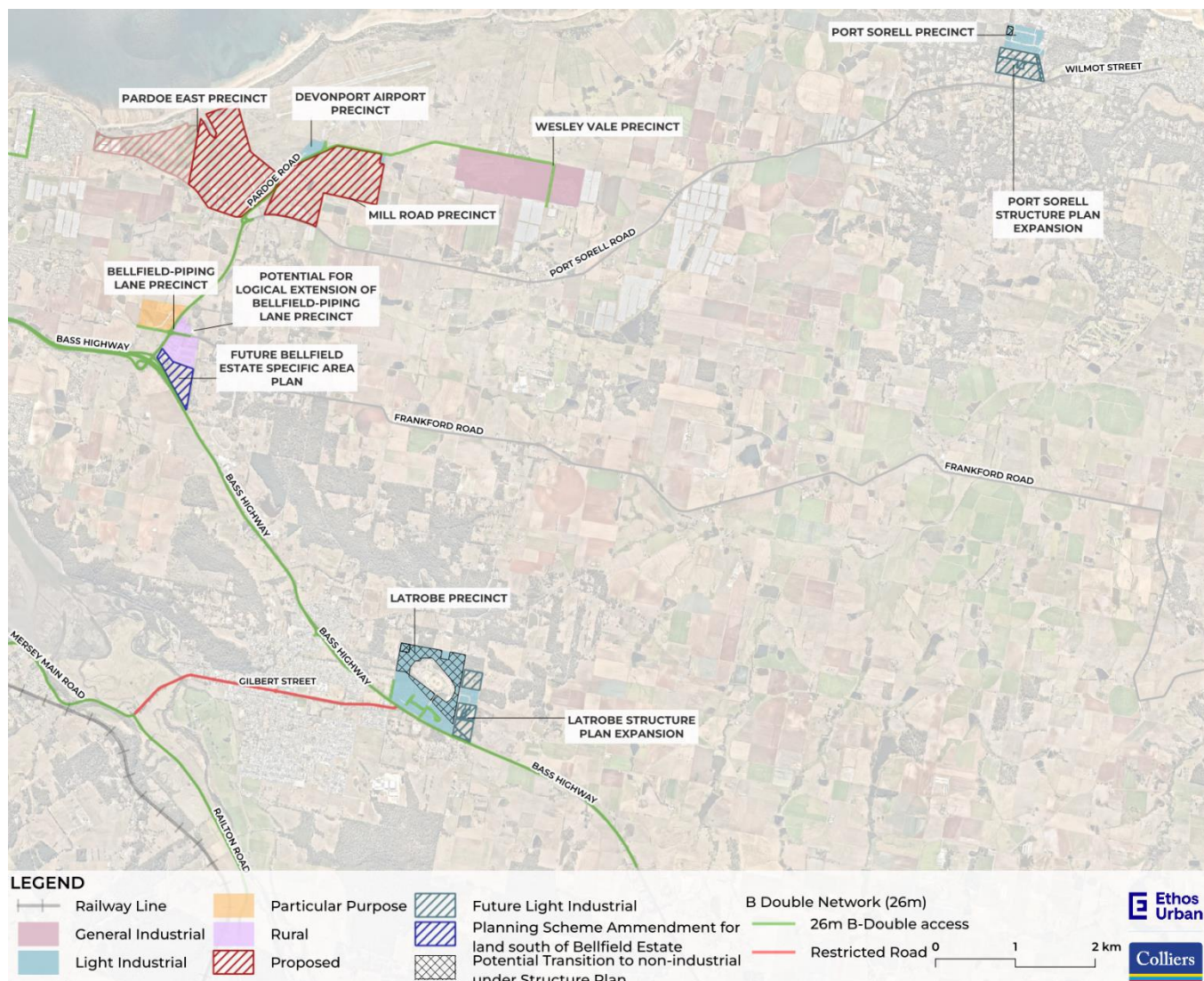


Figure 6.3 Latrobe future industrial expansion site

Source: Ethos Urban, QGIS

Kentish

Industrial land at Kentish is currently at capacity with no supply available for any new occupants in the municipality.

Railton

Any expansion of industrial land in the Railton precinct would be serving the requirements of the Cement Australia facility. No specific site is identified for expansion - as any need, if it arises, would be because of operational needs of Cement Australia which are impossible to predict in advance. However, a potential direction for growth is north of the intersection of Cement Works Road and Railton Road due to proximity to existing infrastructure and accessibility.

An existing strip of industrial land between Latrobe Road and the railway line may in the future have some potential to be sub-divided and used by businesses not directly related to the Cement Australia operations. This would be subject to market demand and relevant planning considerations at that time, although in principle has merit as a means of enabling business growth to the benefit of the Railton community and surrounds.

Sheffield

Within Sheffield a logical and potentially favourable area for expansion of industrial land is immediately to the south-west of the existing industrial land along Claude Road. This adjacent parcel of land on a first principles basis appears suitable for future industrial development as a natural extension of the existing precinct.

Kentish Summary

The potential may exist for changes in industrial land to accommodate the future operational requirements of Cement Australia at **Railton**. Further, the potential for some sub-division and unlocking of industrial land to new businesses on land between Latrobe Road and the railway corridor at Railton is also possible, subject to market demand and relevant planning considerations in the future.

In **Sheffield**, the extension to the south-west of the existing industrial precinct along Claude Road should be investigated as a priority noting the current lack of vacant land to accommodate business growth.

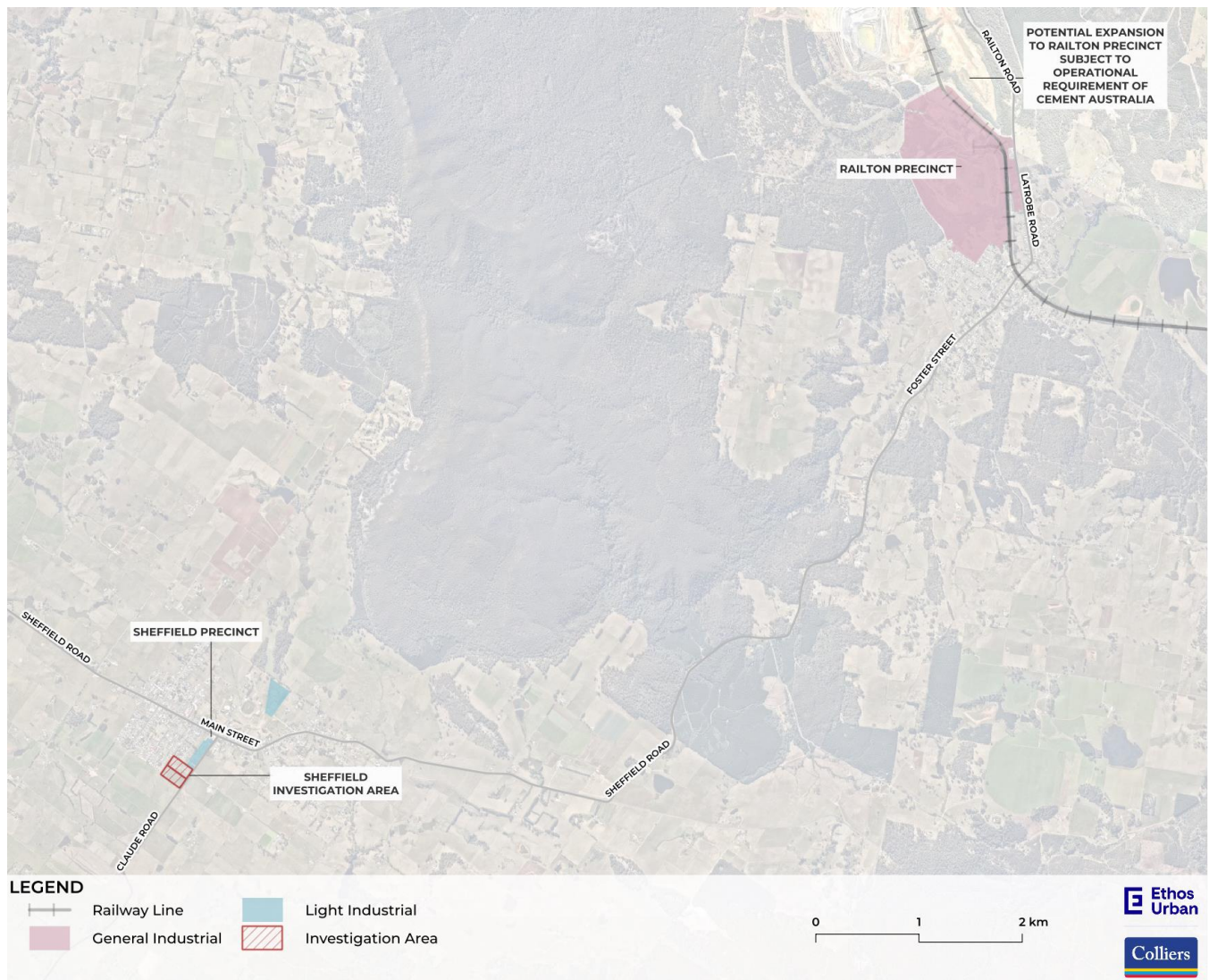


Figure 6.4 Kentish future industrial expansion site

Source: Ethos Urban, QGIS

6.3 Complementary Strategic Growth Factors

The availability of industrial land supply is only part of the equation when it comes to attracting and sustaining industrial investment.

To fully unlock the economic potential of the Mersey Leven Region, it is also essential to maintain and strengthen the key enablers that support industrial activity.

Labour Mobility across the region

A mobile workforce supports the growth of industry by enabling people to live and work across LGA boundaries, making the regional labour market more flexible and resilient.

The Mersey Leven Region benefits from short commuting distances and strong transport links that enable workers to take up jobs across Devonport, Latrobe, Central Coast, and Kentish. This regional labour pool supports

industries that depend on a reliable, locally based workforce, particularly in construction, logistics, manufacturing, and agribusiness.

The Mersey Leven Region has a large and growing workforce of approximately 28,680 employed persons in 2024, of which 28% work in industries which are appropriate for industrial zoned land. Self-containment data in Section 4 of this report highlights that almost 80% of Mersey Leven residents are employed within the Mersey Leven Region.

As the industrial sector expands, continued support for workforce training, skills development, and inter-LGA transport access will be key to ensuring a sustained supply of skilled workers that supports business growth and attracts new industrial uses.

Supply Chain Integration across Industries and Councils

Strong local supply chains allow industrial businesses to source inputs and services efficiently, reducing costs and improving productivity.

The Mersey Leven Region has a well-established industrial base, particularly in agriculture, food production, transport, construction, and logistics. These sectors already work in tandem across LGA boundaries. As new industrial land becomes available, opportunities to grow local supplier networks will increase, especially if planning encourages clustering and complementary land uses. As such, industrial development in one LGA can deliver direct benefits to businesses in other parts of the Mersey Leven Region.

For example, the agriculture sector supporting downstream processing, packing and export activities in the Mersey Leven economy and generates demand for industrial land to accommodate manufacturing and processing facilities.

Connected transport and infrastructure networks

Industrial development benefits from infrastructure that moves goods, services, and people efficiently across the region.

The Mersey Leven Region's infrastructure, including the Bass Highway, B-Double truck network, Devonport Airport, the mainline freight route, the Spirit of Tasmania terminal and the Devonport Port, is inherently a competitive advantage.

These assets support freight and passenger movements across all LGAs in the Mersey Leven Region, to the rest of Tasmania, and to mainland Australia via national freight routes and export channels. Upgrading shared transport links and extending services (e.g., road access, digital connectivity, utilities) into new industrial areas will ensure land is both attractive and functional for prospective investors.

The Mersey Leven Region also benefits from access to natural gas infrastructure and proximity to Tasmania's hydroelectric power generation, providing industries with reliable, low-emission energy options. This is particularly attractive to energy-intensive manufacturers and businesses aligned with clean energy goals. Availability of scalable and sustainable energy further enhances the region's ability to attract advanced industry and larger operators looking for long-term operational certainty.

The Tasmanian Gas Network pipeline runs through the Mersey Leven Region, with a recent connection delivered to Ulverstone and the Simplot factory. This sets a precedent for extending natural gas access to other industrial users in the region, supporting future growth and investment.

A Unified Regional Approach to Governance and Investment

Collaboration between councils reduces duplication, strengthens investment cases, and ensures that industrial land is developed in the right places for regional benefit.

The four councils of the Mersey Leven Region have a history of working together and have formalised this with a memorandum of understanding to work more closely together to form the Mersey Leven Strategic Alliance. By continuing to develop their shared vision for industrial development, they can coordinate land use planning, infrastructure delivery, and workforce strategies.

This unified approach builds trust with investors and provides a level of certainty that is critical for business planning and long-term investment. It shows that the region is proactive, aligned, and capable of delivering the infrastructure and support required for major projects.

Additionally, if a new industrial estate is in one LGA, the benefits will be distributed regionally through jobs, supply chain opportunities, and access to services. Importantly, it also strengthens the region's ability to attract investment by presenting a coherent and collaborative front.

Summary

The Mersey Leven Region is already demonstrating progress in these areas, continued focus and coordination will be critical to realising the next phase of industrial opportunity.

This is made easier with a strategic land use framework which ensures that the availability of appropriate industrial land is not an issue which delays or undermines industrial development and investment.

6.4 Summary of Potential Economic Outcomes

An overview of potential economic outcomes associated with industrial land supply framework identified in this Chapter is provided below. This is necessarily on an indicative basis, although remains useful in providing guidance on the economic benefits to the Mersey Leven Region of enabling the long-term growth of industrial activities at appropriate locations.

State Industrial Land Study

As input to this Mersey Leven Industrial Land Study, the directions of the Draft Statewide Industrial Land Study for the Cradle Coast Region were made available. This is a summary document – which it is emphasised was provided as a draft - dated June 2025.

Important challenges identified in the document include (Page 5):

- **A shortfall of industrial land** in some areas to meet future needs, including both regionally and locally significant industrial areas
- **A mismatch** between available industrial land and lot supply
- **Inadequate infrastructure and servicing** – power and sewerage - of regionally significant industrial areas that inhibit accommodating and attracting business.

In relation to industrial land supply, the summary notes (Page 5):

There are over 20 years of suitable vacant supply to meet demand [across Cradle Coast region], but this does not mean that the right land is in the right locations. Lack of suitable vacant land may limit opportunities for business growth and job creation.

As a response to the identified challenges, the summary identifies the following interventions (Page 6):

- Planning for more industrial land
- Strategically plan for suitable industrial lots in line with the strategic intent of each regionally significant precinct (which includes Devonport Airport), including uses that depend on and thrive in inter-modal settings, proximity to maritime uses, proximity to the (air)port and major transport corridors and/or population centres
- Strategically plan for adequate servicing of regionally significant precincts primarily through proactive engagement with infrastructure providers to prioritise infrastructure upgrades that enable future growth and attract investment.

The above considerations are consistent with, and aligned, to those identified in this Mersey Leven Industrial Land Study.

An Investment Destination – Mersey Leven “Major Enterprise Precinct”

A key objective of this Industrial Land Study is to encourage and facilitate investment of industrial activities in the Mersey Leven Region. This is beyond simply ensuring an adequate supply of industrial land on a ‘business as usual’ basis.

Rather, a role of the Mersey Leven Region Strategic Alliance is to position the region as a focus for new investment and economic activity which otherwise would not occur with business as usual.

A key outcome of this Industrial Land Study is that the focus for substantial new investment in industrial activity of regional significance can be expected to occur in a cluster of existing industrial land, and areas identified for future investigation, in proximity to Devonport Airport (see also Figure 6.3). This includes:

- The existing small industrial area adjacent to Devonport Airport
- The Wesley Vale precinct including the former mill
- The Piping Lane/ Bellfield precinct
- Pardoe East Investigation Area
- Mill Road Investigation Area.

In total, this includes over 330 hectares of land either currently zoned, or with the potential to be, as part of a major cluster of industrial activity.

Importantly, this includes the ability to masterplan and deliver on sites with the potential to accommodate large-scale investment and activities which might otherwise go to other, currently better known, locations elsewhere in Tasmania or on mainland Australia. That is, larger industrial users with the potential to generate 100-plus jobs at a single facility. It is also possible for a precinct such as this to attract high technology uses, including those with sophisticated linkages to the agricultural industry (Bio Mar and Botanical Resources Australia are existing examples of these opportunities).

To place the Mersey Leven Region **‘on the map’** as a valid option for major industrial investment, the potential exists to identify this broader area of Devonport and Latrobe Council's as a ‘Major Enterprise Area’ or similar.

This would not have any statutory effect, rather reflect the reality that in combination these precincts mean that the Mersey Leven Region is open for business as a potential location for significant and sophisticated industrial development.

Importantly, this is also to the benefit of Central Coast and Kentish Council areas for who would provide a significant portion of the workforce generated from any such investment. Both LGAs will also have existing and potential future businesses who benefit from supply chain opportunities.

Leverage Infrastructure

The proposed framework for industrial development has specific consideration of existing and proposed infrastructure. This includes:

- Proximity and access to the Bass Highway
- The presence and opportunities provided by Devonport Airport and Port of Devonport
- Access to existing Heavy Vehicle routes
- Relationship to existing urban form
- Access to the regional workforce
- Access, and potential access, to key utilities infrastructure including power, gas and reticulated waste water.

Jobs and Investment

The exact nature of jobs and investment unlocked by the pro-active approach to identifying and facilitating future industrial development in the Mersey Leven Region is impossible to identify in advance.

However, it is a reasonable estimate that over 200 net developable hectares of additional industrial land can readily be delivered with the framework identified in Section 6.2 of this report. This area of industrial activity is, if well occupied, able to accommodate in the order of **4,000-plus direct additional jobs** in the Mersey Leven Region. These jobs can deliver a major boost to a wide range of economic and community outcomes for all.

That employment benefit does not consider the flow-on supply chain opportunities for other businesses in the Mersey-Leven region ranging from utilities providers, through to farms and trades businesses.

Benefits will also accrue to the wider Tasmanian economy by the Mersey Leven Region delivering a supply of industrial land well-matched to a wide range of technical or large-scale users which might otherwise locate in mainland Australia – and even overseas.