

City of Greater Geelong

INDUSTRIAL LAND SUPPLY REVIEW

2025



Instructions	
Instructing Party	City of Greater Geelong
Purpose	Industrial Land Supply Review
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Executive Summary - The Greater Geelong Industrial Land Supply Review 2025

Purpose

- An industrial land supply review is an assessment of all current and future land designated for industrial uses.
- The *Greater Geelong Industrial Land Supply 2025* review informs Greater Geelong City Council, businesses, landholders and the wider community on the location and form of existing and future industrial uses and land supply.
- The review investigates industrial land, land use, and the importance of the industrial sector within the Greater Geelong economy.
- The review identifies the gross amount of occupied industrial land, and the gross amount of vacant/ available land for future industrial development.

Key Findings – The City's Industrial Sector is Growing

- Greater Geelong's (the City) industrial sector is growing in jobs, floor space and economic output.
- Despite significant disruption and structural adjustment since 2010, the City retains nationally significant energy and manufacturing sectors.
- At 2021, the City's industrial sector accounts for 50% of the City's economic output.
- In the post-COVID/post 2020 period, the City's industrial footprint has been expanding by over 21 hectares per annum.
- Into the future, a confluence of favourable industrial supply and demand factors will grow the City's industrial sector. This includes a growing population, unique road, rail, sea and air capability, proximity to Melbourne's western growth corridor, established industry and a growing workforce.
- The City is currently subject to a significant pipeline of approved and mooted industrial proposals valued at over \$3 billion.

The City Requires New Industrial Land Supply

- At 2025, the City lacks zoned, unencumbered, serviced industrial land supply.
- 2025 Industrial land supply conditions are as follows:
 - The City's south lacks industrial land supply to service the needs of a growing population. At 2025, the City's southern industrial precincts are fully occupied.
 - The City's north incorporates 90% of the City's vacant industrial land supply. This includes the Geelong Ring Road Employment Precinct (GRREP) in which 70% of the City's vacant industrial land supply is subject to minimum lot size requirements that require large and medium lot development.
 - The GRREP is the only significant source of greenfield industrial land supply in the City. The City's remaining industrial land supply is largely comprised of fragmented infill lots.
- By 2027, the City will have less than ten years of theoretical industrial land supply. Much of this supply, however, will be subject to subdivision controls that preference large lots. Due to this the City's capacity to accommodate the industrial needs of small and medium sized firms is currently impeded.
- Without the addition of new greenfield industrial supply, the City:
 - will be unable to sustain its post 2020 industrial expansion
 - is constrained in its ability to facilitate the floor space needed to grow economic activity in response to the City's growing population in the City's south.
 - is constrained in its ability to leverage the City's unique air, sea, road and rail connectivity for wider economic benefit.

It follows that the City requires:

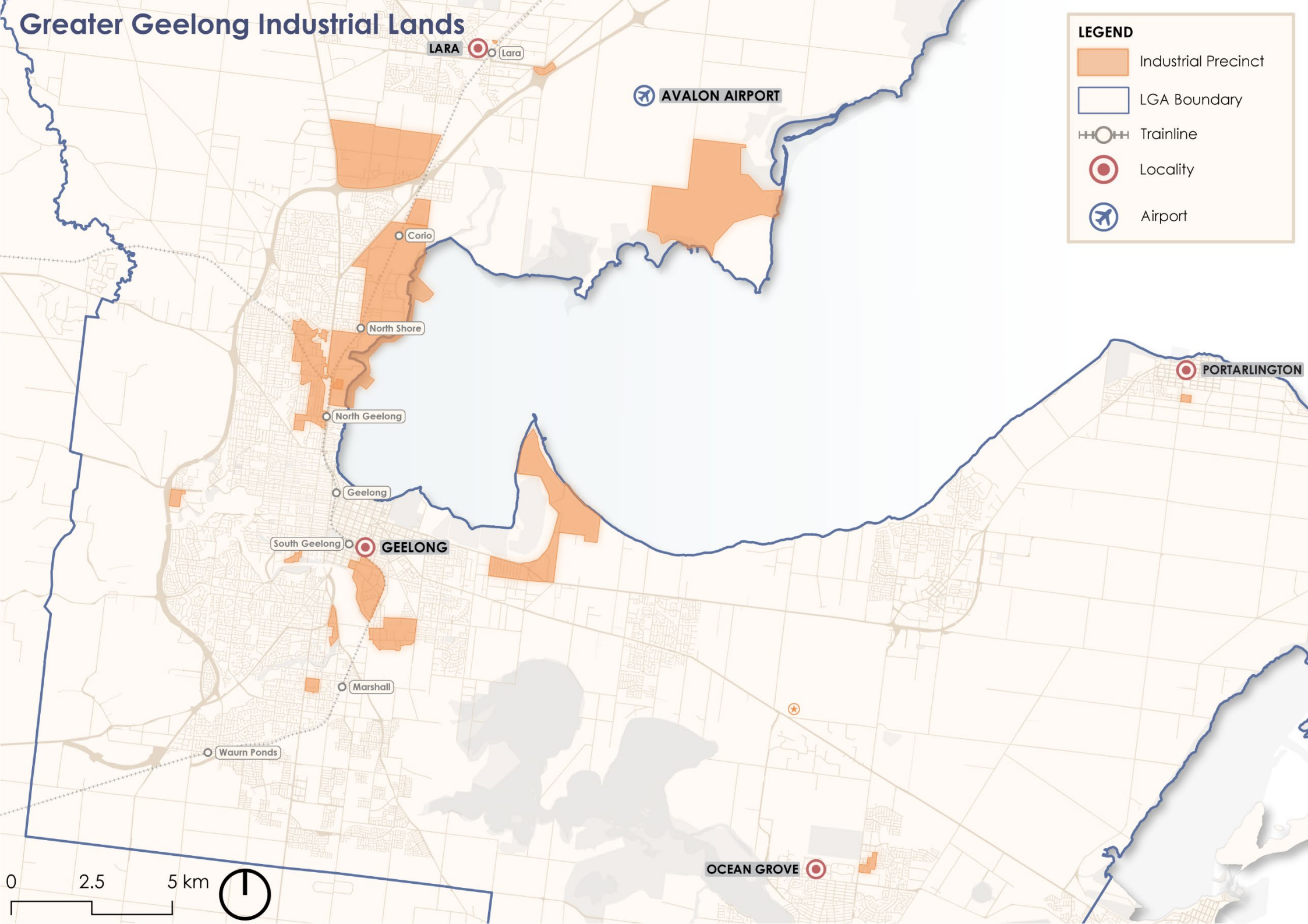
- (a) new unencumbered serviced greenfield industrial land that can accommodate the needs of a broad spectrum of traditional and non-traditional industrial sectors including small and medium sized operations.
- (b) greenfield land supply in the City's southern region – 90% of the City's industrial land supply is located in the north of the municipality. Industrial areas in the City's south are fully occupied and lack expansion options to accommodate the industrial needs of the City's growing population in the City's south.

Future Employment Precincts will Boost the City's Industrial Land Supply and Expand Industrial Land Options

- The delivery of the South West Geelong Investigation Area, NEIP, Lara Business Park and Greater Avalon Employment Precinct will resolve the City's industrial supply constraints.
- In combination, new precincts have the capacity to provide over 1,300 hectares of gross employment land.
- The timing and deliverability of new employment precincts requires further statutory and infrastructure confirmation.

Recommendation

- The City requires a new updated Industrial Land Strategy to guide the next phase of the City's industrial evolution. The Strategy should include a focus on clarifying the timing, delivery challenge and role of future precincts, options for landholders to participate in a logical inclusions process and further policy guidance on future industrial needs and uses.



GEELONG'S INDUSTRIAL LANDSCAPE



01

1.0 Industrial Land State of Play

The City of Geelong retains a significant and growing industrial economy. Manufacturing, energy, construction and logistics industrial sectors underpin the City's economy, accounting for near on 50% (\$23.3B) of the municipality's overall economic output at 2024 (REMPAN).

Economic output attributable to the City's industrial sector continues to grow increasing by almost \$8 billion since 2017. Manufacturing is still Geelong's largest economic sector by output. Manufacturing contributed \$9.4 billion to the City's economic output in 2024 (REMPAN).

At 2025, the City's industrial precincts encompass both traditional industrial industries and a growing and diverse range of non-traditional population focused, leisure, food and hospitality sectors which together form a core source of employment, income and economic activity for the City's community.

In an age of uncertainty in which global ties and supply chains are increasingly volatile, the City's industrial areas are a source of local economic resilience and economic capacity. Geelong's rich industrial history positions the City to help Victoria and the nation navigate ongoing economic structural change.

Figure 1: Aerial View of North Shore



Source: State Library of Victoria

Figure 2: Geelong Port Today



Source: City of Greater Geelong

1.1 Greater Geelong Industrial Overview

The City's industrial areas are a critical source of employment and economic activity as detailed as follows.

1.1.1 Industrial Employment

Industrial areas support 25% of all employment across the City comprising an estimated 32,000 jobs at 2021. Employment in industrial areas is growing. Since 2016, the City's industrial areas added an estimated 5,530 jobs at average of 690 additional jobs per annum.

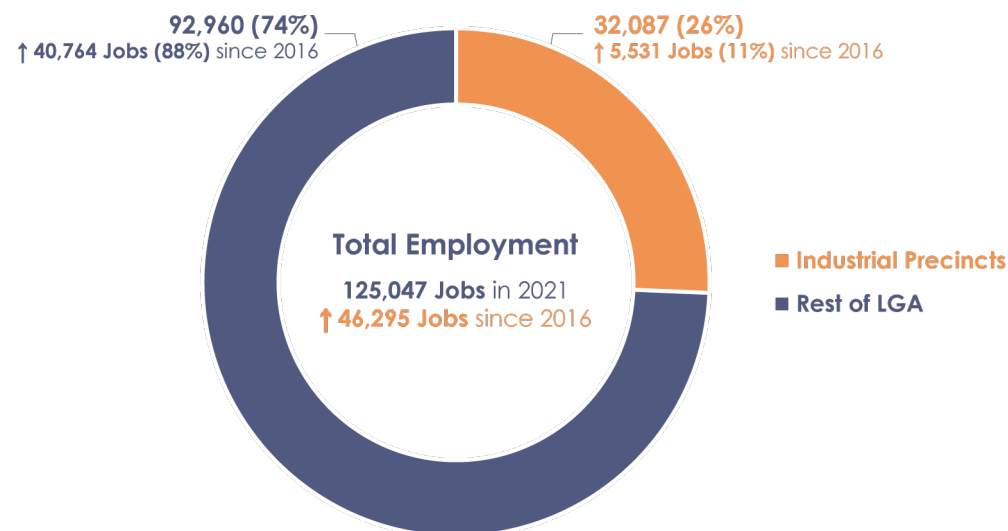
The closure of Ford Geelong in 2016 resulted in the loss of 600 manufacturing jobs and the loss of jobs in a range of ancillary industries. Notwithstanding industry closure and disruption, manufacturing still leads the City's economic output (\$9.35B of \$47.2B) and still comprises a significant share of local employment, comprising 8,000~ jobs at 2021. Consistent with global trends in advanced economies, manufacturing output has increased at the same time as the quantity of labour needed to produce goods has declined.

The City is home to new advanced manufacturers including industry leading automotive innovator Carbon Revolution, wind farm fabricators at Vestas Renewable Energy Hub and defence industries at Avalon. The City is also home to a number of major food and fibre processors, numerous construction enterprises, a major fabrication and engineering sector as well as nationally significant energy capability.

Since 2016, annual average job growth (2.4% AAGR) within the City's industrial areas has been slightly lower than employment growth throughout the City (2.7% AAGR), yet greater than the broader Victorian economy (1.9% AAGR).

Figure 3: Total Employment and Job Growth (LGA) 2016-2021

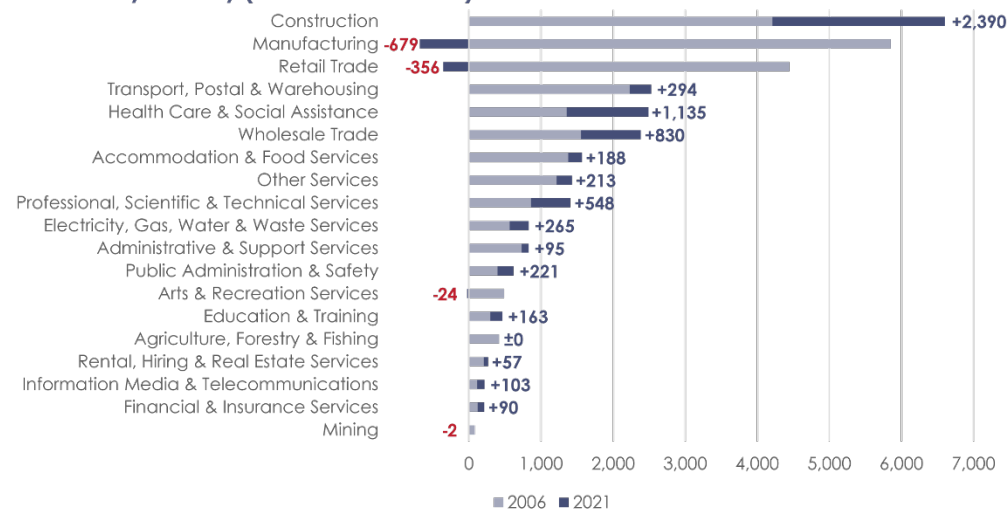
Total Employment and Job Growth 2016 - 2021



Source: ABS, REMPLAN, Charter Keck Cramer

Figure 4: Workers by Industry (Industrial Precincts) 2006 - 2021

Workers by Industry (Industrial Precincts) 2006 - 2021



Source: ABS, REMPLAN, Charter Keck Cramer

Population Growth and the Industrial Sector

The City of Greater Geelong (The City) is one of Australia's largest regional cities. Since 2001 the City has welcomed over 90,000 new residents.

The City's growing population has seen housing approvals grow from 2,460 dwellings in 2014 to 3,370 in 2024, fuelling the expansion of the City's construction sector. Construction is now the City's second largest sector by output and employment. Construction output has undergone a fivefold increase since 2010, growing by \$6.7 billion to total \$8.4 billion at 2024. Construction, likewise, represents the city's second largest sector by employment (behind health care).

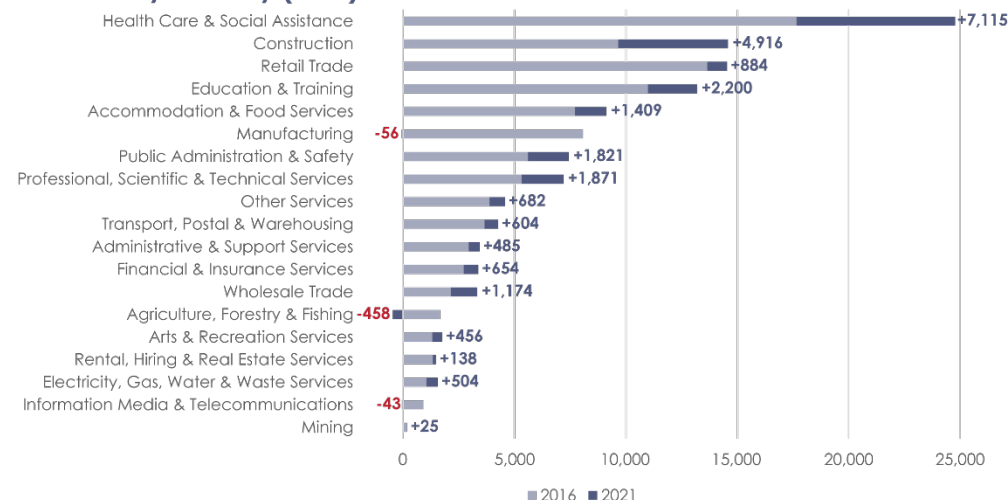
Many of the City's construction jobs and firms are located in industrial areas. Industrial locations support construction activity through the provision and sale of construction supplies, bespoke fabrication, construction staging and by servicing the storage needs of infrastructure operations, land development and building construction trades.

Energy, logistics and wholesale trade employment is also growing. These jobs are essential in helping growing local and regional communities enjoy predictable access to water, energy, food, merchandise and household consumables.

Jobs in industrial areas are changing. The rise of services as a dominant element of the Victorian and the City's economy coincides with industrial planning reforms of the early 2010s that permitted an expansion of consumer-focused uses in industrial locations. Across Victoria, gyms, play centres, entertainment, bespoke food and leisure venues have become a growing component of industrial industries. This change is reflected in the growth of health, government, service and retail jobs in leading consumer-focused industrial areas such as West Fyans and Pivot City. Service jobs now comprise 44% of all employment in industrial locations.

Figure 5: Workers by Industry (LGA) 2016 - 2021

Workers by Industry (LGA) 2016 - 2021



Source: ABS, REMPLAN, Charter Keck Cramer

CASE STUDY

Regional Renewal: Pivot City Innovation District North Geelong

Pivot City Innovation District at Mackey Street North Geelong is an award-winning renewal precinct comprising 11 hectares of former industrial land.

The site re-invents the heritage listed Federal Mills (1951) wool milling manufacturing facility and nearby glass factory (1934). The renewed facilities and surrounding warehousing support 50,000sqm of workspace occupied by more than 60 enterprises including private, social and government enterprises (Ports Victoria, Wathaurong Aboriginal Co-Operative, SMEC Global, ABN Group, Sanitex, Environment Protection Agency Victoria and Symal).

At 2024, the facility supported approximately 1,000 staff at a relatively high employment density of approximately 90 jobs per hectare which is at the upper end of job densities generally observed in renewal locations. The site also incorporates extensive garden areas, comprising 4,000 sqms of space and a range of hospitality areas including iconic niche food and beverage businesses that function as dining destinations and visitor attractors. At 2024, there are plans to continue to expand the site's provision of commercial floor space including the development of hotel accommodation.

In the context of Greater Geelong, Pivot City demonstrates:

- proven demand for refurbished industrial spaces
- the renewal of heritage industrial form to support professional service and hospitality uses
- the transformation of largely discordant and abandoned facilities into new visitor destinations.

Figure 6: Pivot Innovation District North Geelong



Source: Hamilton Group

1.1.2 Industrial industry and Output Growth

According to Australian Business Register data, at 2025, there were approximately 1,830 registered businesses within the City's industrial areas.

According to business registration information:

- Construction, manufacturing and automotive uses (Other Services) comprise the most prevalent businesses in the City's industrial areas.
- Service, retail, property and professional service enterprises make up 51% of businesses in industrial areas.

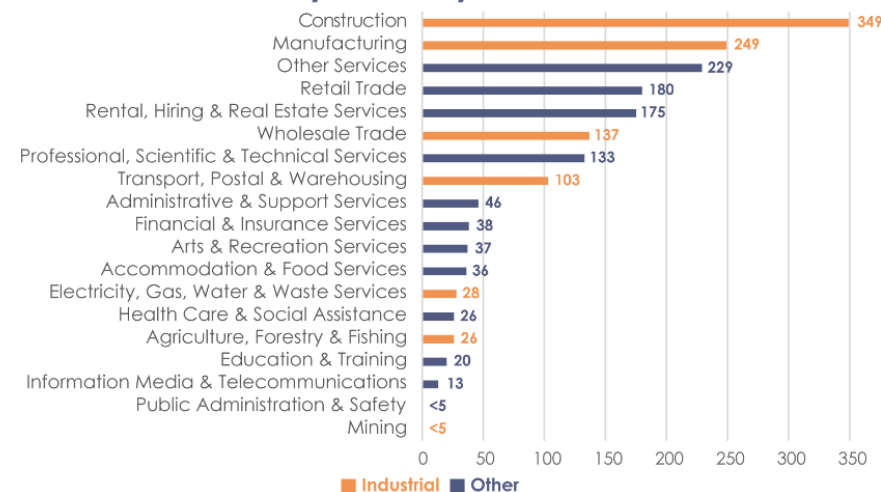
The growth of the service sector has helped renew aged and abandoned industrial built form as is evident in the renewal of aged facilities in Pivot City and West Fyans.

Economic output data provides the following insights:

- Declining manufacturing employment has not diminished manufacturing's economic output. Manufacturing leads the city's economic output and worker productivity which equates to approximately \$1million in output per manufacturing worker. Continuing to support and nurture manufacturing activity in the City is fundamental to the City's economic health.
- Construction businesses are now the most prevalent form of business in the City's industrial areas. Over the past decade, construction employment, output and the overall economic contribution of construction to the City's economy has undergone sustained growth – construction output since 2010 has grown at a rate of \$480 million per annum to now represent 17.8% of the City's total economic output. Per worker, construction output represents a highly productivity part of the city's economy.
- Across all sectors economic output in industrial areas is growing per worker and per hectare. Over the 2016 to 2021 period, economic output per industrial hectare grew by near on \$500,000 to \$1.49M.

Figure 7: Business Count by Industry 2025

Business Count by Industry 2025



Source: ABR, Charter Keck Cramer

Figure 8: Economic Output per Worker by Industry 2016 – 2021*

Economic Output per Worker by Industry



Source: ABS, REMPLAN, Charter Keck Cramer

* Based on 2024 Economic Output data

1.1.3 Industrial Expansion

Since 2019, the City has averaged \$125 million in industrial building approvals per annum. 2023, was a peak year in which industrial development approvals exceeded \$230 million. Industrial building approvals affirm the steady expansion of the City's industrial footprint.

On a per capita basis, the City attracts higher shares of industrial investment per person than Victoria's other regional cities.

New industrial development combines office, service and production space. Contemporary industrial facilities include sustainable water, waste and energy infrastructure and landscaping.

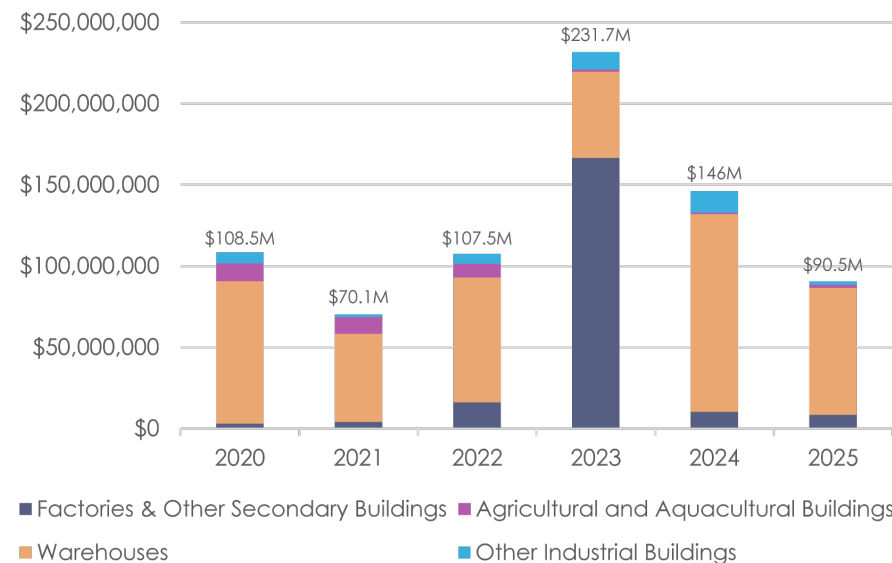
Figure 10: Example of 2025 Industrial Development at 128-146 O'Brien's Road, Corio



Source: WILMAC

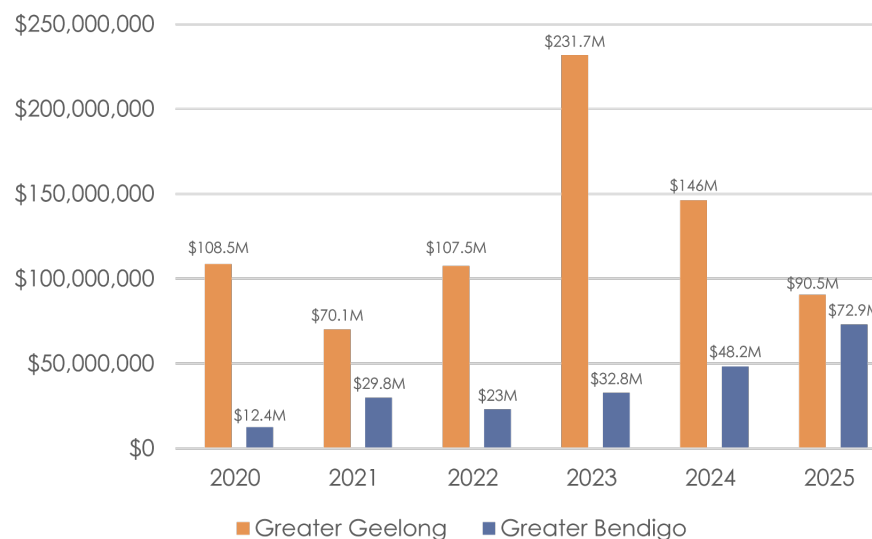
Figure 9: Industrial Building Approvals by Value & Total Value FY2020 – FY2025

Industrial Building Approvals by Value (\$), Greater Geelong FY2020 - FY2025*



*FY2025 is limited to April 2025 due to availability of data

Total Value of Industrial Building Approvals FY2020 - FY2025*



*FY2025 is limited to April 2025 due to availability of data

Source: ABS, CKC

1.1.4 Industrial Land Across Greater Geelong

The industrial economy and its businesses operate on land zoned for industrial purposes. This is land within the Industrial 1, 2 and 3 Zones and the Commercial 2 Zone.

The City incorporates 2,915 hectares of industrial land. This includes over 1,600 hectares in the Industrial 2 Zone, primarily in the City's north. It follows that the City's northern industrial precincts are home to heavy industry (refineries, major manufacturing, large format logistics uses). The City's south is primarily comprised of land in the Industrial 1 Zone (IN1Z) which provides for a wide range of lower impact uses.

Table 1: Hectares by Zoning (LGA)

Zoning	Area (ha)
C2Z	183.5
IN1Z	1,026.5
IN2Z	1,680.2
IN3Z	25.3
Total	2,915.5

The vast majority (90%) of industrial lots are below 5,000 sqm. These 4,900 lots, however, comprise only a small proportion of the city's industrial footprint (just over 15% of industrial land). Conversely, the city's 372 lots 1-hectare or greater in size comprise near on 80% of the city's industrial footprint.

Table 2: Number of Lots and Area by Lot Size Ranges (LGA)

Lot Size	Number of Lots	% of Lots	Area (ha)	% of Area
Small (0-0.5 ha)	4,896	89.4%	445.0	15.3%
Medium (0.5-1.0 ha)	197	3.6%	137.3	4.7%
Large (1.0-5.0 ha)	298	5.4%	650.2	22.3%
Very Large (≥5.0 ha)	85	1.6%	1,683.0	57.7%
Total	5,476		2,915.5	

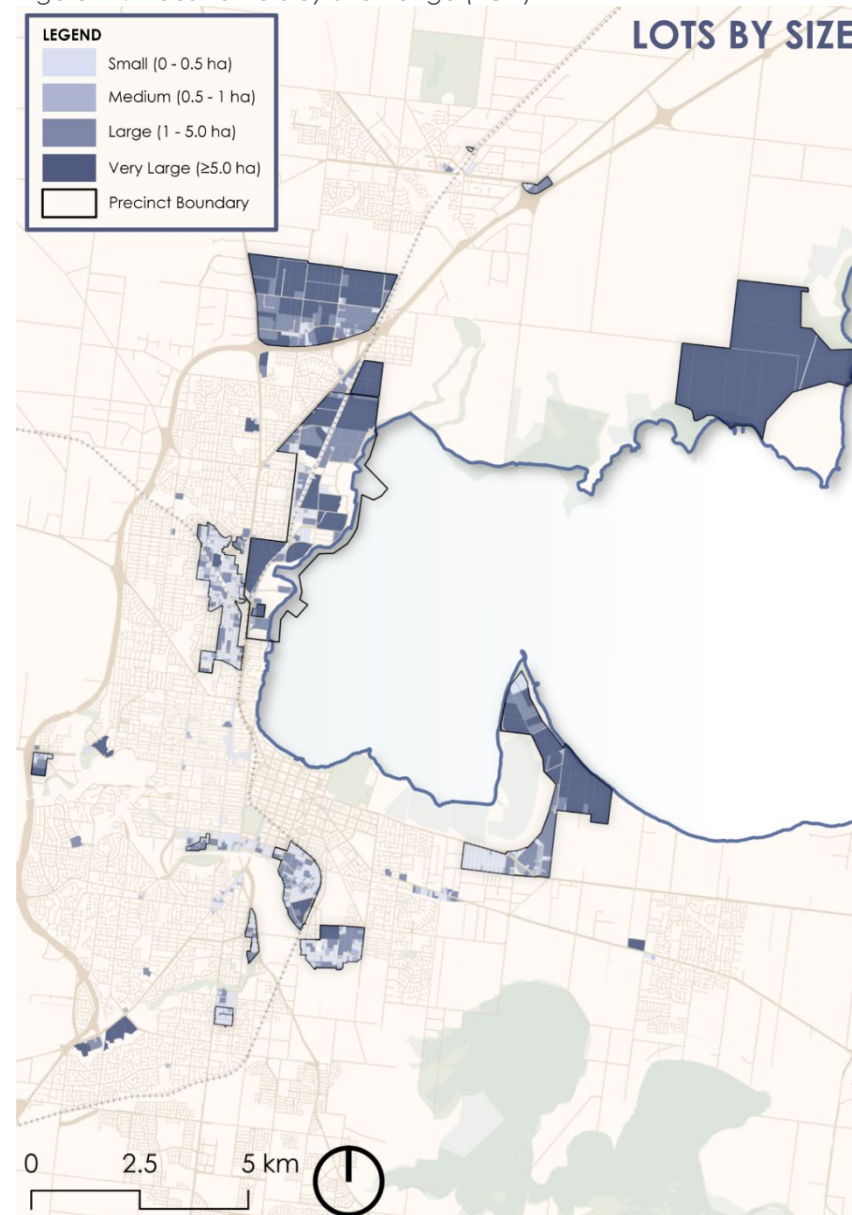
The table below profiles the size composition of lots under 5,000 sqms. As can be seen, near on two thirds of the city's industrial lots are under 1,000 sqms.

Table 3: Number of Lots and Area by Small Lot Size Ranges (LGA)

Lot Size	Number of Lots	% of Lots	Area (ha)	% of Area
0-500 sqm	2,009	36.7%	44.9	1.5%
500-1,000 sqm	1,571	28.7%	109.6	3.8%
1,000-2,500 sqm	884	16.1%	135.4	4.6%
2,500-5,000 sqm	432	7.9%	155.2	5.3%
Sub-Total	4,896	89.4%	445.0	15.3%

Source: CKC

Figure 11: Industrial Lots by Size Range (LGA)

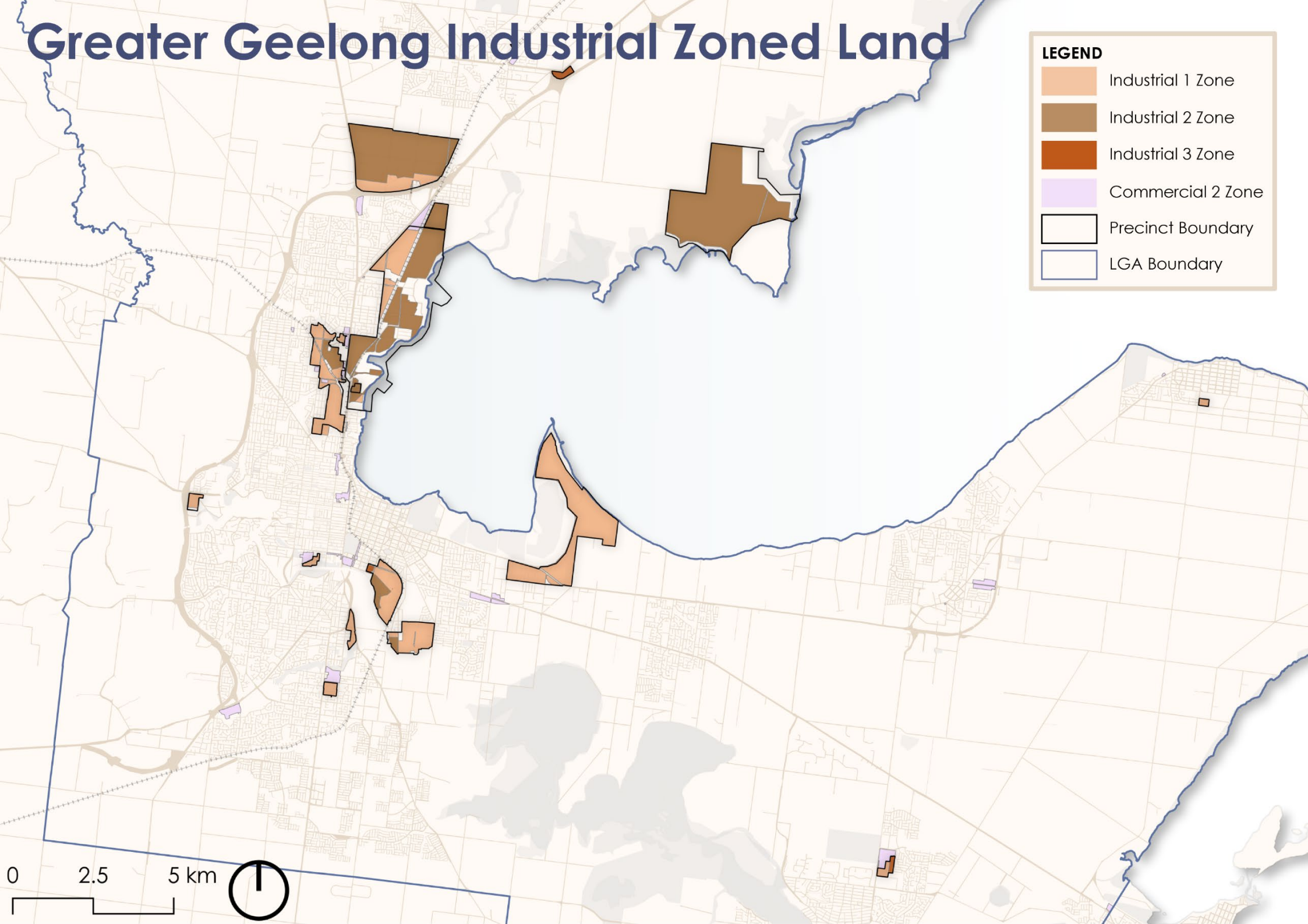


Source: CKC

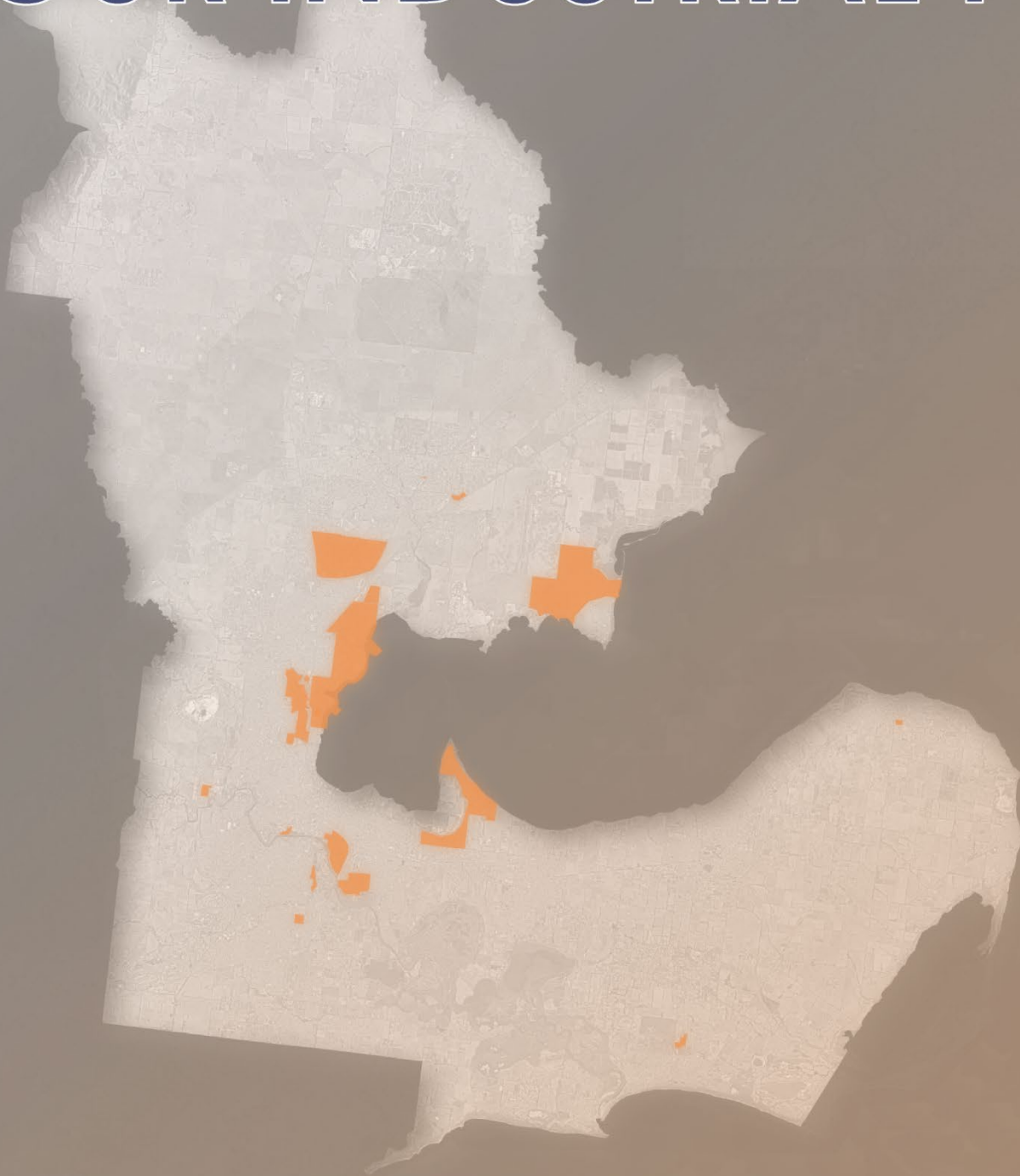
Greater Geelong Industrial Zoned Land

LEGEND

- Industrial 1 Zone
- Industrial 2 Zone
- Industrial 3 Zone
- Commercial 2 Zone
- Precinct Boundary
- LGA Boundary



OUR INDUSTRIAL PRECINCTS



02

2.0 Geelong's Industrial Precincts

The physical and economic attributes and land use emphasis of the City's industrial precincts differs by location.

Across the City, there are a total of 15 industrial areas. In reviewing the economic role and physical attributes of these locations, Charter has clustered the City's industrial areas into four primary industrial precincts as follows:

- Geelong Port
- Geelong Ring Road Employment Precinct (GRREP)
- North Geelong
- Southern Industrial Precincts*

Collectively, the City's primary industrial precincts account for the majority of industrial jobs, job growth and economic output – **at 2021, the City's four primary industrial precincts comprised 95% of industrial employment, produced 97% of industrial employment growth since 2016 and accounted for 97% of industrial output at 2024.**

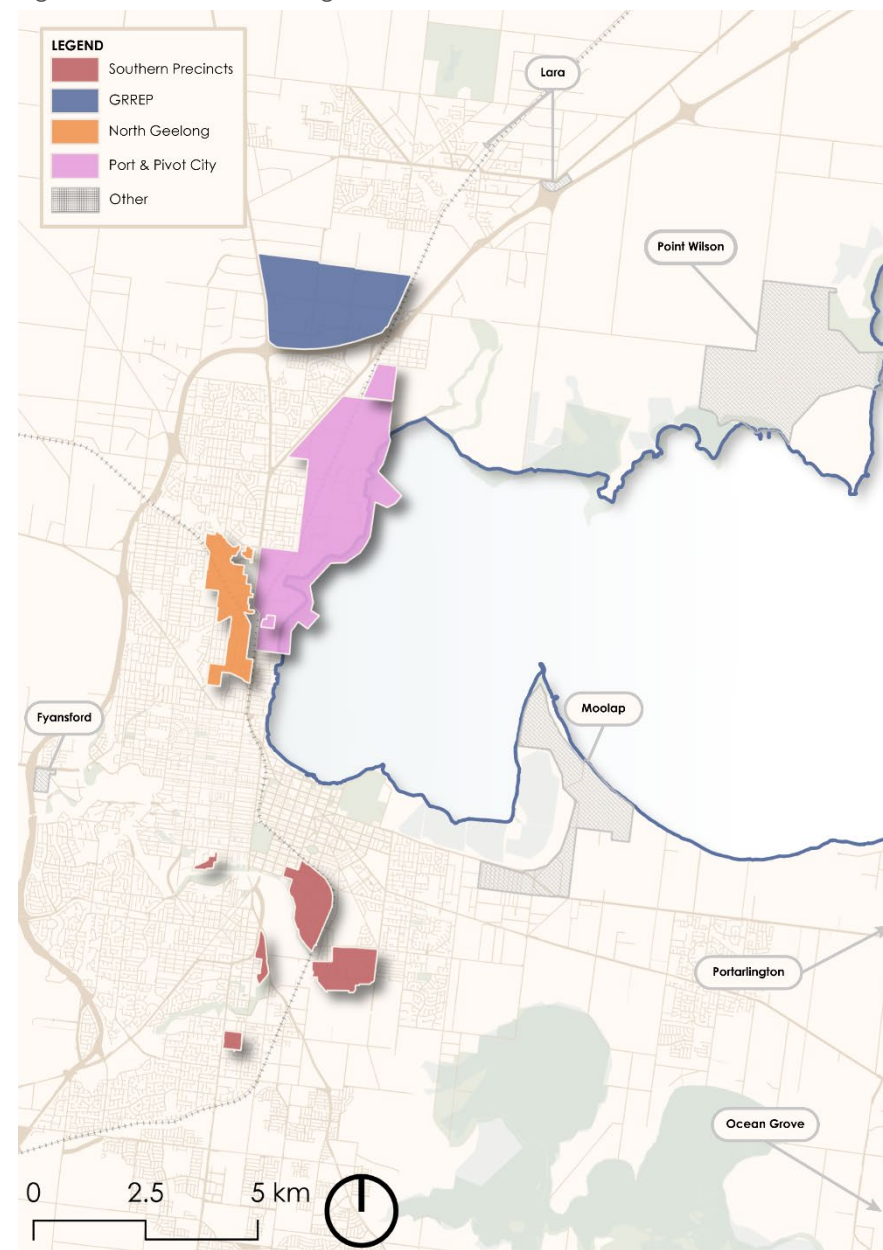
Table 4: Jobs, Economic Output & Job Density by Industrial Precinct 2016 - 2021

Precinct	Workers	Change	Output (\$B)	Change	Jobs per ha	Change
Southern Precincts	14,450	+2,522	\$6.1B	+\$3B	14	+4.3
GRREP	2,920	+1,272	\$1.9B	+\$1.2B	1.2	+0.54
North Geelong	8,270	+891	\$3.5B	+\$1.5B	19.2	+2.1
Port	4,980	+656	\$3.7B	+\$320.8M	5.9	+0.83
Other	1,460	+190	\$878.4M	+\$265.3M	0.24	+0.03
Total	32,080	+5,531	\$16.3B	+\$5.5B	3.0	+0.5

Source: ABS, CKC, REMPLAN

*The Southern Industrial Precincts comprises industrial land in Belmont, Breakwater, Newtown, Grovedale and South Geelong. These industrial areas have been clustered into a single precinct based on their collective proximity, similar enterprise composition and economic similarity.

Figure 13: Greater Geelong Industrial Precincts



The City's primary industrial precincts (the Southern Precinct, Northern Precinct, GRREP and Port) industrial precincts are pivotal to the City's economy, economic development and employment growth.

Each of the primary industrial precincts are growing in investment and employment led by the Southern Industrial Precinct and the GRREP. The Southern Industrial Precinct is the City's leading industrial employment area by employment and economic output (over 14,000 + jobs and \$6.1 billion in output). There is, however, limited land in the City's southern industrial areas to sustain further expansion. The GRREP is also growing and is the main and almost exclusive focus of the City's recent industrial development and expansion.

The City's primary industrial precincts occupy 50% of the City's industrial land. Point Wilson (797 hectares) and Moolap (404 hectares), account for a further 40% of zoned land. Each of these areas, however, support relatively low density and intensity industrial uses. There are also industrial areas in Fyansford, Lara, Moolap, Ocean Grove, Point Wilson and Portarlington.

Table 5: Area (hectares) by Zoning and Industrial Precinct

Precinct	IN1Z	IN2Z	IN3Z	C2Z	Total (ha)
Southern Precincts	221.3	35.7	3.7	0	260.7
GRREP	103.4	442.0	0	0	545.4
North Geelong	149.7	32.2	0	0	181.9
Port*	114	373.7	0	7.0	494.8
Other	437.9	796.6	21.6	176.5	1,432.6
Grand Total	1,026.4	1,680.2	25.3	183.5	2,915.5

*Includes land in Pivot City

Source: CKC

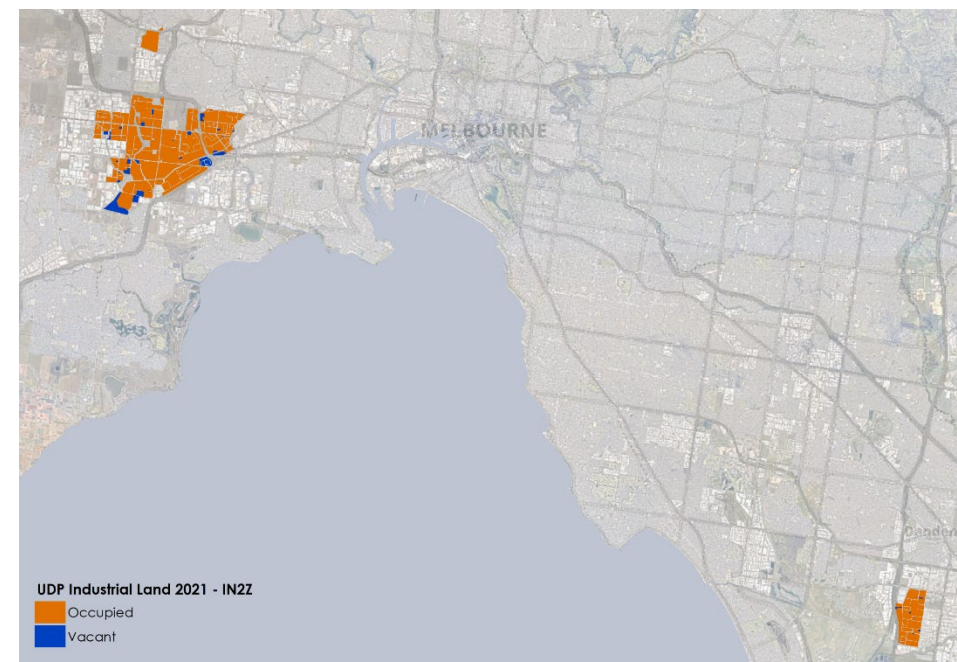
Point Wilson comprises Commonwealth land used for defence purposes. The Moolap Coastal Strategic Framework Plan 2019 addressed the future use and development of industrial land in Moolap. In so doing, the Framework Plan identified existing industrial areas for transition to parkland, environmental functions and tourism. The Framework Plan also identifies industrial land for retention in Moolap's south. This land is supported for light and service industry. Further information on Moolap, Lara and Point Wilson is detailed at the conclusion of this chapter.

The City Incorporates More Vacant Industrial 2 Zoned Land than Melbourne

The Industrial 2 Zone is a zone that supports the needs of heavy industry and high impact uses.

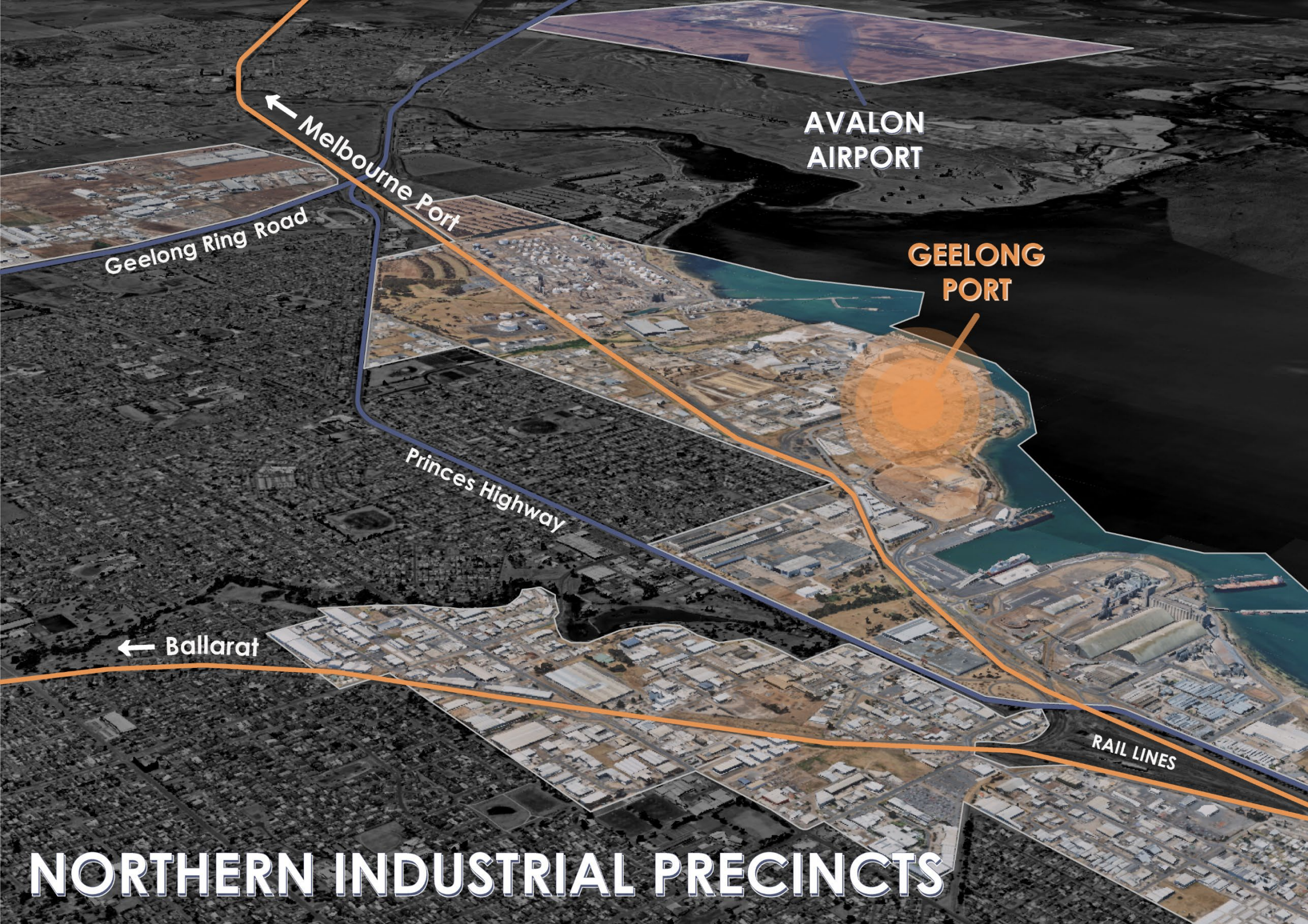
Within metropolitan Melbourne there is a scarcity of vacant Industrial 2 Zoned land. At 2021, there was 2,094 hectares of industrially zoned land in metropolitan Melbourne of which 137 hectares was vacant.

Figure 14: Urban Development Program IN2Z Land by Occupancy Status 2021



Source: CKC, UDP

At 2025, the City incorporated 1,680 hectares of Industrial 2 Zoned land, of which 150 hectares are vacant. This is more vacant zoned Industrial 2 land than metropolitan Melbourne.



AVALON
AIRPORT

GEELONG
PORT

Geelong Ring Road

Melbourne Port

Princes Highway

Ballarat

RAIL LINES

NORTHERN INDUSTRIAL PRECINCTS

2.1 Geelong Port

Geelong's port is Victoria's second largest port. The port is a major gateway for bulk goods into Victoria including crude oil, petroleum products, fertilizers, phosphate rock, chemicals, major pieces of infrastructure and agricultural outputs.

The port managed an estimated 14.66 million tonnes of cargo in 2023. Goods pass through the port's two primary berths at Corio Quay and Lascelles, and its dedicated fuel and grain terminals and its variety of secondary berths.

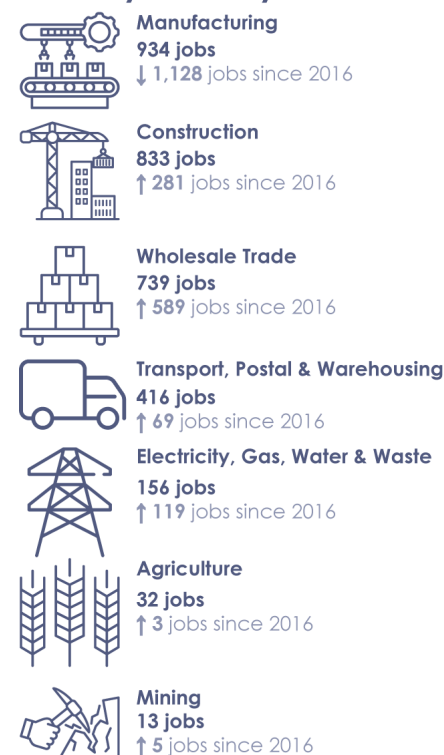
The port area incorporates the Viva refinery, which supplies 50% of Victoria's and 10% of the Australia's fuel. The refinery also produces bitumen and solvents. Together with the Ampol Lytton Refinery in Brisbane, it is one of only two remaining fuel refineries in Australia. Viva has committed to supporting the retention of the Viva facility at least until 2027. The facility is currently subject to a planning process to enable the facility to import LNG gas.

The port is also a major departure point for the export of Victoria's agricultural produce particularly via the port's grain terminal. In the recent past, the relocation of the Spirit of Tasmania to the port significantly expanded the passenger and private vehicle role of the port and its broader role in the local tourism economy. The further addition of ferry services over time will expand the visitor economy role of the port.

The port precinct supports a range of logistics and stevedoring enterprises which are co-located with the port's heavy industry, engineering, construction, infrastructure and manufacturing uses. The core port area is inaccessible to the public.

The southern portion of the port precinct incorporates the Pivot City facility in which the built form of discontinued industry has been comprehensively renewed for population focused uses (social services, professional services, light industry, food and hospitality and entertainment). Pivot City exemplifies the renewal of the City's industrial heritage in service of the needs of the City's new economy.

Figure 15: Geelong Port Dashboard Statistics
Jobs by Industry 2021



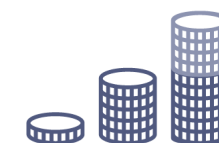
TOTAL LAND*: 495ha

*Refers to industrial land only

Total Employment **Economic Output**

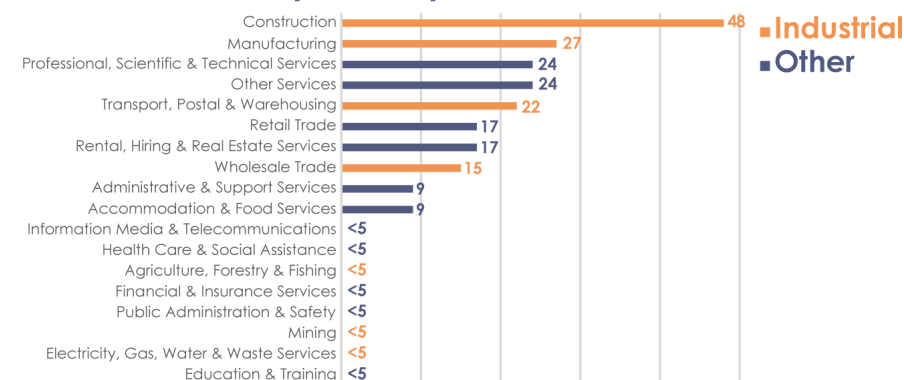


4,981 Jobs in 2021
↑ 656 Jobs since 2016



\$3.7B in 2024
↑ \$320.8M since 2017

Business Count by Industry 2025



Source: ABR, CKC, REMPLAN

LAND & LAND USE

The Geelong Port encompasses 495 hectares of industrial land across 631 parcels.

The vast majority (76%) of the port's land is zoned in the Industrial 2 Zone and thereby able to support high impact heavy industry uses. The port comprises an irregular collection of small, medium and large lots. The Bulk Grain and Lascelles Wharf Precincts (see over page) incorporate both large and small lots, while the refinery precinct is primarily made up of large lots.

Table 6: Geelong Port – Industrial Lots by Size and Zoning

Lot Size	C2Z	IN1Z	IN2Z	Total Lots
Small (0 – 0.5 ha)	1	184	352	537
Medium (0.5 – 1 ha)	2	6	7	15
Large (1 – 5 ha)	2	17	40	59
Very Large (>5 ha)	0	4	16	20
Total Lots	5	211	415	631

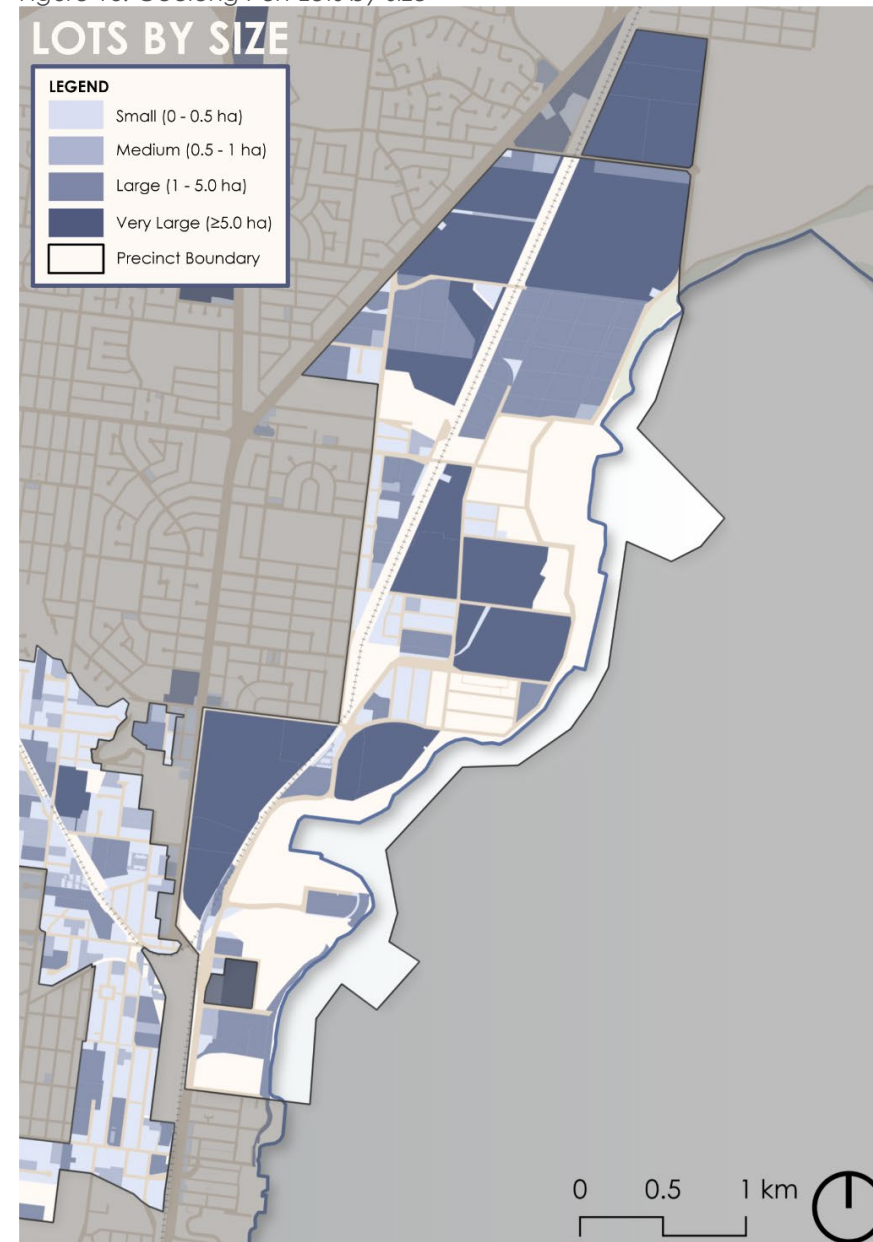
Source: CKC

Note, the Port includes Port Zoned land that is not included in this study.

KEY ISSUES

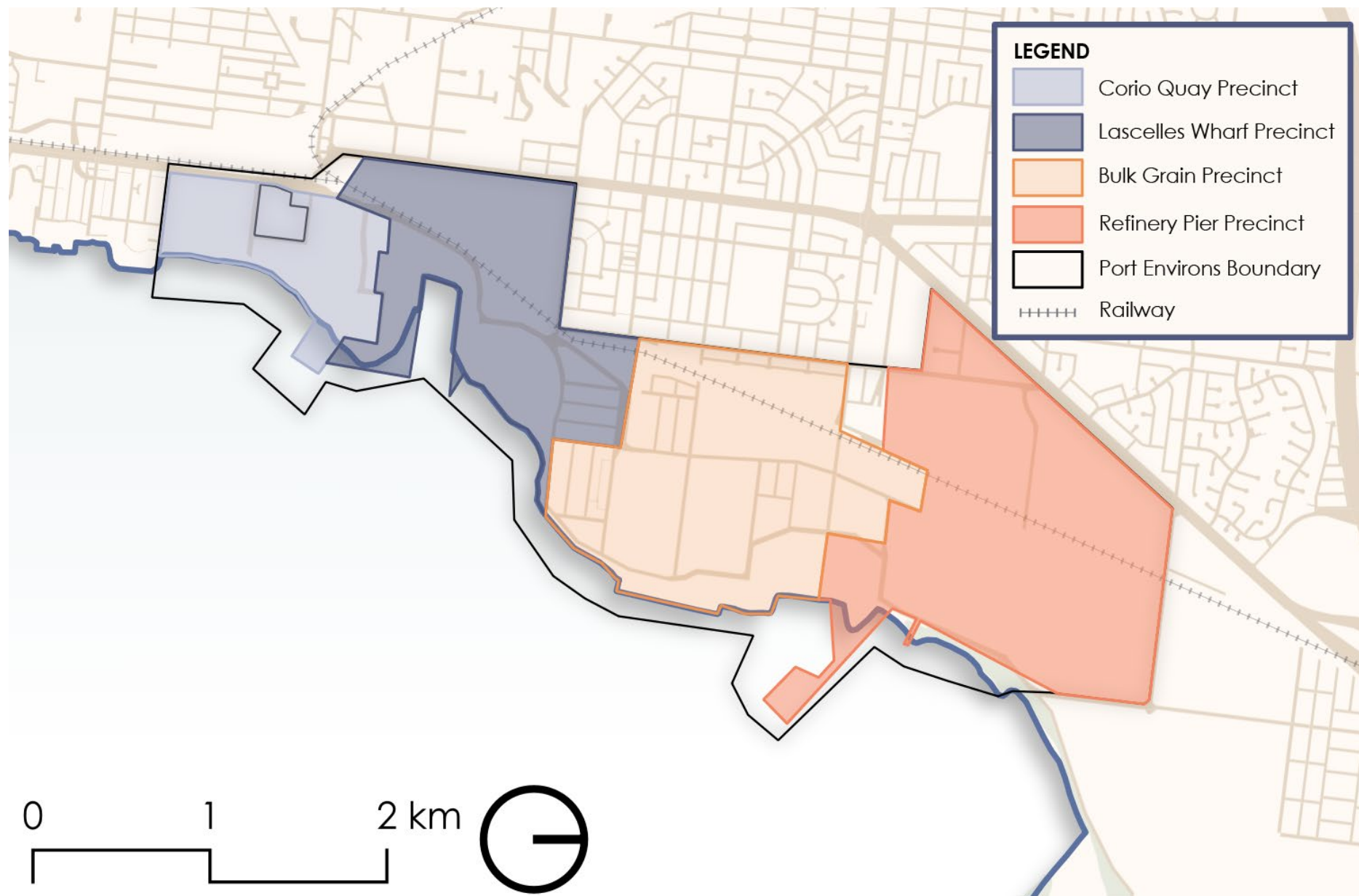
- **Encroachment:** The port's industrial 2 Zoned land is a clear advantage for port uses that have enabled the operation of heavy industry including refinery operations. Any future residential growth in proximity to the port represents a risk to the continuity and growth of operations. Growth in nearby residential uses and sensitive uses represents a potential land use risk.
- **Infrastructure Investment:** As Victoria and the City of Greater Geelong grows, the port is positioned to further service the state's bulk export and import operations. Further investment in road and rail infrastructure will be essential in supporting the evolution and capacity of the Port.
- **Pivot City and the Port:** Pivot City may be considered as more aligned with the form and function of the City's Northern Industrial Precinct than the port precinct in its focus on directly serving population needs.

Figure 16: Geelong Port Lots by Size



Source: CKC

Figure 17: Geelong Port Internal Precincts



Source: CKC, Port of Geelong

2.2 Geelong Ring Road Employment Precinct (GRREP)

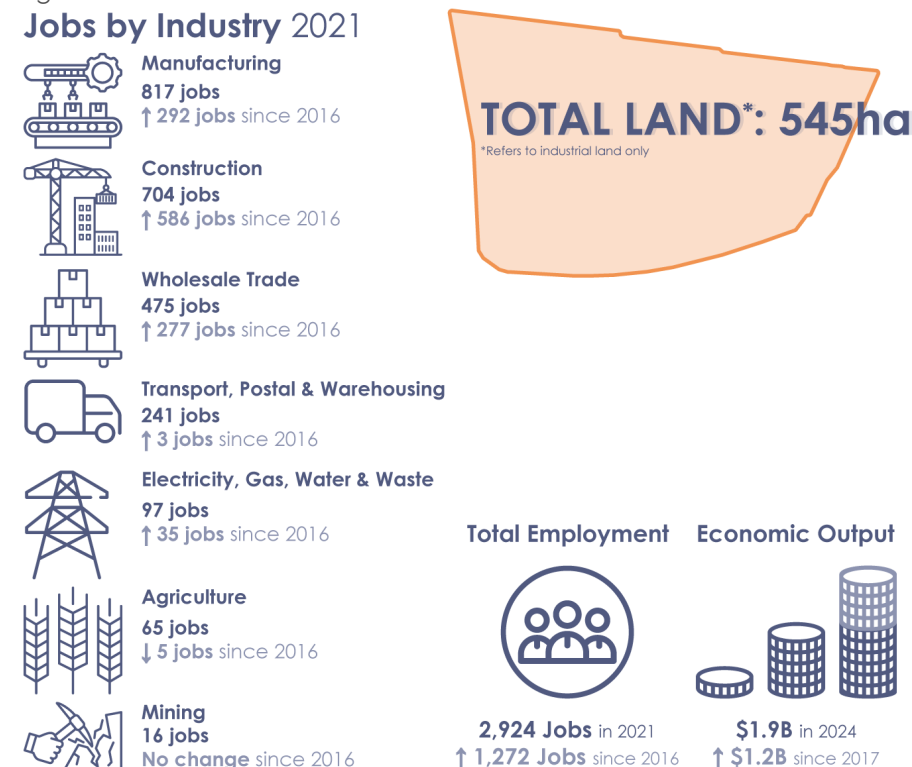
The Geelong Ring Road Employment Precinct (GRREP) was established as a new industrial precinct to leverage from the delivery of the Geelong Ring Road which was completed in 2013. The GRREP is located six kilometres from the Port of Geelong and 12 kilometres from Avalon Airport and enjoys direct access to Melbourne and Victoria's west via the Princes Freeway.

The GRREP is a location for high impact industry. The precinct is protected by a 1,000-metre industry buffer that largely affects the rural living properties adjoining Bacchus Marsh Road. No additional sensitive land uses, including residential development and community facilities, are permitted within the buffer to maintain the economic and employment integrity of the GRREP.

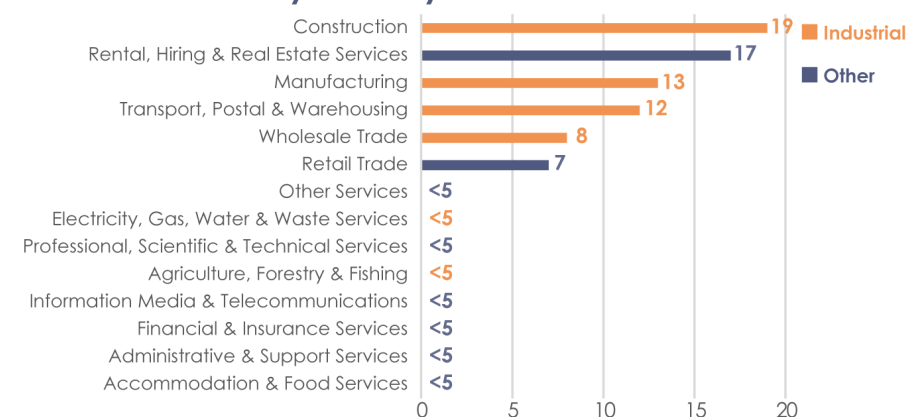
The delivery of the ring road sparked significant and ongoing industrial development and an associated increase in land values. At 2025, the GRREP functions as the City's leading precinct for large-format, major industry development. The precinct is home to a total of 90 businesses including 57 manufacturing, construction and logistics enterprises. The precinct is growing in employment and industry lead by the growth of traditional industrial businesses.

The precinct is subject to planning controls that aim to accommodate the land needs of large format industry. The GRREP incorporates a Viva refinery facility as well as fuel pipelines that limit the form and scale of uses in proximity to the facility. Overall, the GRREP exemplifies the success of infrastructure led industrial development.

Figure 18: GRREP Dashboard Statistics



Business Count by Industry 2025



Source: ABR, CKC, REMPLAN

Figure 19: GRREP Built Form



LAND & LAND USE

The GRREP incorporates 545 hectares of industrial land across 396 parcels. The majority of the GRREP's land (81%) is comprised of large lots within the Industrial 2 Zone. In contrast, land in the Industrial 1 zone is mostly comprised of smaller lots.

Table 7: GRREP – Industrial Lots by Size and Zoning

Lot Size	IN1Z	IN2Z	Total Lots
Small (0 – 0.5 ha)	243	22	265
Medium (0.5 – 1 ha)	8	8	16
Large (1 – 5 ha)	14	71	85
Very Large (>5 ha)	3	27	30
Total Lots	268	128	396

Source: CKC

KEY ISSUES

Minimum Subdivision Requirements: The GRREP is subject to minimum lot size requirements for subdivision as detailed in Schedule 18 of the Design and Development Overlay (see page 56). Minimum lot size requirements accommodate the land needs of large format industrial uses.

Minimum lot size requirements have been consistently identified by industry as a limit on development. At 2025, the precinct incorporates the only broadhectare industrial land available for development across the City. As such, at 2025, the City's capacity to respond to industrial demand is currently constrained by minimum lot size requirements – the capacity of the City to accommodate the land use needs of small and medium sized industrial uses is constrained.

The GRREP, nonetheless, continues to be a focus for development and is currently subject to a variety of planning permit applications, approvals and committed projects that will see it continue to expand in employment and industry.

*Charter notes that M C Herd Abattoir operates at 245-255 Bachus March Road, a 42ha site under the Farming Zone, directly south west of the GRREP. The abattoir is a major employment site and is supported for continued operation by Council, as stated in the Corio Norlane Structure Plan (2012).

Figure 20: GRREP Lots by Size



Source: CKC

2.3 North Geelong

The North Geelong Precinct is a north south linear precinct that largely takes in the land between Melbourne Road/Princes Highway and Thompson Road North Geelong. The precinct incorporates a mixture of Industrial 1 and Industrial 2 Zoned land. The precinct interfaces with established communities at Norlane, Bell Park and Rippleside.

The precinct is emblematic of the blending of the City's new and established industrial economy. At 2025, retail, service, and hospitality uses intermingle with traditional construction, manufacturing and logistics uses. Accordingly, non-traditional industrial businesses currently comprise 48% of the precinct's registered businesses. These businesses, however, employ more workers (54% of precinct workers) than traditional industrial businesses. Near on 20% of businesses within North Geelong comprise service businesses, including 44 registered professional service businesses.

The precinct's employment is growing, as is the precinct's employment density which is now equal to 20 jobs per hectare. Economic output is likewise growing. North Geelong incorporates a total of 587 businesses, across 187 hectares of land, which in comparison to other major precincts represents a high business to land ratio. The precinct's smaller lot sizes (a median occupied lot size of 615sqm) have enabled a diversity of businesses to establish in the precinct. This includes a large number of retailers that leverage from the precinct's city-wide accessibility via the Princes Highway.

Figure 22: North Geelong Built Form

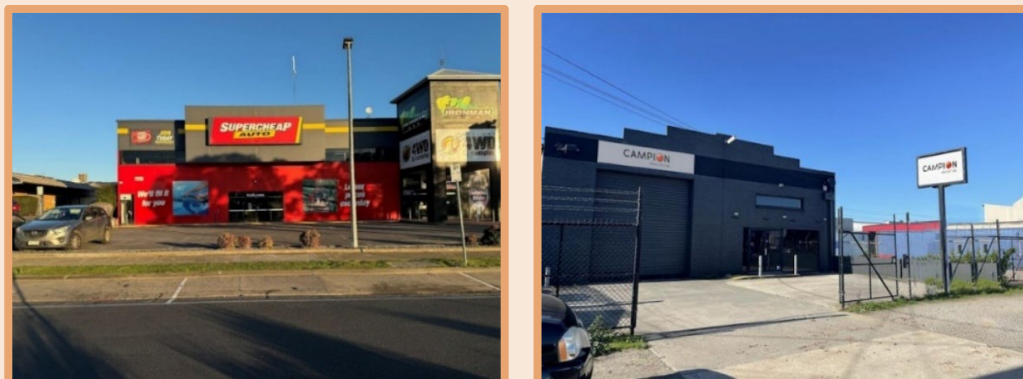
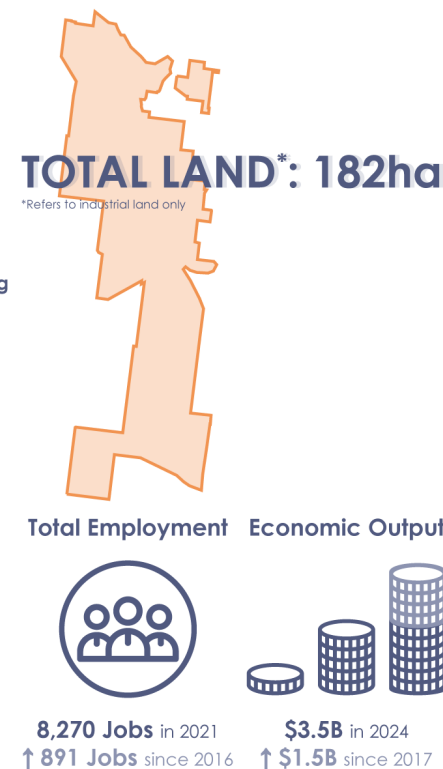
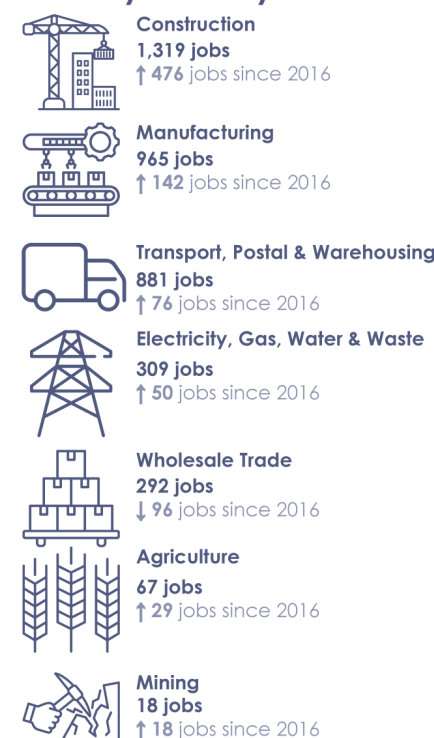
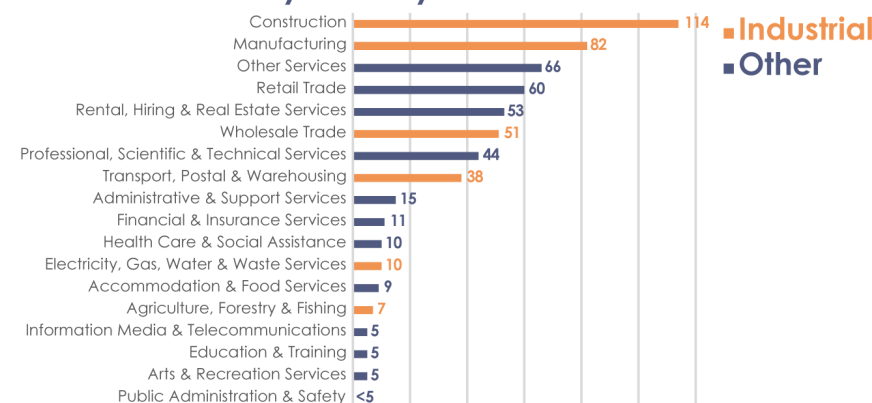


Figure 21: North Geelong Dashboard Data
Jobs by Industry 2021



Business Count by Industry 2025



Source: ABR, CKC, REMPLAN

LAND & LAND USE

North Geelong incorporates 182 hectares of industrial land across 1,148 lots. North Geelong's industry mix has been enabled by its lot composition, which is overwhelmingly small, particularly when compared to the lot configuration of nearby industrial precincts (GRREP and the Port). Parcels below 1 hectare in size account for 98% of North Geelong's total lots. The majority of land is within the Industrial 1 Zone.

Table 8: North Geelong – Industrial Lots by Size and Zoning

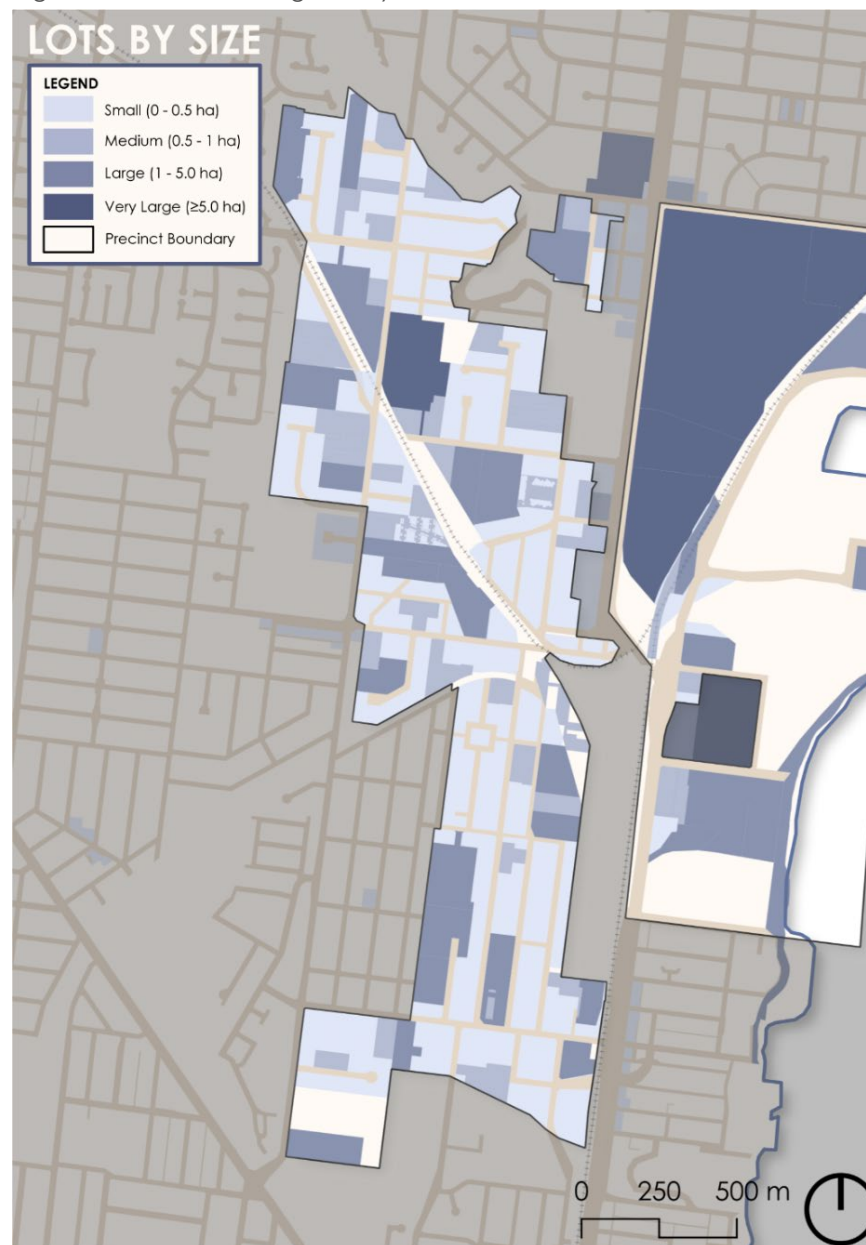
Lot Size	IN1Z	IN2Z	Total Lots
Small (0 – 0.5 ha)	906	171	1,077
Medium (0.5 – 1 ha)	38	8	46
Large (1 – 5 ha)	22	2	24
Very Large (>5 ha)	0	1	1
Total Lots	966	182	1,148

Source: CKC

KEY ISSUES

- **Retaining Industry:** North Geelong is transitioning towards a consumer-focused, population-serving industrial area. The precinct supports the service needs of local population which is growing. A key challenge is to ensure traditional industry is not displaced and retains a social licence to operate as service and population functions of the precinct continue to grow.
- **Improving Amenity:** North Geelong's industrial amenity is in poor condition, particularly relative to other locations. Encouraging the renewal of existing facilities and improvements in streetscape and amenity will be critical in retaining the precinct's attractiveness and investibility particularly as new contemporary industrial estates emerge in the coming years.

Figure 23: North Geelong Lots by Size



Source: CKC

SOUTHERN INDUSTRIAL PRECINCTS

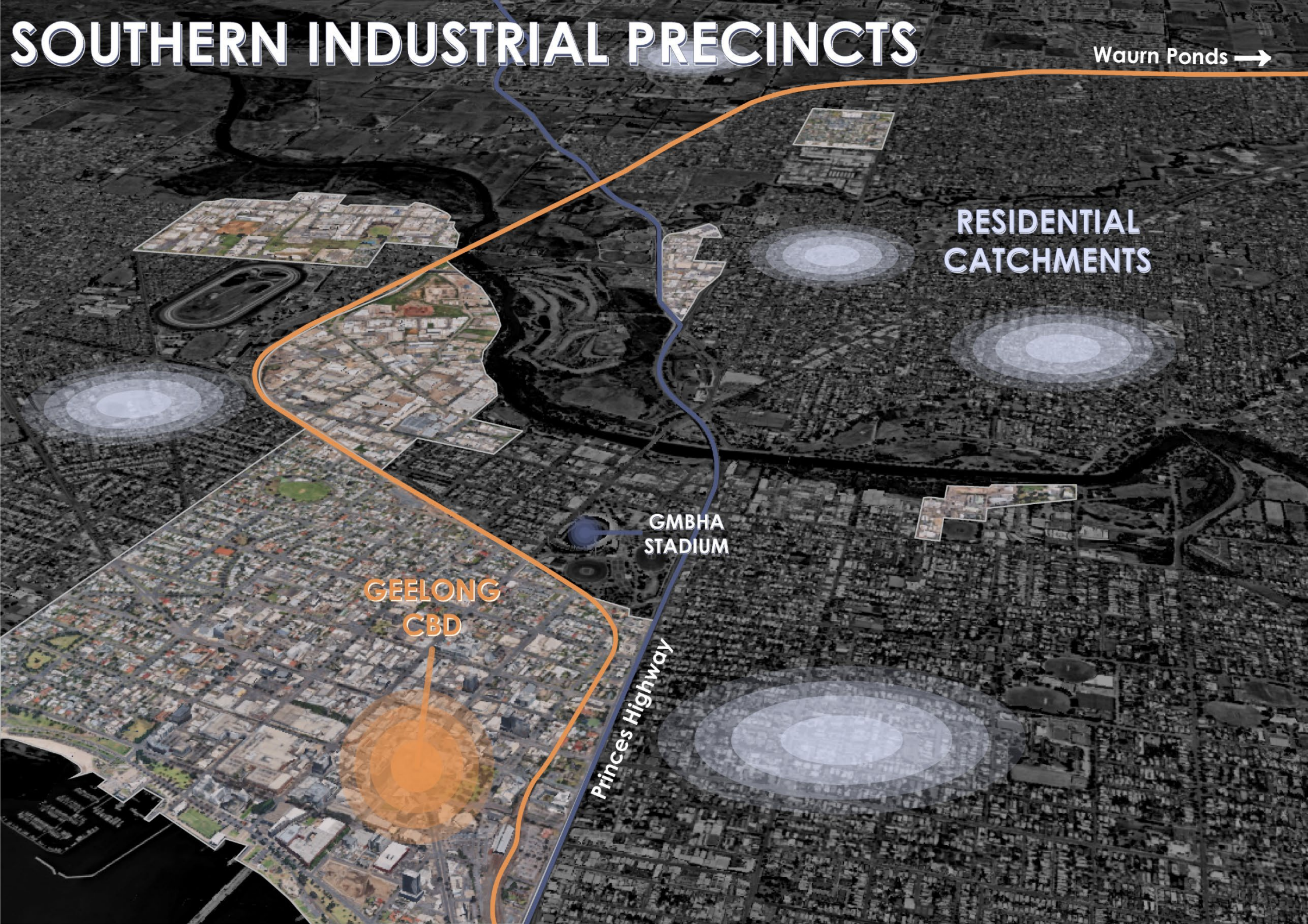
Waurn Ponds →

RESIDENTIAL
CATCHMENTS

GEELONG
CBD

GMBHA
STADIUM

Princes Highway



2.4 Southern Industrial Precincts

The City's southern industrial precincts comprise the Belmont, Breakwater, Grovedale, Newtown and South Geelong industrial areas. These form a critical part of the City's employment base and economy, comprising just over 10% of the municipality's jobs. With over 14,300 jobs and \$6.1 Billion in annual output, southern industrial areas are the City's most significant industrial areas by employment and output.

Over the past two decades the industrial areas that make up the southern precinct have been enveloped by growing residential communities. The majority of the City's recent population growth has been in the City's south. Population growth has transformed the role and focus of the southern industrial areas which have grown into dynamic locations of population serving, non-traditional industrial activity. At 2025, non-traditional consumer and population services focused businesses comprise 60% of precinct businesses.

Traditional industries, nonetheless, continue to operate in the precinct including numerous and growing construction enterprises. Manufacturing employment has likewise increased in the precinct and continues to comprise a significant form of employment in the City's south. In the recent past, however, the precinct's main form of job growth has been in non-industrial sectors including retail, health and social assistance job growth. Like the northern industrial precinct, a high proportion (25%) of registered businesses in the central precinct comprise service businesses including recreation, professional services and personal services.

Figure 25: Southern Industrial Precincts Built Form

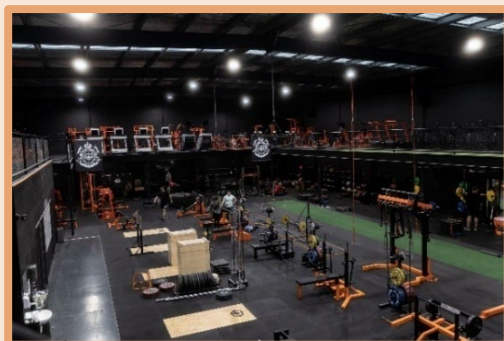
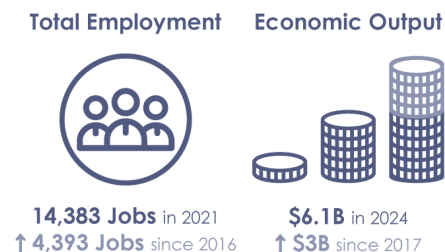
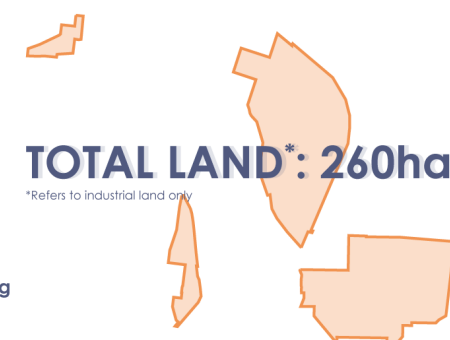
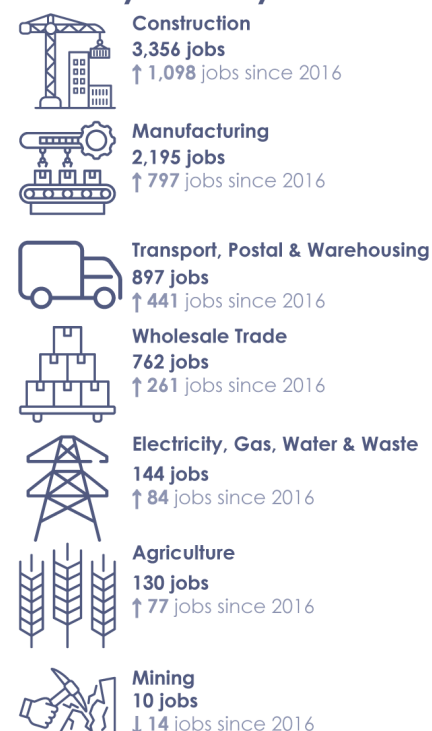
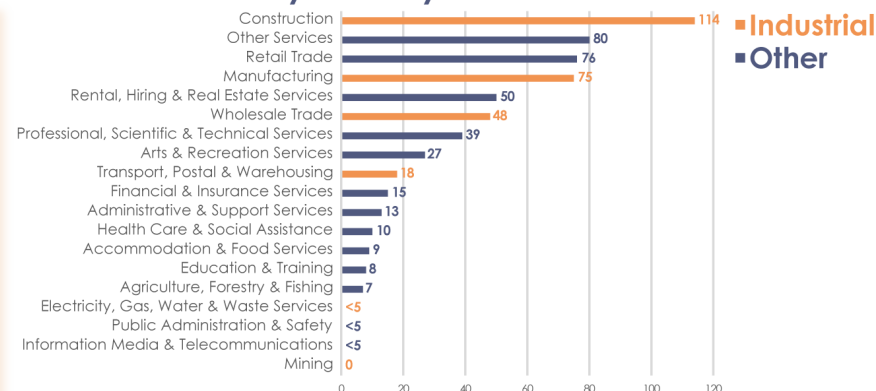


Figure 24: Southern Industrial Precincts Dashboard Statistics

Jobs by Industry 2021



Business Count by Industry 2025



Source: ABR, CKC, REMPLAN

CASE STUDY

West Fyans (Geelong's Mini Cremorne)

At 2024, the precinct supports extensive automotive and home and hardware uses and growing service uses. Redundant industrial facilities have been renewed to support a mixture of design, architecture, finance, media and technology uses as well as hospitality, fitness, health and personal service uses. The precinct benefits from proximity to nearby professional communities in Newtown and Highton. Key insights:

1. Fastest growing occupations are in health and professional services. There are more than 500 professional service staff in the precinct. Traditional industrial employment is in decline.
2. At 2024, the precinct supported 34 professional service firms, 25 fitness firms and 12 health organisations. The precinct exhibits high levels of office occupancy and growing floor space demand and investment.
3. Proposed new office development in commercial and industrial areas has attracted strong demand as exemplified by the Barwon and Newtown Business Park.

The precinct exemplifies an inner urban transformation toward knowledge work, hospitality and services, as has occurred in inner Melbourne and the re-use of industrial heritage for the new economy.

This overview is provided in the context of the City's ongoing review of the West Fyans / Fyans Street Precinct Structure Plan.

Newtown Business Park



Supports health, veterinary, accounting and software design uses as well as an array of traditional trade and industrial uses.

Future: Barwon Business Park



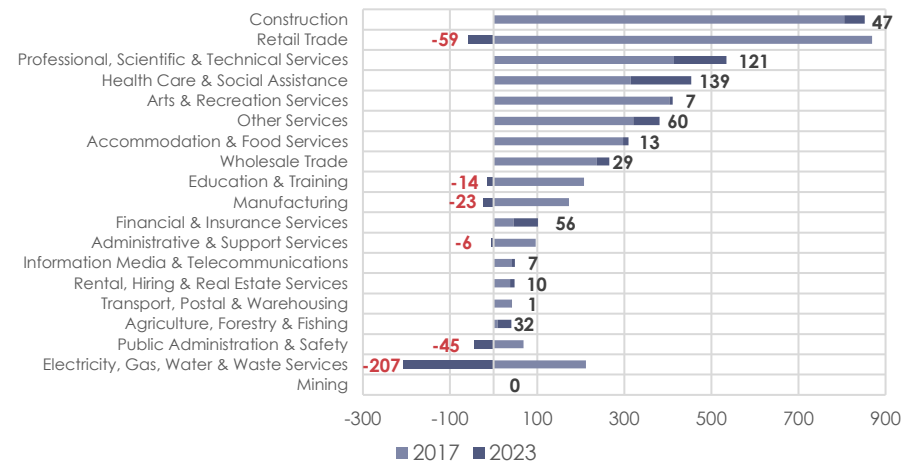
Development of 20 three and four storey offices with views over the Barwon River. At 2024, the development was 60% sold. Will be delivered in 2025

One Rutland/Woolstores



The renewal of historic industrial built form along Rutland Street has delivered two new commercial facilities that currently support an array of urban focused commercial uses including construction and architectural services, software design, photography, skin care, rock climbing, acting, alternative food, fitness, hair dressing, and various hospitality and retail outlets

Figure 26: West Fyans Employment Change 2016 -2021



Source: ABS, CKC

LAND & LAND USE

The industrial areas that comprise the southern precinct incorporate high numbers of smaller industrial lots and spaces. Small spaces have enabled the precinct to take on a diversity of new uses including many predominantly non-industrial uses. The precinct comprises over 260 hectares of land that also includes large sites that support major enterprise.

Table 9: Southern Industrial Precincts – Industrial Lots by Size and Zoning

Lot Size	IN1Z	IN2Z	IN3Z	Total Lots
Small (0 – 0.5 ha)	947	143	28	1,118
Medium (0.5 – 1 ha)	37	11	0	48
Large (1 – 5 ha)	38	8	1	47
Very Large (>5 ha)	3	0	0	3
Total Lots	1,025	162	29	1,216

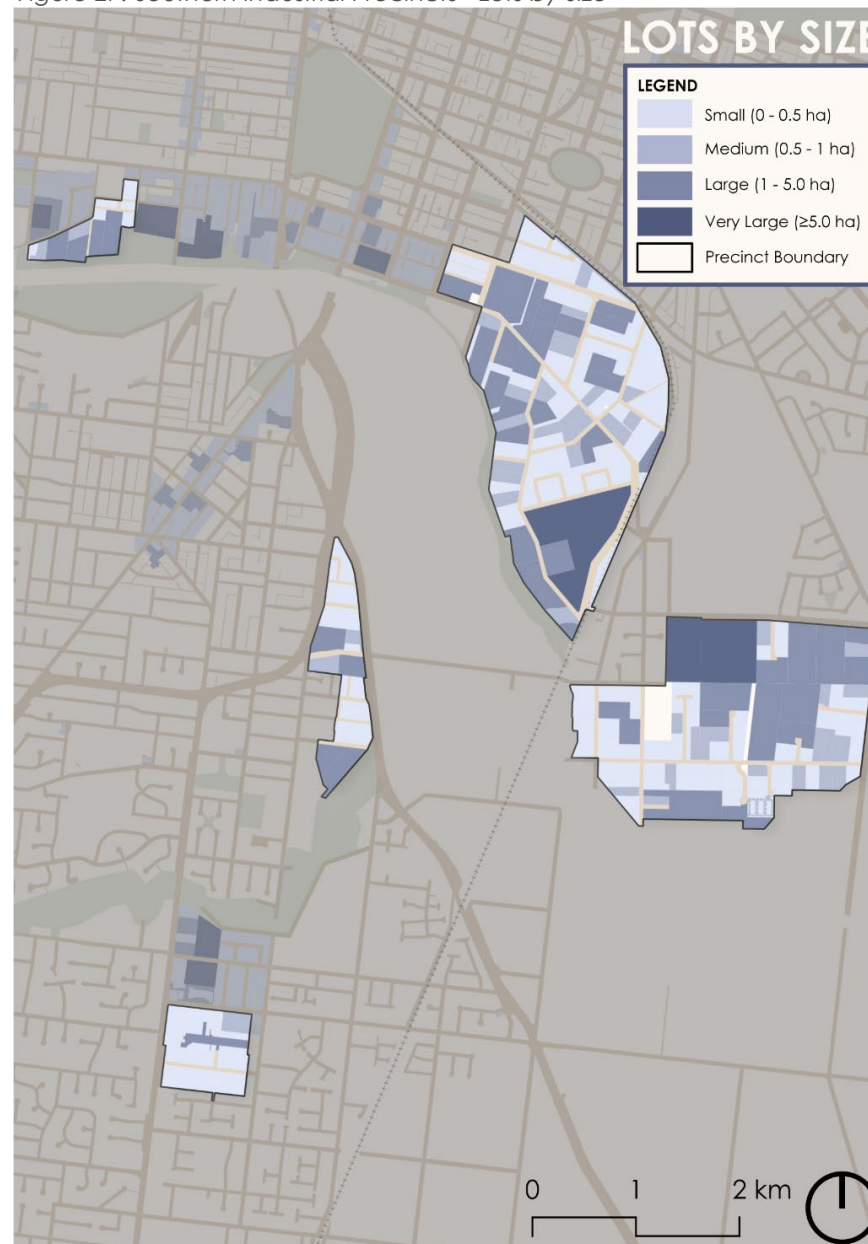
Source: CKC

KEY ISSUES

Key issues include:

- **Land supply:** There is minimal land supply within the precinct to respond to demand arising from a growing population. Supporting renewal and redevelopment of existing facilities should be a key priority.
- **Major industry:** The residential development and population growth has resulted in heavy industry uses in the city's south increasingly operating in denser, more congested environments in which odour and noise impacts of industrial uses are increasingly incompatible with their context. As such, there is a need to identify opportunities and incentives to, over time, support the re-location of heavy industry to more appropriate locations potentially in the City's north.
- **Industry retention:** Planning should continue to support the retention of construction, manufacturing and automotive uses in southern industrial areas even as population focused uses grow.

Figure 27: Southern Industrial Precincts - Lots by Size



Source: CKC

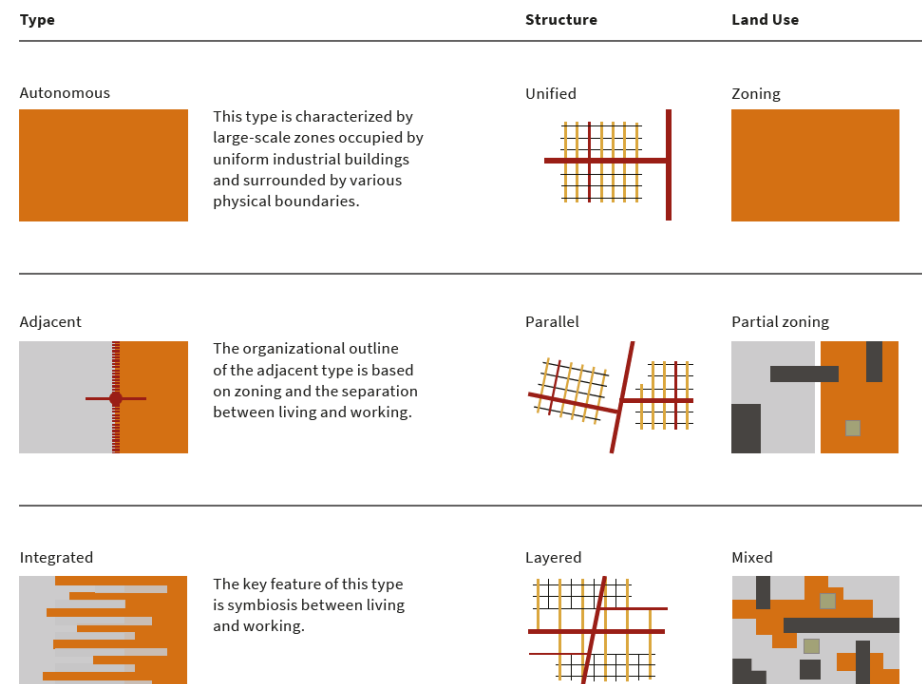
2.4.1 Industrial Precinct Key Insights

As part of the development of this report, Charter engaged with local industry in relation to the outlook and role of the city's industrial precincts. Amongst respondents there was a consensus that the southern and northern industrial precincts functioned differently and that in particular, there was a need to protect northern areas from encroachment in order to safe guard the longevity and land-use freedom of northern industrial precincts.

Table 10: City of Greater Geelong – Industrial Precinct Types

Precinct	Precinct Type	Implications
Southern Industrial Precincts	Integrated	There is a close association between population and industry. Southern industrial areas will continue to foster further connection between industrial areas and population particularly as population grows. This however is likely to generate a range of amenity and traffic challenges. Additionally, as a highly productive area with significant industry and employment there is a need to continue to retain highly productive industry while encouraging heavy industry to relocate to autonomous industrial locations. There is a further need to actively support infill and industrial renewal given the lack of vacant industrial land in the City's south to enable southern industrial areas to support an expansion of population focused industrial uses as the city expands.
GRREP	Autonomous	The GRREP is deliberately isolated and alienated from social space, for the purpose of protecting the amenity and safety of living areas and guaranteeing ongoing productive practices. The productivity of industry and the city is reliant on the continued isolation of major industry from sensitive uses. A key consideration for the GRREP is the extent to which subdivision requirements might be eased without comprising the role of the GRREP as an area of autonomous industry.
North Geelong	Adjacent	Industry and residents remain largely separate. Ensuring traditional industrial industry maintains a social licence and a capacity to operate and grow as the precinct changes is a key consideration.
Port	Autonomous	The Port requires isolation from community to guarantee ongoing operations. Preventing encroachment while supporting the ongoing renewal and development of sites and transport infrastructure are key priorities.

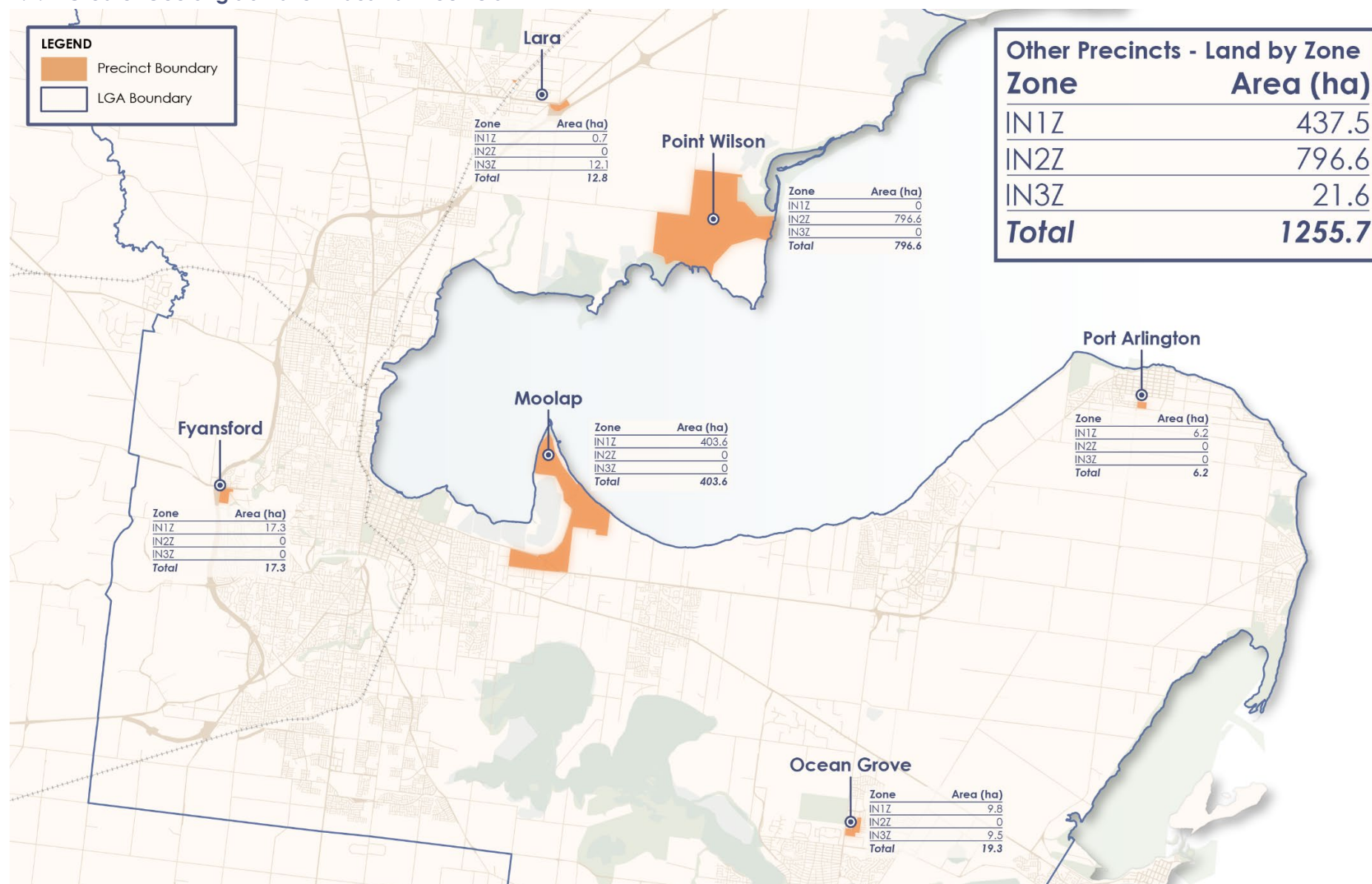
Figure 28: Hatuka & Ben Joseph (2022) New Industrial Economy Framework



Hatuka & Ben Joseph's (2022) *New Industrial Economy Framework* provides a helpful structure for thinking about the role and evolution of industrial space. Areas of production and living interact differently largely depending on the role and use of industrial space. The *New Industrial Economy Framework* categorises the relationship of productive land to social space according to their level of interaction and integration as follows:

- *Integrated Industrial Areas*: Enclaves of industrial land in which there is a close association between community and industry.
- *Adjacent Industrial Areas*: This is a common form of industrial spatial organisation exemplified by locations in Spotswood and Altona, where community and industry coincide in close proximity, but function very separately.
- *Autonomous industrial Areas*: In autonomous locations productive space is deliberately isolated and alienated from social space, for the purpose of protecting the amenity and safety of living areas and guaranteeing ongoing productive practices.

2.4.2 Greater Geelong's Smaller Industrial Precincts



Source: CKC

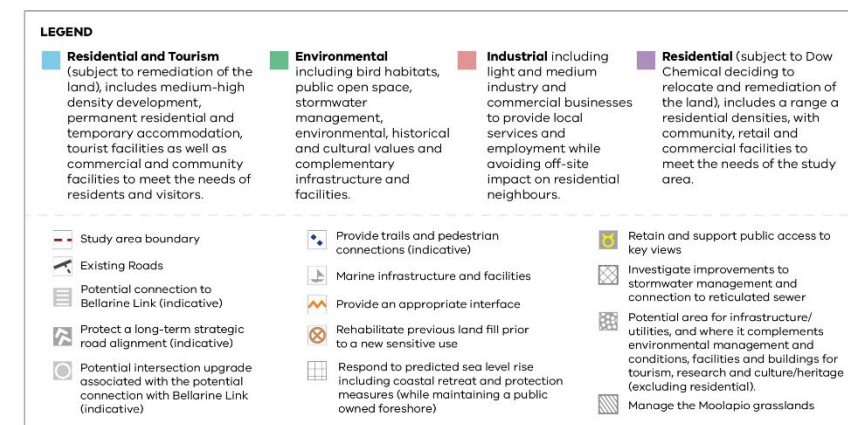
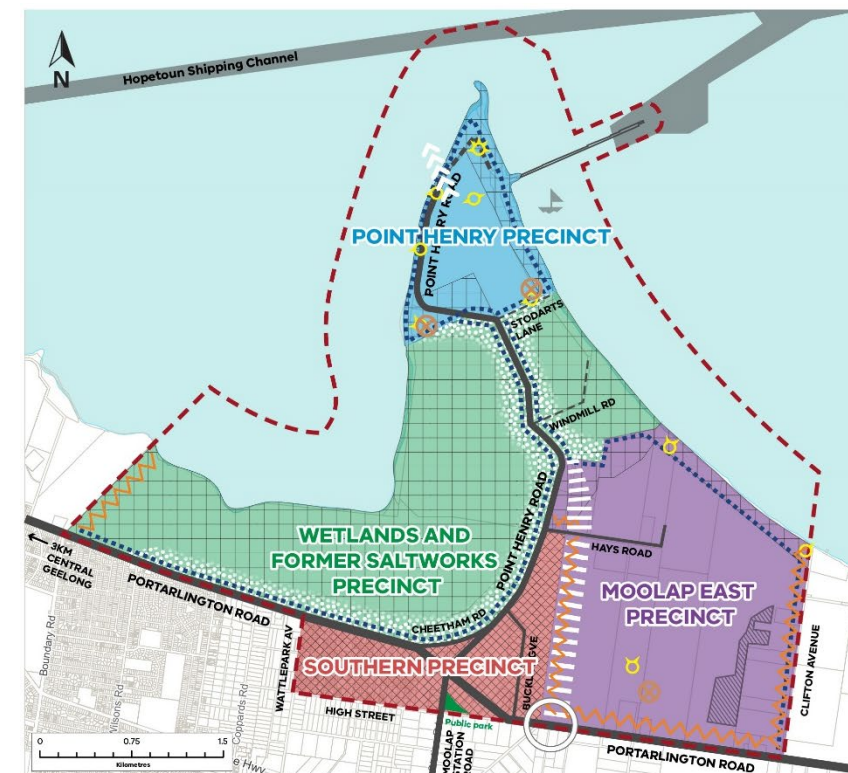
2.4.3 Moolap

Moolap is located along Portarlington Road, encompassing Point Henry, the former Cheetham Saltworks, an industrial precinct in its South and a number of large parcels to the East currently under the Farming Zone (FZ). Moolap played a significant role in Greater Geelong's industrial history, housing the Saltworks since the 1890s and the Alcoa aluminium smelter and rolling mill until 2014. Over the course of Moolap's development, the Moolap Southern Precinct has seen an industrial economy flourish, with close to 200 businesses establishing themselves in the area.

The Moolap Southern Precinct is primarily comprised of traditional industrial enterprises with a particular strength in auto-repairs and parts retailing, as well as manufacturing and construction.

Following the closure of Alcoa's operation, the Victorian State Government prepared the Moolap Strategic Framework Plan (2019) to guide its future development. Under the new framework plan, Moolap's Southern Precinct is expected to remain as land for industrial uses whilst the surrounding areas to the North and East are identified for transition to residential, environmental and tourism purposes. At present, land to the North of the Moolap Southern Precinct remains under the Industrial 1 Zone (IN1Z) and is yet to be rezoned for its identified future uses.

Figure 29: Moolap Coastal Strategic Framework Plan Map



Source: Victoria State Government

Figure 30: Moolap Built Form



2.4.4 Point Wilson

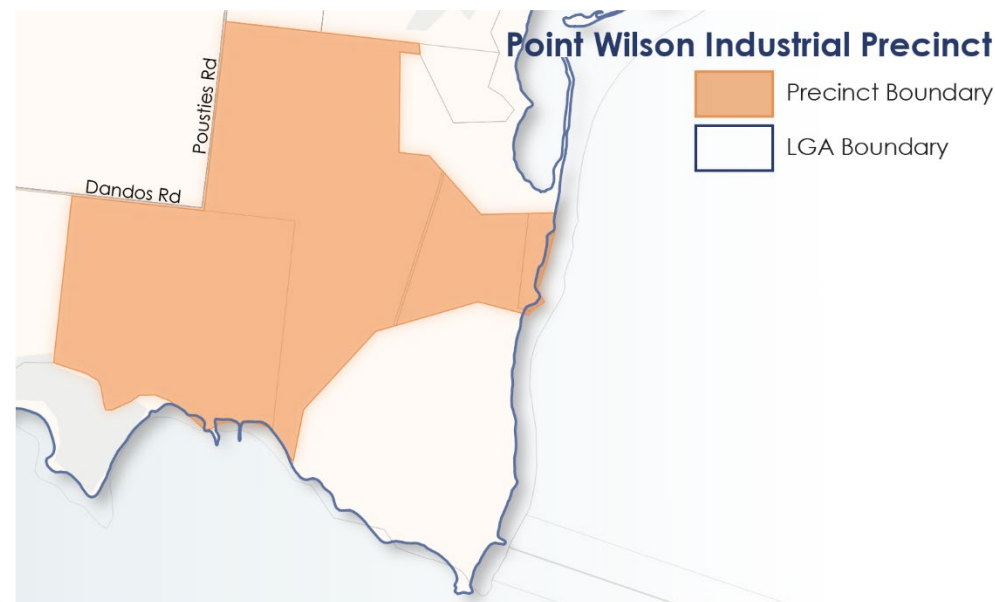
Point Wilson, located directly adjacent to Avalon Airport, encompasses 796 hectares of Industrial 2 Zone land. At 2025, Point Wilson's industrial land primarily functions as an active quarry and is considered to be fully occupied. In the long-term future there is potential for the land occupied by the quarry to be transitioned to other industrial uses.

Commonwealth land in Point Wilson functions as key site for the Australian Defence Force (ADF), enabling the importation of guided weapons, explosive ordinance and associated material shipments.

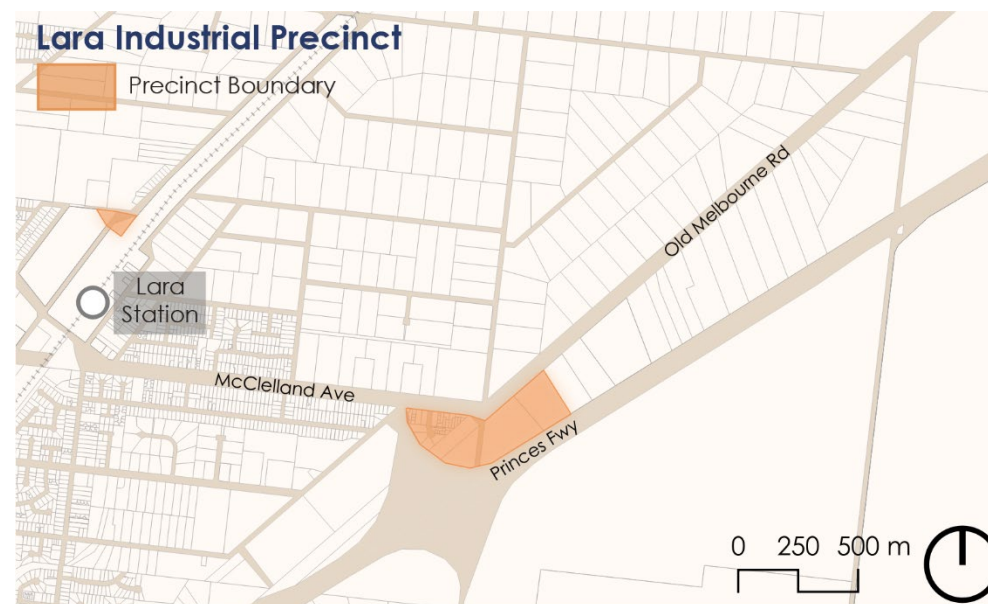
2.4.5 Lara

Lara incorporates two pockets of industrial land that account for 12.8 hectares of Greater Geelong's industrial land. The pocket directly adjacent to Lara Station is zoned as IN1Z, whilst the larger pocket to the East is IN3Z land. Across the two pockets of industrial land, uses predominantly service the agricultural industry, with key agriproduct manufacturers and transportation businesses occupying the precinct. Lara also features several non-traditional uses such as fitness centres, a physiotherapy clinic and a florist.

The future Lara Business Park will expand industrial land supply in Lara by 73 hectares.



Source: CKC



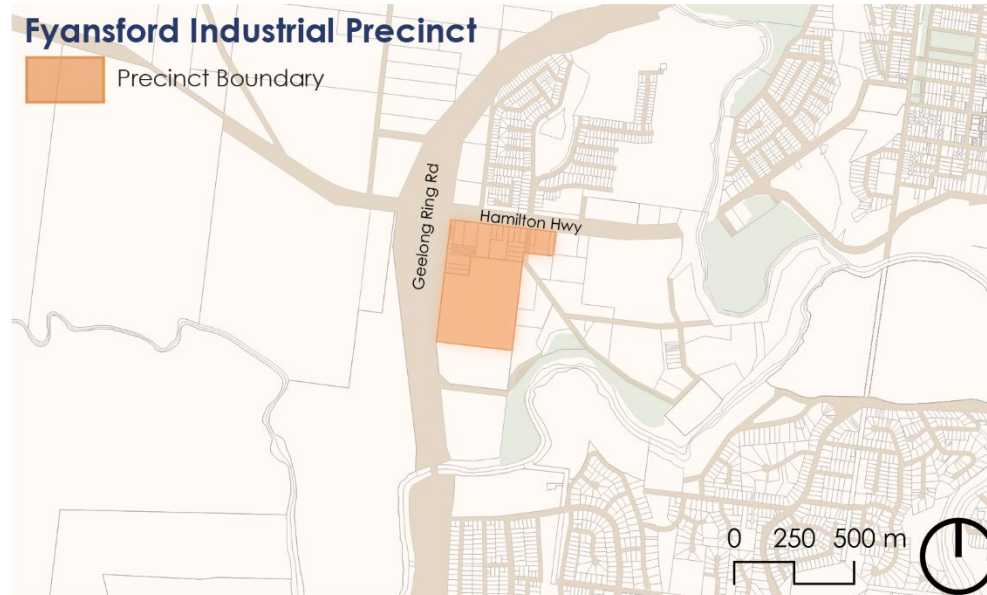
Source: CKC

2.4.6 Fyansford

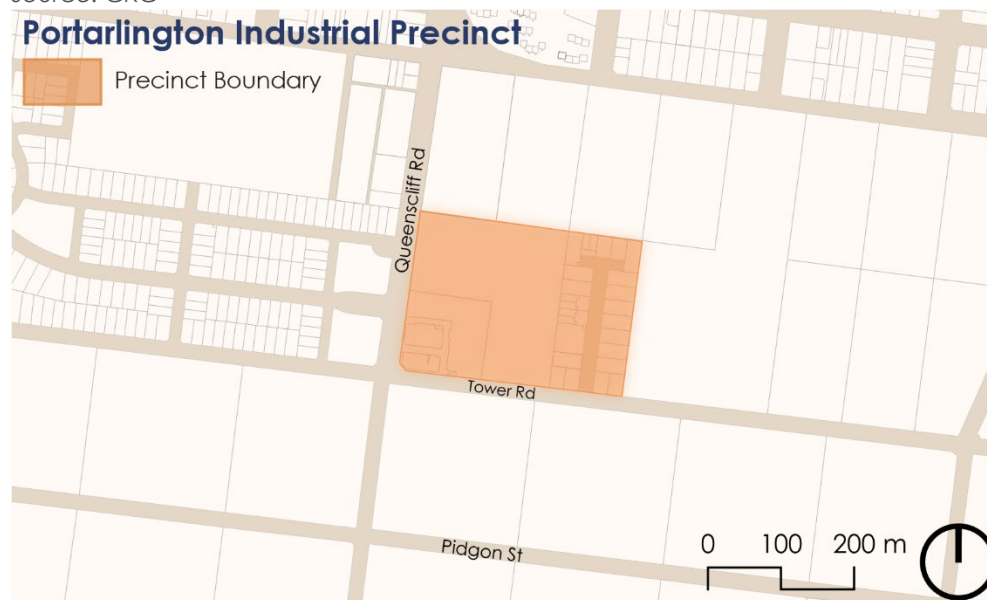
Fyansford is located 5km West of Geelong's CBD. The precinct comprises 17.3 hectares of IN1Z land. The majority of the precinct's industrial form was developed over the past ten years. The precinct primarily services the construction sector. At 2025, Fyansford incorporated a number of vacant and underutilised lots.

2.4.7 Portarlington

Portarlington's industrial precinct is located along the southern edge of the town. The precinct is Greater Geelong's smallest industrial precinct, encompassing 6.2 hectares of IN1Z land. The precinct's enterprises are largely locally serving automotive repair businesses. The precinct also includes a fitness centre and manufacturer of climate-friendly agricultural solutions.



Source: CKC

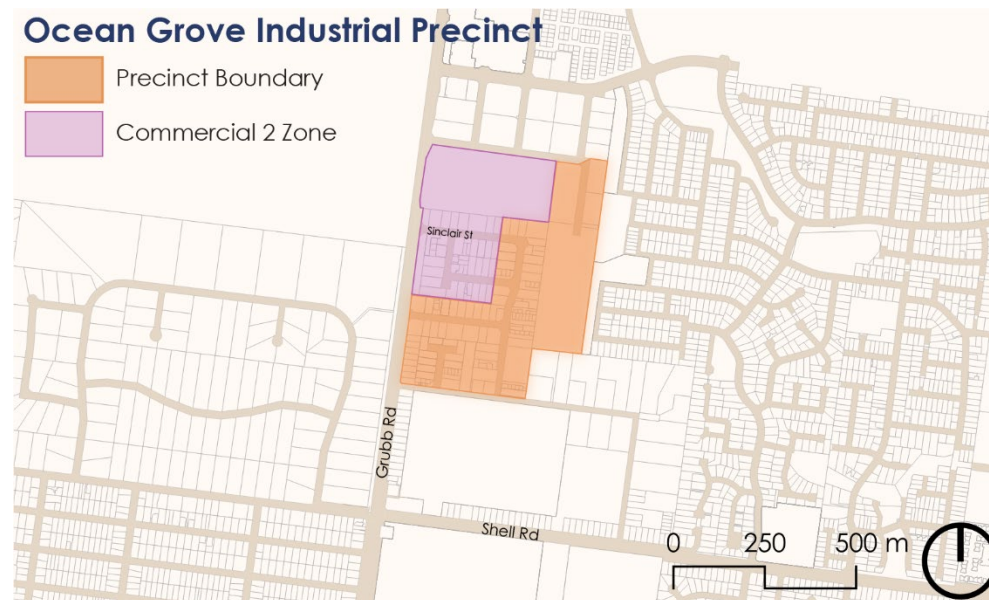


Source: CKC

2.4.8 Ocean Grove

Ocean Grove's industrial precinct, is located approximately 20km south east of Geelong's CBD. The precinct has seen significant industrial intensification over the past 15 years.

The precinct is predominantly comprised of smaller industrial lots. Ocean Grove's industrial business composition is a blend of traditional industrial uses and population-serving enterprises, featuring an antiques store, Vietnamese restaurant, an art gallery and a children's play centre, as well as more traditional uses such as auto parts retailers, electrical supply stores and construction businesses. The precinct incorporates IN1Z, IN3Z land and directly adjoins C2Z zoned land.



Source: CKC

FUTURE OUTLOOK

An aerial photograph of a coastal city, likely Auckland, New Zealand. The image shows a dense residential area on the left, transitioning into industrial zones and a large port area on the right. The city is situated on a peninsula or near a large body of water, with a clear blue sky and distant mountains visible on the horizon.

03

3.0 Future Outlook

The City's economic output, employment and enterprise are growing and are set to continue to grow.

Most recently, the City's jobs growth and enterprise diversification has been led by the city's rapidly expanding service sector which has undergone exponential growth over the past 15 years in response to the needs of a growing population.

Concurrently, the City's industrial sectors are also growing. Population-induced demand has underpinned a growing construction sector which now comprises the City's second largest industry sector by employment. Manufacturing output and productivity is also expanding as are the City's energy, logistics, wholesaling and waste sectors with each of these sectors adding over 500 jobs since 2017.

The corresponding renewal and expansion of the City's industrial footprint forms a key, but perhaps less visible, part of Geelong's recent economic growth as reflected in the following indicators:

- *Industrial planning permits and building permits* – the City averages \$125 million in new private industrial investment per annum.
- *Industrial land development* – averaging more than 20 hectares per year since the end of the pandemic.
- *Industrial renewal* – aged and abandoned industrial facilities are being renewed as exemplified by Pivot City and West Fyans.
- *Industrial jobs growth* - industrial jobs are growing at 2.77% per annum.

Conditions for Industrial Growth

Looking to the future, a confluence of favourable industrial supply and demand factors are set the conditions for continued industrial growth. These factors include:

- **Industrial Investment Factor 1: Population Growth**
- **Industrial Investment Factor 2: Locational Advantages**
- **Industrial Investment Factor 3: Workforce Growth**
- **Industrial Investment Factor 4: De-Globalisation and Reshoring**
- **Industrial Investment Factor 5: Policy Support**

These factors are discussed as follows.

Figure 31: Industrial Development Key Statistics



Source: ABS, CKC

Industrial Investment Factor 1: A Growing Population Requires Industry

The energy, waste, food, construction, maintenance, automotive, infrastructure, specialist service and trade needs of a growing local and regional population directly influence industrial floor space demand.

Greater Geelong is undergoing rapid and unprecedented population growth. At 2024, the municipality was home to approximately 290,000 residents, having grown by 62,000 residents in the ten-year period since 2014.

Over this time, an average of 3,240 new dwellings were approved per annum for development which, as discussed above, has fuelled the sustained expansion of the City's construction sector and the corresponding growth of construction enterprise in the City's industrial precincts.

Notably, the City's recent growth was not anticipated by demographers and state wide projections. Demographers projected strong migration to the City but not at the scale that eventually occurred.

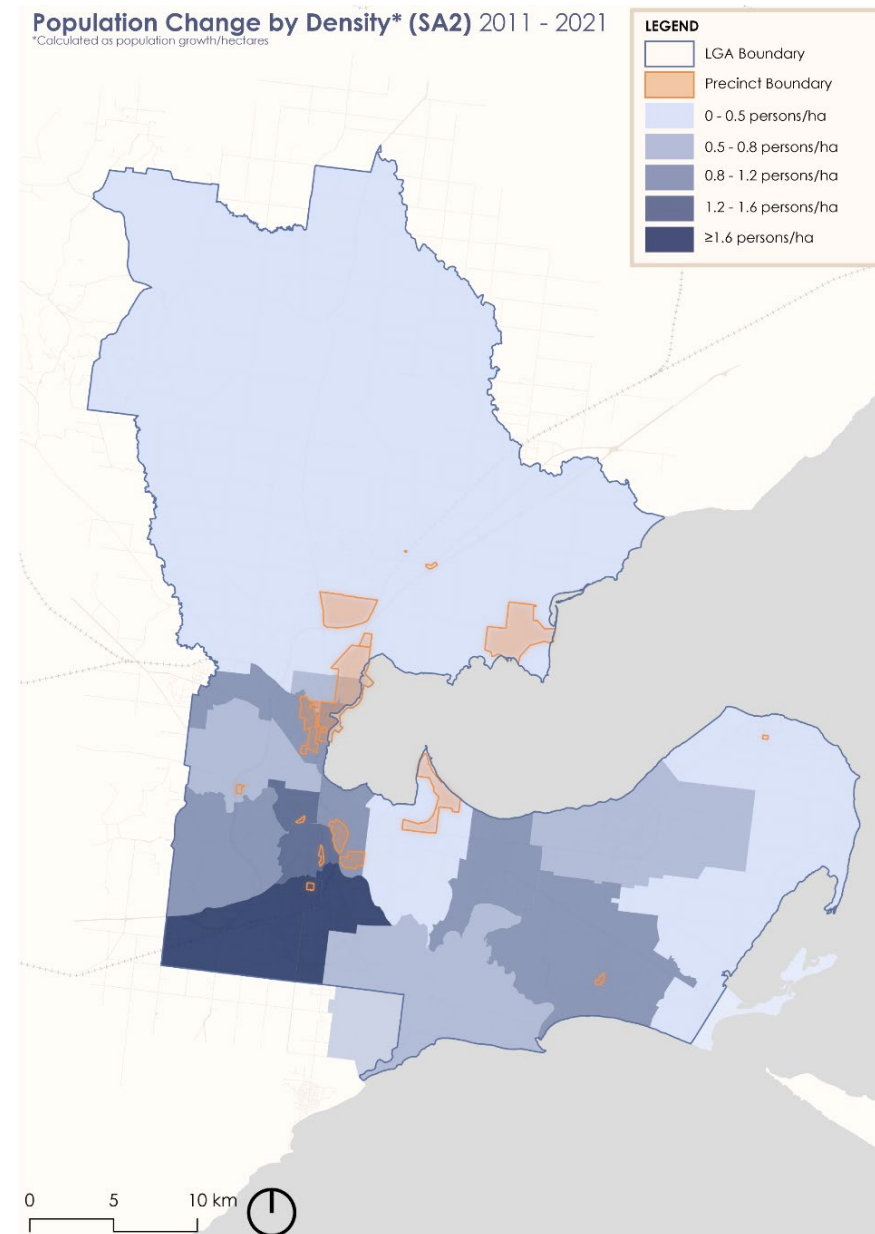
Growth has been focused in the City's South

Zoned greenfield land in the City's south at Armstrong Creek/Mount Duneed has facilitated rapid and significant population growth and urban change. Near on 82% of the City's population growth between 2011 and 2021 occurred across the City's southern areas, in turn, shifting the City's population epicentre south toward the coast.

As the City's southern population has grown, industrial land at Belmont, Breakwater, Grovedale, Newtown and South Geelong has been encircled by growing and increasingly dense residential neighbourhoods. Between 2011 and 2021, population density in the City's southern areas grew by 1.5 persons per hectare and is likely to have continued to intensify since 2021.

As previously discussed, the co-location of the City's southern industrial precincts and a growing population has propelled significant investment, jobs growth and jobs densification in the City's southern industrial areas particularly to support the establishment of new population serving enterprise. The City's southern industrial areas, however, lack available land to accommodate further demand as the City's southern population continues to grow.

Figure 32: Greater Geelong Population Change by Density 2011-2021



Source: ABS, CKC

Population Outlook

Geelong is projected to continue to experience similar levels of growth to those seen over the past 10-15 years. To 2036, Victoria in Future (VIF) anticipates the municipality will support an additional 98,000 residents, at an average annual growth rate of 2.1%. This means that by the mid 2030's, the City is likely to be home to a community of 400,000 residents up from 290,000 residents today. By 2046, Greater Geelong is expected to reach a population of approximately 442,000 (Forecast.id).

Into the future, the City's southern areas will continue to lead the city's population growth. However, with the delivery of new greenfield areas in the city's north, the north is projected to take on a greater share of the City's population growth.

Population growth will result in increased merchandise, construction, energy, food, waste and service demand which will inevitably engender increased and ongoing demand for new industrial floor space at every scale (small, medium and large sized space).

On per capita basis, a City of 400,000 residents will need additional industrial floor space of between 450,000 to 550,000 sqms based on industry floor space ratios.¹

¹ Based on a JLL ratio of 4.5 to 5.5 sqms of industrial space per person

Figure 33: Greater Geelong Projected Population Growth (SA2) 2021 – 2036
Projected Population Growth (SA2) 2021 – 2036

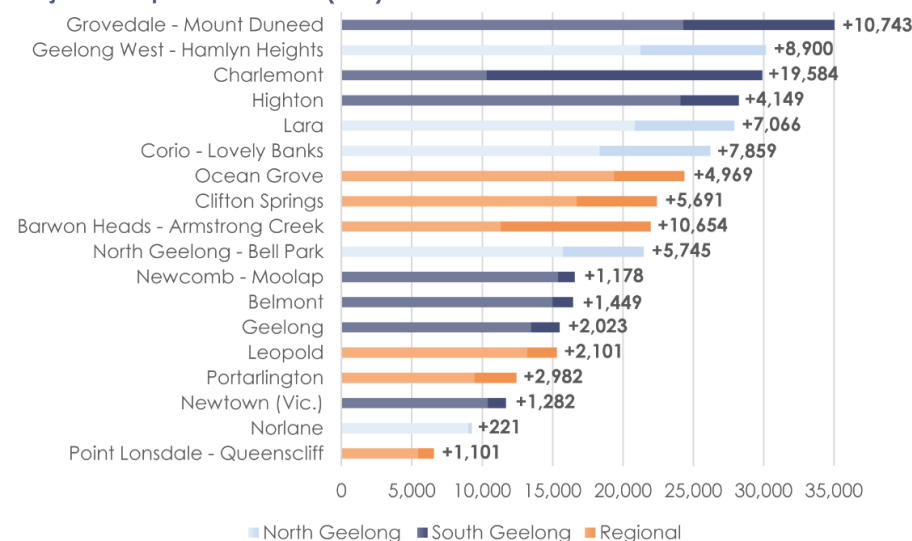
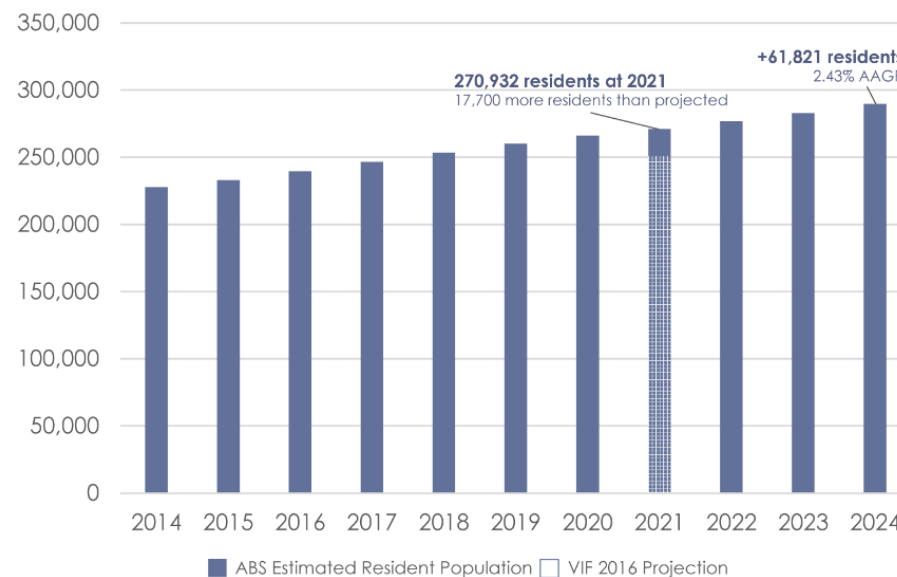


Figure 34: Greater Geelong Population Growth (LGA) 2014 – 2024
Population Growth (LGA) 2014 – 2024



Source: ABS, CKC, VIF 2016 & 2023

Industrial Investment Factor 2: Locational Advantages

Industry requires rapid, predictable and largely unconstrained access to consumers, supply chains, service providers and labour to succeed.

Greater Geelong enjoys unique locational advantages:

- unencumbered industrial land connected to multi-modal transport options
- metropolitan and regionally accessible industrial land.

Unique Operational Reach and Capability

Geelong's northern industrial precincts enjoy unique operational reach. Air, sea, rail, and road transport connectivity enable access to local, regional, national and international markets.

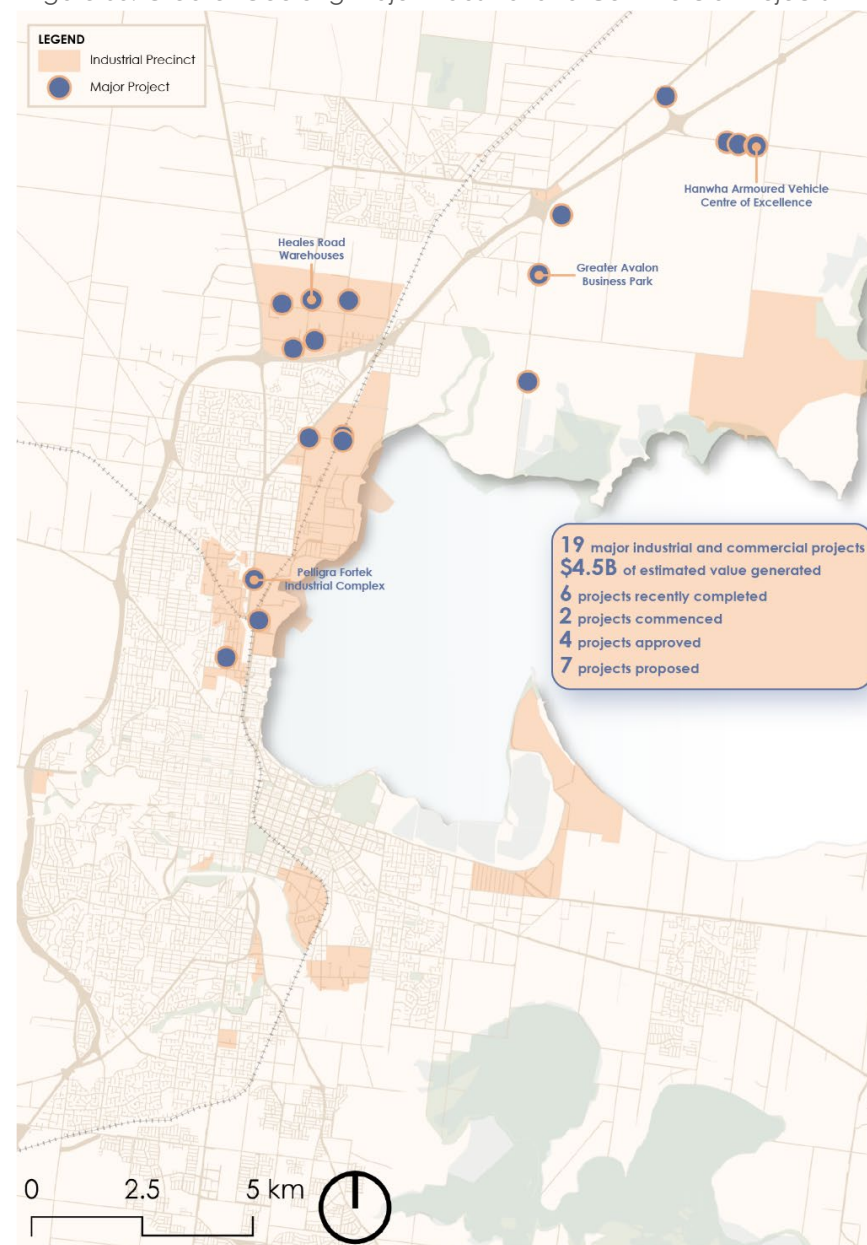
The constellation of the Geelong Port, the Princes Highway, Avalon Airport, and western rail and freight routes in the City's north provides the City's northern industrial sector a breadth of transport capability that enables the movement of goods in all forms and sizes - bulk goods, consumer goods, liquids and oversized infrastructure.

Unique accessibility, in combination with largely unencumbered industrial land, helps explain why the City's industrial north is currently subject to a substantive pipeline (19 major projects*) of proposed and confirmed industrial floor space investment totalling \$4.5 billion to be delivered over the next 5 years (this includes the Avalon development which is an estimated \$3.3 billion of development). Investment includes defence, warehousing, energy, cargo processing, fuel and food infrastructure which will inevitably grow the city's industrial footprint, workforce, networks and output.

We note that as the City's northern industrial precincts expand and new industrial land is developed, there are aspirations to further improve and expand the capacity of the City's transport infrastructure. The *Geelong Port and Land Freight Infrastructure Plan* identifies a range of transport investments to further elevate the investment profile and development of the Port and surrounding land. Additionally, the revival of the Western Rail Plan and the delivery of the Western Roads Upgrade will support improved transport connectivity throughout the western region including Greater Geelong.

*Major projects includes projects with an estimated value over \$10 million

Figure 35: Greater Geelong Major Industrial and Commercial Projects



Source: [City of Greater Geelong](#), CKC

Integrating with a Booming West

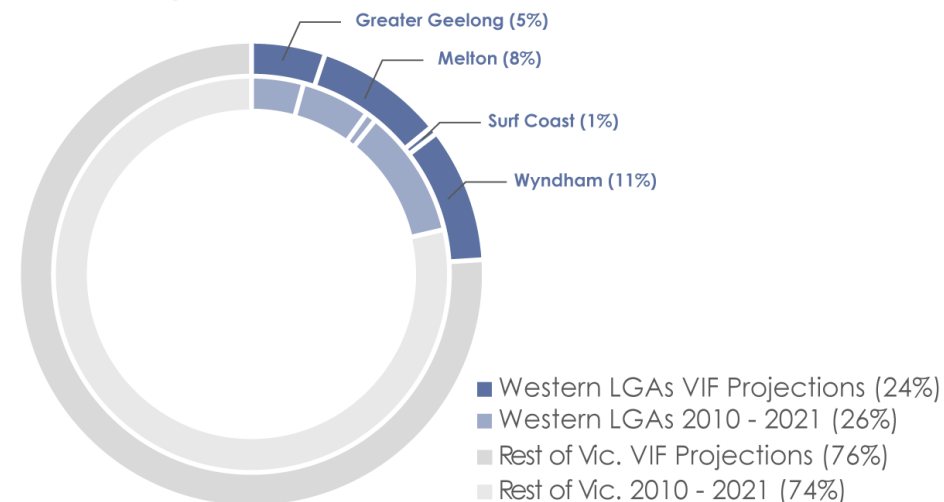
The City's accessibility and connectivity includes direct proximity to Melbourne's growth area communities which represents a further industrial investment supply side attractor.

Melbourne's west leads the state's population growth. The Princes and Western Highways take in rapidly growing and young communities at Rockbank, Cobblebank, Point Cook, Wyndham Vale and Tarneit. The City of Wyndham which directly borders the City of Greater Geelong is one of the fastest growing communities in Australia, recording average population growth of 5.1% per annum. By 2051 Melbourne's Western Growth Corridor will be home to over the 1.8 million residents and 664,000 households.

Greater Geelong's existing and future northern industrial precincts are within a 25 minute private vehicle journey to the Western Growth Corridor as well as an equivalent 25 minute journey to the Geelong's growing resident base in its south. Geelong's northern industrial areas are thereby positioned to service the consumer, supply chain and infrastructure needs of Victoria's fastest growing communities. Hence, the scale of industrial investment and future expansion that this area is set to experience.

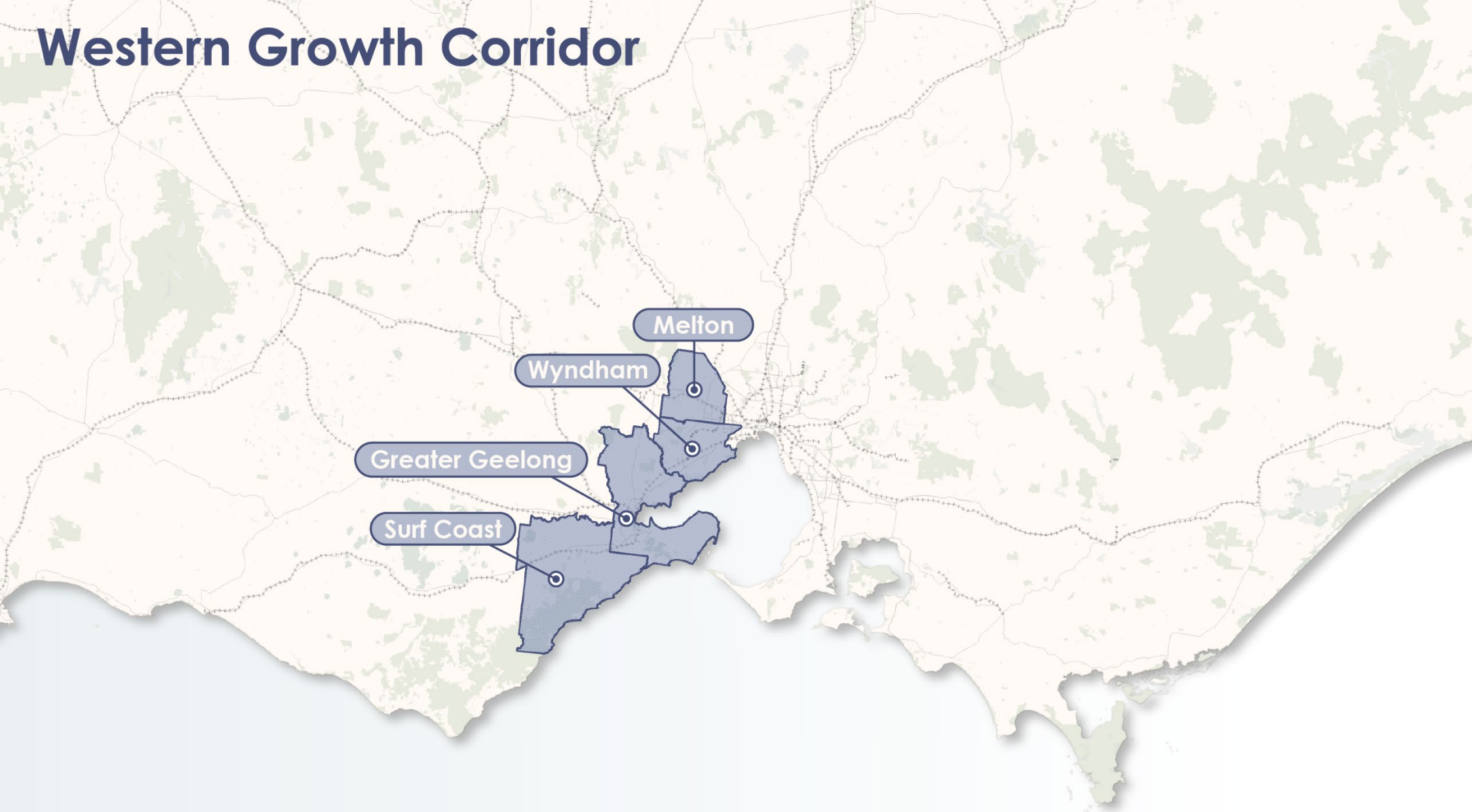
Rail and road connectivity provides a basis to integrate the Cities of Wyndham, Melton and Greater Geelong. Currently, 4% of Greater Geelong's workforce live in the Cities of Melton and Wyndham. Greater Geelong is also an attractor of new residents from Melbourne's west. Between 2016 and 2021 Greater Geelong attracted over 2,500 new residents from the City's of Melton and Wyndham and over 1,000 residents from each of Hobsons Bay, Merri-Bek and Moonee Valley. In addition, at 2021, close to a third of the Surf Coast's employed population worked within Greater Geelong.

Figure 36: Western Growth Corridor Projected Population Growth 2010 - 2036
Percentage of population increase in Victoria 2010 - 2036

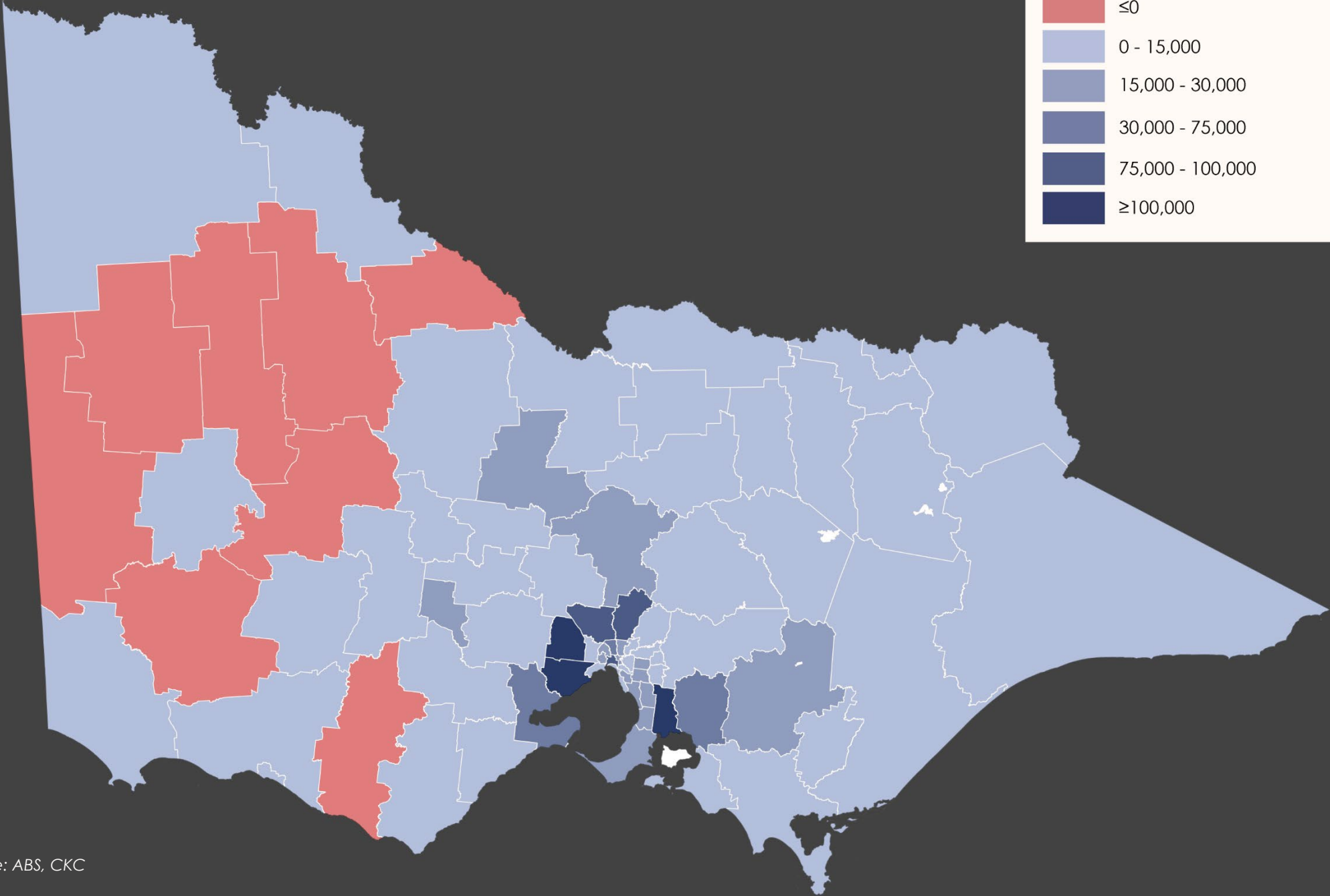


Source: CKC, VIF 2023

Western Growth Corridor



Population change in Victoria by LGA (2010 - 2023)



Source: ABS, CKC

Industrial Investment Factor 3: Workforce Growth

The availability of a large skilled workforce is a fundamental industrial supply factor essential to inducing industrial investment. An industrial location without access to a workforce cannot service industry needs, regardless of the location's land and locational advantages.

The City and broader region's growing population comprises a substantive labour force made up of numerous young, skilled adults highly engaged in economic activity.

Assuming the same participation rate as recorded at 2021 (60.7%) the City's workforce will grow to approximately 188,000 workers in the next decade with a significant increase in the number of prime working age adults in their 20s to mid-40s. The City will likewise sit in close proximity to a deep labour pool along the Western Corridor which in the City of Wyndham alone will comprise potentially 225,000 workers by 2036.

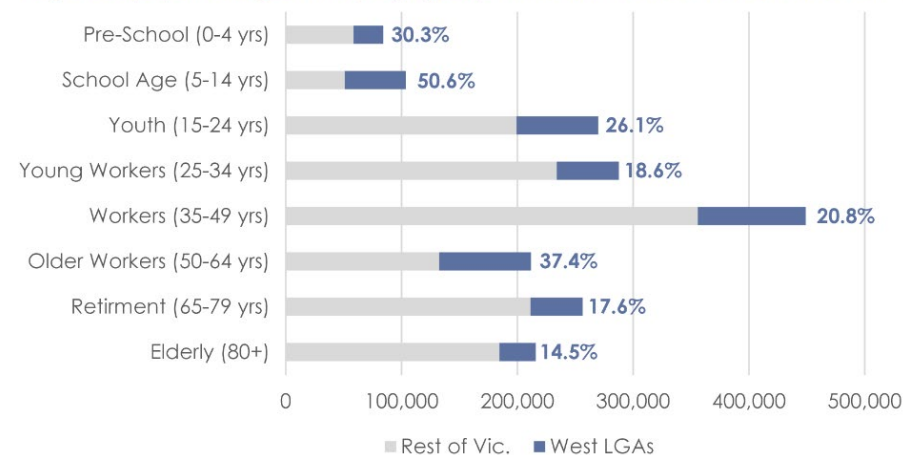
Victoria's centre for young people

To 2036, over half of the growth in school aged population will occur in Victoria's western local government areas. Growth in pre-school and youth cohorts is expected to follow similar trends, with over a quarter of growth in each cohort expected to be located within the West.

The west is projected to be home to Victoria's youngest demography. By mid next decade, for instance, a third of Victoria's 0-24 year olds will be living in western local government areas.

For industry, a growing youthful population provides a unique combination of workforce capability and household consumers – noting that young establishing households are major drivers of new housing and household expenditure while forming a formidable labour force.

Figure 37: Western LGAs Projected Population Growth in Age Groups 2010 - 2036
Projected population growth by age group in Western LGAs & Rest of Vic. 2021 - 2036



Source: CKC, VIF 2023

Industrial Investment Factor 4: De-Globalisation and the Digital Economy

In the decades prior to the Covid-19 pandemic, developed economies focused on the cost of continuing to support major manufacturing operations and the supply side efficiencies and economic benefits of relocating production to lower cost developing economies.

Across the developed world this rationale resulted in industry closure including the closure of major manufacturing industry across Victoria including Greater Geelong. The pandemic and more recent global trade uncertainties have, however, drawn attention to the issues of supply chain risk, predictability and the national security implications of limited capacity to produce critical inputs.

In this context, major industry and government are increasingly giving greater economic weight to economic certainty and predictability, particularly in the wake of heightening geo-political risks. In this context, industry and government are exploring options to shrink the distance between where goods are produced and where they are consumed (de-globalisation). Production costs, nonetheless, remain a major barrier as well as the availability of skills – decades of off-shoring have eroded the local skills base.

Notwithstanding enduring cost and skill barriers, the desire to strengthen supply chains and local productive capability is set to become an enduring shift rather than a temporary phase, given global uncertainties and the need to retain capacity to produce critical economic inputs of national importance. Government support for continued fuel refining capability in Geelong and support for supply chain resilience is representative of a shift toward the retention and renewal of critical national economic capability.

For the reasons described above - access to skills, growing markets and population, established industry and transport connectivity - Greater Geelong is ideally located to support a structural shift toward onshoring and the broader renewal and expansion of national and state manufacturing capability.

Industrial Land Demand and the Digital era

In the digital era, growing numbers of firms, employees and consumers are successfully able to operate independently of place and space. The rise of online retail enables consumers to shop independent of physical stores, while the rise of work from home options enables a wide variety of work independent of dedicated commercial floorplates.

While retail strips and office buildings have been adversely impacted by the digital economy, the digital economy has greatly benefited industrial areas. Every click and download generates demand for industrial space - fulfillment centres, logistics hubs and data centres. There is a direct correlation between digital sales and physical space requirements that is resulting in tangible impacts on industrial land demand. For every, every \$1.5 billion in online retail sales, an estimated 110,000 square metres of distribution warehouse space is required.

The digital economy's impact on industrial land is likely to intensify rather than moderate. The continued growth of cloud computing, artificial intelligence and e-commerce suggests that demand for specialized industrial facilities will remain strong. Industry 4.0 and corresponding advances in niche manufacturing are likely to further increase demand for physical space in industrial areas.

While the digital economy creates substantial opportunities for industrial land development, it also presents unique challenges. Digital industries in combination with the overall electrification of industry requires significant energy capacity and potentially significant investment in new infrastructure and energy capacity, which in many locations is a constraint on industrial growth. We have heard from local industry that the provision of high-capacity energy infrastructure is fundamental to industry and an emerging concern in Greater Geelong. We also note that new high-capacity industrial facilities developed for the new economy attract premium rents and prices.

As Geelong's digital economy grows, the need for sustainable physical infrastructure required to support a range of advanced industries will also grow. Understanding and anticipating these trends will be central to the delivery of the City's new industrial precincts and economic sustainability of existing areas.

Industrial Investment Factor 5: Industrial Policy Support

Industrial growth and the supply of industrial land is subject to significant and largely supportive State Government land use policy.

Plan Victoria (2025)

Plan Victoria is the Victorian Government's land use strategy. The plan seeks to deliver more jobs near homes by planning for, protecting and readying commercial and industrial land for development.

The plan includes key actions relevant to the development and delivery of industrial land:

- **Action 8 - Ensure new industrial and commercial land is ready for development** - Accordingly, government commits to resolving issues preventing development, including service, drainage and environmental constraints.
- **Action 12 - Protect and Enhance Tree Canopy** which includes trialling development and tree cover in new industrial precincts.
- **Action 18 - Improve the environmental sustainability of development** – which may impact on the sustainability of new industrial development



A 10-year plan for industrial land (2025)

In November 2025, the Department of Transport and Planning released A 10-year plan for industrial land which sets out a range of actions to boost industrial land supply across the state. The Plan identifies State significant industrial projects and precincts including precincts within Greater Geelong:

1. Geelong Future Economy Precinct (Deakin)
2. Geelong Port Renewable Energy Precinct
3. Pivot City Innovation District
4. Geelong Ring Road Employment Precinct
5. Greater Avalon Employment Precinct



The Plan also outlines moves to enable development of new industrial land and precincts, including the rezoning of the Greater Avalon Employment Precinct and the establishment of a Trunk Infrastructure Fund.

In 2025, State Government also introduced new Industrial and Commercial Land Classifications. The classifications identify the role of all industrial and commercial land across the State. At 2026, the classifications are yet to be applied to industrial and commercial land in regional municipalities. Classifications are as follows:

1. Local Industrial Area – Existing
2. Local Industrial Area - Future
3. Local Commercial Area – Existing
4. Regionally Significant Industrial Area - Existing
5. Regionally Significant Industrial Area - Future
6. Regionally Significant Commercial Area - Existing
7. Regionally Significant Commercial Area - Future
8. State Significant Industrial Area – Existing
9. State Significant Industrial Area - Future
10. State Significant Commercial Area - Existing
11. State Significant Commercial Area - Future

Victoria's Economic Growth Agenda

As part of the State's economic growth agenda, the Victorian Government has released two key policies in the Victorian Economic Growth Statement (2024) and Victorian Industry Policy (2025).

The policies identify advanced manufacturing and defence, health technologies and medical research, circular economy, digital technologies and agribusiness as priority growth sectors for the Victorian economy.

Critically, to support sector growth the Victorian government is committed to delivering the 10-year plan for industrial land, focusing on Melbourne's northern and western growth corridors and regional Victoria. Specifically, the initiative seeks to boost regional employment options by unlocking land for jobs in regional greenfield locations including Avalon.

This initiative aims to provide businesses with clear pathways for expansion and development. The industrial land initiative is supported by a commitment to streamline regulatory processes and to support market led investment.

The policies also seek to support Victoria's defence-oriented supply chain to win work, grow and support the AUKUS initiative which may create opportunities for investment in defence-related industries, potentially boosting Geelong's established defence sector.



Separation Distance Guidelines (2024)

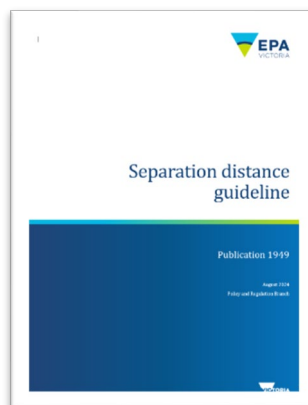
The Environment Protection Authority provides guidelines for industry separation distances. The new guidelines recommend specific buffer distances for various industrial activities to manage the impact of odour, dust, and noise.

The guidelines provide advice on recommended separation distances between industrial land uses that emit odour and/or dust, and sensitive land uses including residential areas.

Separation protects industry from the risk of incompatible land uses and resulting operational issues and the community from industries and activities that pose health, safety and amenity risks. It also protects industries from incompatible land use and development.

Separation distance guidance supports the implementation of the *Planning and Environment Act 1987* (P&E Act) and the *Environment Protection Act 2017* (EP Act).

The guidelines entail both statutory and strategic planning implications and key implications for the development of the City's new industrial precincts and the ongoing development and renewal of existing industrial areas.



The Barwon Regional Economic Development Strategy (2022)

outlines the current economic context and outlook for the wider Barwon Region. The Strategy highlights the region's strong population growth and youth in-migration, particularly in Geelong and the Surf Coast, crediting the area's liveability and proximity to socioeconomic hubs. The Barwon region maintains a positive employment outlook, with high labour-force participation rates and low unemployment rates relative to the regional Victorian average.

The Strategy identifies that the region's employment base is diversifying, with similar growth trends to that of Geelong. Over the almost 20 years between 2001 and 2020, population serving industries grew greatly, with health care and social assistance experiencing the highest level of growth in employment across all sectors. Education and training industries also expanded significantly.

Whilst highlighting the shifts towards an increasingly diversified economy, the Strategy places significance upon the role of the region's traditional industrial industries. The role of manufacturing is one that is rapidly changing yet critical in the success of the region's economy.

The plan sets out the medium-to long-term strategic directions for Barwon's economic development including directions supportive of the transformation of industrial industry:

1. **Accelerate the transition to new and high-value manufacturing opportunities.**
2. **Further the innovation and skills ecosystem.**
3. **Realise the potential of the visitor economy.**
4. **Maximise the economic benefit from the expanding service-based sectors.**
5. **Build a sustainable and climate-resilient region.**



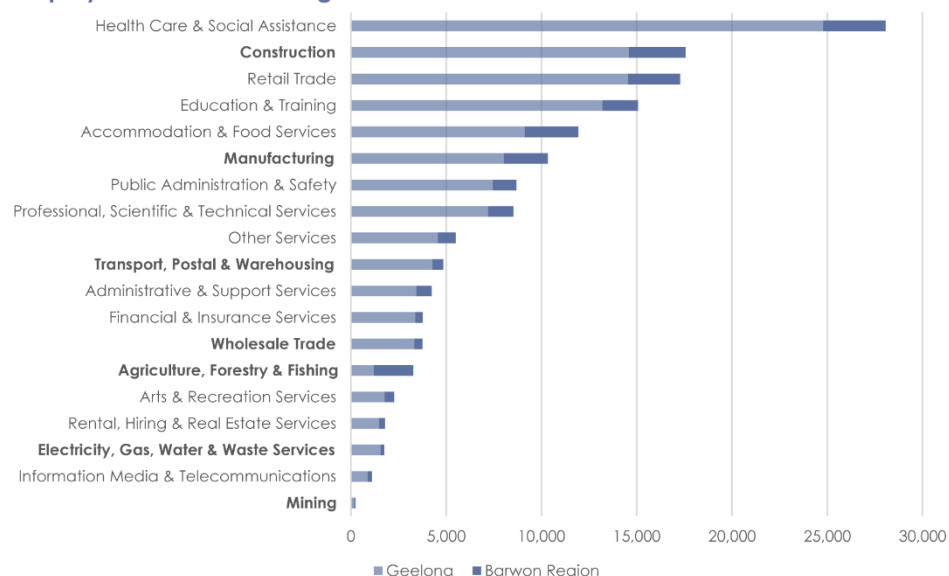
3.1 Key Insights

The overlapping influence of local and regional population growth and associated housing and infrastructure development, the City's unique road, sea and air accessibility combined with its heavy industry capability and supportive land use settings, establish favourable conditions for future industry expansion and industrial investment.

Anticipating this, Victorian government employment projections for the Barwon region forecast future growth in industrial employment including a return to manufacturing employment growth which is in keeping with the volume and focus of recent industrial permits and approved and mooted industrial projects.

Figure 38: Employment in Barwon Region 2024

Employment in Barwon Region 2024



Source: CKC, Victorian Skills Authority

Table 11: Industrial Demand and Supply Intensity Factors

Demand Intensity Factors	Industrial Sector Impacts	Rating
Population growth	Population growth will boost trade volumes. Demand for space to support ecommerce, logistics, construction, consumer goods, energy, waste services, and recreation uses will grow.	
Established Industry and Economic Growth	Industry is growing, fostering investment, innovation and adoption of new technology.	
Supply Intensity Factors		
Flat unencumbered land in proximity to energy and infrastructure	The City incorporates land that supports power intensive industry in locations that enable sensitive uses, and 24 hour operations.	
Proximity to Population	The City incorporates industrial precincts in close proximity to population enabling delivery optimization for e-commerce, construction, and services.	
Connectivity (highway, port and airport adjacent)	The City enjoys unique sea, rail, road and air accessibility that fosters labor access, truck compliance, visibility, e-commerce, logistics, inter-mediate goods, trade supplies. In the future the City is positioned to service a population of over 2 million residents.	
Large skilled workforce	The City's workforce is growing in volume and skill. The City is attractive to youthful in-migration.	
Industry Networks	The City incorporates an established and growing industrial and commercial networks needed to foster specialisation, customization, and supply chain complexity and diversity.	

Source: CKC

LAND SUPPLY

An aerial photograph of a city and its surrounding landscape. The city is characterized by a dense grid of streets and buildings, with a prominent river or canal winding through it. The surrounding area includes large, flat, open fields, some of which appear to be agricultural or industrial. The overall tone of the image is sepia or brownish, giving it a historical or archival feel. The text 'LAND SUPPLY' is overlaid in the top left corner in a large, bold, white font with a blue outline.

04

4.0 Greater Geelong Industrial Land Supply

The following explores industrial land supply across the city.

At 2025, the City incorporated approximately 2,915 hectares of land zoned for industrial uses². This includes 2,730 hectares (93.7%) of land zoned within Industrial Zones (Industrial 1, 2 & 3 Zones) and 184 hectares of land zoned Commercial 2 (C2Z). The City's 2,915 hectares of zoned land comprises 5,500 lots with a median lot size of 662 sqm.

For the purpose of this review, all identified land has been categorised as either occupied, underutilised or vacant (see glossary for definitions). At 2025, the City's zoned industrial land is highly occupied. Over 2,000 hectares is categorised as fully developed and occupied (71% of total land). A further 550 hectares (19% of zoned land) is identified as underutilised, suggesting a proportion of this land (not all) might be theoretically intensified for further industrial uses. Underutilised sites support an active industrial use and are thereby not considered vacant within this assessment. The median lot size of underutilised lots is 3,960 sqm.

The study identified 292 hectares of vacant industrial land across 381 lots.

Table 12: Greater Geelong – Occupancy Status of Industrial Land

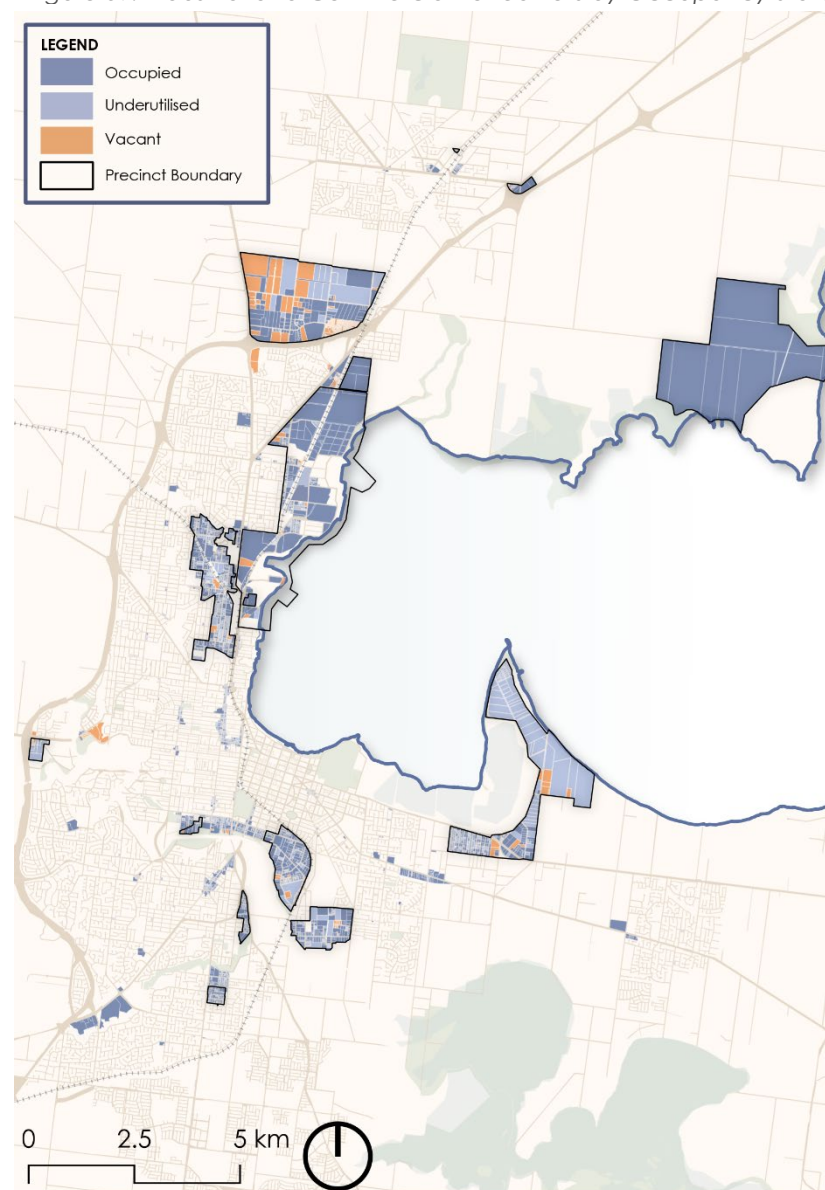
Vacancy Status	No. of lots	Land including Moolap South (ha)	Total land (ha)
Occupied	4,840	2070.6	2,071.3
Underutilised	255	295.0	552.1
Vacant	227	275.6	292.0
Total	5,322	2,641.2	2915.5

Source: CKC

The following explores the status of vacant, occupied and underutilised land within the City's primary precincts.

² Includes land zoned as C2Z, IN1Z, IN2Z, IN3Z

Figure 39: Industrial and Commercial Zoned Lots by Occupancy Status



Source: CKC

Zone	Fyansford	GRREP	Lara	North Geelong	Moolap	Ocean Grove	Portarlington	Port*	Point Wilson	Sth Geelong Precincts	Other	Total
Total Industrial Land												
IN1Z	17.3	103.4	0.7	149.7	403.6	9.8	6.2	114.1	0.0	221.3	0.3	1026.5
IN2Z	0.0	442.0	0.0	32.2	0.0	0.0	0.0	373.7	796.6	33.3	0.0	1677.8
IN3Z	0.0	0.0	12.1	0.0	0.0	9.5	0.0	0.0	0.0	3.7	0.0	25.3
C2Z	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.0	0.0	0.0	176.5	183.5
Total	17.3	545.4	12.8	181.9	403.6	19.3	6.2	494.8	796.6	258.4	176.9	2913.1
Occupied Industrial Land												
IN1Z	2.7	49.3	0.7	122.3	80.7	9.1	1.9	102.7	0.0	157.9	157.9	527.6
IN2Z	0.0	170.5	0.0	25.5	0.0	0.0	0.0	351.3	796.6	31.6	31.6	1375.5
IN3Z	0.0	0.0	11.5	0.0	0.0	5.1	0.0	0.0	0.0	3.7	3.7	20.3
C2Z	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.0	0.0	0.0	0.0	147.9
Total	2.7	219.9	12.2	147.8	80.7	14.1	1.9	461.0	796.6	193.3	193.3	2071.3
Underutilised Industrial Land												
IN1Z	13.3	0.6	0.0	20.3	295.7	0.6	3.4	6.7	0.0	56.8	0.0	397.4
IN2Z	0.0	132.6	0.0	6.2	0.0	0.0	0.0	13.6	0.0	2.4	0.0	154.7
IN3Z	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
C2Z	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	13.3	133.2	0.0	26.5	295.7	0.6	3.4	20.3	0.0	56.8	0.0	549.7
Vacant Industrial Land												
IN1Z	1.4	53.5	0.0	7.2	27.2	0.2	0.9	4.6	0.0	6.6	0.0	101.5
IN2Z	0.0	138.9	0.0	0.5	0.0	0.0	0.0	8.9	0.0	1.7	0.0	149.9
IN3Z	0.0	0.0	0.6	0.0	0.0	4.4	0.0	0.0	0.0	0.0	0.0	5.0
C2Z	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	35.6	35.6
Total	1.4	192.4	0.6	7.7	27.2	4.6	0.9	13.5	0.0	8.3	35.6	292.0
Industrial Land Vacancy Rate												
IN1Z	8.0%	51.7%	0.0%	4.8%	6.7%	1.6%	14.1%	4.0%	-	3.0%	0.0%	9.9%
IN2Z	-	31.4%	-	1.5%	-	-	-	2.4%	0.0%	4.7%	-	8.9%
IN3Z	-	-	4.6%	-	-	46.6%	-	-	-	0.0%	-	19.6%
C2Z	-	-	-	-	-	-	-	0.0%	-	-	20.2%	19.4%
Total	8.0%	35.3%	4.3%	4.2%	6.7%	23.7%	14.1%	2.7%	0.0%	3.2%	20.1%	10.0%

* Includes Pivot City

Source: CKC

4.1 Geelong Port Industrial Land Supply

Geelong Port is one of the City's most occupied precincts. The Port comprises 487 hectares of zoned land, of which 93% of land is classified as occupied.

It follows that the Port has limited available vacant land supply to support industrial expansion. At 2025, the study identified a total of 13.5 hectares of vacant land, 12.3 hectares of which is serviced. The majority of vacant serviced land comprises large lots that are well positioned to support a range of industrial development, including large-format industrial development and small lot subdivision. Overall, due to its limited land supply, the Port area is not well positioned to accommodate a large share of the City's future industrial floor space demand. The Port's primary form of industrial expansion will result from renewal and intensification of aged sites. Renewal, however, risks lot fragmentation and the loss of large lots needed to serve port purposes.

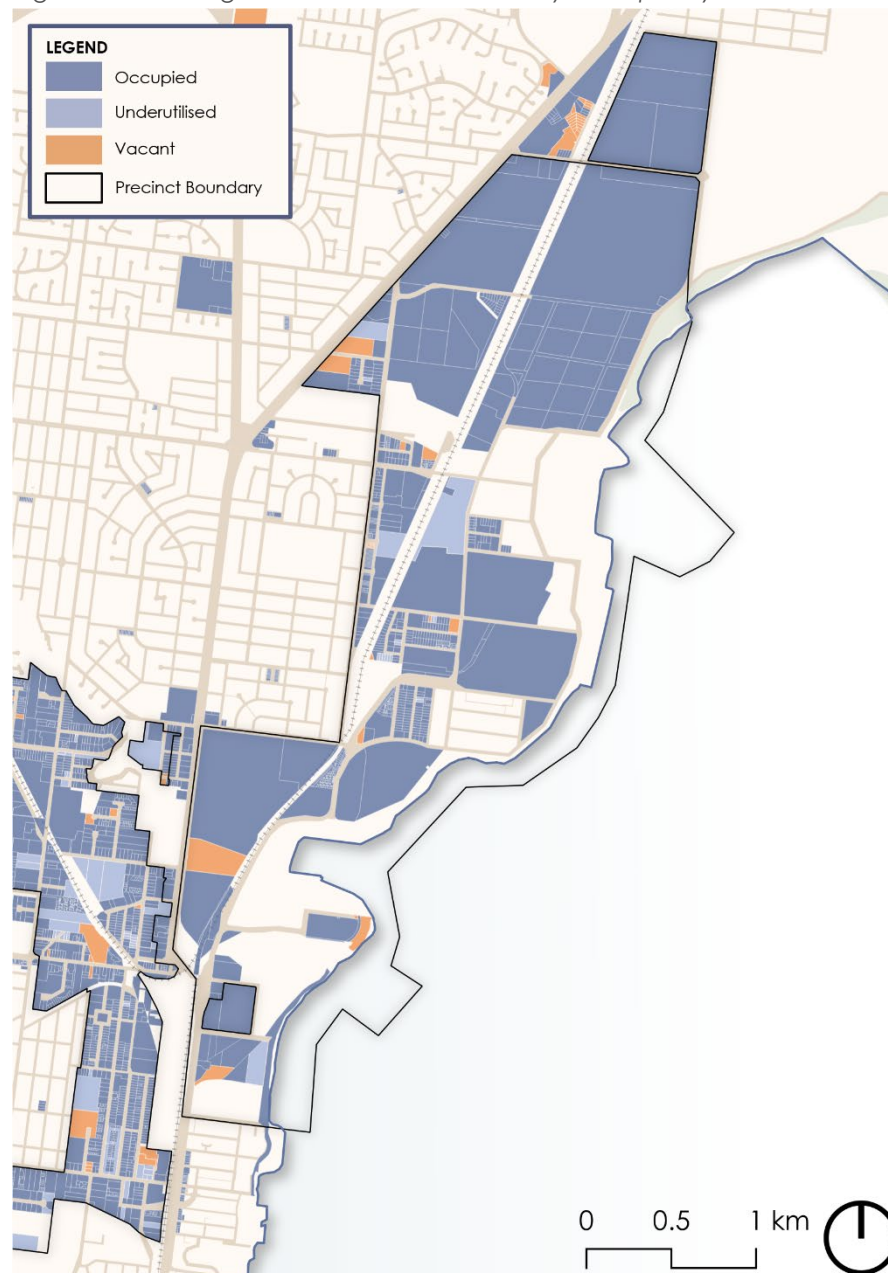
The Port area includes Port Zoned land (PZ) which directly supports Port activity. This area is excluded from this review as this area is generally not available for private development. Notwithstanding this, as identified in the *Port of Geelong Port Development Strategy 2024*, Port Zoned land comprises significant undeveloped land which may be developed for port-related uses and may subsequently absorb a proportion of future industrial demand.

Table 13: Geelong Port – Occupancy Status of Industrial Land

Vacancy Status	No. of industrial lots	Total Area (ha)
Occupied	560	457.1
Underutilised	18	16.5
Vacant	18	13.5
Total	596	487.1

Source: CKC

Figure 40: Geelong Port Industrial Zoned Lots by Occupancy Status



Source: CKC

4.2 Geelong Ring Road Employment Precinct Land Supply

At 2025, the GRREP was 40% occupied. The GRREP incorporates a total of 193 hectares of vacant land of which 105 hectares is currently serviced and development ready.

The GRREP comprises the only source of vacant broadhectare industrial land in the municipality accounting for 70% of the City's total vacant industrial land and 77% of vacant land comprising large developable lots (≥ 1.0 ha).

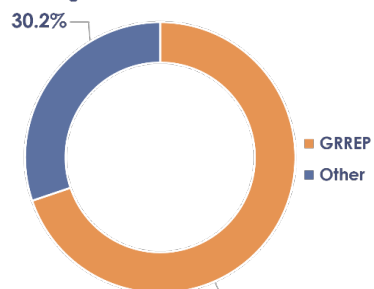
As of April 2025, the GRREP was subject to a significant pipeline of approved and pending planning permits that if acted upon would see the development of over 61 hectares of available land - in theory reducing the precinct's vacant land to a total of 131 hectares.

As discussed, the GRREP is subject to subdivision controls that favour the land use needs of large format industrial operations. As a result, 48% of the City's vacant industrial land is currently subject to a minimum subdivision requirement of 5 hectares, while a further 20% of the City's vacant industrial land is subject to a minimum subdivision requirement of 1 hectare. The implications of this are further explored in Section 5.

Table 14: GRREP – Occupancy Status of Industrial Land ³

Vacancy Status	No. of lots	Total Area (ha)
Occupied	133	219.7
Underutilised	19	133.2
Vacant	90	192.6
Total	242	545.5

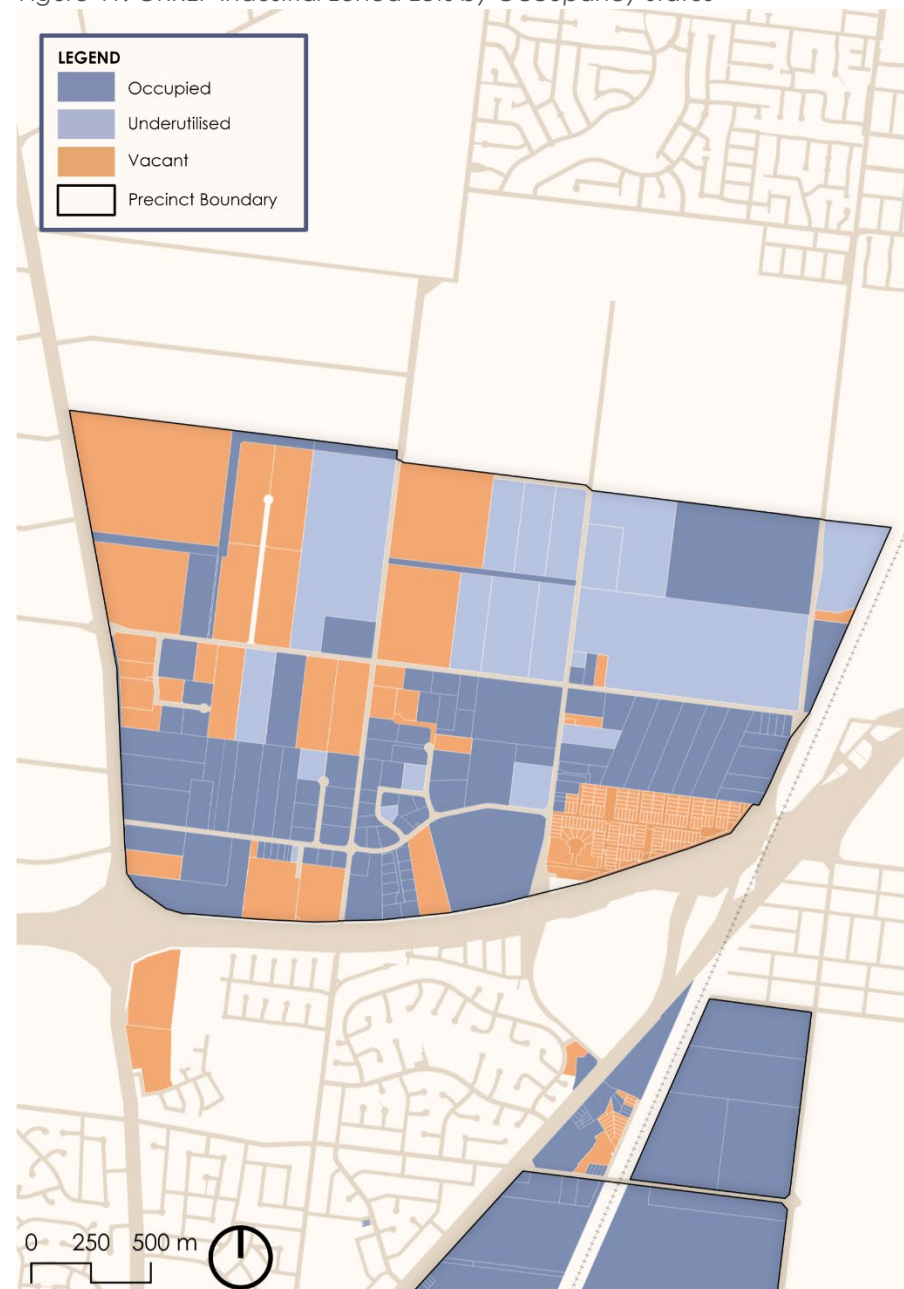
Percentage of Total Vacant Industrial Zoned Land*



Source: CKC

³ GRREP vacant lot analysis reflects parcels as determined by the cadastre and parcels identified in the New Station Estate. Figure 40 reflects cadastral parcels.

Figure 41: GRREP Industrial Zoned Lots by Occupancy Status



Source: CKC

4.3 North Geelong Industrial Land Supply

North Geelong is a fully occupied industrial precinct. The precinct incorporates 7.7 hectares of serviceable vacant land across 21 lots. The majority of vacant land is concentrated in 2 large lots of 4.8 hectares in size.

Vacant sites are currently subject to planning permit processes. The ultimate delivery of permitted sites will reduce vacant lot supply to 2.8 hectares across the precinct.

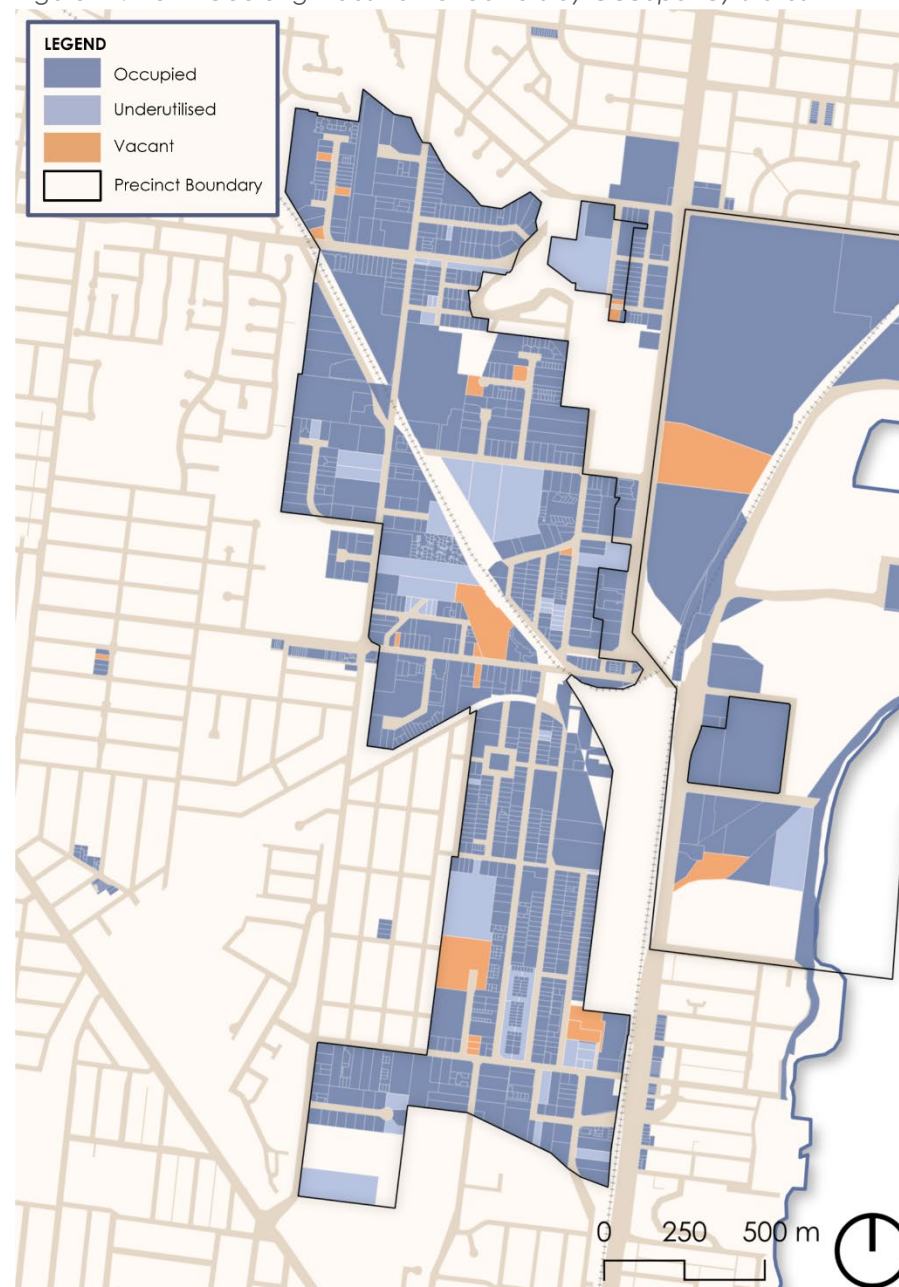
There are a number of potentially underutilised industrial sites in the precinct that have the potential to support future renewal. Into the future, the ongoing evolution of the North Geelong precinct will be reliant on the renewal of existing sites.

Table 15: North Geelong – Occupancy Status of Industrial Land

Vacancy Status	No. of lots	Total Area (ha)
Occupied	1,072	147.8
Underutilised	54	26.5
Vacant	21	7.7
Total	1,147	182

Source: CKC

Figure 42: North Geelong Industrial Zoned Lots by Occupancy Status



Source: CKC

4.4 Southern Precincts Industrial Land Supply

The industrial areas that comprise the Southern industrial precincts are fully occupied.

In the recent past the City's southern industrial areas have been subject to significant demand and development. At 2025, southern industrial areas incorporated an estimated 8.3 hectares of vacant industrial land, of which 5.6 hectares of is serviced.

As the city's southern region continues to grow in population there is very limited vacant land and sites (26 sites) to support the development of new industrial uses to service the needs of the community.

The south includes a number of heavy industry uses including uses in West Fyans that may no longer be in keeping with the population and place-making direction of the City's southern region.

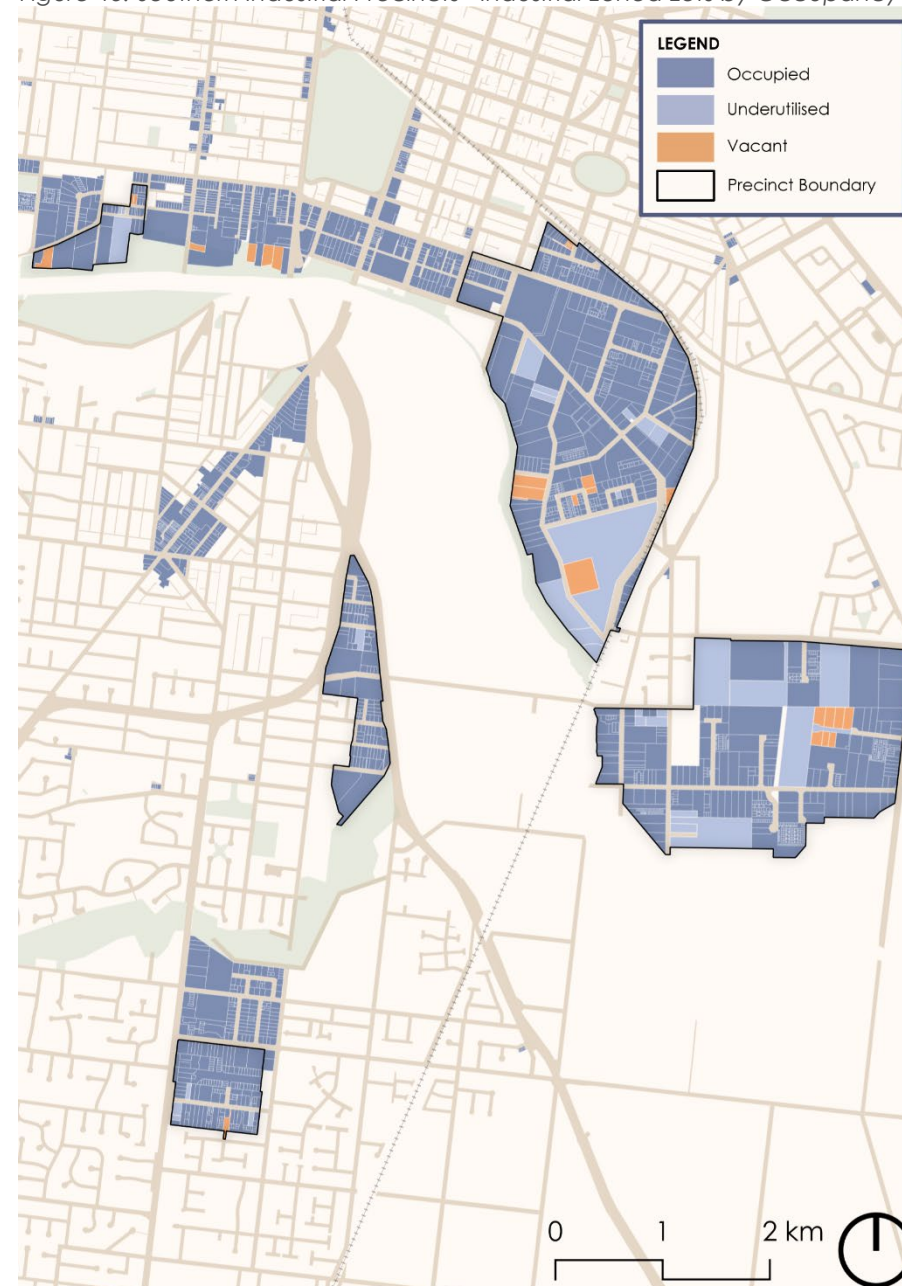
The future of industrial development and expansion in the City's southern industrial areas will (a) entail the renewal of existing sites and (b) the redevelopment of land vacated by the relocation of heavy industries.

Table 16: Southern Industrial Precincts – Occupancy Status of Industrial Land

Vacancy Status	No. of lots	Total Area (ha)
Occupied	1,159	193.3
Underutilised	31	59.2
Vacant	26	8.3
Total	1,216	260.7

Source: CKC

Figure 43: Southern Industrial Precincts - Industrial Zoned Lots by Occupancy



Source: CKC

4.5 Moolap Industrial Land Supply

The 129.3ha Moolap Southern Precinct, as outlined in the 2019 *Moolap Coastal Strategic Framework Plan*, is intended to accommodate light and medium industry alongside commercial businesses that provide local services and employment. Its fine-grain urban form allows for a human-scaled interface with future surrounding land uses, which are expected to transition toward residential, tourism and environmental purposes.

At present, 79.9 hectares of the precinct is occupied, with a further 10.7 hectares vacant, including two larger undeveloped sites.

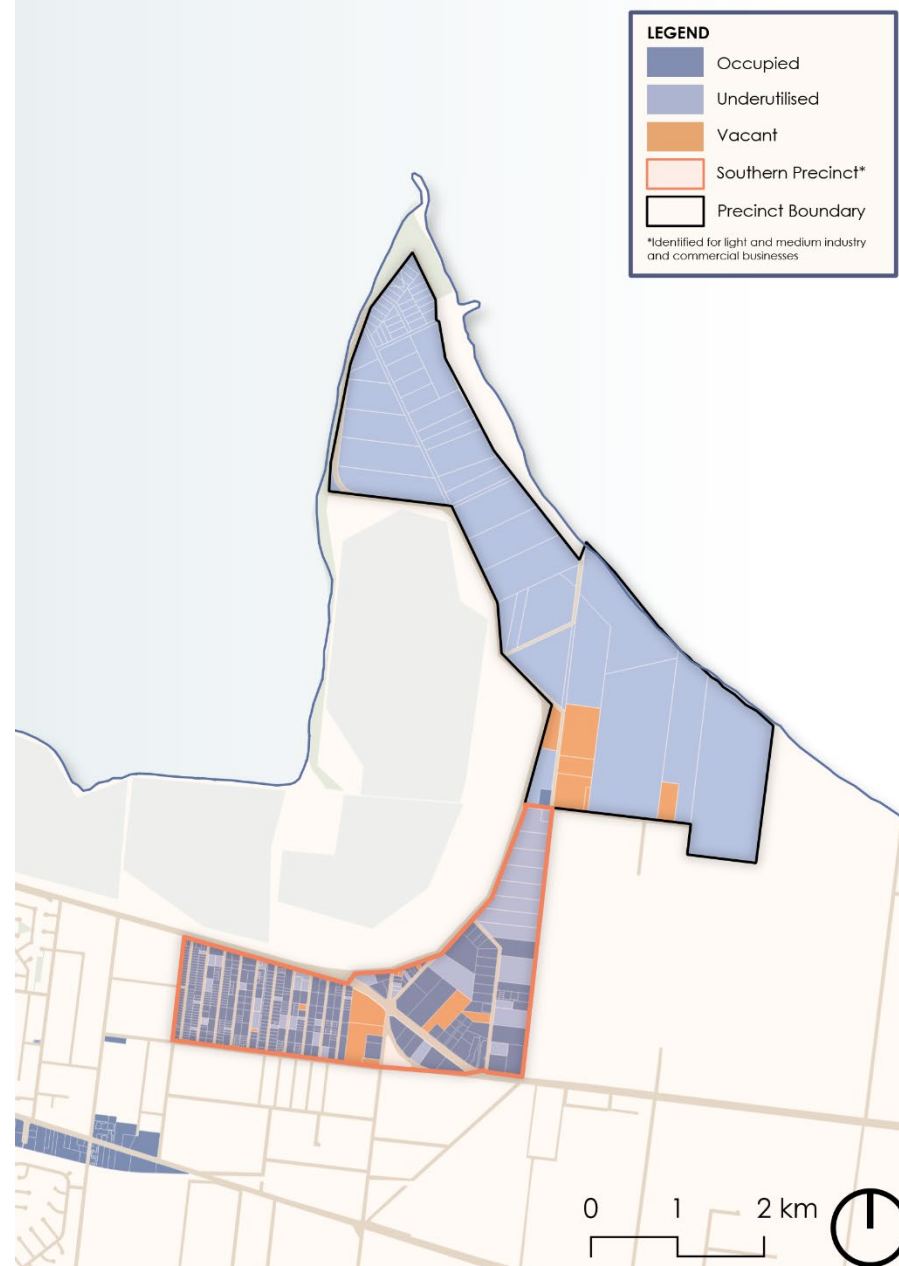
The absence of a reticulated sewer network restricts the establishment of operations that rely heavily on water or generate significant waste. Improvements to drainage and sewer services in combination with interface treatments will enhance both amenity and environmental impact while strengthening the precinct's appeal for industrial infill development.

Table 17: Moolap – Occupancy Status of Industrial Land

Vacancy Status	No. of lots	No. of Lots (South)	Total Area (ha)	South Area (ha)
Occupied	492	490	80.7	79.9
Underutilised	116	50	295.7	38.6
Vacant	16	10	27.2	10.7
Total	624	550	403.6	129.3

Source: CKC

Figure 44: Moolap - Industrial Zoned Lots by Occupancy Status



Source: CKC

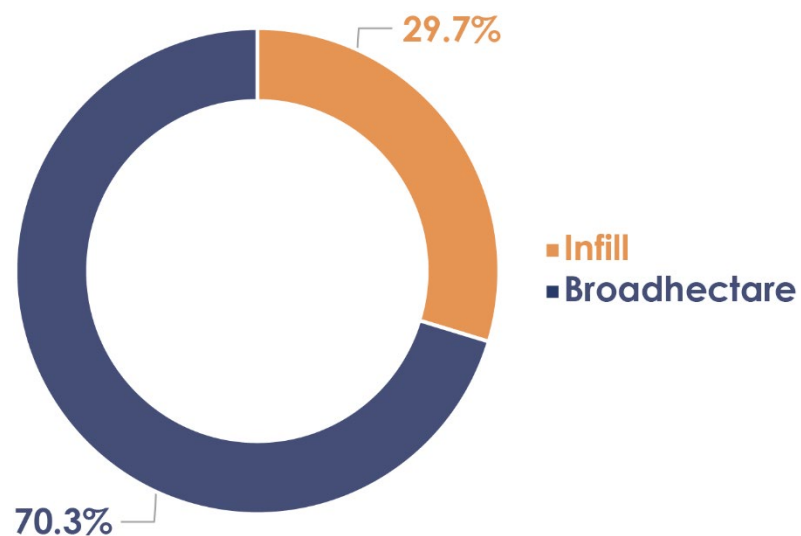
4.6 Land Supply - Key Insights

At 2025, the City's Industrial Land Supply is Concentrated in the GRREP

- The City incorporates 276 hectares of vacant zoned industrial land and 36 hectares vacant land in the Commercial 2 Zone.
- Three quarters of the City's industrial land supply is concentrated in the GRREP in the form of greenfield industrial land.
- The remaining vacant industrial land is comprised of largely fragmented vacant infill lots located throughout the City's established industrial precincts (Port, North, Moolap and the Southern industrial precincts).

Figure 45: Proportion of Vacant Land in Infill & Broadhectare Locations

Proportion of Vacant Land in Infill & Broadhectare Locations



Source: CKC

Established industrial precincts

- Fragmented vacant infill lots comprise the majority of land supply in the City's established industrial precincts (the Port, North Geelong and Southern industrial precincts).
- Infill lots are primarily comprised of smaller lots of less than 5,000 sqms lots. There are a small number of larger lots above 1 hectare in size within established areas.
- Floor space expansion and development in the City's established industrial precincts is dependent on (a) the renewal of aged sites (b) the development of remnant vacant sites and the (c) renewal of land vacated by heavy industry as exemplified by locations such as Pivot City.
- Established industrial precincts currently incorporate 81.1 hectares of vacant infill land supply.

Table 18: Vacant Infill Lots by Lot Size Established Precincts

Lot Size Range	# of Lots	Total Area (ha)
0-0.5 ha	90	12.1
0.5-1.0 ha	13	9.1
1.0-5.0 ha	19	38.1
≥5.0 ha	4	22.6
Total	126	81.8

Source: CKC

The City Lacks Zoned Vacant Industrial in its South Region

- The City's southern region lacks vacant industrial land to support expansion.
- At 2025, the industrial areas that comprise the City's southern industrial precinct are fully occupied.
- The precinct is growing in jobs, enterprise and employment density. The City's southern industrial areas incorporate 10% of the City's jobs.
- The City requires new industrial land supply to support and service the needs of a growing population. The vast majority of the City's industrial land supply is located in major industry locations in the City's north. Only 6% of the City's available industrial land supply is located in the City's south in proximity to the City's growth area population.
- Future industry growth in the City's south will entail (a) the renewal of aged sites (b) the redevelopment of vacant land resulting from the re-location of heavy industry and (c) the eventual addition of new industrial greenfield land in the City's south.

Table 19: Vacant Land in Northern and Southern Precincts

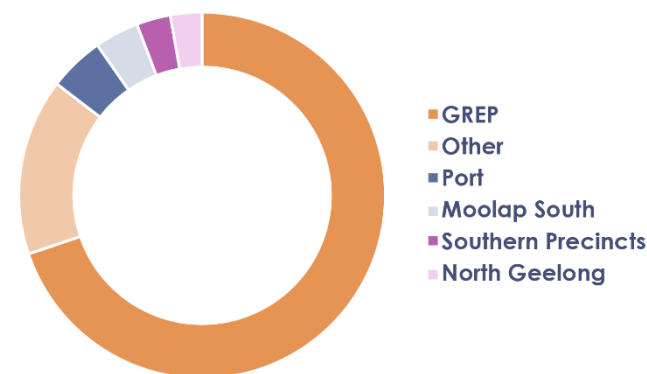
Region	# of Lots	Total Area (ha)
Northern Precincts	291	215.5
Southern Precincts	40	24.5
Total	329	240.0

Source: CKC

GRREP and Municipal Industrial Land Supply

- The vast majority of the City's vacant broadhectare industrial land is located in the GRREP.
- As a result, a high proportion (70%) of the City's industrial land supply is subject to minimum lot size requirements.
- GRREP minimum lot size requirements are intended to support the buffer, lot size and land use needs of major industrial operations. As a result, at 2025, 48% of the City's industrial land supply is subject to a 5 hectare minimum lot size requirement while a further 20% of the city's industrial land supply is subject to a minimum lot size requirement of 1 hectare. Near on 70% of the city's industrial land supply is subject to land requirements that fit the needs of major operations.
- At 2025, the City lacks:
 - Broadhectare industrial land supply not subject to minimum lot size requirements
 - Land supply able to accommodate the floor space needs of small and medium sized operations that straddle traditional and non-traditional industrial sectors.
 - Development ready land supply in locations adjacent to growing population nodes. As discussed, the majority of the City's industrial land supply is located in major industry locations in the City's north.

Figure 46: Percentage of Vacant Industrial Land by Precinct
Percentage of Total Vacant Industrial Zoned Land by Precinct*



*Includes Vacant Commercial 2 Land

Source: CKC

4.7 Greater Geelong Land Supply Key Insights

Precinct	Vacant Lots	Vacant Land (ha)	Observations
Geelong Port	18	13.5	○ Limited vacant industrial land supply, largely in fragmented, irregular shaped lots ○ Potential to accommodate a moderate level of future industrial development ○ Port Zoned land is set to be developed to support industrial uses related to the operation of the Port
GRREP	90	192.4	○ Incorporates vast majority of vacant industrial land supply ○ In the near term, approved/pending planning permits are set to accelerate development and reduce vacant land supply ○ Vacant land is subject to subdivision requirements.
North Geelong	21	7.7	○ North Geelong is highly occupied and lacks meaningful vacant land supply. ○ Approved/pending planning permits are set to further reduce already limited land supply. ○ Future development in North Geelong is likely to occur through infill development and further intensification.
Southern Industrial Precincts	26	8.3	○ Southern Industrial areas are highly occupied and lack meaningful vacant land supply ○ Transition towards population-serving industrial enterprises has seen industrial lot intensification. ○ Southern industrial lands remaining vacant land supply is almost entirely within small lots. ○ High demand for industrial land suited towards smaller footprint, consumer-focused enterprises in the southern precincts necessitates the exploration of opportunities to unlock new industrial land in proximity to population.
Other	66	53.7	○ Vacant industrial land supply external to the four major precincts is widely dispersed across Greater Geelong ○ At present, Commercial 2 Zoned land accounts for the vast majority of vacant land outside of major precincts, totalling 35.6 hectares. ○ The remaining 18.1 hectares is a mix of IN1Z and IN3Z largely concentrated in Moolap's Southern Precinct and otherwise distributed in small pockets across Fyansford, Lara, Ocean Grove and Portarlington.
Total	375	275.6	○ At 2025, Greater Geelong incorporates a total of 276 hectares of vacant industrial land across 375 lots (excluding areas identified for transition in Moolap). ○ Land supply is concentrated within the GRREP and is set to soon be further reduced with the development of lots subject to approved/pending planning permits. ○ Precincts with high concentrations of consumer-focused enterprises located in proximity to residential populations lack appropriate vacant land to accommodate existing and future demand.

GRREP

Focused analysis

05



5.0 GRREP Focused Analysis

As the City's primary source of vacant industrial land, land development requirements within the GRREP entail municipal wide industrial development implications. As discussed earlier, the GRREP comprises 70% of the city's vacant land supply. At 2025, the City is effectively dependent on the GRREP to accommodate greenfield industrial development.

The following explores the GRREP planning framework in the context of the city's industrial economy and future land supply needs.

5.0.1 GRREP Land Supply by Design and Development Overlay Precinct

The GRREP is a major industry area that supports the land and buffer needs of large-scale industrial operations. Accordingly, Clause 7.03-2L of the Greater Geelong Planning Scheme seeks to "Direct industries that require substantial buffer distances from sensitive land uses to the core of the Industrial 2 Zone in the Geelong Ring Road Employment Precinct."

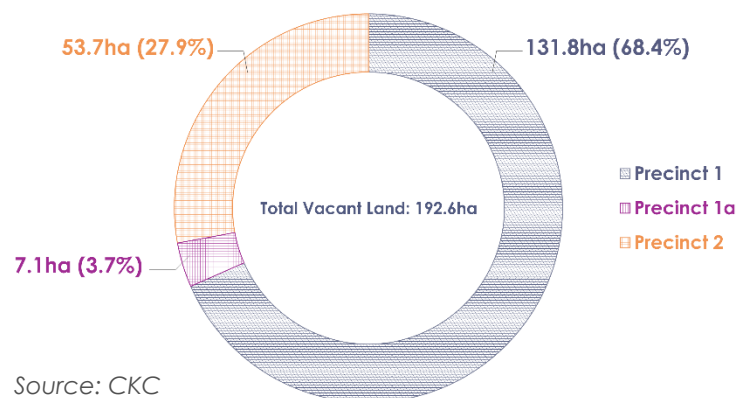
Design and Development Overlay Schedule 18 (DDO18) to the Greater Geelong Planning Scheme details subdivision and minimum lot size requirements within the GRREP. DDO18 identifies three precincts (see next page) that are subject to minimum lot size requirements for subdivision as follows:

Precinct 1: Minimum subdivision lot size requirement of 5 hectares

Precinct 1a: Minimum subdivision lot size requirement of 1 hectare

Precinct 2: Minimum subdivision lot size requirement of 2,000 sqm

Percentage of Vacant Industrial Land in GRREP



Source: CKC

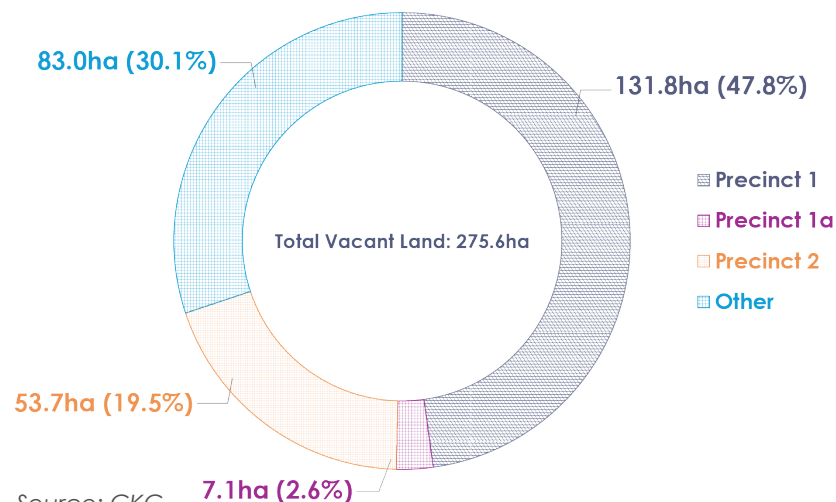
GRREP and City Wide Industrial Land Supply

The quantum and proportion of municipal industrial land supply subject to GRREP planning requirements is as follows:

- Precinct 1 incorporates approximately 132 hectares of vacant land representing 48% of the City's industrial land supply.
- Only 5 lots within Precinct 1 are of a sufficient size to meet the precinct's subdivision requirements. These lots account for 60% of Precinct 1 land area. The remaining lots cannot achieve subdivision. There is theoretical capacity for an additional 16 lots in Precinct 1.
- Precinct 1A – includes minimal vacant land which is expected to be fully developed in the near future.
- Precinct 2 incorporates 53 hectares of vacant land representing 20% of the City's industrial land supply. Precinct 2 is currently subject to a significant pipeline of development applications and is likely to be fully occupied in the near future (see section 6 consumption modelling).

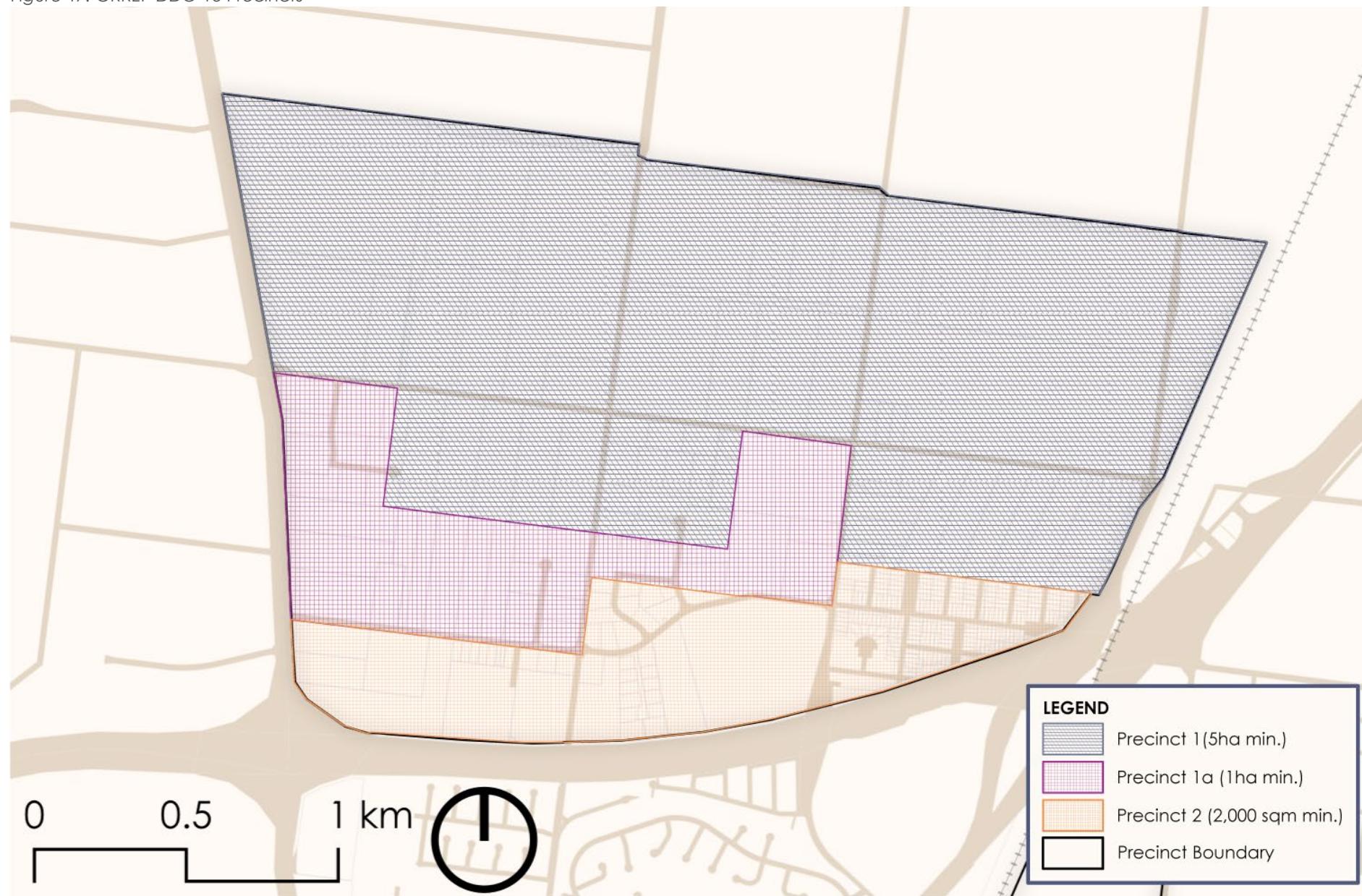
At 2025, the City's capacity to accommodate industrial demand is dependent on the GRREP. As a result, the City is limited in its capacity to accommodate the floor space needs of small and medium sized operations that generally require smaller spaces than generally facilitated in the GRREP.

Percentage of Vacant Industrial Land (LGA)



Source: CKC

Figure 47: GRREP DDO-18 Precincts



Source: City of Greater Geelong, CKC

Industry Lot Size Requirements and GRREP Subdivision Controls

The following explores the relationship of industry land occupancy to GRREP lot size requirements. The analysis considers the size of lot that is generally needed to support the operations of large-scale enterprises in key industrial sectors – manufacturing, logistics, construction, energy and wholesale trade.

The analysis focuses on industry that occupies lots in the 75th percentile of lots and above (the upper quartile of lot sizes). The analysis seeks identifies the relationship of land occupancy by major industry and GRREP lot size requirements.

To undertake this assessment, Charter reviewed 2,000+ lots in industrial areas to identify the relationship of industrial uses to lot size. The assessment identified the size of lot occupied by industry at the median (50th), 75th, 95th and 100th percentile of lot sizes. The study focuses on the very largest of lots occupied by industry which is consistent with the role and objectives of the GRREP as a large format industry area.

Investigation Results

As demonstrated in the table below, the upper quartile (top 25%) of lots occupied by enterprise in industrial areas generally exceeds 2,000 sqms. The 95th percentile of lots occupied by construction, energy and waste exceeds 4,000 sqms and 1 hectare for manufacturing, transport and wholesale operators.

Table 20: Distribution of Lot Sizes (sqm) by Traditional Industries

Industry	Median	75 th	90 th	95 th	Max
Construction	630	1,420	3,470	4,490	26,610
Electricity, Gas, Water & Waste	2,890	3,660	4,100	4,455	25,070
Manufacturing	850	2,350	5,835	10,950	81,590
Transport, Postal & Warehousing	1,300	2,960	10,160	16,890	81,890
Wholesale Trade	1,100	2,540	7,290	13,420	185,870

Source: CKC

The table below identifies the proportion of businesses in Greater Geelong that occupy lots within each of the GRREP subdivision bands.

Between 25% and 35% of businesses in the manufacturing, logistics and wholesale sectors occupy sites of greater than 2,000 sqms. An even higher proportion of businesses in the energy and waste industries (over 65%) occupy sites above 2,000 sqms but less than 1 hectare. The 2,000 sqms minimum generally meets the expressed lot size needs of the upper 25% of businesses.

Between 3% and 7% of businesses, in each sector occupy lots above 1 hectare with a minimal proportion (less than 1%) of businesses occupying lots above 5 hectares. This is with the exception of logistics enterprises, in which 10% of enterprises occupy sites of 1 hectare and greater.

We note that for over 80% of construction enterprises a 2,000 sqm lot size is excessive. The median lot size for the construction industry is 630 sqms.

Table 21: Proportion of Businesses that occupy lots by GRREP size

Industry	Precinct 1 (≥5ha)	Precinct 1a (1ha -4.99ha)	Precinct 2 (0.2ha – 0.99ha)
Construction	0%	3.8%	14.5%
Electricity, Gas, Water & Waste	0%	3.4%	65.5%
Manufacturing	0.8%	5.1%	24.9%
Transport, Postal & Warehousing	2.0%	8.1%	28.3%
Wholesale Trade	1.4%	5.0%	23.7
Total	0.8%	4.9%	22.5%

Source: CKC

Based on the above analysis:

- The GRREP subdivision requirements generally limit the GRREP to businesses that require the upper 25% of lot sizes – in other words businesses that require a large land footprint.
- It follows that GRREP subdivision requirements successfully exclude smaller and medium size operations that generally require lots below 2000 sqms. We note that GRREP land can be developed for smaller industrial footprints provided the land is not subdivided and the use achieves environmental approval.
- Precinct 2 minimum subdivision requirements (2,000 sqm minimum subdivision requirement) accords with lot sizes generally occupied by between 15% to 30% of industry. For the waste and energy sector lots of between 2,000 sqms to 1 hectare meet the needs of 65% of businesses.
- The minimum lot size specified in Precinct 1 (5 hectares) is generally occupied by only a very small proportion of industry (<1%).
- Large lots in excess of 1 hectare are most readily required by the transport industry. 10% of the logistics industry occupies sites of 1 hectare or greater.

It follows that:

- that 48% of the City's 2025 lot supply in Precinct 1 is aligned with the lot size needs of a very small proportion (1%) of industrial industry.
- 20% of the City's vacant industrial land supply in Precinct 2 is suited to the lot size needs of between 15% to 30% of industry.
- GRREP lot size requirements are well above the median lot size requirements of all industries. As such, GRREP subdivision requirements act to successfully exclude small and medium size operations from the GRREP.

In considering the planning of the GRREP it is important to note that the GRREP currently supports fuel refinery operations and incorporates a fuel pipeline. This triggers a range of land use requirements and specialised approval processes related to buffer distances and uses in proximity to hazards. As a result, the availability of suitable lots is not the sole determining factor for industry drawn to the GRREP.

LAND CONSUMPTION

An aerial photograph of a large-scale construction project. In the center, a multi-story building is under construction, with its concrete frame visible. Several large concrete mixer trucks are parked around the site, and one is in the process of pouring concrete. The ground is a mix of dirt, gravel, and some finished pavement. To the right, a multi-lane highway with several cars is visible. In the foreground, there's a large, flat area of land, possibly a future parking lot or plaza, with some construction equipment and materials scattered across it. The overall scene depicts a significant land consumption for urban development.

06

6.0 Industrial Land Consumption (2010 – 2025)

The study investigated annual average industrial land consumption/development within each industrial precinct and across the LGA, between 2010 and 2024.

Since 2010, approximately 200 hectares of the city's vacant industrial land was developed at an average rate of 14.3 hectares per annum. When Commercial 2 Zoned land is excluded, approximately 180 hectares of industrially zoned land was developed in this time, at an average annual rate of 12.9 hectares.

Development spiked in the mid-2010s when, following the delivery of the GRREP, 40 hectares of vacant industrial land was developed over the 2016 and 2017 period.

In the post Covid era, industrial development increased to an annual rate of development of over 21 hectares per annum, 7 hectares above the 15 year average from 2010.

The GRREP has been a major focus for industrial expansion. A total of 86 hectares of industrial land has been developed in the GRREP since 2010 at a rate of 6.1 hectares per annum. The rate of GRREP development increased to over 11 hectares per annum since 2020.

Industrial areas in the City's south experienced average annual development of 3 hectares per annum since 2010. Industrial land development in the City's south has slowed owing to the lack of available land.

Industrial development outside of the City's core industrial precincts has averaged approximately 2 hectares per annum since 2010.

Looking to the immediate future, we note that at 2025 there is over 60 hectares of approved and pending industrial development proposals indicating continued industrial expansion.

See the Appendices 8.12 for further information on precinct by precinct consumption rates.

Figure 48: Industrial Land Developed (LGA) 2010 - 2025
Industrial Land Developed (LGA) 2010 - 2025

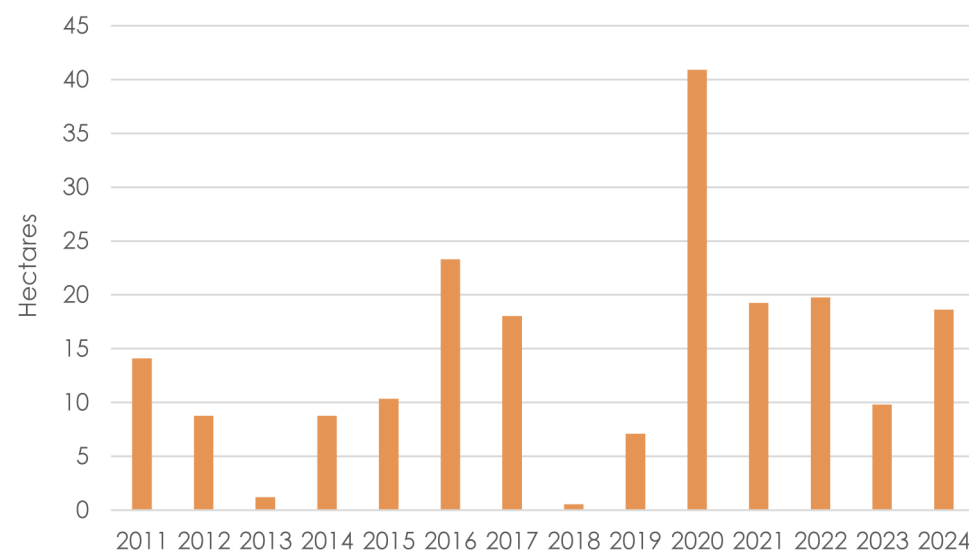
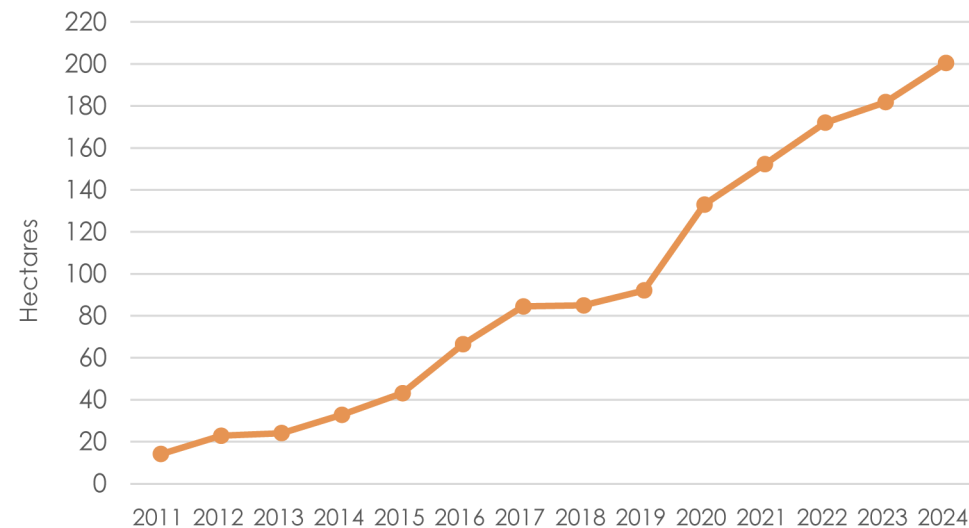


Figure 49: Accumulative Industrial Land Developed (LGA) 2010 - 2025
Accumulative Industrial Land Developed (LGA) 2010 - 2025



Source: CKC

6.1 Future Industrial Land Consumption – Greater Geelong

Historic rates of land consumption have been used to model the capacity of the City to continue to support industrial development.

Base Case

Since 2020, industrial land consumption across the City averaged 21.6 hectares per annum. The base case assumes that the City sustains the post 2020 rate of industrial land development into the future. Under base case assumptions, at 2025, the City of Greater Geelong incorporates less than 13 years of industrial land supply. We, however, note that 70% of the City's industrial land supply is subject to minimum lot size constraints which is ultimately likely to impede industrial expansion particularly when GRREP Precinct 1A (1 hectare minimum) and 2 (2000 sqms minimum) reach full development (see projection overleaf). Due to this, the City is not well positioned to sustain its post 2020 rate of industrial expansion without the addition of new industrial greenfield land.

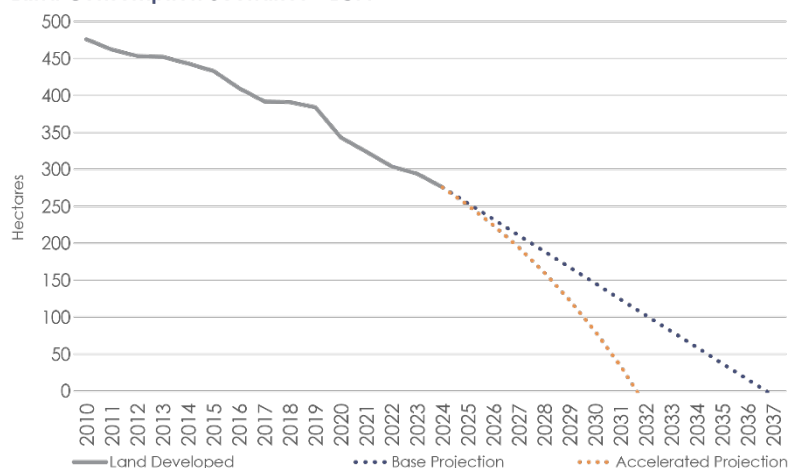
Table 22: Base case land consumption (LGA)

Base	
Annual average consumption rate (ha)	21.6
Vacant industrial zoned land supply (ha)	275.6
Period of land availability (yrs)	13

Source: CKC

Figure 50: Land Consumption Scenarios - LGA

Land Consumption Scenarios - LGA



Source: CKC

Accelerated Case

Since 2020, the City's annual rate of industrial development has exceeded long term average consumption by over 7 hectares per annum. For the 2020 to 2025 period this growth represents an average annual growth rate of approximately 11.7% above the long term average.

The accelerated case assumes that the City's average annual rate of industrial consumption will, over time, continue to grow according to the implied post 2020 industrial consumption growth rate. Resulting industrial land consumption would see the City's supply of vacant industrial land consumed within 8 years. Achieving a higher annual rate of industrial consumption of 30+ hectares per annum will ultimately require new greenfield land supply given the likely constraining impact of minimum lot size requirements in the GRREP.

We note that the future Lara Business Park has the potential to supply approximately 78 hectares of new greenfield industrial land supply which at inception in 2030 will theoretically provide an additional 3 to 4 years of supply.

Table 23: Accelerated case land consumption (LGA)

Accelerated	
Annual average consumption rate (ha)	36.8
Vacant land supply (ha)	275.6
Period of land availability (yrs)	8

Source: CKC

6.1.1 Future Land Consumption in the GRREP

At 2025, the Geelong Ring Road Employment Precinct incorporates a total of 193 hectares of vacant industrial land across its 3 precincts specified under DDO-18.

As detailed above GRREP Precinct 1a and 2 provide relatively smaller lot subdivision opportunities than Precinct 1 (minimum 5 hectares). Since 2015, Precinct 1a and 2 have collectively been developing at an annual rate of 8.3 hectares per annum.

Base Case

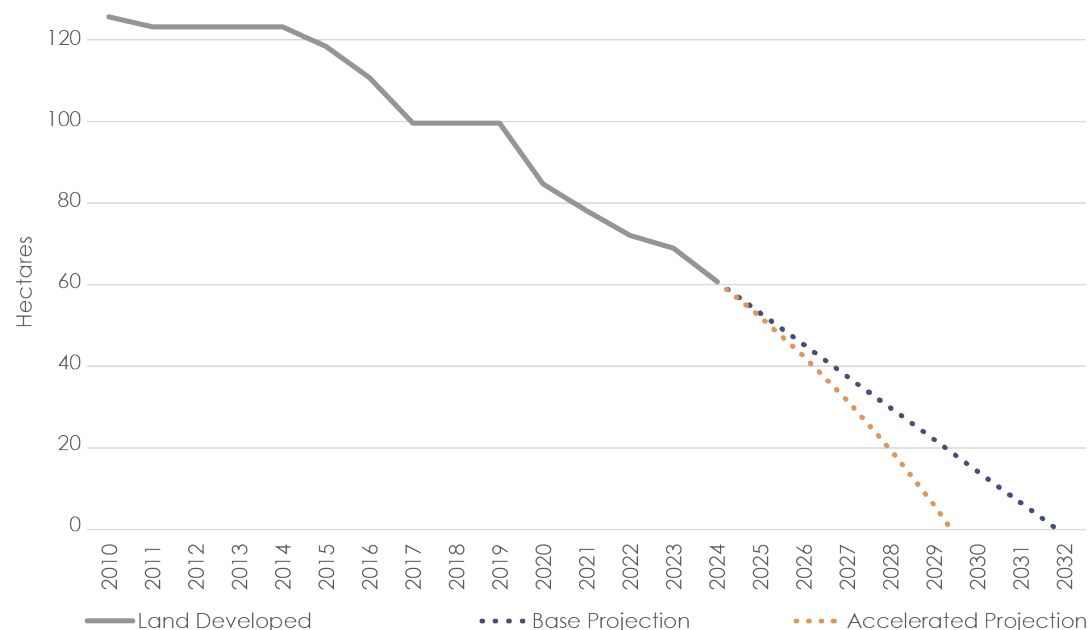
At 2025, Precincts 1a and 2 incorporated 60 hectares of vacant land. Assuming that these precincts continue to develop at a rate of 8.3 hectares per annum, Precincts 1a and 2 will be fully occupied within 7 years.

Accelerated Case

Assuming that development in the GRREP grows at the post covid growth rate of 11.7% per annum, average annual consumption in the precincts would grow to approximately 11.6 hectares per annum. Under this scenario precincts 1a and 2 will be fully occupied within 5 years.

Both the GRREP base case and accelerated case indicate that in the near term the GRREP is projected to experience significant constraints in the provision of smaller 1 hectare and 2,000 sqms lots. This, in turn, underlines the need for the introduction of new unencumbered greenfield industrial land as without the addition of new land, by the late 2020's/early 2030's the majority of the City's greenfield industrial land supply will be subject to a 5 hectare subdivision requirement.

Figure 51: Land Consumption Scenarios – GRREP (Precinct 1a & 2)
Land Consumption Scenarios - GRREP (Precinct 1a & 2)



Source: CKC

Table 24: Base case land consumption (GRREP)

Base	
Annual average consumption rate (ha)	8.3
Vacant industrial zoned land supply (ha)	60.8
Period of land availability (yrs)	7

Source: CKC

Table 25: Accelerated case land consumption (GRREP)

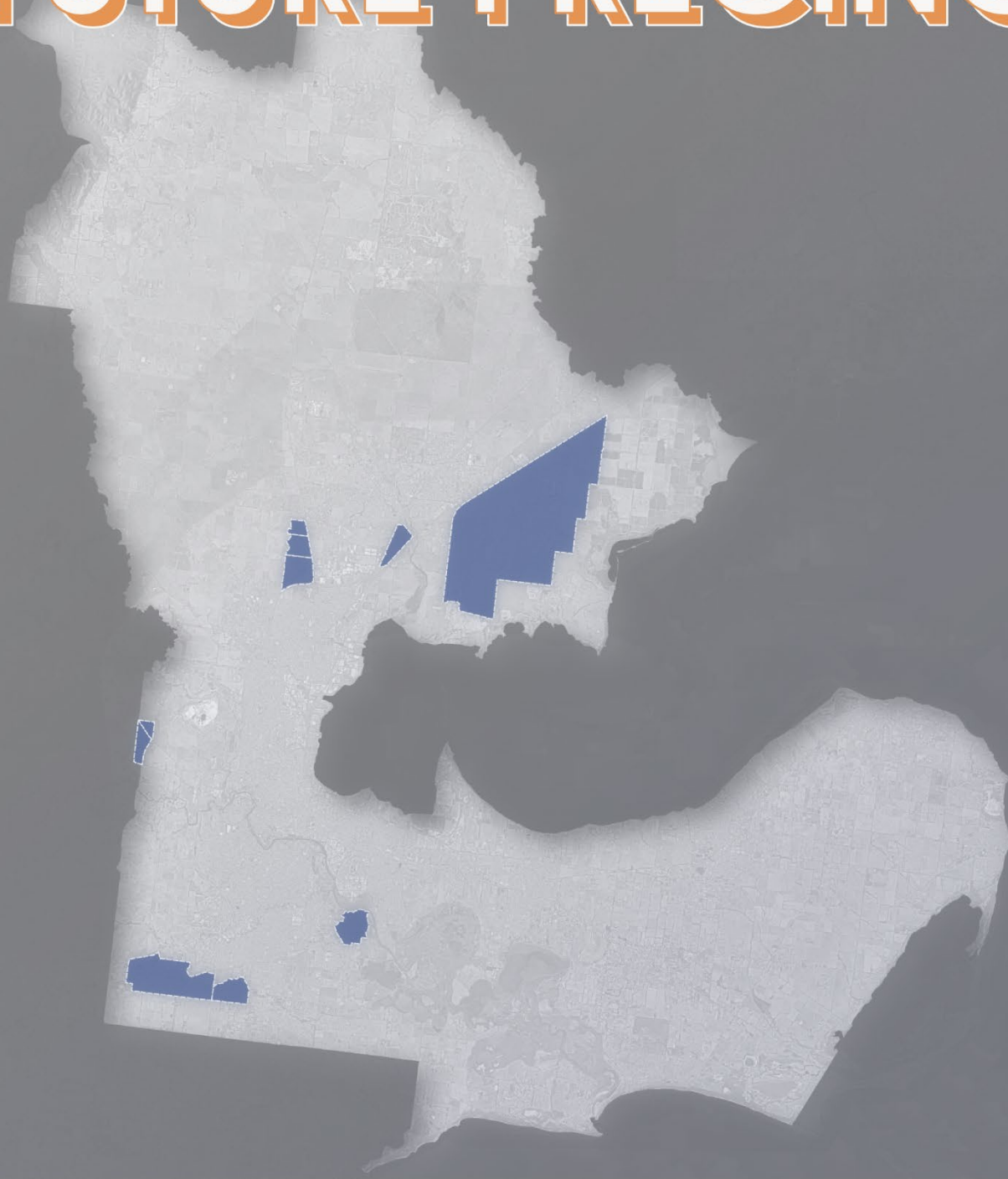
Accelerated	
Annual average consumption rate (ha)	11.6
Vacant land supply (ha)	60.8
Period of land availability (yrs)	5

Source: CKC

Modelling Insights

- Under current post-covid development rates, the City has approximately 13 years of industrial land supply. Much of this supply, however, is located within the GRREP which is subject to minimum subdivision requirements.
- By 2027-2028, under current conditions the City will incorporate less than 10 years of theoretical supply noting that the City's industrial areas are currently subject to over 60 hectares of approved and pending development proposals.
- In considering future growth, it is important to note that a high proportion of the City's vacant industrial land supply is subject to minimum subdivision requirements.
- GRREP precincts 1a & 2 are projected to be fully occupied in the near term (within 5 to 7 years). At this point, the GRREP and, in turn, much of the City's, remaining available land supply will be subject to a 5 hectare minimum subdivision requirement.
- To avoid this scenario the City needs to introduce new unencumbered greenfield supply including new supply in the City's south.
- At present, industrial land supply is highly concentrated in the City's north. While the City may be able to theoretically sustain a relatively high rate of industrial development in the short to medium term owing to the volume of approved and pending permits, the City, nonetheless (a) lacks capacity to promote industrial growth in the City's south in proximity to population (b) lacks unencumbered greenfield industrial land able to accommodate the needs of small and medium sized industry.
- Without unencumbered well located land the City will not be able to sustain its post covid industrial boom and leverage of its overlapping accessibility, population and workforce advantages.

FUTURE PRECINCTS



07

7.0 Future Precincts

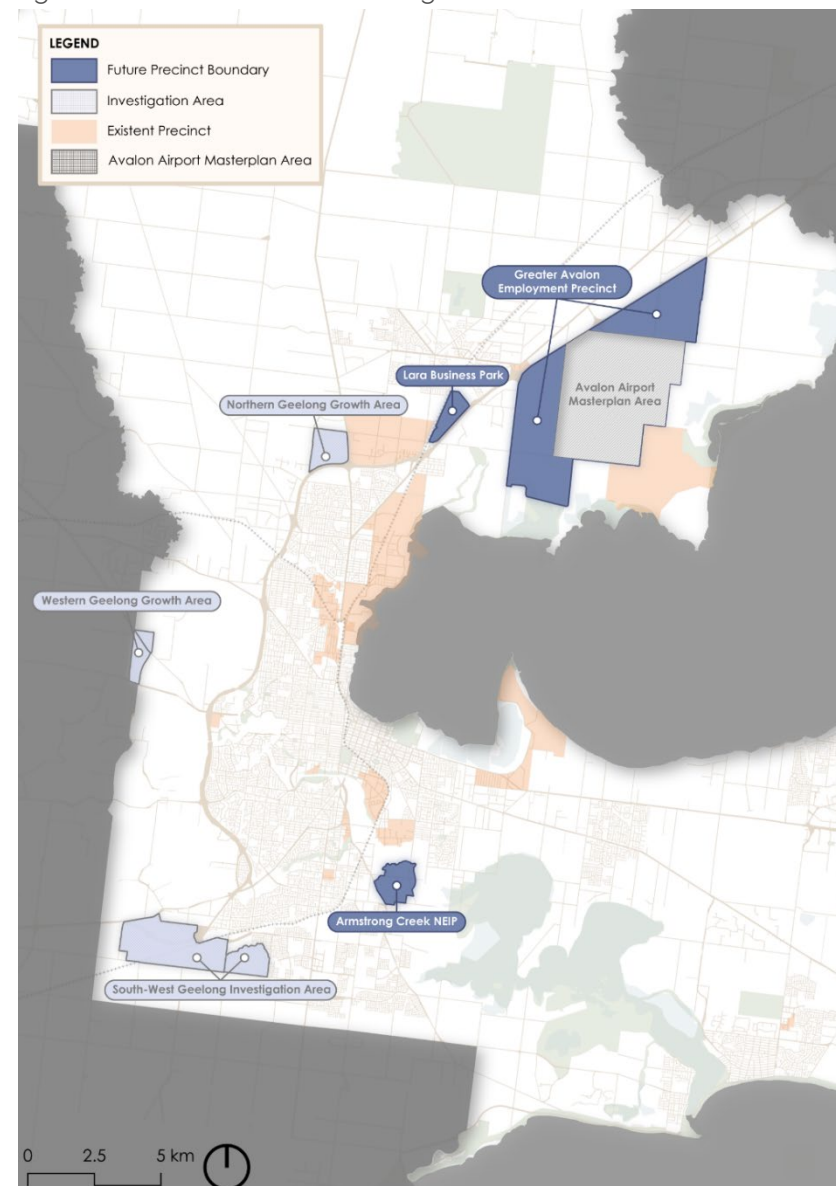
3 Future Precincts

1. Greater Avalon Employment Precinct
2. Avalon Airport
3. Lara Business Park
4. Armstrong Creek North East Industrial Precinct

3 Investigation Areas

1. Northern Geelong Growth Area
2. Western Geelong Growth Area
3. South-West Geelong Investigation Area

Figure 52: Future Precincts & Investigation Areas



Source: CKC

7.1 Greater Avalon Employment Precinct

FUTURE ROLE

The Greater Avalon Employment Precinct (GAEP) holds a critical role in the future of the region's industrial landscape. Located approximately 14km north of the CBD and 52 kilometres from Melbourne, the GAEP is currently being planned by the Victorian Planning Authority as part of its Precinct Structure Plan (PSP) program. The precinct is directly connected to the Princes Freeway and is in close proximity to the Geelong Ring Road, rail lines and the proposed Outer Metropolitan Ring Road. The precinct is set to deliver an airport precinct, incorporating diverse employment uses across a range of lot sizes. As part of its delivery, MAB is developing a 780-hectare business park that seeks to deliver "super use sites, small-scale industrial, a dedicated commercial business hub, open space, food, retail, entertainment and accommodation services."

KEY ISSUES & OPPORTUNITIES

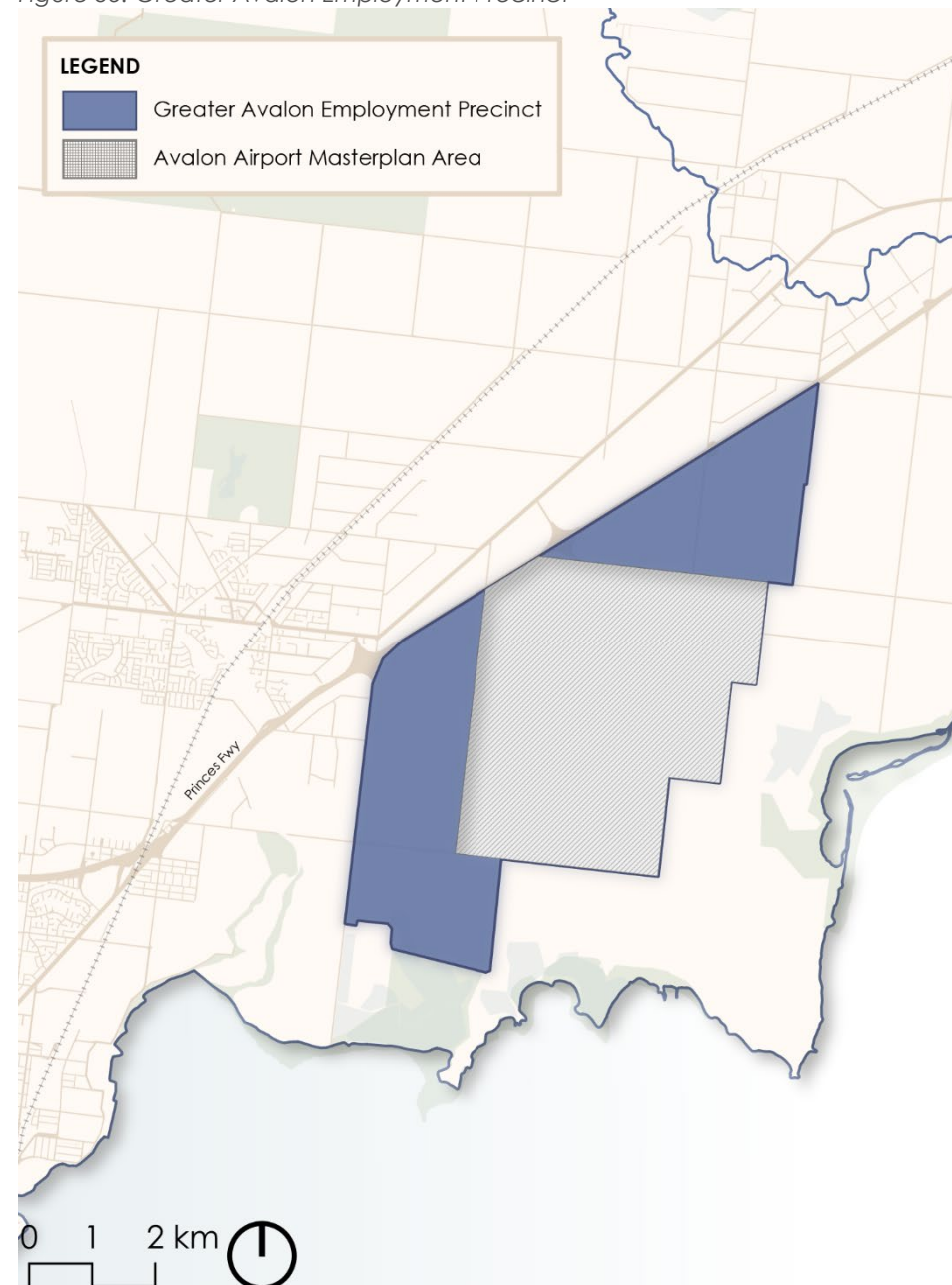
The GAEP provides an opportunity to accommodate demand for traditional, large-scale industrial operations, as well as smaller, contemporary population serving firms, potentially alleviating existent pressure on the GRREP to allow subdivision of smaller scale lots. The GAEP is anticipated to create 17,963 jobs (VPA).

Figure 54: MAB Business Park Rendering



Source: MAB

Figure 53: Greater Avalon Employment Precinct



Source: CKC, VPA

7.2 Avalon Airport Masterplan Area

FUTURE ROLE

The Avalon Airport, is both a commuter and logistics airport. The Avalon Airport Masterplan (2015) seeks to guide the transformation of the airport into a major mixed commercial environment incorporating retail, accommodation, commercial and industrial enterprises.

The Avalon Airport Masterplan identifies 8 precincts that encompass approximately 1,600 hectares of land. The masterplan indicates that the Princes, Beach, Dandos and Green Precincts will incorporate light industrial uses. Across the masterplan area, there is potential to deliver upwards of 1,000 hectares of industrial land.

The further development of the Avalon Airport provides an opportunity for Geelong to strengthen its role as a leading logistics hub in Victoria. Proximity to the Geelong Port provides Avalon Airport with a major strategic advantage for exporting Australian produced goods, such as Tasmanian beef, to international markets. The development of Avalon Airport will assist in accommodating demand for large-scale logistics operations and light industrial firms.

Figure 55: Avalon Airport Masterplan Precincts



7.3 Northern Geelong Growth Area

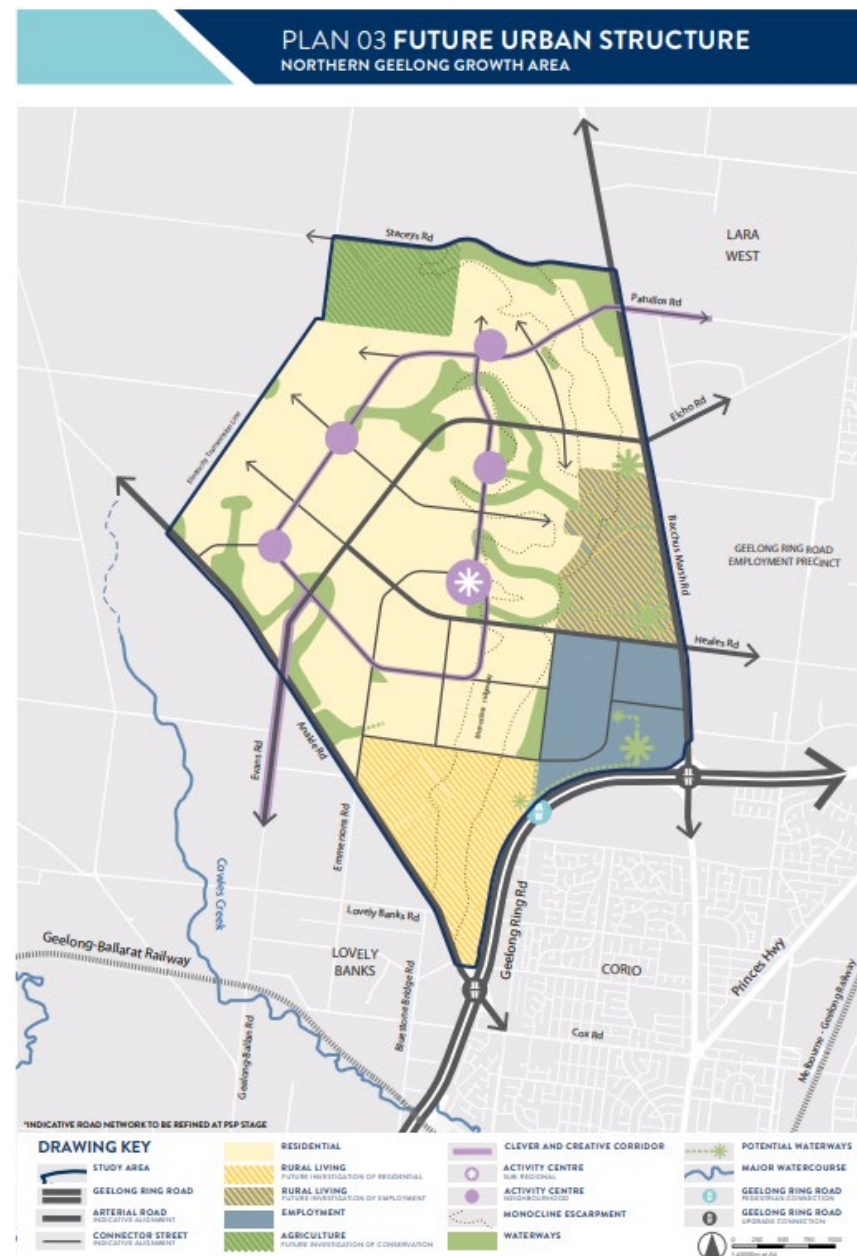
FUTURE ROLE

The Northern Geelong Growth Area (NGGA) is part of the wider Northern and Western Geelong Growth Area (NWGGA), which is the largest urban growth initiative in Regional Victoria. Located 10km north of Geelong's CBD and 60km from Melbourne, the NGGA includes a 177 hectare employment precinct.

The future employment precinct is adjacent to Bacchus Marsh Road, providing connectivity to Geelong Ring Road, Princes Freeway, Avalon Airport, the Port of Geelong and Metropolitan Melbourne. The employment precinct will support a mix of light industrial and commercial activities, with industrial activity focused on service industries, light manufacturing and urban services (e.g. trades, maintenance, utilities) as well as warehousing, distribution, transport and logistics hubs.

The Northern Geelong Growth Area is projected to support 14,000 local jobs. To support future employment uses the site requires upgrades to the intersections between Heales Road and the Geelong Ring Road. Based on its strategic location and potential future demand, the precinct has the potential to expand by an additional 124 hectares, extending further along Bacchus Marsh Road.

Figure 56: Northern Geelong Growth Area



7.5 Lara Business Park

FUTURE ROLE

The future Lara Business Park is situated to the south of the Lara township. The business park will comprise a 78-hectare site in the Industrial 1 and Industrial 3 Zones, enabling manufacturing, freight, logistics and service industries to operate in proximity to major transport infrastructure, including Avalon Airport, Lara Train Station as well as the Geelong Ring Road Employment Precinct. The site is currently subject to a rezoning process (amendment C453ggee).

Lara Business Park will support a range of economic activities and employment opportunities. Key issues with the site include its proximity to Hovells Creek and the Limeburners Bay Ramsar Wetland, which requires careful management of stormwater and runoff to avoid ecological impacts, as well as the need to manage increased vehicle movements including heavy trucks.

Amendment C453ggee was publicly exhibited at the end of 2025 and will undergo a panel hearing in 2026.

Figure 58: Lara Business Park



Source: City of Greater Geelong

7.7 South-West Geelong Investigation Area

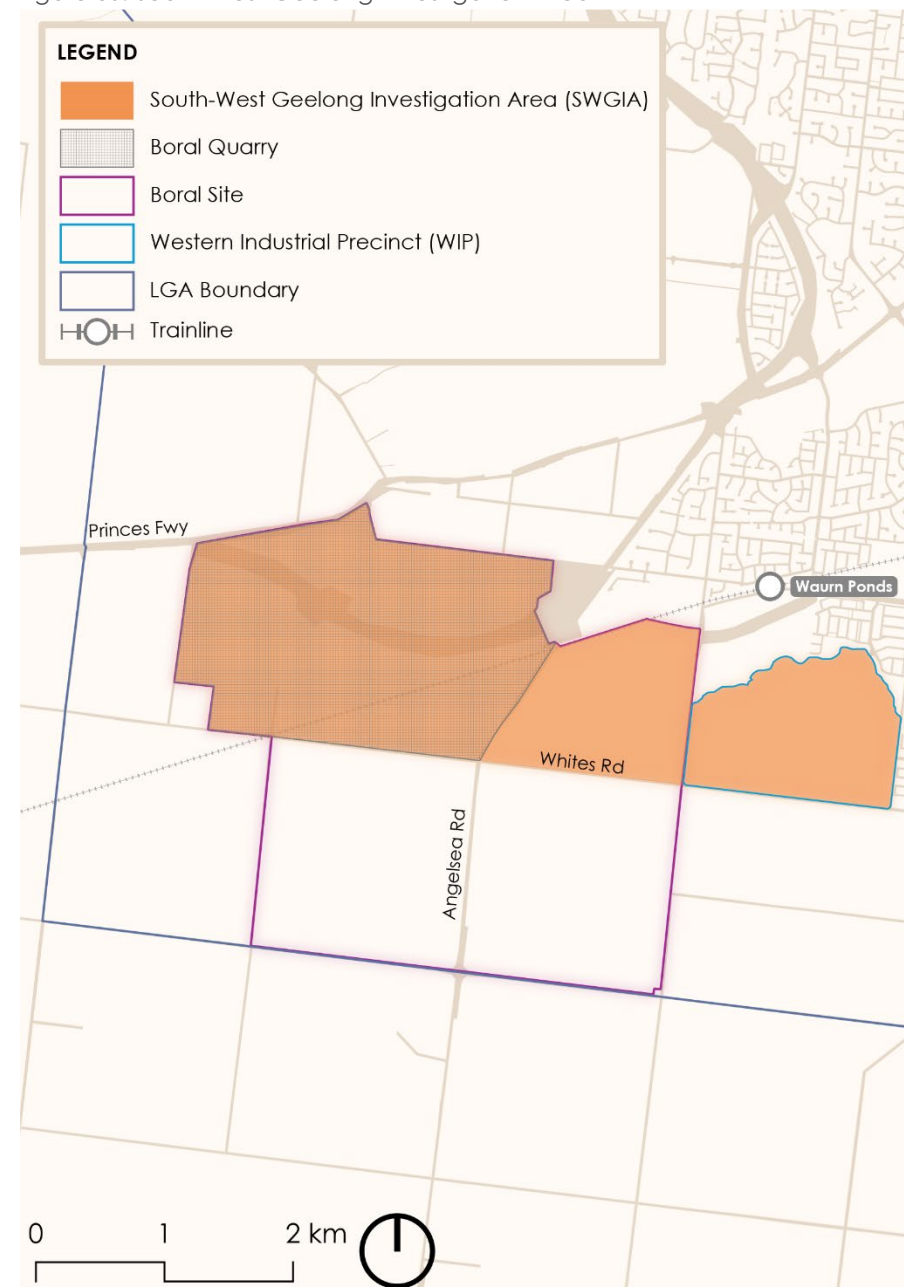
FUTURE ROLE

The South-West Geelong Investigation Area is located west of Armstrong Creek and encompasses the formal Boral quarry site and the Western Industrial Precinct. The Boral Quarry incorporates 1,030 hectares of land. The site incorporates high levels of potential connectivity via the Geelong Ring Road, Princes Highway and rail line. A mixed-use employment precinct of over 170 hectares has been proposed. This will include industrial uses, warehousing, offices, tourism and transit-oriented development.

The Western Industrial Precinct directly abuts the Boral Quarry site and is part of the Greater Geelong Growth Area. The precinct comprises 126 hectares of land planned for general and local industrial uses. Originally intended as a high-amenity business park for advanced manufacturing, the proposed uses include light industry, trade supplies, warehousing, large format retail and business services.

The Boral Quarry site has direct access to major transport routes and the potential for a future train station and stabling yard. Land, however, is likely to require remediation.

Figure 60: South-West Geelong Investigation Area



Source: CKC

7.8 Future Land Supply– LGA (Future Precincts)

The following details the City's known future industrial land supply.

Land supply information is based on publicly available information at 2025.

The delivery of SWGIA, NEIP, Lara Business Park and Greater Avalon Employment Precinct provides the potential to increase supply by 1,334 hectares. At 2025, delivery dates range between 2026-2056. We also note that on delivery net developable area is likely to be substantially less than the gross area detailed in the table below.

We note, the ongoing expansion of Avalon Airport, quarry land at Point Wilson and development of Port land provides additional industrial land expansion capacity.

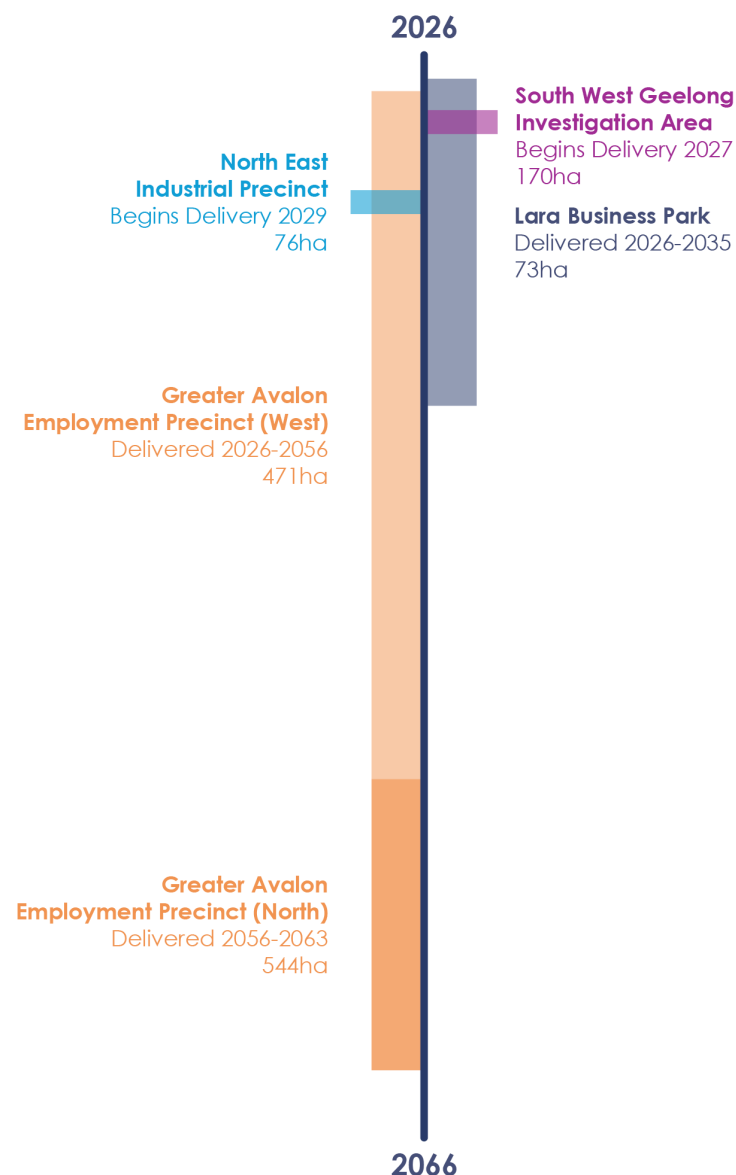
Table 26: Future precincts – Developable Area & Estimated Delivery

Precinct	Gross Developable Area (Ha)	Est. Delivery
SWGIA	170	2027
GAEP West	471	2026-2056
GAEP North	544	2056-2063
GAEP Total	1,015	2026-2063
NEIP	76**	2029
Lara Business Park	73	2026-2035
Total	1,334	

**Developable Area estimated based upon areas identified as industrial within the NEIP

*Charter notes that the North and West Geelong Growth Areas include land subject to investigation for the purpose of industrial/employment uses. Delivery of these growth areas, as well as the Avalon Airport Masterplan area, would likely see a further increase in Greater Geelong's industrial land supply.

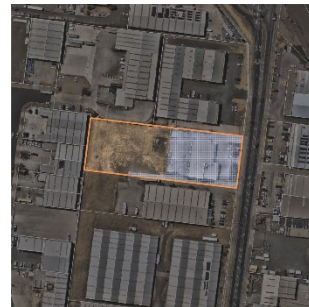
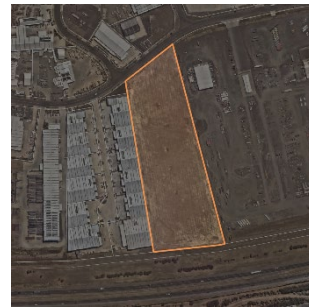
Future Industrial Precincts Delivery Timeline



Source: CKC

8.0 Appendices

8.1.1 Occupancy Status Definitions

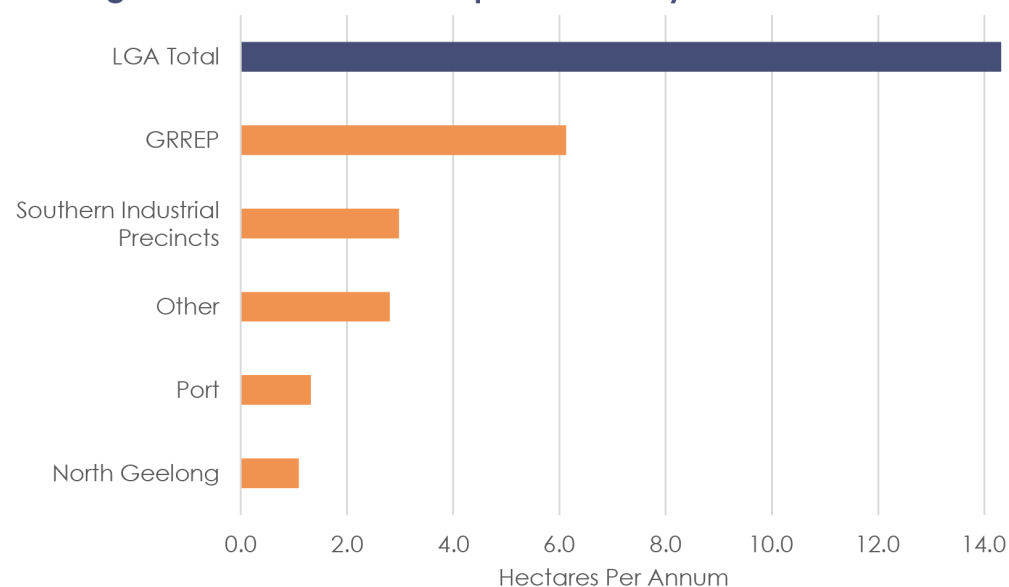
Term	Definition	Example
Occupied	Land that is currently subject to an active industrial use.	
Underutilised	Industrial land that is occupied by an industrial use that includes significant vacant land within the lot. The underutilised estimate does not include an assessment of the overall volume of vacant land. The estimate is the total site area of lots considered potentially underutilised.	
Vacant	Land that does not support an active use of any form.	

8.1.2 Land Consumption Methodology and Precinct Consumption Rates

For the purpose of this report, industrial land consumption rates across the City of Greater Geelong have been calculated using the following methodology:

1. Using aerial imagery (February 2025), classify all industrial lots as occupied, underutilised and vacant as per definitions on the page above.
2. Using Google Earth historical aerial imagery, identify which 2025 occupied and underutilised lots were vacant in 2010.
3. Using Google Earth historical aerial imagery, identify the year in which lots underwent change from vacant to occupied or underutilised.
4. Calculate accumulative development by year and precinct, as well as average annual consumption rates.

Average Annual Land Consumption Rates by Precinct 2010-2025



Source: CKC

8.1.3 Public Engagement Review

Charter Keck Cramer (CKC) assisted The City of Greater Geelong to develop the Industrial Land Supply Review report with input from internal and external stakeholder engagements.

The City of Greater Geelong received 36 submissions in response to the draft *Industrial Land Supply Review* from a diverse range of stakeholders including government agencies, local residents, private industry enterprises and landholders, industry bodies and other organisations. The City of Greater Geelong also held a drop-in session at Council offices. The majority of submissions were supportive of the draft review and its findings while seeking refinements, corrections or expanded analysis on specific matters.

Private enterprises and landholders represented the largest cohort of respondents, reflecting strong market interest in the future direction of industrial land planning across the municipality. Submissions raised a wide range of site specific and strategic matters with recurring themes around land supply adequacy, precinct boundaries, subdivision controls and the need for market ready land to service small to medium sized industrial uses and enterprises.

Across all submissions, a range of themes emerged including the constrained supply of industrial land, the future role of key precincts such as the GRREP, Moolap and the Avalon Airport corridor, the need to balance industrial and residential land uses and the importance of proactive engagement with landholders, industry and government agencies in the preparation of the forthcoming Industrial Land Use Strategy. Submitters also identified the need to protect industrial land from encroachment and the need to co-ordinate development with energy and water provision and capacity.

These submissions have been comprehensively reviewed and have informed the final Industrial Land Supply Review, providing a strong foundation for the forthcoming Industrial Land Use Strategy. Given the depth and site-specific detail contained in several submissions a *Logical Inclusions Framework* will be developed as a part of the Industrial Land Use Strategy to assess rezoning proposals.

Project Timeline:



8.1.4 Summary of Submissions

Type of Submission	Themes	Number of Submissions
Government Agency	Submissions from government agencies focused on infrastructure servicing, strategic alignment with state planning and precinct-level observations. Key themes included water and sewerage capacity constraints, the importance of early coordinated planning for new precincts, transport infrastructure needs, alignment with state policy frameworks and the need for continued consumption with all relevant authorities in the preparation of an Industrial Land Use Strategy. Concerns were also expressed about statements in relation to industry re-location. Authorities also emphasised the need to address encroachment issues and the need to co-ordinate development with energy and water provision and capacity.	4
Local Resident	Residents raised concerns regarding residential-industrial land use conflicts and interface issues. Residents advocated for rezoning measures to support housing development and access to amenities.	1
Private Industrial Enterprise/Landholder	Private industrial enterprise/landowners were the largest group of submissions covering a range of interests and perspectives. Submissions included advocacy for specific land holdings to be recognised or rezoned for industrial purposes. Submitters expressed support for the review while identifying site specific corrections and recommendations. Submitters also expressed concerns regarding precinct boundaries, industrial transition and land supply figures. Key recurring themes included the future of the GRREP and its subdivision controls, recognition of the strategic role of Moolap, recognition of the industrial role of the Avalon Airport, greater recognition of smaller industrial precincts, and the need for more market-ready land to serve small and medium enterprises. Submitters provided further information on the City's expansion areas and consumption rates.	25
Industry Body	Submissions from Industry bodies focussed on broader strategic and policy matters including lot size diversity, planning reform, adequacy of land supply, infrastructure investment and governance frameworks. Overall, submissions from industry bodies were supportive of the need for an Industrial Land Use Strategy emphasising the characteristics which provide positive conditions and protections for industrial enterprise.	5
Other Enterprises/Organisations	This submission advocated for formal recognition and stronger protection of water management and circular economy operations urging both local and state government to safeguard existing precincts from residential encroachment and consider establishing a formally recognised Waste Hub of State Significance.	1

**Charter notes that the most up-to-date publicly available data has been used throughout this report. Data provided through the submission process has been carefully considered and where possible, discrepancies between private and publicly available data have been reconciled. However, where it was not possible to reconcile discrepancies between datasets, publicly available data has been used.*