

Waikato District Council

Growth and Economic Development Strategy

**Project 2
*Industrial Land Evaluation'***

Part 2.1

***Suitability of Identified Industrial Land for
Different Types of Industrial and Service Uses***

North Huntly / Ohinewai

and

Taupiri

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Suitability of Identified Industrial Land for Different Uses

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1.0 INTRODUCTION AND OVERVIEW OF THIS REPORT

This is a '*scoping study*' intended to provide initial guidance to the Waikato District Council in developing and implementing its latest *Plan Review* and developing future, more targeted *Economic Development Strategies*.

As such it builds substantially on the work done for Council's 2018 '*Blueprint Strategy*' work, that this author was substantially involved with.

This Report is intended to identify the types of *industrial land uses* that would be best accommodated in particular industrial areas identified in the Strategic Plan and to identify possible *complementary activities*.

This Report begins by outlining the amount of land for different types of industrial land uses that Waikato may need to supply by the year 2045 that was established during Council's 2018 '*Blueprint Strategy*' work.

The next Section sets out the key locational, servicing and topography considerations important when identifying suitable land for different industrial land uses from land development, business attraction, accessibility, affordable reticulated services and broader amenity perspectives.

The following Sections then provides insights in to what may be the *most desirable primary uses* and *complementary activities* for particular future industrial areas identified for Waikato's new Strategic Plan.

The land uses recommended for each area have regard to:

- The overall amount of land for different types of activities that Waikato could seek to accommodate.
- The potential role each area could play in Waikato's future economic growth and the wider Regional economy.
- The ability to create 'superior business environments' to attract different types of businesses.
- The locational, transport and accessibility requirements of different types of industrial land uses.
- The cost effectiveness of providing suitable sites having regard to topography, geology, slope stability, potential for future flooding, future availability of reticulated services and existing subdivision patterns.
- The compatibility between the proposed land uses and the likely sensitivity of nearby land uses, activities and environmental areas, and
- The need to conveniently supply nearby goods and services to local businesses, visitors and the local resident population.

The particular future industrial areas covered by this report are located in Huntly/Ohinewai and Taupiri.

The study into desirable and preferable land uses is somewhat handicapped by the lack of detailed site analysis (in terms of soils, geology and environmental issues) and by not being part of investigations into all existing and potential future industrial land in the District.

2.0 PROJECTED FUTURE DEMAND FOR INDUSTRIAL LAND

Three 'Future Scenarios' were used to project the potential future demand for industrial land in Waikato to 2045 (Table 2.1):

'Existing Economy' Scenario - where future employment continues to reflect that of the *existing Waikato economy*. This would result in demand for 154 ha of Industrial land (plus 4 ha for showroom space).

'Recent Growth' Scenario - where future employment growth reflects the *types of activities growing in Waikato* between 2001 and 2017. This would result in demand for about 240 ha of Industrial land (including 8 ha of showroom space).

'High Growth' Scenario – Where Waikato's future employment growth matches the *highest recent growth* achieved for different activities in Regional North Island or the Waikato District (whichever was the highest between 2001 and 2017). This would result in demand for 460 ha of Industrial land (including 40 ha of showroom space).

Table 2.1
The Likely Demand for Waikato 'Industrial Land'
Under Each Scenario

	<i>Existing Economy</i>		<i>Waikato 'Recent Growth'</i>		<i>High Growth</i>	
General industries	40		46		86	
Food & Clean Production	41		52		64	
Construction & Utilities	40		78		126	
<i>Total Industries</i>	121		176		276	
Transport & Storage	9		10		40	
Wholesaling	21		47		124	
<i>Total Logistics</i>	30	20%	57	24%	164	37%
<i>Total Industrial Land</i>	151		232		440	
Vehicle and Parts Sales	0		0		0	
Bulky Goods & Hire Services	1		2		11	
Retail Services	0		0		0	
Office Based Services	2		5		9	
<i>Retail & Support Services</i>	3		7		20	
TOTAL Ind Land Demand (Ha)	154		239		460	
<i>Showroom Space (ha)</i>	4		8		40	
* 'High Growth' = highest of Waikato and Regional North Island recent growth (calculated as increased jobs/1000 resident population increase from 2000 to 2017)						
Regional North Island defined as North Island excluding Metropolitan Areas (of Auckland, Hamilton, Wellington, Lower Hutt, Upper Hutt TLAs)						

Home based businesses have been deducted from each activity (such as the building & construction industries)

The Waikato *'Recent Growth' Scenario* projects potential demand for 239 ha of Industrial Land for Waikato over the 28 years between 2017 and 2045 (giving an average of 8.5 ha per year).

This is somewhat less than the 268 ha of Industrial Land demand identified under the *WISE 'Medium Population Projection'* for the Waikato District between 2013 and 2041 (9.6 ha pa).

This *'Recent Growth' Scenario* projected future demand for 239 ha of Waikato District Industrial Land from 2017 to 2045 is also equivalent to the 241 ha of demand for Industrial Land between 2017 and 2047 projected by the latest *'Business Development Capacity Assessment 2017'* for the Waikato District – which included a 15% margin above the actual projected demand (*Market Economics* July 2018, Table 2.2).

Table 2.2
'Business Development Capacity Assessment
Demand for Waikato 'Industrial Land' 2017-2047

Ward	Demand 2017-2047	Available Supply 2017	Centres in ward
	Ha	Ha	
Awaroa ki Tuakau	75.2	119.5	Ohinewai, Tuakau
Onewhero	4.0	0	
Whangamarino	14.6	47.1	Meremere, Te Kawkata
Hukanui-Waereng	11.0	21.6	
Whaingaroa	12.9	0.8	
Huntley	19.1	7.2	Huntley
Ngaaruawahia	11.6	4.1	Ngaaruawahia
Newcastle	68.7	89.7	Whatawhata
Raglan	7.1	7.4	Raglan
Eureka	14.1	0	
Tamahere	2.6	1.9	
Total	240.8	299.2	

(*Market Economics* July, 2018 NB includes a 15% margin above the model's projected demand)

2.1 Planning For Industrial Land for the 'High Growth' Strategy

The *'High Growth' Scenario* would involve planning for three times more industrial land in Waikato (460 ha) than envisaged under the *'Existing Economy' Scenario* (154 ha).

This would require finding suitable locations for the following major industrial land uses:

- 276 ha (60% of future industrial land) for *Industrial Activities* comprising:
 - 126 ha for *Construction and Utility* activities
 - 86 ha for *General Industries*
 - 64 ha for *Food and Other Clean Production* activities
- 164 ha (37% of future industrial land) for *Transport and Logistics Operations* including:
 - 124 ha for *Wholesaling* activities (almost equivalent to the highest industrial activity)
 - 40 ha for *Transport and Storage* activities (almost equivalent to clean production)

This 460 ha *'High Growth'* demand is of the same order of magnitude as the 439 ha projected demand under the WISE *'Medium Population Projection'* for Industrial Land needed in the Waikato District between 2013 and 2061.

This could be considered an appropriate *'Minimum Regrets' Planning Approach* that will:

- Protect *'Strategically Located Land'* important to attract future industrial land uses
- Ensure Waikato *does not run out of* suitable, affordable, well located, cheaply serviced industrial land (if high growth rates eventuate)
- Ensure future well located, cheaply serviced *industrial land is not lost to other activities* (such as residential land uses) – that have other alternative locations available for development
- Provide *more industrial land than that immediately needed* to stop existing land owners tying up the only available industrial land supply (keeping it for higher prices, or insisting on design & build project profits)
- Recognises that well located Industrial Land will be *needed beyond the life of the present plan* (at lower growth rates).

2.2 The Future Demand from *'Cottage Industries'* and *'Service Trades'*

A separate Report projected the likely future demand for *'Cottage Industries'* and *'Service Trades'* in the Waikato District up to 2045 based on the same *'High Growth' Scenario* (Waikato District Council Growth and Economic Development Strategy Project 2 *'Industrial Land Evaluation' Part 2.2 a 'Projected Future Industrial Land Demand for 'Cottage Industries' and 'Service Trades'*, October 2019)

The results of this analysis revealed a projected demand for 7.2 ha of industrial land for *'Cottage Industries'* in the Waikato District.

Some 3.7 ha (26%) of this *'Cottage Industry'* land would require to be located in *'clean production'* areas - with 92% of this land (3.5 ha) needed for *food* related *'Cottage Industries'*.

Some 1,000 sq. m. of land is projected to be needed for *'Cottage Industries'* requiring *'showroom space'* that would be best located to attract *'passing trade'*.

The results of this analysis also revealed a projected demand for 12.6 ha of industrial land for *'Service Trades'* with 35% of this demand (4.4 ha) coming from *'Service Trades'* requiring *'showroom space'*.

Seventy percent (70%) of the required *'Service Trades'* land (10 ha) could be accommodated in *'General Industry'* areas – although a better quality business and employee environment would be more attractive.

3.0 LOCATION AND SITE REQUIREMENTS FOR DIFFERENT INDUSTRIAL LAND USES

It is important to provide suitable flat land that is easy and affordable to service, at desirable locations for each of these sets of activities, with major industrial land users able to easily access the regional transport network (desirably without introducing additional industrial traffic through town and village centres or through residential areas).

General Industry Areas also need to be well buffered from residential and environmental areas and other areas likely to be sensitive to electro-magnetic radiation, noise and vibration and geological stable land able to provide sound foundations.

Clean Production Areas need to be kept free from inappropriate nearby land uses that could create dust, vibration, and electromagnetic vibration and food processing and manufacturing restricted to areas easily provided with sufficient water and appropriate effluent discharge.

Advanced Warehousing and Logistics Areas need to provide very large sites (up to 5 ha and beyond) with stable foundations and no nearby activities (such as heavy gauged rail lines) that could transmit vibrations that could adversely impact automated picking operations.

Securing strategically located industry land of National, Regional or Local Significance beyond immediate needs could be achieved by:

- Delineating this land on promotional and planning documents
- Identifying why this land is important and for what proposed uses – as *specific*, *'place based' economic and employment opportunities*
- Promoting and publicising this land at these locations in an Waikato *'Atlas of Economic Opportunities'*

Such land would not be *'locked up' for these uses* for ever – the continuing future need for such land would be reassessed during each plan review and whenever some alternative use is proposed for that land.

3.1 More Detailed Land and Location Attributes To Attract Different Industrial Land Uses

More detailed locational criteria for different types of industrial land uses and the most suitable type of land and locations can be summarised as follows.

'Business Parks' and 'Clean Production' Precincts

Key Location Criteria:

- Locate in designated high amenity 'clean production areas' (For 'high tech' industries, scientific equipment, pharmaceuticals, health and beauty product and food businesses, also suitable for data warehouses)
- If food industry is significant locate where adequate, affordable water supply, effluent and sewerage treatment and acceptable points of effluent and water discharge (Individual or shared 'primary' effluent treatment may be need for individual uses or the precinct)
- Locate away from noisy, dirty, low visual amenity activities and general industry
- Locate where these uses will have greatest 'positive visual impact' (With high visibility from the motorways and major arterials and at locations where they can act as high visual amenity 'gateways' to 'high quality' industrial areas)
- Locate where easily accessible from the 'Motorways' and local 'Arterial Road Network' (Close to 'motorway interchanges')

- Locate to minimise adverse impacts from 'heavy vehicles' (so that trucks will not be introduced into 'residential areas', pass through 'major centres', or congested 'streets')
- Locate convenient to centres able to provide high quality employee 'facilities and amenities', recreational and convenient to employee residential areas (Ideally within easy cycling distance on dedicated cycle paths).
- Locate 'small, flexible business premises' suitable for R&D and small 'start-up' businesses close to where the larger technology businesses are located and close to employee 'facilities and amenities', close to Town Centres.

Visual References: 'Business Parks'



Visual References: 'Clean Production' Precincts' (could be part of *Businesses Parks*)



Visual References: Communications Based 'Business Parks' and 'Data Warehouses'



'General Industries; Warehousing, Distribution and Logistics' Precincts

Key Location Criteria:

- Locate where easily accessible from 'Motorways' and the 'Regional Road Network' (preferably not visible from these roads, and not close to, heavily trafficked roads, with many buses and coaches, to minimise emergency risks)
- Locate away from the 'main motorway' and 'arterial' 'gateway access' to existing and future 'residential', and 'high quality' industrial and business areas
- Locate to minimise adverse impacts from 'heavy vehicles' (where trucks will not be introduced into 'residential areas', 'major centres', or congested 'streets')
- Locate away from any existing or future 'residential areas' and other 'sensitive' areas (such as schools, retail, office, technology and quality business areas)
- Locate well away from 'clean production' areas (technology, pharmaceutical, health and beauty products and food production areas)
- Located where visibly and spatially buffered from 'sensitive areas' (major highways, town and village centres, places of recreation and high scenic amenity, and residential areas)
- Locate where 'flood free', 'flat land', *not* in need of significant fill suitable for 'large sites' (slopes less than 7%) desirably with solid geology for foundations
- Locate where least 'risk of polluting' waterways and creek systems, (preferably at least 200m away from local creeks and waterways)
- Locate away from any major existing or future 'high amenity' employment, major recreational, visitor, tourist, or environmentally sensitive area.

Implications for large 'standalone' industrial, warehousing and logistics operations:

Locate where 'flat land', suitable for larger operations (slopes less than 7%, desirably less than 2% for sites greater than 4 ha)

These are best located on large areas of flat land, adjacent to 'rural areas' - where these activities can be physically, acoustically and visually buffered by three things - distance, the topography and by the clean production or light industry areas located between these activities and residential areas, town centres and other sensitive land uses.

Locate where there will be ready access from the State Highways, close to major interchanges (without trucks having to passing through or near any existing or *new Town Centre or residential areas*).

Large industrial operations may need to be located close to the national electricity grid – depending on the proposed power source and anticipated electric loads.

Rail access and spur lines can be important to major importers and exporters of bulky goods and intermodal logistics operations

Visual References: 'Warehousing, Distribution and Logistics' Precincts









Implications for 'Difficult to Locate' Activities:

There are many activities that can have some 'off-site impacts' that need these same locational advantages but are best located well away from hi tech businesses, residential and environmentally sensitive areas.

These include transport and logistics depots and warehousing, storage and distribution enterprises and transport and heavy equipment storage hiring and depots that need to operate at night and weekends.

Also, vehicle, transport equipment and marine engine installation, maintenance and repair; outdoor fabrication and assembly, and activities producing high levels of electromagnetic radiation (such as electrical or transmission equipment and transformer assembly, repair, servicing and testing).

Even plastic sign making can produce bursts of electromagnetic radiation and unacceptable high level noise when using routers.

These could be treated as '*special industries*' that are located in well buffered locations, well within the 'general industry' land or buffered by extensive transport and warehouses precincts.

There are other activities that are normally benign but can present serious problems in the event of fire.
T

These include food manufactures that have large stores of gums, emulsifiers, extenders, enhancers or flour.

Also warehousing, packaging, storage or distribution of pharmaceuticals, chemicals, inks, pesticides, pool chemicals, paints, cleaners, cleaning fluids; batteries and tyres (even the distribution warehouses for major retail chains that transport, store or distribute large volumes of these articles).

Also paint, chemical, plastic, reinforced plastic and polymer products manufacturing, storage or distribution.

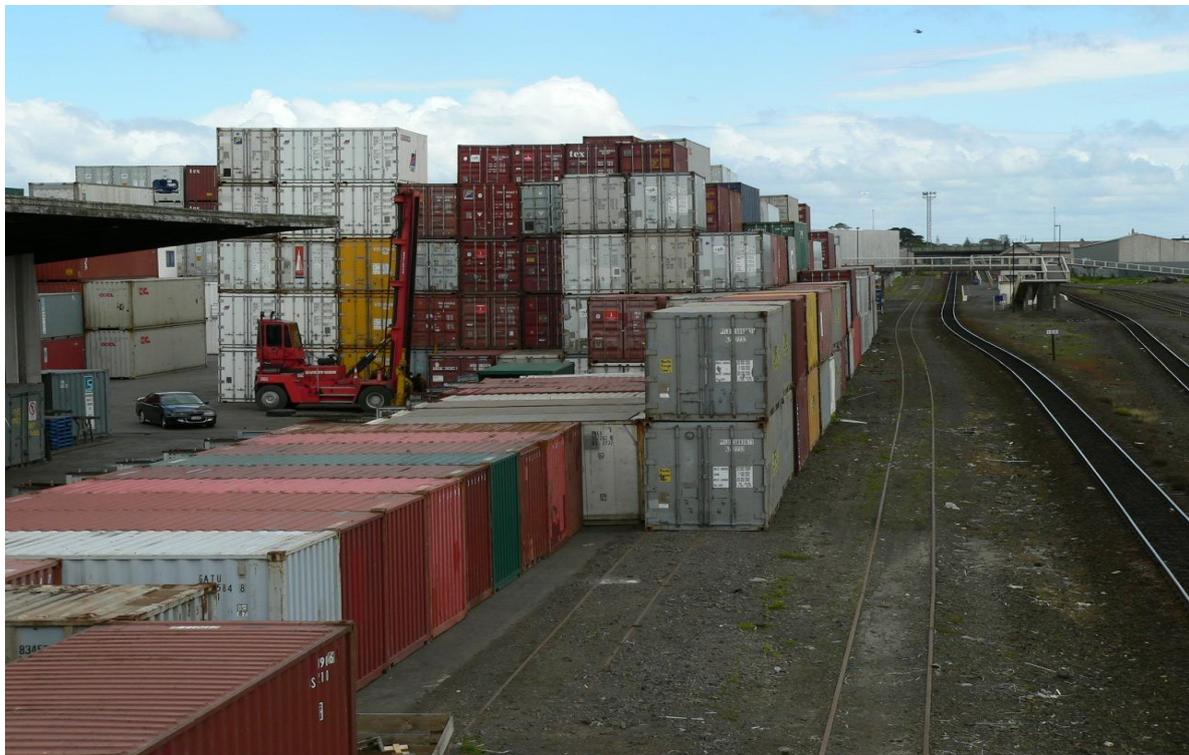
Uses with large chemical, paint, cleaners, diesel, oils or fuel storage and large transport and machinery depots will need flat, flood free, 'bundled' sites to contain spillages.

Then there are *unsightly activities* that could 'visually blight' a *business park* or *trading estate* environment.

These can include concrete batching plants, timber yards, builders' and utility yards, concrete product manufacturing, container depots.

Also car sales yards and vehicle hire depots, machinery and equipment hiring, sale and display of mobile homes, boats and caravans. These will also require reasonable exposure to 'passing traffic'.

Visual References: 'Difficult to Locate' Activities



Visual References: 'Unsightly' Activities (requiring exposure to 'passing traffic')





'Trading Estates', 'Light Industries' and 'Service Trades' Precincts'

Key Location Criteria:

- Relatively free to locate anywhere (provided minimum 'off-site' impacts, but some premises may not be visually appealing)
- Desirably locate where easily access to local arterials, State Highways and the 'Regional Road Network'
- Desirably located close to large residential growth areas (including those of Hamilton and Southern Auckland corridor)
- Desirably close, but not immediately alongside, any existing or future residential area
- Desirably located close to town and village centres but separated from any 'main street' retail area.
- Locate close to other 'industrial areas' (where these activities can benefit from nearby customers and services)
- Locate close to business and retail areas likely to provide employee 'facilities and services' that attract potential 'customers'
- Locate away from the highest amenity 'gateways' to the most prestigious retail, business and office areas
- Suitable for location closer to more sensitive environmental and recreational areas.

Implications for Medium to large 'standalone', smaller and 'multi-tenancy' developments

Sites typically 1,000 to 5,000sq m (averaging 2,000 sq. m):

These are best located to form a *visual and physical 'buffer area'*, on the land between '*clean production*' and '*high amenity*' business areas and lower amenity '*general business areas*' with possible off-site impacts that are located on larger sites on the flatter land

These are best located close to, and readily accessed from, the residential areas they can expect to serve.

Visual References: 'Trading Estates', 'Light Industries' and 'Service Trades' Precincts





Enabling the Local 'Grow-Out' of Home Based Businesses

It is important to provide *affordable* opportunities to 'grow-out' successful home based businesses to small rental premises *within 4km of every major new population growth areas*.

These will require a variety of different premises according to the type of business including:

- Small, *affordable* 'ground floor' office space (tenancies 20 to 200 sq. m.)
- Small *affordable* 'Cottage Industry' and 'Service Trades' with storage space (typically 50 to 200 sq. m. tenancies)
- Small *affordable* retail and showroom space (typically 20 to 100 sq. m.)

Such 'affordable' space should be planned for *adjacent to the retail areas in every village and town centre* where ever there is significant future residential growth is proposed.

It is important that *local centres* are also seen as *multi-functional employment centres* - not solely developed for local shops.

Land needs to be protected at each of these locations for the *later addition* of office and service premises.

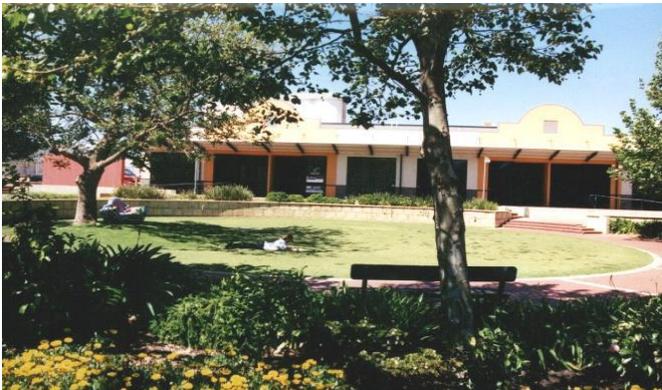
This cannot happen if housing and other uses are allowed to extend right up to the proposed shops.

Visual References: 'Small Scale Office Space'





Visual References: 'Flexible Small Scale Business Space'



High Quality, Mixed-Use 'Residential Business' Areas

The vast majority of businesses in the 'new economy' providing most employment are entirely compatible with residential uses.

These small scale businesses are already providing significant employment growth in Auckland, throughout New Zealand and in other modern western economies.

There is less need to spatially separate such businesses from residential areas.

Some 84% of employment growth in Provincial North Island New Zealand, between the years 2001 and 2017, came from activities that could be *located alongside residential uses* (120,600 jobs) and 49% of all employment growth could co-exist in the same building with residences (unpublished investigations by this author).

Consequently, there are realistic opportunities to develop mixed-use residential business environments with diverse 'live-work' opportunities.

These diversified, high amenity *mixed-use business residential areas* are likely to be attractive to young entrepreneurs, new small business founders and higher skilled residents who can live and work where ever they please.

They are also attractive to older professionals and successful business people and their partners seeking to establish small, new, businesses prior to retirement.

Visual References: 'Mixed-use' Residential/Business Uses.





Visual References: 'Live-Work' Opportunities



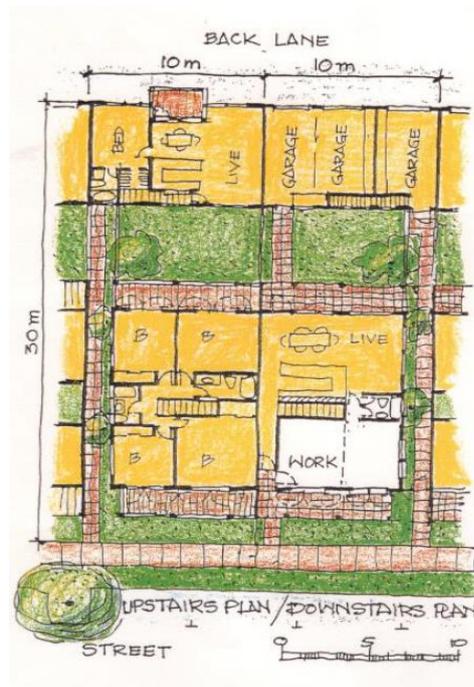
Visual References: Indicative Designs for 'Live-Work' Residences

CITY OF WHITE ROCK
Six Live/Work
Townhouses

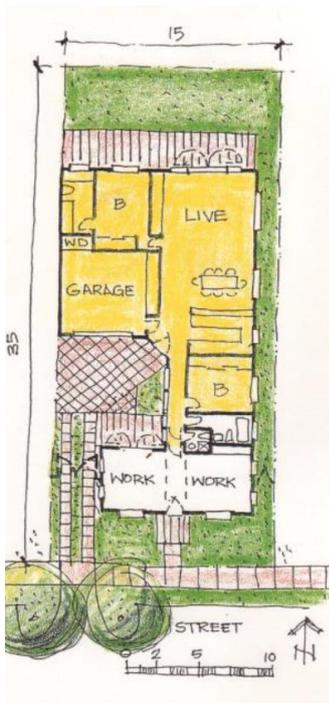
With an FSR of 1.17, each unit in Ocean Wynd has its own ground floor workspace with separate entrance.



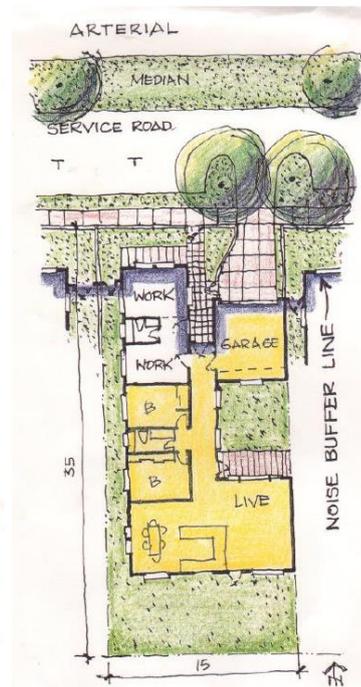
15161 Prospect Ave. Two storey townhouses facing the street with work space on ground floor.



Double Storey Home Based Business (with studio/dwelling to back lane)



Home Based Business on 'South Facing' Section



'North Facing', Noise Buffering Live-Work Design



Double Storey 'Small Lot' Live Work

4.0 IDENTIFIED EXISTING AND POTENTIAL FUTURE 'ECONOMIC OPPORTUNITIES'

There are specific 'Economic Opportunities' that the Waikato District Council may want to pursue when considering particular industrial land uses for different parts of the District, including:

- *Freight & Logistics Clusters*
- *Food Processing Clusters*
- *Motor Sports Cluster*
- *Building Fabrication & Furnishings Clusters*
- *Technology, Agricultural Services Research & Development*
- *Information Technology & Data Warehousing*

Suitable locations to develop each of these opportunities need to feature strongly when considering the possible 'best use' for the different parcels of future industrial land proposed in the Waikato's new Strategic Plan.

Freight & Logistics Clusters

Waikato straddles the 'southern freight corridor' between Auckland, Port Tauranga and the southern parts of North Island New Zealand.

Key freight routes include the Waikato Expressway, State Highway 2 and Main Trunk Railway. These routes provide easy access to Auckland (including its port and International Airport), Hamilton, and Tauranga (New Zealand's second major port).

The District's 'Economic Development Strategy' identifies the opportunity to capitalise on the Waikato expressway and the District's strategic location in the Greater Auckland Growth Corridor to grow a local 'freight hub'.

Specific significant opportunities including:

- The proposed *Ruakura 'Freight Hub'*,
- The new *rail and road terminal* in Tokoroa, and
- The *Northgate Business Park* (109 ha which is being marketed as a freight and logistics site and home to the Port of Auckland regional inter-modal rail/road freight hub).

Food Processing Clusters

The District's 'Economic Development Strategy' also identifies the opportunity for 'value-adding' processing from local rural production.

However, the lack of water availability and lack of large scale water storage constrains the attraction of further 'wet' industry and more intensive, irrigation based, primary production such industries rely on.

Horotiu is home of one of the most modern beef processing plants in the southern hemisphere 'AFFCO Horotiu' with its associated rendering plant, where protein meals and tallows are produced for the Asian market.

The 'Gateway Business Park' is located just south of *Pokeno* village with a range of lots ranging in size from 0.2ha to 5 hectares are already available for sale.

The dairy products industry is already concentrating in Waikato with major dairy products production facilities at Pokeno (occupying 65 ha - *Yashili* 5 ha, *Pokeno Nutritional Park* 5 ha, *Synlait* 25 ha) and at Horotiu (*Open Country Dairy* 3.4 ha). Infant formula manufacturer *Yashili* has constructed a 'state-of-the-art' production plant in Pokeno with an output of 52,000 tonnes of infant formula per annum and *Synlait* has acquired a 25 ha Pokeno site enabling significant future expansion of its business.

Te Kauwhata is renowned for its horticulture, and a number of notable products come from the area. It is centrally located in one of New Zealand's famous wine-producing regions, and is home to the historic 1902 *Rongopai Winery*, secured by *Invivo Wines* in January 2016 as New Zealand's first 'crowd-funded' winery which also offers the prospect of frequent visits from many equity owning small investors.

There are 91 hectares of land in the south-east of *Tuakau* which is zoned Industrial and 15ha of land zoned industrial services. The industrial zone provides for manufacturing, processing, assembling, storage, distribution and wholesale activities. The industrial services zone provides for businesses that support the industrial zone, as well as small-scale manufacturing, processing, assembling, storage, distribution and wholesale activities.

Motor Sports Cluster

There is potential to further develop a '*motorsports cluster*' based on Pukekohe, Meremere and Hampton Downs.

This could include attracting high value motor sports parts and accessory manufacturing and fitting (such as very high value telemetry, brake and electrical harnesses for sports and racing cars).

There could be opportunities to expand into a '*specialist vehicle building, service and repair*' cluster – perhaps focused on lithium Ion electric and hydrogen cell vehicles (possibly including agricultural, construction, trucking and logistics equipment and machinery).

Coach building and car restoration industries could also prove a valuable fit with the development of a more diversified '*Motor Industry Cluster*' for the District.

Security, anti-hijacking and defensive driving training may be another opportunity – for national and international government agencies, high value businesses; individuals, visitors, security, car hire and chauffer firms, insurance companies and high power car and motor bike retailers, their staff and clients.

This could form a valuable part of the District's '*high value*' visitor attraction strategy - that could include providing high powered motor sports training and 'track days' for local, national and international visitors.

All desirably packaged with overnight accommodation and desirable family and partner programs.

Building Fabrication & Furnishing Clusters

Puketirini's existing construction businesses include *Fletcher Constructions*, *Metro-Panel*, *Phillip Leather Prefabrication Modular Homes*, *Huntly Joinery*, *Huntly Kitchens*.

There could be opportunities to diversify the District's construction products industries by attracting other specialised, bespoke and customised furniture manufacturers, and engineered, reinforced and architectural timber products manufactures (including those seeking to relocate out of Auckland).

Useful connections could be made with the timber research and product innovation activities conducted by Scion, the Rotorua Polytechnic and the Forestry Industry Centre of Excellence and Innovation Centre at Rotorua.

There is also the prospect to build a '*Bedding, Furniture and Soft furnishings*' Cluster focusing on the large '*Sleepy Head*' manufacturer – also attracting related businesses from more constrained sites in Auckland.

Clustering these and related businesses could attract other product and component manufacturers and suppliers and foster a commercially strong *soft furnishing* manufacturing, wholesaling and retail and interior decoration industry – that would also serve the growing residential population in Auckland's *Southern Metropolitan Growth Corridor*.

There could be an opportunity of developing a *New Zealand Centre of Excellence* around construction trades.

Technology, Agricultural Services, Research & Development

Newstead hosts the DairyNZ headquarters and the Livestock Improvement Corporation (LIC), and just across the border are the CRIs AgResearch and Plant and Food Research at Ruakura and AgResearch's Hill Country research station at Whatawhata.

There may be opportunities to expand these agricultural research and development opportunities.

There could also be exciting opportunities to develop clusters of *new economy* and *technology based* businesses in fields such as:

- *Pharmaceutical Distribution* (possibly including small scale manufacturing – with large scale less likely)
- *Health and Beauty Products* – manufacturing, marketing and distribution
- *Veterinary products* – manufacturing, marketing and distribution (including 'ai' supplies)
- *Medical Equipment, assembly and servicing* – everything from remote key hole surgery, remote cataract lens replacement, laser cutting lens to and colonoscopy equipment for humans and animals
- *Scientific, Business and Robotic Equipment*- assembly and servicing
- *CAD/CAM Equipment and Software Development* – such as automated layout and precision water and laser cutting, casting and die making for plastic extrusion,
- *Reinforced Plastics, Genetic and Engineered Timber Products* – used for specialised purposes (including Kevlar products, 3D printed protheses, artificial skins, burn graft materials, artificial body parts, valves, artificial hearts and kidneys)
- *Specialised Processing, Process Control, Quality Control and Sorting Equipment* - assembly, software and servicing (e.g. for milk, horticulture, agriculture, mining, deep water and other hostile environments)
- *Remote and Satellite Sensing* - monitoring, telemetry, communications, data logging, expert system assessments and automated interventions
- *Robotics, Remote Control, Specialised and Electric Vehicles* – assembly, evaluation, monitoring, servicing, innovations, improvements and repair (including customised robotics and remote control vehicles and systems).

Information Technology & Data Warehousing

The relatively stable geology compared to other parts of New Zealand should make the District attractive as a safe and secure location for data warehousing, data storage, cloud computing and storage, call centre and communication facilities.

However, there is uncertainty about the timing and roll out of latest, fastest broadband with the *Ultra-fast Broadband* roll out for main towns and improvements in rural broadband coverage and performance is yet to be confirmed under the government's UFB2 and RBI2 funding programmes.

The *national fibre network* presently only extends around the major townships.

In the case of the industrial areas of interest, the existing fibre optic network only extends to North Huntly – with a possible node at Ohinewai Township. However, there is extensive fibre optic cable coverage at Taupiri.

5.0 POSSIBLE 'BEST USE' OF THE PROPOSED 'OHINEWAI' INDUSTRIAL LANDS

This section scopes the most desirable and likely land uses that could be expected to be attracted to the *Ohinewai Industrial Land* identified in the proposed *Draft Waikato 2070 Growth and Economic Development Strategy*.

It does so by taking into account the economic and business location considerations identified above; the land and its location's relative attractiveness compared with possible competing industrial land, and an initial overview of the particular attributes of each location.

The *Draft Waikato 2070 Growth and Economic Development Strategy* recognises the potential for the following industrial land at Ohinewai:

- Ohinewai North 435 ha (gross area)
- Ohinewai South 259 ha (gross area)

5.1 Situational Awareness

This land is located in a rural setting approximately half way between Te Kauwhata and Huntly (7km to the south).

The land and its uses should be highly visible from the Waikato Expressway (SH1) which provides easy access to the Regional and national road network via the Ohinewai interchange immediately to the south of the subject land.

Huntly, close to the south, has a struggling town centre, in need of revitalisation, with a declining economic bases due to its loss of its mining economy and a remaining focus on construction materials that have limited opportunities to expand.

Existing construction products manufacturing businesses located at Huntly include *Fletcher Constructions*, *Metro-Panel*, *Phillip Leather Prefabrication Modular Homes*, *Huntly Joinery*, *Huntly Kitchens*.

The proximity of the North Island main trunk rail line, with the possibly of a spur line and private sidings, could provide a locational advantage for importers and distributors of bulky products and large scale manufacturers and distributors of bulky items – especially those likely to *export* through Auckland or Tauranga.

This land has a considerable advantage being largely vacant land closest to Auckland and the south Auckland 'growth corridor' with full Expressway access in all directions – including south to Hamilton, Taupo, Wellington, and other southern cities and the southern parts of North Island.

The import, export and distribution of bulky goods is facilitated by the proximity of the Waikato Expressway connections north and south and the potential to run a spur line or private sidings from the main National Trunk railway line.

High speed, broadband users are presently inhibited because the existing fibre optic network does not extend to this area – with the possible exception of a node in Ohinewai township

5.2 Land Characteristics

The ownership parcels and sub-division pattern would allow for reasonably large to very large sites.

The land is relatively flat and flood free and drops towards the Lake Waikare and Lake Rotokawau to the east - with significant lakeside natural areas located between these industrial areas and the lakes.

The area provides a relatively small pocket of high quality soils, in keeping with its lakeside location. However, there are far more extensive areas of contiguous high quality soils in this, and other, parts of the District.

5.3 Economic and Employment Risks and Opportunities

This land would be most suitable for *large 'standalone' industrial, warehousing and logistics operations* that would not pose any risk to Lake Waikare, Lake Rotokawau and the natural environment.

The possibility of providing cheap large sites makes this land susceptible to attracting large plants and extensive business operations with few jobs and low skilled employment that are finding it difficult to find affordable large sites in Auckland or elsewhere in New Zealand.

Such land uses are undesirable given their limited, low skilled employment and the economic, social and employment difficulties already facing Huntly and the wider District (see the *Waikato Blue Print' Report*).

These less desirable land uses could include concrete batching plants and concrete product manufacturers, large timber yards (already found in the area), building products, building frame and roofing trust manufacturers; the display and sale of swimming pools, spars, barns and sheds, demountable and mobile homes and offices, kit homes and granny flats; extensive, large scale outdoor construction supplies, agricultural and landscaping and infrastructure materials supplies, and large, extensive utility depots.

These generate limited economic and few employment benefits and could further depress Huntly's economic, employment and revitalisation opportunities.

New economic opportunities could shun this area and the economic future of Huntly will be further compromised if these less desirable land uses are readily visible from the Waikato Expressway.

Specialised Construction Technology Opportunities

A better alternative would be to focus on diversify Waikato's, the Region's, and Huntly's construction products industries by attracting other specialised, bespoke and customised engineered, reinforced and architectural designed timber products, and customised and bespoke furniture manufacturing, and specialist hospital, accommodation and shop fitting in a new '*Specialised Construction Technology*' Cluster (including existing businesses seeking to relocate out of Auckland).

There could be an opportunity of developing a *New Zealand 'Construction Industry' Centre of Excellence* around these specialised construction industries and 'new technology' construction trades.

Bedding Furniture, Soft furnishings and Interior Decoration Opportunities

There is also the prospect to build an influential '*Bedding, Furniture and Soft furnishings*' Cluster focusing on the large '*Sleepy Head*' manufacturer. This could include attracting related businesses from more constrained sites in Auckland and attracting the distribution warehouses of major importers of bedding, furniture, bathroom and kitchen products and soft furnishings – taking advantage of the main trunk rail and excellent expressway access.

Clustering these and related businesses could attract other product and component manufacturers, suppliers and distributors and foster a commercially strong *soft furnishing* design, manufacturing, wholesaling and retail outlets.

This clustering could also foster an '*interior design*' and '*interior decoration*' industry – that would also serve the growing residential population in Auckland's *Southern Metropolitan Growth Corridor*.

Food and Clean Production Opportunities

The ability to provide such large, flat sites with good rail and expressway access provides this area with the unique ability to make good regional shortages of sites for the food and dairy processing industry – provided sufficient land is dedicated to such uses to justify the provision of adequate water and waste treatment facilities.

The clustering of sufficient food and dairy processing industries in this area could then justify the synergistic provision of shared services – such as power generation; reticulated steam, gasses, and chilled water, refrigerants; water stripping, primary and secondary waste treatment; packaging and cold stores; and enabling cost effective waste, grey water, plastics and packaging recycling.

Sufficient land would need to be allocated for such uses to justify the provision of bulk water supply and waste treatment that is not presently available to this area.

Health and Technology Opportunities

There may also be possibilities to attract to these highly visible, lake side locations a 'Health and Technology' Cluster based on businesses in fields such as:

- *Pharmaceutical Products* - manufacturing, packaging and distribution
- *Health and Beauty Products* – manufacturing, packaging, marketing and distribution
- *Veterinary products* – manufacturing, marketing and distribution (including 'ai' supplies)
- *Medical Equipment, assembly and servicing*
- *Scientific, Business and Robotic Equipment*- assembly and servicing
- *CAD/CAM Equipment and Software Development* – such as automated layout and precision water and laser cutting, casting and die making for plastic extrusion,
- *Specialised New Material, Reinforced Plastics, Genetic and Medical Products* – specialised designed, assembly and production of specialised individual, bespoke and small batch production items
- *Specialised Processing, Process Control, Quality Control and Sorting Equipment* - assembly, software and servicing (e.g. for milk, horticulture, agriculture, mining, deep water and other hostile environments)
- *Remote and Satellite Sensing* - monitoring, telemetry, communications, data logging, expert system assessments and automated interventions
- *Robotics, Remote Control, Specialised and Electric Equipment* – assembly, evaluation, monitoring, servicing, innovations, improvements and repair (including customised robotics and remote control systems)
- *Cloud Computing, Call Centre and Data Warehousing* – subject to the availability of appropriate broadband fibre optic services.

5.4 Land Demand Considerations

There is potentially more industrial land proposed for Ohinewai (694ha, gross land area) than potentially needed for the whole District's projected demand up to the year 2045 (460 ha net usable industrial land).

However, it is important that strategically located Industrial land in desirable locations, where businesses will want to locate, should be protected to underpin the long term economic and employment future of Waikato, the Region and the Nation.

Therefore such strategically located land should not be lightly squandered on land uses that provide limited economic or employment benefits, or on land uses (such as residential) that could easily be accommodated at equally attractive locations for them elsewhere.

The further north, towards Auckland, that suitable serviced industrial land can be provided by the District, the more desirable it is likely to be from a business perspective.

Therefore it is especially important to protect this strategically important future employment land from inappropriate land uses and to preserve sufficient well located land for higher value business and industry uses beyond the life of the present plan

5.5 Planning Implications

The lack of readily available bulk water supply and sewerage services combined with excellent Expressway access, closest to Auckland, suggests early development for *large scale transport, wholesaling and distribution activities* and *large scale, 'low impact' manufacturing* may be most appropriate early developments.

This would include ensuring sufficient, appropriately located land to building a regionally significant *'bedding, furniture, soft furnishings and interior decoration* cluster.

There would also be opportunities to attract smaller technology businesses to well-located sites with good Waikato Expressway access, visibility and exposure. With the 'distribution warehouses', assembly and 'service operations' of national and international technology firms being accommodated on larger sites in 'business parks', or 'clean production' precincts.

The ability to provide large, flat sites with good rail and expressway access provides significant potential to attract food and the dairy processing industries as other land with adequate water supply and waste treatment becomes unavailable.

This suggests the necessity to preserve sufficient land for the clustering of such activities to justify the future provision of bulk water and waste treatment services to this area – or to warrant the private, or shared, provision of such services.

Desirable Early Land Provision

Based on these considerations, and the analysis in Section 2.0, a *'Minimum Regrets'* Strategy would be to plan to protect sufficient future industrial land at Ohinewai for the following:

Food and Clean Production Areas 60 ha (94% of projected demand to 2045)

Wholesaling, Transport and Distribution Areas 80 ha (49% of projected demand to 2024)

Construction, Utilities and General Industries 140 ha (66% of projected demand to 2045)

This means that a developable useable industrial land area of *at least 280 ha* should be immediately planned for in Ohinewai.

Identification of Locations for Particular Industry Clusters

Particular 'Industry Clusters' should be planned for Ohinewai - with sufficient suitable land provided for these clusters identified and realised through planning provisions, promotional planning, infrastructure, landscaping and economic development initiatives.

These could appropriately include;

- A 'Bedding, Furniture and Soft furnishings' Cluster - focusing on the large 'Sleepy Head' manufacturer and attracting other furniture and soft furniture manufacturers, designer products, designers and suppliers (including furniture and soft-furnishing wholesaling, retailing, showrooms, display and design studios).
- A 'Health and Technology Products' Cluster – seeking to attract businesses in the pharmaceutical and animal and human health products sectors, and robotics and remote sensing businesses (with specialisations in 'remote sensing in hostile environments' and 'food processing and control systems')
- A 'Specialised Construction Technology' Cluster - bespoke and customised engineered, reinforced and architectural designed timber products, and customised and bespoke furniture manufacturing, and specialist hospital, accommodation and shop fitting.

Planning for this Early Provision of this Industrial Land

Initial planning for the Ohinewai Industrial lands could most effectively include:

- i. A 'Business Park' of 60 to 65 ha
 - Located along the Waikato Expressway frontage
 - Possibly extending to overlook the Waikeri Lake's environmental areas

This would be targeted at clustering these new economy, technology and clean production activities.

It may be possible to split this demand into three separate areas of approximately 20 ha each to take advantage of the different advantages of:

- Visibility from the expressway
- Access to industrial area from residential areas
- Any desirable lake front and environmental vistas

Areas of *less than 20 ha* would be inappropriate because of their inability to preserve a desirable, high quality, high amenity, landscaped business environment.

- ii. A 'Warehousing, Distribution and Logistics' Area of 80 to 100 ha

This would meet a substantial proportion (50%) of the District's identified medium term needs to 2045 for large sites for such uses.

The planning provisions could include the packaging and assembly of products (which is increasingly the case using products and components manufactured overseas).

This area would need to be located close to main access to the industrial area from the Expressway and located to effectively physically and acoustically buffer the business park areas from any general industry areas.

Part of such land could then be potentially repositioned or rezoned to add to the 'Business Park' settings – especially if any 'new economy' or 'technology' clusters were to begin to develop in this area.

iii. A 'Construction, Utilities and General Industry' Area of 140 ha

This would meet a substantial proportion (two-thirds) of the District's identified medium term needs for sites for such uses.

This recognises that population growth and property, infrastructure and residential development will be concentrated in the north of the Waikato District, and in the southern Auckland Metropolitan growth areas to the north of Waikato – which can be most readily accessed from the proposed North Huntly Waikato Expressway interchange.

These areas should be well buffered physically, visually and environmentally from the Expressway and Lake Waikare – particular care will need to be taken to avoid any adverse environmental impacts on the lakes and their surrounding environmentally sensitive areas.

Provision could be made for some 'difficult to locate activities' - such as concrete batching plants; outdoor fabrication, bulk fuel depots; the storage of chemicals and potentially harmful materials, and activities emitting radio-magnetic radiation.

Some 5 to 10 ha should be sufficient to meet this requirement – as this area is not intended as a regional warehousing and distribution area for dangerous, noxious or potentially hazardous materials.

This 'Special Industry Areas' for 'difficult to locate activities' should be located well away from the other more sensitive land uses, nested out of sight, well within the general industry area.

Such activities should be located in flood free, well 'bunded' sites that do not drain towards Lake Waikare, Lake Rotokawau or nearby areas of natural significance.

Protection of 'Strategic Future Industrial Land'

It would be a wise to protect a further 320 ha at Ohinewai as 'Strategic Industrial Reserve Land'.

This 'Strategic Industrial Reserve' Land should be located to be suitable for 'food and clean production' (100ha), 'business parks' (60ha), 'warehousing and logistics' (100 ha) and 'general industry' (60 ha).

The 100 ha of reserved 'clean production' land would ensure sufficient land for any major expansion of the dairy processing industry – provided that it is viable to supply appropriate water and waste treatment.

The dairy products industry already occupies large sites in Waikato at Pokeno (*Yashili* 5 ha, *Pokeno Nutritional Park* 5 ha, *Synlait* 25 ha) and at Horotiu (*Open Country Dairy* 3.4 ha).

Similar, small scale dairy plants and pharmaceutical company operations, requiring up to 6 ha, could easily be accommodated within the 60 ha proposed for 'clean production' activities in the initial planning for Ohinewai.

However, more land should be reserved for future 'clean production' to enable the establishment of other larger operations requiring much larger sites (such as *Synlait* that required 25 ha).

The additional 100ha of 'Strategically Reserved' clean production land should be protect at Ohinewai to preserve this opportunity - also providing the opportunity for these activities to be cost effectively supplied with adequate water and waste infrastructure.

Possible Long-Term Future Residential Uses

There may be longer term opportunities to create integrated new '*mixed-use business/residential areas* and '*affordable*', *quality residential areas* on part of the Ohinewai land – possibly taking advantage of high amenity lakeside and natural environment opportunities.

This would help to attract the types of residents needed to realise the identified industry clusters and better position the District, and wider region, to realise 'new economy' technology, business and services opportunities.

This type of development could help to attract and retain new small business founders and higher skilled residents who can live and work where ever they please – who are essential to develop the specialised industry clusters identified earlier in this report

If a substantial part of this land was considered for residential development, part of it could most effectively be developed as a good quality, *mixed-use residential and business area* – that would better position Waikato to attract and participate in new economy activities (see Section 3.1 – more on this in the following assessment of the Huntly North '*East Mine*' lands).

Avoiding the Loss of This Strategically Located Land to Less Desirable Uses

The availability of large, flat land with great expressway access creates a tricky planning problem of how to protect sufficient land at the most desirable business locations for these high value business and industry clusters whilst avoiding the loss of these economically important, strategically located land to less desirable extensive, low skilled, low employment activities likely '*come first*' looking for large, cheap sites.

If land is given over to these less desirable '*first comers*' they are *unlikely to 'move on'* at any later date - given the national and regional shortages of cheap, large sites for these types of activities.

This suggests the following aspects of an appropriate planning regime for Ohinewai:

- a. Protect the land for appropriate types of land uses – including *promotional 'planning documents'* that identify desirable and un-desirable land uses
- b. Planning should recognise and identify where particular *industry clusters* are proposed to be located
- c. Rezoning *small batches of land* as demand is revealed for these desirable land uses – ensuring such developments can be properly integrated into the future development of the whole 694 ha area
- d. *Performance based planning provisions* that will protect the significant natural environment and ensure the desired superior 'business environment' to attract the desired uses.

6.0 POSSIBLE 'BEST USE' OF THE PROPOSED 'HUNTLY NORTH' INDUSTRIAL LANDS

The *Draft Waikato 2070 Growth and Economic Development Strategy* recognises the potential for 26 ha of industrial land at 'East Mine' immediately north of Huntly.

6.1 Situational Awareness

This land is immediately to the north of Huntly – located alongside the old highway and adjacent to Huntly's northern residential areas.

Similar locational and economic development considerations discussed for Ohinewai apply to this land.

This land is immediately adjacent to the proposed *North Huntly Expressway Interchange* and should be directly accessible from its connecting roads.

However, this access does not provide for southern movements onto the national and regional road networks.

The North Huntly interchange access to the Waikato Expressway (SH1) is a 'half cloverleaf' that does not allow for movement to or from the south.

So there is no convenient Expressway access towards and from Hamilton, Tauranga and the southern parts of the North Island.

6.2 Land Characteristics

Potential land uses are further constrained by the smaller sections and land holdings and the land's proximity to Huntly and the residential areas immediately to the south of this land.

This makes this land unsuitable for large scale premises or activities with potential adverse 'off-site' impacts – including those likely to operate at night, on public holidays and throughout the weekend.

All these considerations, in combination, makes this land generally unsuitable for heavy industry, large scale manufacturing and large scale transport, warehousing, storage and logistics operations.

Outdoor storage, manufacturing and assembly; timber yards, house storage, builders yards; car yards, utility and Council depots are also inappropriate – given the higher amenity and better quality development that should be sought this close to Huntly and its town centre.

Allowing such inappropriate land use would run the risk of further blighting the Huntly townscape; inhibiting Huntly's social and economic rehabilitation and stultifying the prospects of revitalisation and economic renewal of Huntly and its struggling Town Centre.

The land is relatively flat and apparently floodfree despite its proximity to the river. The proximity of the Waikato River, its foreshore and environmental lands could provide some interesting recreational opportunities.

All these findings are subject to more detail structure planning and site analysis.

6.3 Land Demand Considerations

'Service Trades' and 'Cottage Industries'

Previous investigations identified the potential demand for 3 ha of additional industrial land for newly established *Service Trades and Cottage Industries* at Huntly up to 2045.

The provision of at least 3 ha of *Service Trades and Cottage Industries* land would be appropriate at this location to service Huntly, its growing residential population; to service local businesses, and to provide a home for wider serving service trade businesses and enable the local 'grow-out' of local home based businesses.

This area could also be expanded to enable existing light industry and cottage industries in Huntly to grow.

Also, to provide an opportunity for existing light industries, service trades and cottage industries in and around the Huntly Town Centre to relocate - as property prices increase, or larger premises are required.

Potential 'Business Park' Uses

This whole area could be considered for *'Business Park' uses* – if suitable locations for this are not realized at Ohinewai which has greater proximity to Auckland and Expressway access both north and south (rather than just the north).

However, *'mixed residential business uses'* may be a better use of the remaining land – subject to local amenity considerations.

Potential 'Mixed Business Residential' Uses

The remaining area could be considered for high quality *mixed business/residential uses* – with affordable 'live-work' opportunities.

This would help diversify and support the Huntly Town Centre and provide affordable opportunities to incubate and then 'grow-out' home based businesses.

Small designer premises, mixed-use residential and business premises, live-work residential properties, home based businesses and flexible, affordable businesses premises suitable for the 'grow out' of a wide variety of local home based business may also be appropriately located in these *mixed business/residential* areas.

Recreational and leisure activities, attractive to residents, day visitors and tourists, may also prove beneficial to the broader community and provide a useful economic opportunity.

See the other *Waikato Blue-Print' Work* and the *Relative 'Competitive Advantage' of Waikato' Report* to better understand the importance of such diversification to the future of the wider Waikato District.

Retail Opportunities

Small scale showrooms may be appropriate.

Small scale *appliances and furnishings retail warehousing* may also be appropriate and individual Direct Factory Outlet shops – but not large scale regional retail warehouses, nor large scale Direct Factory Outlets (DFOs).

Not smaller retail premises that are more appropriately located in the Huntly Town Centre.

Small hardware and garden centres may also be appropriate – but not large scale garden and landscape supplies.

Inappropriate and Undesirable Land Uses

The following activities should be considered inappropriate for this location – because of its proximity to the Huntly Town Centre and the potential for them to under-mine and further depress the built environment:

- Vehicle and marine repair; servicing, upholstery, body and component fitting
- Vehicle hire and sales yards (unless part of well landscaped motor vehicle sales precinct)
- Builder's or utility yards, or Council depots
- saw mills and timber yards, concrete batching plants
- concrete, timber, and building products manufacturing
- outdoor manufacturing, storage or assembly operations
- Large scale builders' hardware, garden and landscape supplies.

6.4 Planning Implications

An integrated high quality, *mixed-use residential and business area* could be the most beneficial use for this area.

The following recommendations are subject to more detail structure planning and site analysis.

Opportunities for a Landscaped 'Trading Estate'

This East Mine area could be planned as a well landscaped *'Trading Estate'* comprising some 5 to 10 ha - with at least 5 ha promoted for *Service Trades and Cottage Industries*.

This could include a *Tourist and Visitor Cottage Industry Mall* (see previous Reports).

This *'Trading Estate'* should be located in close proximity to the access roads to the North Huntly Waikato Expressway interchange.

Ideally this *'Trading Estate'* would be clearly visible from the Waikato Expressway and its Town Centre access roads in order to increase potential customer awareness and attract 'passing trade'.

Mixed-Use, 'Live-Work' Opportunities

The rest of the land, some 15 to 20 ha, could usefully be considered for development as an affordable, high amenity, *mixed-use 'residential business'* and *recreational area* – subject to existing amenity; local flooding and environmental considerations.

This type of development could help to attract and retain young, new small business founders and higher skilled residents who can live and work where ever they please – who are essential to develop the specialised industry clusters identified earlier in this report.

Its proximity to Huntly could help turn around the existing blighted image of Huntly, and the additional new demand could help to reinvigorate the Huntly Town Centre.

Huntly, this location and its proposed *'mixed-use' residential business areas* could benefit significantly from the provision of unique River front recreational and leisure activities attractive to residents, day visitors and tourists (see the Waikato Blue Print work and previous Reports).

This *'mixed-use 'residential business'* and *recreational area* should be located at a highly visible Town access location, and visible from the Expressway access. So that these businesses can benefit from greater awareness by 'potential customers'; they can attract 'passing trade'; and the high visual amenity can begin to counter the existing negative images of Huntly and its Town Centre.

Alternative Sites for 'Unightly' and 'Difficult to Locate' Activities

Alternative sites should be quickly found and promoted to successfully accommodate more difficult to locate, unsightly land uses and services that already exist or will be looking to locate in Huntly.

These uses include:

- Vehicle and marine repair; servicing, upholstery, body and component fitting
- Vehicle hire and sales yards (unless part of well landscaped motor vehicle sales precinct)
- Builder's or utility yards, or Council depots
- saw mills and timber yards, concrete batching plants
- concrete, timber, and building products manufacturing
- outdoor manufacturing, storage or assembly operations
- Large scale builders' hardware, garden and landscape supplies.

Consideration could be given to immediately planning for these less desirable services to be appropriately located vacant industrial buildings in the vicinity of Huntly.

New locations for *unsightly 'difficult to locate' services* could be found in abandoned and closed parts of local quarries and nearby land fronting *Tregoweth Lane*, and *Riverview Road* South of Huntly.

The owners of these quarries could be approached to level and leave the quarry bottoms, access and road frontage of the quarries suitable for such uses.

Some owners may even be persuaded to diversify their operations into such uses.

'Promotional Planning' To Realise These Opportunities

Promotional Planning documents could promote such adaptive, change of use for these vacant buildings and quarry sites.

'Indicative Designs' (with the owner's consent) for such adaptive re-use of a quarry and a parcel of *Tregoweth Lane* fronting land could help to turn these opportunities and economic prospects into reality.

This *'indicative designs'* approach has proved particularly effective in successfully stimulating changes of use; redirecting attitudes of existing property owners to their properties and instigating business diversification in many similar situations in other places.

A similar *'indicative design approach'* could be used to unlock the *East Mine* site and promote the vision for a well-integrated, affordable, good quality *mixed-use residential and business area* with regionally significant *tourist, visitor and recreational attractions*.

Opportunity Prospectuses could most effectively market and promote particular opportunities – including these quarry sites, the *Tregoweth Lane* and *Riverview Road* fronting land, and *mixed-use residential business areas* (also appropriate for the Town Centre between the railway and Ralph St.).

See the other *Waikato Blue-Print' Work* and the *Relative 'Competitive Advantage' of Waikato' Report* to better understand the vital importance of such diversification to the economic and employment future of the greater Waikato District.

7.0 POSSIBLE 'BEST USE' OF THE PROPOSED 'TAUPIRI' INDUSTRIAL LANDS

The *Draft Waikato 2070 Growth and Economic Development Strategy* recognises the potential for 107 ha of industrial land at 'Taupiri':

- 59.9 ha (gross) at Taupiri 'North' – located east of the future Waikato Expressway
- 47.1 ha (gross) at Taupiri 'South' – located west of the future Waikato Expressway

7.1 Situational Awareness

This land is located in a rural setting approximately half way between Huntly (10km to the south) and Hopuhopu (5 km to the south). Taupiri village is located on the Waikato River immediately to the west.

The land and its uses should be highly visible from the Waikato Expressway (SH1) which provides easy access to the national and regional road networks.

Both parcels of land lie close to the *Gordonton Road Intersection* on the Waikato Expressway - providing exceptional accessibility north, towards Auckland, and to all destinations south.

However, there no possibility of direct rail access.

The social and economic problems facing Huntly have been alluded to in the discussion about the Ohinewai and North Huntly land.

Hopuhopu, immediately to the south, was a former military camp returned to Waikato-Tainui in 1993, who converted it to their headquarters and the Waikato-Tainui College for Research and Development.

7.2 Land Characteristics

The land is relatively flat and flood free

The reasonably large sections should enable sensible development of each of these relatively small developable areas to create a coherent '*integrated industrial employment area*'.

The norther parcel consists of a pocket of high quality soils. However, there are far more extensive areas of contiguous high quality soils further to the east and very extensive areas of high quality soils to the north.

The 'Eastern' industrial area is affected by two local stream networks that will tend to break the area up into smaller precincts. This area would need substantial water and waste water infrastructure. This makes it relatively unsuited for 'wet industries'

The 'Western' industrial land is somewhat steeper making it more suitable for smaller developments on smaller sections and activities that will make less demands on this area's limited water and waste water infrastructure.

7.3 Economic and Employment Risks and Opportunities

This land's visibility and accessibility the Waikato Expressway makes it potentially a very attract business location.

These same attributes makes it susceptible to attracting businesses serving wider markets that few, mainly low skilled jobs that will provide little economic benefit and will do little to provide local employment.

The availability of affordable land with good regional accessibility could make it likely to attract such activities that are being forced out of other locations locally or in Auckland's growth corridors, or are finding it difficult to locate closer to Auckland.

These less desirable land uses could include concrete products manufacturers, timber yards, large scale outdoor storage operations; construction, materials, fertilizer and landscaping supplies, and large utility depots.

The effects of two local streams breaking up the 'Eastern' land and the smaller land holdings and steeper slopes of the 'Western' land make these areas relatively unsuited to large scale warehousing, storage, transport and distribution operations.

The 'Western' industrial area is affected by two major electricity lines – one crossing diagonally through the middle of this land.

This makes it less suitable for technology based businesses that need shielding from electromagnetic radiation.

The land underneath may need to be kept free of any activity which will split the area into two smaller parcels each approximating 20 ha (gross).

However, there may be possibilities of using the land underneath these power lines for roads, parking or outdoor storage.

This area would be unsuitable for activities that could touch or cause arching from these high voltage lines - such as container storage, cranes, crane and builders and utility yards, depots and construction equipment yards.

These considerations, and the lack of water and waste water capacity, makes the land to the 'East' more suitable for smaller scale '*clean production*' and '*business park*' activities – possibility taking advantage of the northern aspect and stream front amenity and natural recreational activities (walks, cycle paths and natural areas).

This could include the smaller distribution and service operations of national and multi-national firms.

This could include the possibility of attracting future call centres and data warehouses (subject to the provision of appropriate 'broadband' telecommunications infrastructure).

This would leave the 'Western' land more suited to smaller light industry, 'trading estate' and service trade activities. These would have little call on the limited water and waste water capacity of this area.

This 'Western' area could include the possibility for some 'general industry' land in appropriate, less visible, well buffered sites.

All these findings are subject to more detail structure planning and site analysis.

7.4 Land Demand Considerations

'Business Park' Land

The possibility of two business parks of 20 ha each should be conserved for the highly visible land in the East.

These high amenity, landscaped '*Business Parks*' could prove attractive to smaller scale technology, health and beauty, pharmaceutical, animal husbandry products and other 'clean product' businesses.

There a real prospect for such a '*business park*' being especially attractive smaller technology based businesses – especially if their employees can benefit from nearby natural environment and recreational activities (such as cafes, walking tracks and bike trails).

Land at this location could also prove attractive to the smaller distribution and service operations of national and multi-national firms.

These *Business Parks* could possibly also attract future communications based industries, call centres and data warehouses (subject to the provision of appropriate 'broadband' telecommunications infrastructure).

'Service Trades' and 'Cottage Industries'

Previous investigations found that 20 ha of *Industrial Land* may be needed for '*Cottage Industries*' and '*Service Trades*' in the Waikato District before 2045.

These investigations identified the potential demand for 1 ha of additional industrial land for newly established *Service Trades and Cottage Industries* at *Taupiri* up to 2045.

Some 22% of this land needs to be provided in '*clean production*' areas where there can be no impact from nearby land uses.

A similar 22% needs to accommodate '*showroom space*'. This is best located where these activities are highly visible and able to attract 'passing trade'.

This land is perhaps best located on the most visible parts of the 'Southern' land – where it will be closer to the '*Taupiri Village*' and the Waikato-Tainui College for Research and Development.

The opportunity could be taken to develop a series of flexible shared-workspaces to encourage the incubation and growth of new business and to enable the successful 'grow-out' of home based businesses.

Such workspace could encourage the development of new businesses from Huntly and Hopuhopu and the wider District.

Perhaps the Waikato-Tainui College may be interested in providing the appropriate entrepreneurial and business support, mentoring and training.

'Light Industry' and 'Trading Estate' Land

The balance of this 'Western' land could be conserved for a 'trading estate' and light industries

It would be wise to retain the possibility of a small pocket of 'general industry' land for small scale 'general industries' – located with this larger light industrial area (a maximum of 20 ha may be appropriate for these uses at this location).

Protecting Land for Potential Shortfalls at 'Ohinewai'

These potential uses are predicated on '*Ohinewai*' being serviced first and being able to accommodate the range of land uses identified and '*reserved future industrial land*' recommended in Section 5.0 of this report.

Any shortfall in the provision of any of the required industrial land at '*Ohinewai*' should be catered for, as far as possible, at *Taupiri*.

This will provide the best benefit because *Taupiri* can provide attractive, fully serviced, 'greenfield' business and industry land (with adequate water supply and waste disposal) - with high visibility and direct access in both directions to the Waikato Expressway.

7.5 Planning Implications

This land could be considered surplus to Waikato's existing foreseeable industrial land needs.

However, it is of *strategic long term importance* - beyond the life of the present plan.

Much sooner, if 'Ohinewai' proves unable to provide the amount and types of land envisaged in this report.

Consequently, it is vitally important to recognise the strategic long-term importance of all of this land and ensure all this land can be available for future industrial use.

This requires protecting this land from being usurped by residential or rural residential 'life style' developments or falling under the control of less desirable land uses looking for large, cheap sites that only offer few, low skilled jobs.

If land is given over to these less desirable uses they are *unlikely to 'move on'* at any later date - given the national and regional shortages of cheap, large sites with good road accessibility for these types of land uses.

Recognising the Strategic Importance of This Land

Consequently this land should be clearly identified and protected as '*strategically important*' future employment land.

Attention should be drawn to locational advantages of this land, the potential created by its Expressway location, and the ability to cost effectively provide services – especially adequate water supply that is inhibiting industrial development elsewhere.

Indicative Planning Documentation

Initial planning for the '*Eastern*' area should indicate that this area is considered of strategic long-term importance for well landscaped '*Business Parks*' – with a particular focus on smaller scale technology, pharmaceutical and other 'clean production' businesses.

Recognizing these future 'business parks' could prove attractive to the smaller distribution and service operations of national and multi-national firms – with the possibility of attracting future communications bases businesses, call centres and data warehouses.

The land to the '*West*' could best be shown as being retained for local '*Service Trades and Cottage Industries*'.

Its potential to be developed as a '*trading estate*'; *clean production and light industry area* should be recognized.

Also the possibility of providing a well buffered '*general industry*' area of up to 20 ha for small scale general industries – at a location that is *not* prominent, *nor* highly visible from the Waikato Expressway and the access roads to its interchange.

It should be made clear that these industrial land uses could change if other well located industrial areas are unable to fulfil their planned business and industry role; as a result of changing demand, and after more detail future structure planning and site analysis.

8.0 THE IMPORTANCE OF LAND SUITABILITY ASSESSMENT, STRUCTURE PLANNING AND PROMOTION

The importance of early 'land suitability assessment', early 'structure planning' and early 'promotion of locations' for 'preferred land uses' *cannot be overstressed* in circumstances such as these.

It is important that strategically located Industrial land, at desirable locations, where businesses will want to locate, should be protected to underpin the long term economic and employment future of Waikato, the Region and the Nation.

Such strategically located land should not be lightly squandered on land uses that provide limited economic or employment benefits, or on land uses (such as residential) that have many more alternative locations that could successfully accommodate them elsewhere in the District.

As discussed in this report each of these proposed industrial areas have particular locational attributes that make them highly desirable from a business and industry stand point.

Foremost amongst these benefits is the potential to provide prominent, large, affordable sites with direct access to the Waikato expressway that provides exceptional accessibility to Auckland and throughout the whole North Island.

The large areas of under-utilised land identified for industrial uses at these locations, with relatively large sections with few owners, offers exceptional opportunities to effectively plan '*integrated industrial areas*', which will:

- Provide, and protect, '*superior business settings*'
- Maintain a '*desirable built environment*'
- Underpin the ability of businesses to *continue to locate and grow* at these locations
- Attract and build *synergistic 'business clusters'* important to long term success of these businesses
- That match or exceed the *business attractiveness* of other areas
- Create a *sustainable 'competitive advantage'* that is difficult or impossible to match
- Generating sustainable, *diversified, long term economic and employment outcomes* for the District and the wider Region.

All these benefits could be easily lost without:

- Early 'land suitability assessment',
- Early 'structure planning' and
- Early 'promotion of locations' for 'preferred land uses'.

These *strategically important future business locations* can be easily lost, or their economic, employment and business potential undermined by 'first come' uses and the location and nature of the first developments on this land.

First demand for these locations is likely to come from extensive, '*low value*' land uses and '*difficult to locate activities*' that are looking for large cheap sites – because of the acute shortage of such sites throughout Greater Auckland and elsewhere in the North Island.

These offer few economic or employment benefits offering relatively few, mainly low skilled jobs - with little incentive for other businesses to locate nearby and generate little income and little demand themselves for products and services from other businesses.

Other less desirable uses could be rural residential developments, uneconomic hobby farms and 'life style' blocks that will quarantine their own and nearby rural lots for little long term gain for economy and local community.

Similarly, the *first desirable land uses* can take the most prominent sites and be designed and located in ways that unintentionally compromises the long term development of the location as an *'integrated employment area'*.

This can undermine the prospect of offering *'superior business locations'*, in an appropriate, well regarded and *protected 'business environment'* for other businesses and activities that could otherwise be attracted there.

8.1 Land Suitability Assessment

Land suitability assessment should include:

- assessment of the natural environment, susceptibility to flood
- the impact of geology and topography on the cost development, foundation stability and the ability to cost effectively suitable stable sites for different types and scale of development
- infrastructure costs, waste treatment and storm water discharge and how the proposed land will fit into the proposed infrastructure sequencing for the broader District
- the appropriate location and design characteristics of providing appropriate road and expressway connections to and through the land

Once this is known it should be possible to identify which land, at which locations, is most suitable, and most cost effectively developed, for the most desirable land uses.

8.2 Structure Planning

Structure Planning should clearly identify which areas of the land are intended for different types of businesses, land uses and activities.

It should also precisely identify and locate the types of roads need to access the area and service the individual precincts - so that it is develop an easily accessed *'integrated employment area'*.

The alignment and location of other important infrastructure should also be determined that is necessary to support the desired land use pattern.

This should form the *'framework' for future planning* and development of the area and provide a *'road map'* for property owners; developers, investors and potential businesses seeking suitable sites.

This *'Structure Plan'* would eventually be translated into appropriate zoning and planning provisions.

8.3 Promotion of Locations for Preferred Land Uses

Promotional Planning that prove business location and land use guidance can be particularly important to convey what is intended to property owners; developers, investors and potential businesses.

'Promotional Planning' can be particularly important to discourage inappropriate land uses and first comers usurping strategically important locations for other activities and uses.

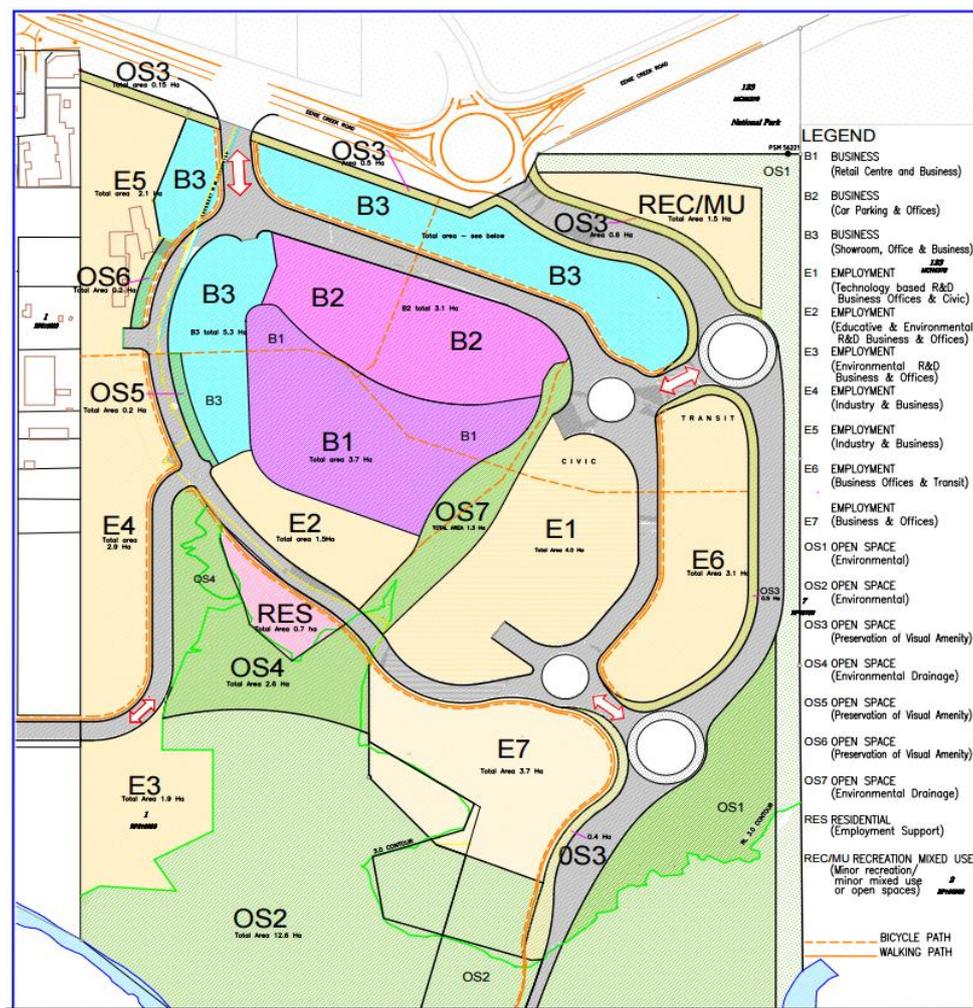
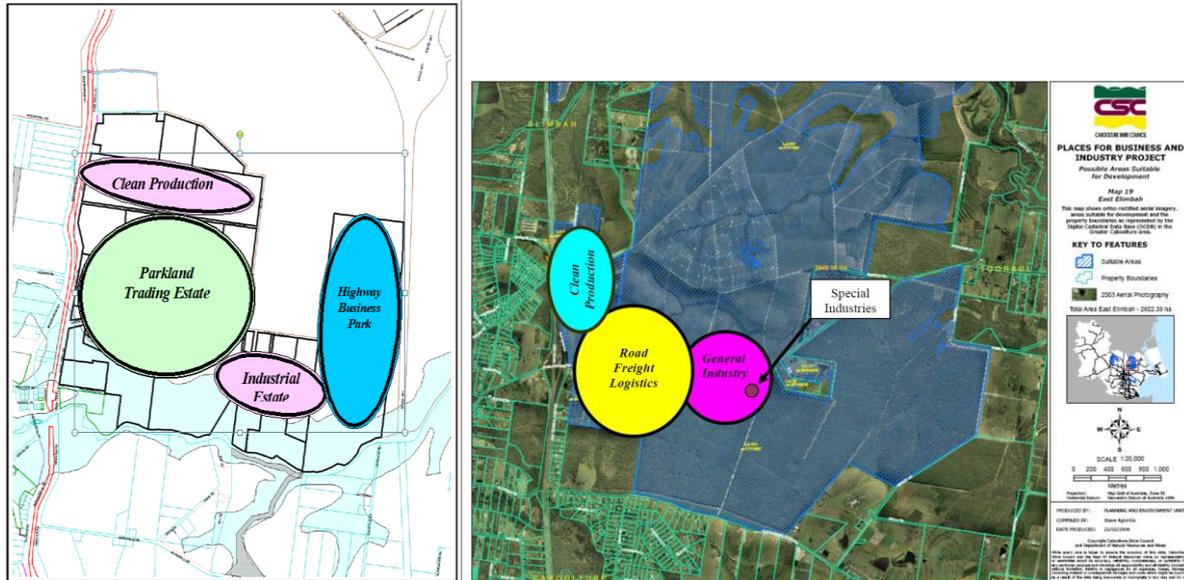
'Promotional Planning' can also prove an effective means of promoting the development of appropriate 'industry clusters' by providing increased certainty that their type of business are welcomed and desired and other similar, complementary and compatible activities; suppliers and service providers are likely to concentrate in the same area.

'Promotional Planning' should clearly identify:

- The preferred land uses for early development
- The desired location for any *'Business Clusters'*, and
- The *presently preferred uses* for identified *'Strategic Industrial Reserve' Land*.

This same information should be clearly identified in District's *Strategic Planning* documents and promoted through the District's 'Economic Strategy', 'Opportunity Prospects' and 'Promotional Planning' Documents.

Visual References: Indicative 'Preferred Use' Location Planning



Visual References: Identification of 'Strategic Future Industrial Land'

Title: Ebenezer 'Integrated Industrial and Logistics' Area

Opportunity:
For a major regional scale employment area of 8,000 hectares including opportunities for very large industrial, freight and logistics operations (able to provide large sites up to 25ha).

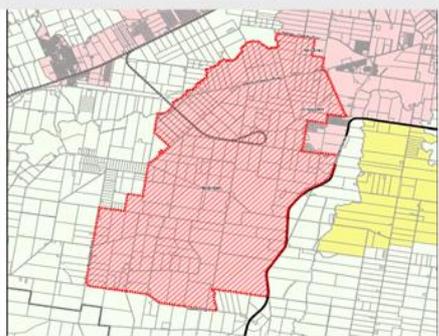
Location: Ipswich City Council, Ebenezer/Wilowbank UBD

Source: Qld Dept Infrastructure and Planning

Proponents: Include Qld Dept Infrastructure and Planning 'Property Services Group'

Contact Person: Phone: Date: email:

Opportunity Map



1. Possible Future Economic and Employment Opportunities of State Significance

2. Identified Opportunity:

- Major regional scale (with possible State significance) employment area of for the Western Corridor and the SEQ Region.
- Suitable for large footprint activities (requiring sites greater than 5ha) - including food and other clean production, manufacturing, freight, warehousing and logistics (with sites possibly exceeding 25ha).

Specific 'Place Based' Economic or Employment Opportunity

Title: 'PA Hospital Health and Science Precinct'

Opportunity:
The 'PA Hospital Health and Science Precinct' will be a world class Centre of Excellence for pharmaceutical and biomedical education, discovery and treatment.

Location: Princess Alexandra Hospital Site, Woolloongabba, Brisbane (UBD Map 180)

Source:

Proponent: (proposing development) Phone: Date:

Contact Person:

Email:

Opportunity Map



1. Existing Economic and Employment Opportunities of State Significance

2. Identified Opportunity:
The 'PAH Health and Science Precinct' will specialise in biomedical and pharmaceutical research, manufacture and treatment.

This precinct forms a fundamental part of '100 Central' Proposal, which incorporates the PA Hospital 'Health and Science Precinct', the Boggo Road 'Eco-Sciences Precinct' and the University of Queensland. This will be a world-class centre of excellence for pharmaceutical and biotech research (attracting technologies and businesses, highly talented researchers and professionals).

'100 Central' is a vital component of Brisbane's broader 'Smart Cities' project, a vision to develop Brisbane as a centre piece for the Smart State. '100 Central' will integrate four (4) new and existing science and education themed precincts into a world leading pharmaceutical and biomedical research community.

Visual References: Promotional Planning 'Opportunity Prospectus'

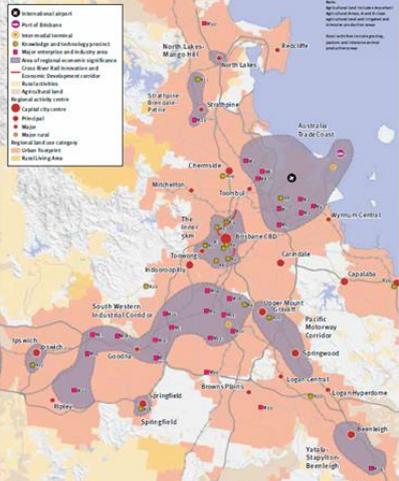


Table 4: Areas of regional economic significance and their composition

Area of regional economic significance	Components
The Inner 5 km	Cross River Rail Innovation and Economic Development Corridor Knowledge and technology precincts Ancherflower Kt Woolly Wood Dutton Park, Berrinda K2 Economic Precinct Princess Alexandra Hospital Gardens Point K3 Queensland University of Technology, Gardens Point campus Hemmant K4 Ray St Brisbane and Women's Hospital The University of Queensland, Hemmant campus Kahira Grove K5 Queensland University of Technology, Kahira Grove campus
Australia TradeCard	Knowledge and technology precinct Australia TradeCard K6 Australian Research Centre for Antarctic Australia (ARCAN) Antarctic Australia Major enterprise and industrial areas Sunnybank M1 Hemmant M2 Gardens M3 Maroonah M4 Moorook M5 North Lakes M6
South West Industrial Corridor	Knowledge and technology precinct Nathan/Coopers Plains K7 Hemmant K4 Growth Corridor Moorook M5 Coopers Plains Gardens M3 Major enterprise and industrial areas Ancherflower Kt Accra Ridge M7 Berrinda/Berrimoo M11 Cannon Point M12 Coopers Plains M13 Boulders/Berrimoo/Berrimoo M14 Bass M15 Robina M16 Berrimoo M17 Salisbury industrial area M18 Cannon Point M19 Seventeenth M20 Woolly Wood M21 Woolloongabba M22
	St Lucia K8 The University of Queensland, St Lucia campus South Brisbane K9 Lyle Gables Children's Hospital Griffith University, South Bank campus Major Hospital Brisbane Queensland Cultural Precinct Southbank Institute of Technology Regional activity centres Logan City Centre Townsville Economic enabling infrastructure Rabbit heavy rail network (Cross River Railway) and improved inner city Contributor to complement Cross River Rail Production and cycle network including green bridges Preston/Bulwer Island M7 Virginia Northgate M8 Economic enabling infrastructure Port of Brisbane Brisbane Airport Brisbane International Terminal Part of Brisbane Motorway Gateway Motorway Regional activity centres Gondola Economic enabling infrastructure Accra Ridge International Terminal Accra Ridge Spraych Motway Heavy rail network including Cross River Rail Warrigley Highway Cannonbank Highway Logan Motorway Regional activity centres Gondola Economic enabling infrastructure Accra Ridge International Terminal Spraych Motway Heavy rail network including Cross River Rail Warrigley Highway Cannonbank Highway Logan Motorway Regional activity centres Gondola Economic enabling infrastructure Accra Ridge International Terminal Spraych Motway Heavy rail network including Cross River Rail Warrigley Highway Cannonbank Highway Logan Motorway

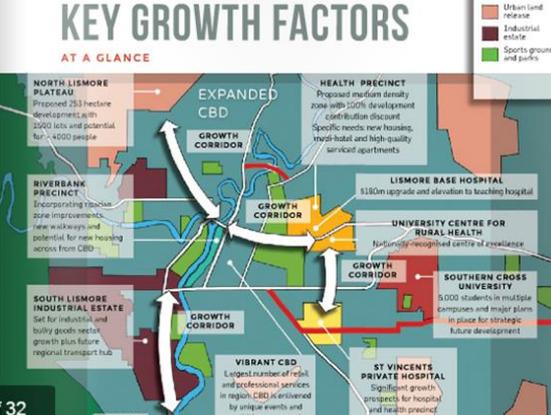
THE LISMORE PROSPECTUS



A GUIDE TO PRIVATE AND PUBLIC SECTOR INVESTMENT IN THE HEART OF THE NORTHERN RIVERS REGION OF NSW

Lismore Prospectus by Kobus Mentz 'UrbanismPlus'

KEY GROWTH FACTORS AT A GLANCE



Legend: Urban land (red), Industrial estate (orange), Sports grounds and parks (green)

- NORTH LISMORE PLATEAU:** Proposed 253 hectare development with 2000 lots and potential for ~4000 people
- RIVERBANK PRECINCT:** Incorporating flood zone improvements, new walkways and potential for new housing sectors from CBD
- SOUTH LISMORE INDUSTRIAL ESTATE:** Set for industrial and bulky goods sector growth plus future regional transport hub
- VIBRANT CBD:** Largest number of retail and professional services in region, CBD rejuvenated by unique events and activities year round
- EXPANDED CBD:** Growth Corridor
- HEALTH PRECINCT:** Proposed medium density zone with 50% development, coffee/Bullion discount, specific needs, new housing, youth-hotel and high-quality serviced apartments
- LISMORE BASE HOSPITAL:** 1180m upgrade and extension to locating hospital
- UNIVERSITY CENTRE FOR RURAL HEALTH:** Nationally-recognised centre of excellence
- SOUTHERN CROSS UNIVERSITY:** 5,000 students in multiple campuses and major plans in place for strategic future development
- ST VINCENTS PRIVATE HOSPITAL:** Significant growth envisaged for hospital and health precinct

KEY GROWTH SECTORS

BUSINESS

BUSINESS GROWTH FACTORS
Factors contributing to business growth and expansion in the region

- The region's strategic location within the Northern Rivers region of NSW provides a significant competitive advantage for businesses seeking to expand their market reach.
- Proximity to major transport routes, including the Pacific Motorway and the Cross River Rail, facilitates efficient logistics and distribution.
- The region's diverse and skilled workforce offers a significant advantage for businesses seeking to expand their operations.
- Access to a range of government incentives and grants supports business growth and expansion.
- The region's vibrant community and high quality of life attracts and retains talent, a key factor for business success.
- Strong infrastructure and services support business operations and growth.
- Low regulatory burdens and a supportive business environment encourage investment and growth.

LISMORE ADVOCATES: WHOLESALE AND MANUFACTURING

NEW LAWRY
NEW LAWRY GROUP OF COMPANIES
NEW LAWRY GROUP OF COMPANIES
NEW LAWRY GROUP OF COMPANIES