5 Employment & Floorspace Forecasts

5.1 Introduction

This section describes employment and floorspace forecasts used in this Study. Both employment and floorspace forecasts are described for each LGA at the 1 digit ANZSIC level for the 2006-2031 period. Using the data from the land use audit these are then converted into BLCs. This is important step in the process as the BLCs allow for better spatial analysis.

The forecasts described in this section represent the demand side of the Study. These are weighed against the supply side data gathered from the land-use audit in the assessment of the sub-region's capacity to absorb future economic growth. Importantly, these employment and floorspace forecasts are presented as 'baseline' forecasts. The role of policy intervention to change prevailing trends is discussed in later sections.

5.2 Employment Forecasts

Background

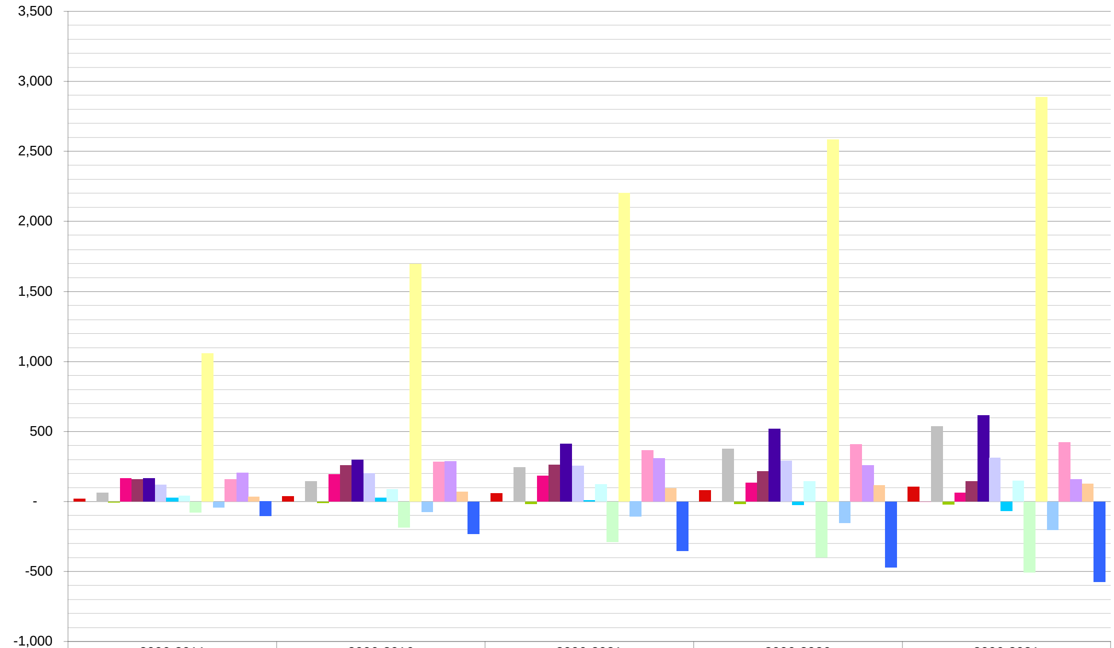
Employment forecasts for this Study have been sourced from the TDC. Produced in 2004, these forecasts provide an indication of the nature and distribution of employment across the Sydney Greater Metropolitan Region. The most significant assumptions have been made with respect to future trends by industry and future demand for retailing, driven by population and income growth. A description of the TDC forecast method is given in Appendix E.

The process of forecasting is based on the analysis and forecasting of share of total employment by industry, the share by sub-region of jobs by industry, the share of job in centres and dispersed jobs in each Subregional and industrial group. The process takes into account an analysis of space constraints for commercial floorspace, based on an analysis of employee-space ratios. It also takes into account user-defined additions of jobs to specific travel zones. Final travel zone forecasts are calculated based on these components.

Forecast Employment Growth

Figure 61 shows the cumulative additional employment forecast for Ku-ring-gai. 'Property & Business Services' are forecast to experience by far the greatest growth with an additional 2,888 jobs in the period 2006-2031. This is followed by 'Retail Trade' with a forecast additional 616 jobs in the 2006-2031 period. 'Personal & Other Services' and 'Finance & Insurance' are both forecast to have a decline in employment in this period with declines of 575 & 505 jobs respectively.

Figure 61. Ku-ring-gai Cumulative Additional Employment Forecast 2006-2031

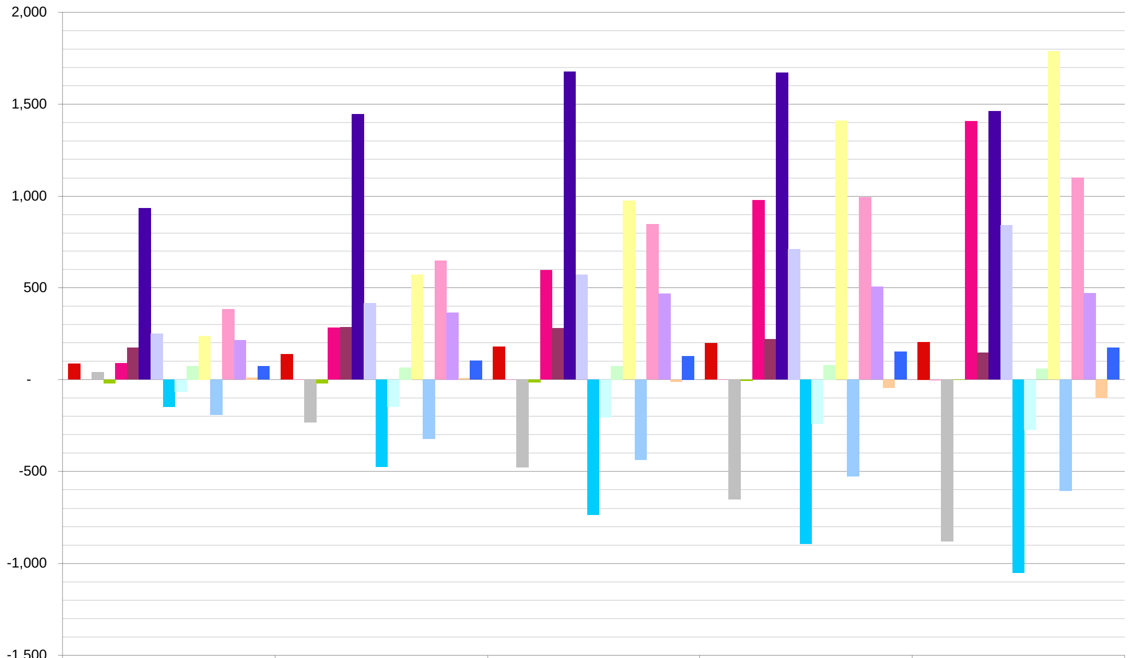


	2006-2011	2006-2016	2006-2021	2006-2026	2006-2031
Agr. For'try & Fishing	17	38	61	82	103
Mining	1	1	0	-1	-3
Manuf.	63	144	247	378	535
Utilities	-6	-10	-14	-17	-20
Constr.	165	195	183	135	64
Wh'sale Trade	158	258	264	216	145
Retl. Trade	165	295	414	518	616
Acc. Cafes & Rest.	119	199	256	291	312
Transp & Stor	27	28	9	-23	-66
Comm. Serv.	43	88	122	142	150
Fin. & Ins.	-78	-182	-288	-398	-505
Prop'ty & Bus Serv	1060	1699	2201	2585	2888
Govt. Admin. & Def.	-41	-71	-108	-153	-203
Educat.	157	285	367	407	422
Health & Com'ty Serv.	206	286	309	262	160
Cult & Recr. Serv.	33	68	95	113	126
Pers & Other Serv	-106	-232	-354	-469	-575

Source: TDC 2004

Figure 62 shows the cumulative additional employment forecast for Hornsby. 'Property & Business Services' is forecast to have the highest job growth over the 2006-2031 period with 1,789 jobs. However, over the 15 years (2006-2021), 'Retail Trade' displays the strongest growth with 1677 jobs and 1462 jobs in the 2006-2031 period. 'Construction' and 'Education' also show strong forecast growth in this period. Employment decline is forecast in 'Transport & Storage', 'Manufacturing' and 'Government Administration & Defence' with losses of 1052, 880 and 607 jobs respectively over the 2006-2031 period.

Figure 62. Hornsby Cumulative Additional Employment Forecasts 2006-2031



	2006-2011	2006-2016	2006-2021	2006-2026	2006-2031
Agr. For'try & Fishing	86	138	178	197	206
Mining	-1	-1	-2	-2	-3
Manuf.	41	-232	-477	-649	-880
Utilities	-22	-21	-15	-8	-3
Constr.	89	280	595	979	1408
Wh'sale Trade	173	286	278	219	147
Retl. Trade	934	1444	1677	1672	1462
Acc. Cafes & Rest.	248	415	571	713	844
Transp & Stor	-148	-473	-737	-893	-1052
Comm. Serv.	-64	-148	-205	-242	-273
Fin. & Ins.	74	64	74	79	59
Prop'ty & Bus Serv	238	572	975	1411	1789
Govt. Admin. & Def.	-191	-324	-437	-527	-607
Educat.	383	646	848	995	1101
Health & Com'ty Serv.	213	364	467	505	470
Cult & Recr. Serv.	11	7	-10	-44	-99
Pers & Other Serv	72	103	127	152	173

Source: TDC 2004

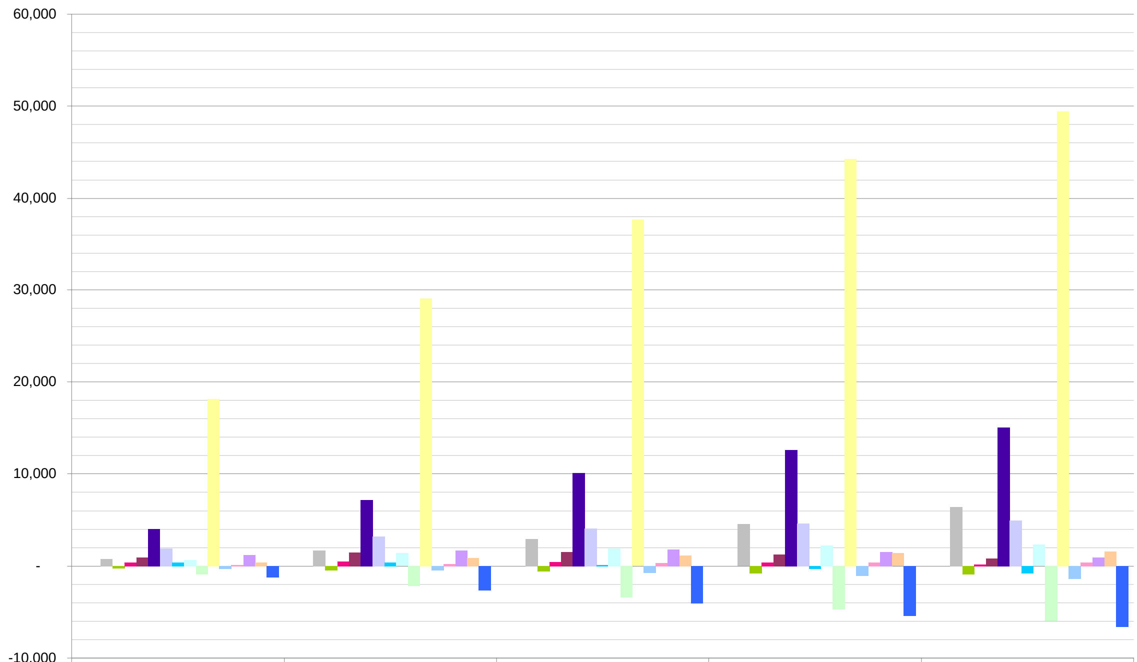
5.3 Floorspace Demand Forecasts

Floorspace Forecasts by ANZSIC

Using the TDC employment data, 'baseline' floorspace demand forecasts have been generated for the audited area as part of this Study. Percentage growth observed in the TDC data for industry sectors has been applied to the floorspace audited by industry sector. This produces floorspace forecasts based on the premise that the audited areas, in total, will account for the same proportion of total LGA floorspace in the future.

Figure 63 shows the cumulative additional floorspace forecast by 1digit ANZSIC for Ku-ring-gai for the period 2006-2031. In line with forecast employment growth, demand for floorspace from 'Property & Business Services' is high at 49,428 sqm over the 2006-2031 period. The next highest in terms of floorspace demand comes from the 'Retail Trade' sector with forecast demand for an additional 15,031 sqm in the 2006-2031 period. Forecast employment decline in 'Personal & Other Services' and 'Government Administration & Defence' translates to demand for 6,604 sqm and 1,408 sqm less floorspace in the 2006-2031 period for these sectors respectively.

Figure 63. Ku-ring-gai Cumulative Additional Floorspace Forecasts 2006-2031(Audited Area Only)

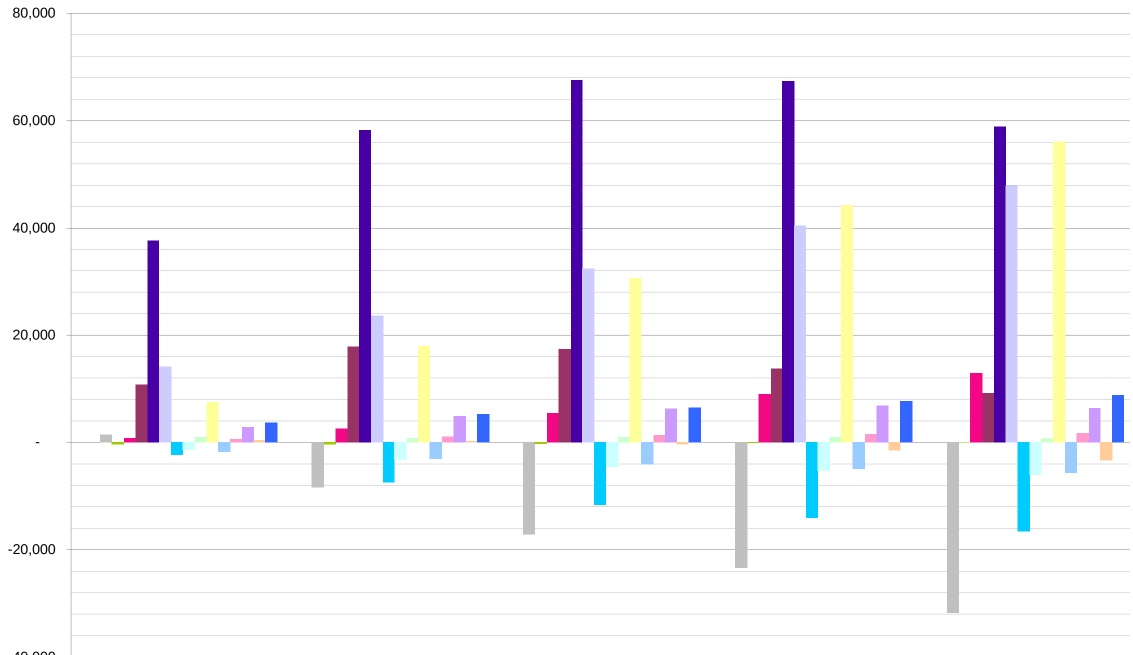


	2006-2011	2006-2016	2006-2021	2006-2026	2006-2031
Agr. For'try & Fishing	0	0	0	0	0
Mining	2	2	0	-2	-5
Manuf.	753	1725	2957	4524	6404
Utilities	-265	-461	-629	-781	-935
Constr.	423	501	471	346	164
Wh'sale Trade	906	1479	1510	1240	829
Retl. Trade	4036	7205	10099	12643	15031
Acc. Cafes & Rest.	1897	3170	4069	4624	4953
Transp & Stor	339	341	106	-284	-810
Comm. Serv.	660	1362	1880	2203	2323
Fin. & Ins.	-914	-2141	-3387	-4682	-5943
Prop'ty & Bus Serv	18139	29083	37676	44241	49428
Govt. Admin. & Def.	-282	-490	-750	-1064	-1408
Educat.	132	239	308	341	354
Health & Com'ty Serv.	1204	1672	1805	1530	934
Cult & Recr. Serv.	413	846	1170	1400	1560
Pers & Other Serv	-1219	-2657	-4057	-5385	-6604

Source: TDC 2004 and SGS 2007

Figure 64 shows the cumulative additional floorspace forecast by 1digit ANZSIC for Hornsby for the period 2006-2031. In line with forecast employment growth, demand for floorspace from ‘Property & Business Services’ and ‘Retail Trade’ is high at 56,185 sqm and 58,946 respectively over the 2006-2031 period. The next highest in terms of floorspace demand comes from the ‘Accommodation Cafes & Restaurants’ sector with forecast demand for an additional 47,914 sqm in the 2006-2031 period. Forecast employment decline in ‘Manufacturing’ and ‘Transport & Storage’ translates to demand for 31,726 sqm and 16,622 sqm less floorspace in the 2006-2031 period for these sectors respectively.

Figure 64. Hornsby Cumulative Additional Floorspace Forecasts 2006-2031(Audited Area Only)



	2006-2011	2006-2016	2006-2021	2006-2026	2006-2031
Agr. For'try & Fishing	0	0	0	0	0
Mining	0	0	0	0	0
Manuf.	1472	-8378	-17186	-23402	-31726
Utilities	-398	-386	-270	-141	-50
Constr.	820	2578	5473	9006	12951
Wh'sale Trade	10817	17901	17424	13730	9203
Retl. Trade	37664	58227	67641	67441	58946
Acc. Cafes & Rest.	14060	23574	32434	40497	47914
Transp & Stor	-2333	-7477	-11642	-14115	-16622
Comm. Serv.	-1415	-3295	-4551	-5373	-6078
Fin. & Ins.	949	827	953	1008	752
Prop'ty & Bus Serv	7462	17976	30634	44309	56185
Govt. Admin. & Def.	-1801	-3050	-4122	-4971	-5717
Educat.	607	1023	1343	1575	1743
Health & Com'ty Serv.	2883	4924	6311	6832	6352
Cult & Recr. Serv.	394	255	-351	-1529	-3412
Pers & Other Serv	3690	5243	6498	7751	8827

Source: TDC 2004 and SGS 2007

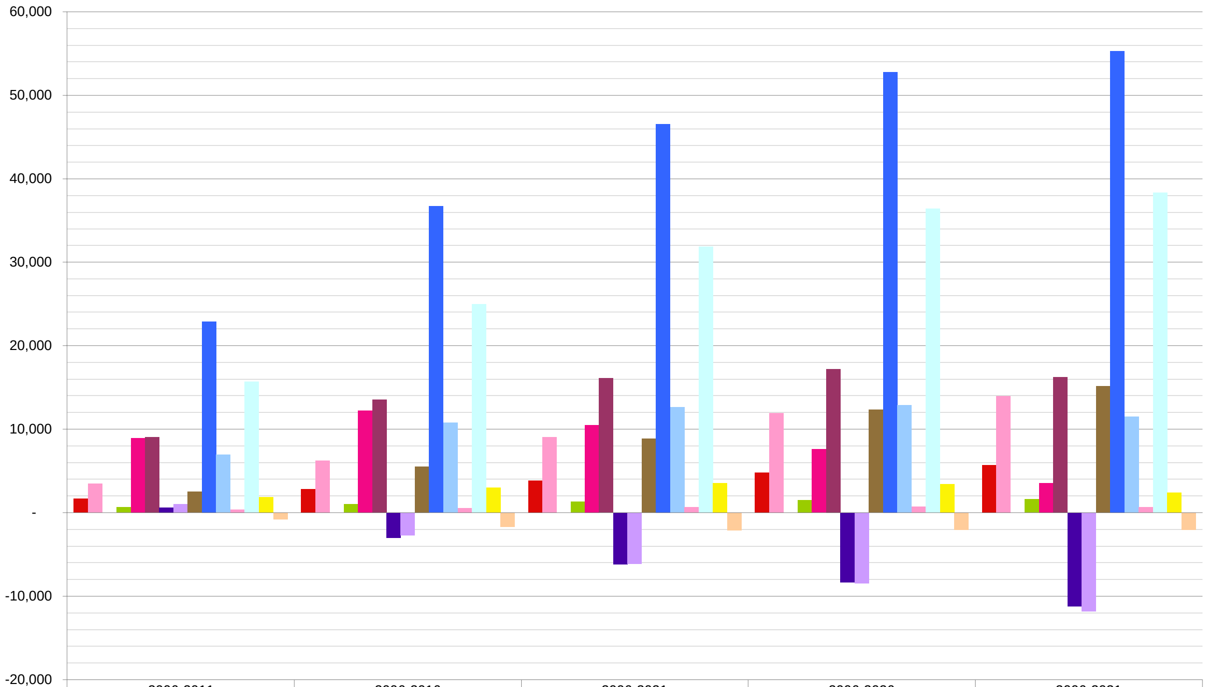
Floorspace Demand by Broad Land Use Category

To understand the supply-demand gaps in the Study area we must first convert the floorspace demand by ANZSIC industry category into Broad Land Use Categories (BLCs). This is important as the assessment of the land's capacity to accommodate floorspace demand driven by employment growth is at the centre of this Study. Assessment of the competitive position of land supply to accommodate floorspace demand is best made in terms of land use categories rather than industry sectors. This is due to the fact that many industry sectors will occupy a range of land types – e.g. factory floor components of 'Manufacturing' industry sector will tend to be located in industrial land while head office functions will tend to be located on commercial land.

The relationship between ANZSIC industry sectors and BLCs has been determined for Hornsby and Ku-ring-gai through the land use audit.

Figure 65 shows the floorspace demand by BLC for Hornsby. Retail activities dominate the forecast with highest floorspace demand for big box retail (RB) Main Street Retail (RM) at 55,307 sqm and 38,343 sqm respectively. Driven by forecast decline in manufacturing employment, demand for heavy manufacturing (MH) and light manufacturing (ML) floorspace is forecast to decline by 11,275 sqm and 11,806 sqm respectively.

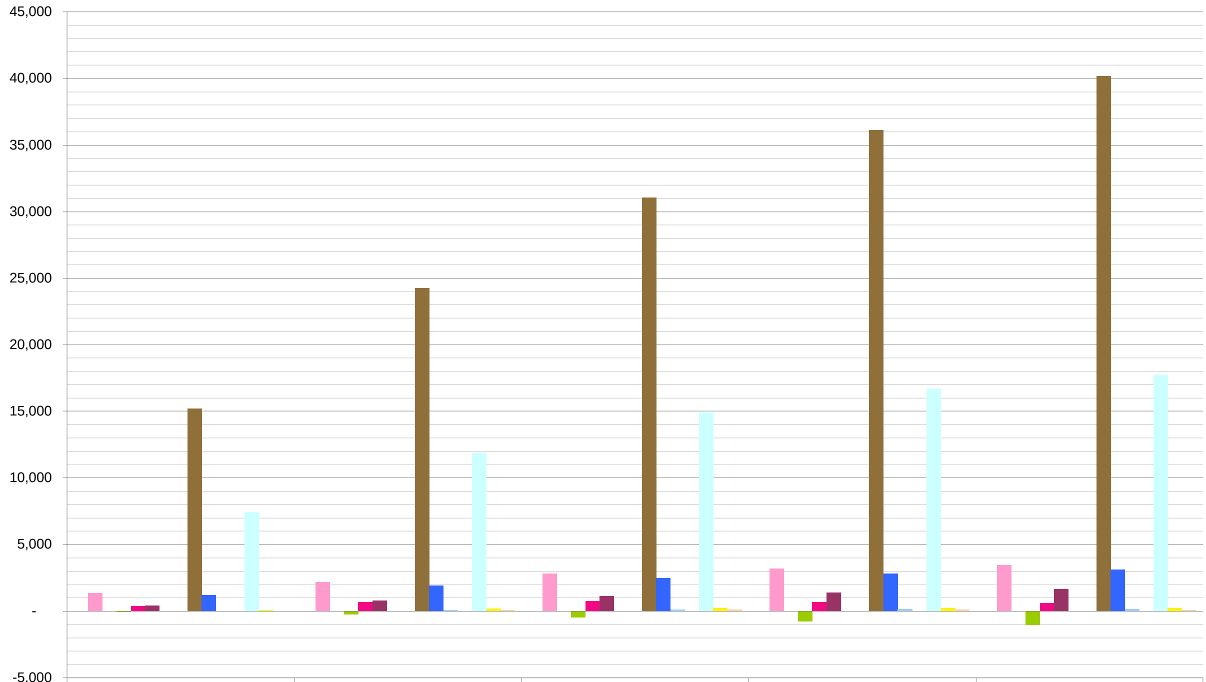
Figure 65. Hornsby Floorspace Demand by BLC (Audited Area Only)



	2006-2011	2006-2016	2006-2021	2006-2026	2006-2031
AST	1670	2800	3852	4810	5690
BP	3477	6224	9046	11904	13961
CAR	0	0	0	0	0
D	644	1001	1282	1498	1612
FL	8956	12223	10523	7575	3567
LL	9067	13567	16104	17185	16246
MH	594	-3020	-6185	-8344	-11275
ML	1046	-2703	-6107	-8499	-11806
O	2512	5504	8829	12314	15152
RB	22889	36745	46584	52815	55307
RBG	6924	10805	12670	12842	11492
RES	363	547	676	721	646
RM	15654	24978	31862	36431	38343
S	1869	2991	3572	3438	2397
US	-794	-1721	-2118	-2070	-2066

Figure 66 shows the forecast floorspace demand by BLC in Ku-ring-gai. This figure shows the total floorspace demand across all of the audited areas and is based on the percentage growth in employment by industry sector in the TDC employment forecasts. Clearly, demand for office space (O) is by far the greatest BLC at 40,185 sqm over the 2006-2031 period. This is followed by Main Street Retail (RM) at 17,728 sqm.

Figure 66. Ku-ring-gai Floorspace Demand by BLC (Audited Area Only)



	2006-2011	2006-2016	2006-2021	2006-2026	2006-2031
AST	0	0	0	0	0
BP	1351	2204	2827	3226	3455
CAR	0	0	0	0	0
D	-62	-245	-471	-737	-1023
FL	424	704	768	709	592
LL	451	805	1125	1408	1679
MH	0	0	0	0	0
ML	0	0	0	0	0
O	15198	24220	31062	36159	40185
RB	1222	1937	2481	2837	3107
RBG	47	83	116	146	173
RES	12	21	27	30	33
RM	7442	11871	14928	16725	17728
S	112	185	233	255	258
US	25	93	132	134	89

5.4 Implications

The key findings from this section are summarised below:

- **Strong forecast growth in property & business services**. This sector displays very strong growth in Ku-ring-gai for the period 2006-2031. In line with forecast employment growth, demand for floorspace from ‘Property & Business Services’ is high at 49,428 sqm over the 2006-2031 period. The next highest in terms of floorspace demand comes from the ‘Retail Trade’ sector with forecast demand for an additional 15,031 sqm in the 2006-2031 period. In line with forecast employment growth, demand for floorspace from ‘Property & Business Services’ and ‘Retail Trade’ is high at 56,185 sqm and 58,946 respectively over the 2006-2031 period.

- **High demand for office space in Ku-ring-gai**. Demand for office space (O) is by far the greatest of the BLC in Ku-ring-gai at 40,185 sqm over the 2006-2031 period. This is followed by Main Street Retail (RM) at 17,728 sqm.
- **High demand for retail in Hornsby**. Retail activities dominate the forecast with highest floorspace demand for big box retail (RB) Main Street Retail (RM) at 55,307 sqm and 38,343 sqm respectively
- **Decline in industrial sectors**. Driven by forecast decline in manufacturing employment, demand for heavy manufacturing (MH) and light manufacturing (ML) floorspace is forecast to decline by 11,275 sqm and 11,806 sqm respectively. Declining industrial employment and associated land requirements will obviously impact on the demand for land in the industrial areas.

6 Gap Analysis

6.1 Introduction

This section discusses the gaps between forecast demand for floorspace by Broad Land Use Category (BLC) and the available supply as determined through the land use audit. The demand forecasts have been generated by converting TDC employment numbers into floorspace figures by both ANZSIC and BLC. This is made possible by using data from the land audit.

- **[Demand Scenario 1] 'Baseline' from TDC forecasts**. This converts the TDC employment numbers into floorspace demand figures by BLC. At a centre/ precinct level, the audited floorspace is grown forward in proportion to the TDC employment forecast for the LGA.
- **[Demand Scenario 2] Baseline plus Subregional targets**. This adds the Subregional employment targets to the scenario 1 demand forecast.
- **[Demand Scenario 3] Share Adjustment between Centres**. This scenario applies to the analysis at a centre/ precinct level only. After allowing for the forecast growth plus Subregional targets, the share of floorspace by BLC is adjusted between centres to better align with the centres hierarchy and economic opportunities.
- **[Demand Scenario 4] Consideration of Housing Strategy.** As a final step in the demand assessment we have determined the likely additional retail floorspace required for the additional dwellings proposed under the Hornsby and Ku-ring-gai housing strategies. The step is necessary as the TDC employment forecasts are based on 2004 population data and will not have considered the dwellings additions proposed in the housing strategies.

To accommodate the forecast demand for floorspace by BLC, we have examined the potential supply under 2 supply scenarios:

- **[Supply Scenario 1] Development with intensification**. Supply potential = vacant floorspace + capacity on vacant sites + capacity on developed sites. Intensification assumes that there is some scope for business to use land more intensively on developed and vacant sites but falls short of assuming development up to the FSR limit. On average, across the LGA, the actual FSRs are 69% of max FSR in Ku-ring-gai and 71% of max FSR in Hornsby. For this Study the intensification limit has been set at **80% of the maximum FSR** under existing controls.

  The 80% intensification figure is based on an assessment of development capacity in the North Subregion completed for a previous study. <u>This is the recommended potential supply figure to be used in this Study.</u>
- **[Supply Scenario 2] Development up to FSR limit**. This assumes that development is able to occur up the FSR limit under the existing planning controls. While this is an unrealistic

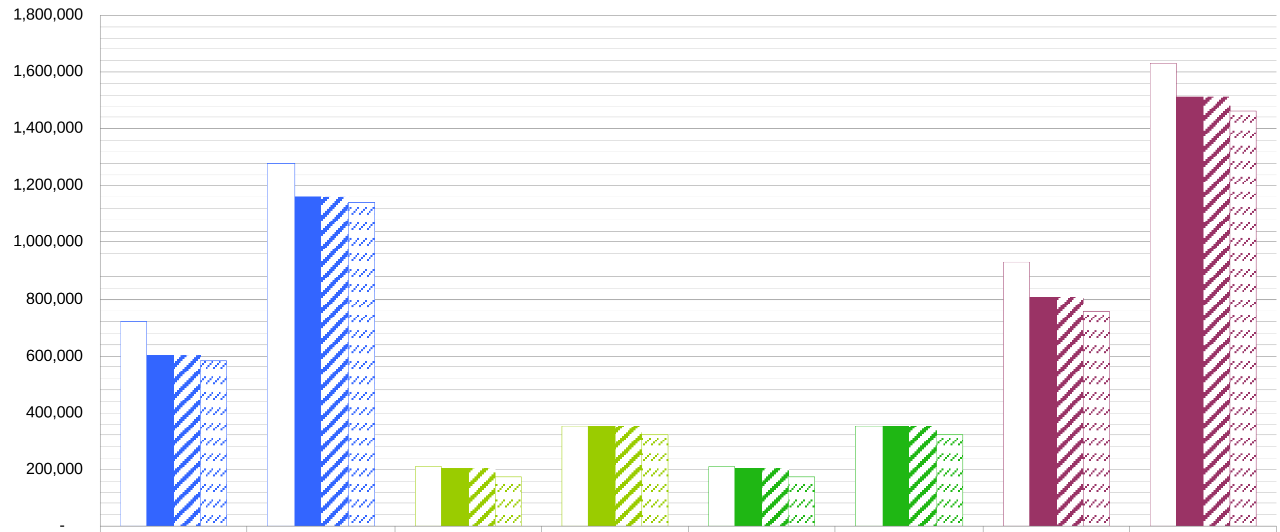
scenario, this is the notional maximum under the current controls. This potential supply figure is included as a benchmark.

6.2 Sub-region and LGA Level Gap Analysis

Sub-region and LGA Level Supply-Demand Gaps

Figure 67 shows the supply-demand gaps for both LGAs and the North Subregion in total after accounting for the forecast additional floorspace demand, the Subregional targets and the additional retail floorspace demand implied by in the dwelling numbers in the housing strategies. Under both supply scenarios, there is 'excess supply' in 2031 after accommodating the forecast additional floorspace in the 2006-2031 period. In Ku-ring-gai, the draft LEP results in slightly higher levels of excess supply than those resulting from the KPSO controls. These LGA level results add up to large levels of excess supply at the Subregional level under both supply scenarios.

Figure 67. LGA Level Floorspace Supply-Demand Gaps (2006-2031)



	Hornsby		KRG (DLEP)		KRG (KPSO)		North Subregion	
	80% of Max FSR	Max FSR	80% of Max FSR	Max FSR	80% of Max FSR	Max FSR	80% of Max FSR	Max FSR
Baseline Forecast	719,849	1,276,889	209,330	354,316	209700	355329	929,179	1,631,205
Subregional Targets	604,038	1,161,078	205,337	350,323	205707	351336	809,375	1,511,401
Share Adjustment	603,982	1,161,022	205,395	350,381	205766	351395	809,377	1,511,403
Housing Strategy	583425	1140465	175,480	320,466	175,851	321,480	758,905	1,460,931

Source: SGS 2008

6.3 Centre/ Precinct Level Gap Analysis

Capacity to Accommodate Forecast Demand

Table 21 shows the gaps between supply potential under the 2 supply scenarios and the forecast demand.

While at an LGA level, we have seen there is excess supply, there are several centres/ precincts where the existing supply potential is not sufficient to meet the forecast demand in the 2006-2031. Centres with supply shortfalls to meet the forecast demand period are the commercial centres of: Appletree Drive Cherrybrook, Carlingford Court, David Road, Castle Hill, Edgeworth David Avenue (Waitara), Epping, Galston, Galston Road (Hornsby Heights), Myrtle Street (Normanhurst), Normanhurst, Pennant Hills Road (Thornleigh), Plympton Road Shops, Epping, Somerville Road (Hornsby Heights), Thornleigh, Waitara, Wisemans Ferry, Yallambee Road.

However, the shortfall at most of these centres is relatively small. The centres with significant levels of supply shortfall are the commercial centres of: Carlingford Court, Galston, Epping, Pennant Hills, Waitara and Thornleigh.

Of particular note are the floorspace shortfalls in Epping as this has a Town Centre designation in the Subregional Strategy and as such would be expected to accommodate a large share of forecast growth (the specific implications of the Subregional Strategy targets are discussed in the following section).

There are also a number of centres/ precincts with very large levels of 'excess supply' after accommodating forecast demand growth. Centre/ precincts where supply potential is more than ten times forecast demand in the 2006-2031 period are the industrial areas of: Kookaburra Road, Asquith, Dural Service Centre, Mt Ku-ring-gai and Thornleigh; and the commercial centres of: Asquith, Beecroft Berowra, Berowra Heights, Berowra Waters, Brooklyn, Cherrybrook, Cowan, Hornsby, Mt Colah Shops, Sefton Road (Thornleigh), West Pennant Hills and Westleigh.

Table 21. Hornsby Forecast Supply-Demand Gaps by Centre (2006-2031)

	2006		Demand		Supply		Gap		
HORNSBY	Floorspace	% Share	2031	Additional FS	80%FSR	Max FSR	80%FSR	Max FSR	Residential FS
(E) Asquith	206,161	14.5%	226,352	20,191	179059	267605	158,868	247,414	0
(E) Dural Service Centre	71,934	5.1%	78,979	7,045	145414	196809	138,369	189,764	190
(E) Mt Ku-ring-gai	115,705	8.1%	127,038	11,332	354438	467910	343,105	456,578	1263
(E) Thornleigh	140,360	9.9%	154,107	13,747	51637	94372	37,890	80,625	0
Appletree Dr-Cherrybrook	1,589	0.1%	1,744	156	-11	324	- 167	168	0
Asquith	7,402	0.5%	8,127	725	13610	19305	12,885	18,580	2875
Beecroft	11,528	0.8%	12,657	1,129	10301	15813	9,172	14,684	1950
Berowra	6,151	0.4%	6,754	602	13166	17840	12,563	17,238	302
Berowra Hts	11,497	0.8%	12,623	1,126	13242	18990	12,116	17,864	0
Berowra Waters	1,359	0.1%	1,492	133	6583	8583	6,450	8,450	263
Brooklyn	4,368	0.3%	4,795	428	4052	6396	3,625	5,968	1613
Carlingford Court	45,499	3.2%	49,956	4,456	-3024	5370	- 7,480	914	0
Cherrybrook	12,393	0.9%	13,607	1,214	17690	24597	16,476	23,383	0
Cowan	263	0.0%	289	26	198	360	173	334	223
Dangar Is	-	0.0%	-	-	-108	14	- 108	14	595
David Rdr-Castle Hill	3,013	0.2%	3,308	295	-116	496	- 411	201	0
Edgeworth David Ave-Waitara	2,489	0.2%	2,732	244	-12	513	- 256	270	0
Epping	62,550	4.4%	68,676	6,126	5167	21831	- 959	15,705	8321
Galston	4,189	0.3%	4,599	410	-3792	-1759	- 4,202	- 2,170	8360
Galston Rd-Hornsby Hts	1,161	0.1%	1,274	114	-59	173	- 172	60	0
Hornsby	419,696	29.5%	460,801	41,105	218658	394835	177,553	353,730	141979
Hospital Precinct	59,788	4.2%	65,643	5,856	23936	42844	18,080	36,988	877
(E) Kookaburra Road	6,336	0.4%	6,957	621	4711	7235	4,090	6,615	0
Kuringai	1,114	0.1%	1,223	109	486	844	377	735	0
Malton Rd-North Epping	1,808	0.1%	1,985	177	208	644	31	467	0
Mt Colah Shops	2,978	0.2%	3,270	292	5859	8153	5,567	7,862	789
Mt Colah Stn	1,502	0.1%	1,649	147	438	1032	291	885	664
Myrtle St-Normanhurst	660	0.0%	724	65	-180	-85	- 245	- 149	0
Normanhurst	1,770	0.1%	1,944	173	-454	-83	- 627	- 256	432
Pennant Hills	84,349	5.9%	92,610	8,261	1158	19371	- 7,104	11,110	644
Pennant Hills Rd-Thornleigh	12,941	0.9%	14,209	1,267	-22	3013	- 1,290	1,746	1165
Plymton Rd Shops-Epping	1,522	0.1%	1,671	149	-25	292	- 175	143	0
Sefton Rd-Thornleigh	1,292	0.1%	1,419	127	8353	10823	8,227	10,697	429
Somerville Rd-Hornsby Hts	-	0.0%	-	-	-118	269	- 118	269	1665
Thornleigh	63,204	4.4%	69,394	6,190	-5361	6522	- 11,551	332	94
Waitara	33,929	2.4%	37,252	3,323	-4678	2136	- 8,001	- 1,187	3954
West Pennant Hills	7,385	0.5%	8,109	723	7732	11234	7,008	10,511	0
Westleigh	8,399	0.6%	9,222	823	6365	9741	5,542	8,918	0
Wiseman's Ferry	3,051	0.2%	3,350	299	282	1043	- 17	745	169
Yallambee Road	559	0.0%	614	55	-102	209	- 157	154	869
TOTAL	1,421,977	1	1,561,244	139,260	1,074,681	1,685,614	935,421	1,546,355	180453
Mt Ku-ring-gai constrained land					138,865	198445			
TOTAL minus constrained land					859109	1416149	719,849	1,276,889	

Supply capacity is less than forecast 2006-2031 demand

Supply capacity is more than ten times forecast 2006-2031 demand

Table 22 shows the gaps between supply potential (vacant floorspace + capacity on vacant sites + capacity on developed sites) under the two scenarios of (i) development up to the FSR limit and development up to 80% of the FSR limit under existing controls for Ku-ring-gai.

For the LGA as a whole there is sufficient potential supply under both scenarios to accommodate the total forecast floorspace demand in the period 2006-2031.

There are several centres/ precincts where the existing supply potential is not sufficient to meet the forecast demand. These are the commercial centres of: East Lindfield, Fox Valley, Pymble Office Park, Roseville chase, West Gordon, West Lindfield. However, in most cases the shortfall is small. The one centre with significant supply shortfall is Pymble Office Park – with a shortfall of 12,058 sqm.

The centres with more than ten times the supply potential to meet the demand forecast are the commercial centres of: Hampden Avenue Shops, North Wahroonga, Killara, Roseville, South Turramurra, St Ives, St Ives North and Turramurra.

Of particular note is the fact that Ku-ring-gai's designated Town Centre – Gordon has capacity to accommodate demand under both supply scenarios.

Table 22. Ku-ring-gai Supply-Demand Gaps by Centre (2006-2031)

	2006		2031 Demand		Supply KPSO		Supply DLEP		20 31 Gap KPSO		2031 Gap DLEP		
KRG	Floorspace	% Share	2031	Add Req	80% of Max	Max	80% of Max	Max	80% of Max	Max	80% of Max	Max	Residential
East Killara	1,137	0.3%	4,263	142	720	1,141	720	1141	578	999	578	999	0
East Lindfield	1,309	0.3%	4,910	163	-295	- 91	-295	-91	-458	-254	-458	-254	0
Eastern Rd-Turramurra	1,290	0.3%	4,837	161	704	1,154	704	1154	543	993	543	993	0
Fox Valley	2,863	0.8%	10,735	-47	-121	456	-121	456	-75	503	-75	503	0
Gordon	99,034	26.1%	371,363	19409	97387	141,590	93726	137929	77978	122181	74317	118519	12712
Hampden Ave Shops-Nth Wahroonga	868	0.2%	3,255	110	1901	2,561	1761	2421	1792	2452	1651	2311	140
Killara	378	0.1%	1,416	47	509	717	509	717	462	670	462	670	0
Lindfield	37,631	9.9%	141,110	6291	30622	46,274	29941	45593	24331	39984	23651	39303	1772
North Turramurra	4,989	1.3%	18,708	349	1648	3,121	1648	3121	1299	2772	1299	2772	0
Princes St-Turramurra	1,328	0.4%	4,981	166	591	1,021	473	903	425	855	307	737	118
Pymble	18,775	5.0%	70,403	3021	12525	19,646	12302	19423	9504	16625	9281	16401	642
Pymble Office Park	88,999	23.5%	333,734	23313	6349	26,848	11255	31754	-16964	3535	-12058	8441	3386
Roseville	17,528	4.6%	65,729	2324	15802	23,258	15029	22486	13478	20934	12706	20162	1229
Roseville Chase	2,383	0.6%	8,937	304	249	817	249	817	-56	513	-56	513	0
South Turramurra	1,210	0.3%	4,536	156	2011	2,771	2011	2771	1856	2616	1856	2616	0
St Ives	47,122	12.4%	176,701	4215	38602	57,854	43048	62299	34387	53639	38832	58084	651
St Ives Chase	927	0.2%	3,476	119	172	411	172	411	53	293	53	293	0
St Ives North	2,092	0.6%	7,845	265	2086	3,052	2086	3052	1821	2787	1821	2787	0
Turramurra	28,712	7.6%	107,666	3317	54118	73,746	49490	69119	50801	70429	46173	65802	4758
Wahroonga	11,511	3.0%	43,164	1313	5782	9,674	5307	9198	4470	8361	3994	7886	475
West Gordon	961	0.3%	3,605	120	-83	100	-83	100	-203	-20	-203	-20	0
West Lindfield	4,485	1.2%	16,817	560	374	1,420	-480	567	-186	860	-1039	7	853
West Pymble	3,622	1.0%	13,583	458	3953	3,048	3953	3048	3495	2590	3495	2590	667
TOTAL	379,153	1	1,421,775	66277	275,606	420,592	275977	421606	209,330	354,316	209,700	355,329	27404

(orange)	Supply capacity is less than forecast 2006-2031 demand
(light green)	Supply capacity is more than ten times forecast 2006-2031 demand

Capacity to Accommodate Subregional Strategy Targets

The Subregional Strategy has the following employment targets:

- Hornsby LGA – 9,000 jobs
- Ku-ring-gai LGA – 4,500 jobs
- Hornsby Major Centre – 3,000 jobs

Table 23 shows the floorspace demand as a result of the TDC employment forecasts for 2031 and the Subregional employment targets. In Hornsby LGA as a whole there is enough supply potential in each scenario to accommodate the floorspace demand implied by the Subregional Strategy employment target. For Hornsby centre, the employment target of 3,000 additional jobs results in an additional floorspace demand of 196,901 sqm. Supply in both the 80% of max FSR and the max FSR scenarios is able to accommodate this.

Again, there are a number of centres with a supply shortfall to accommodate the demand forecast in the 2006-2031 period. These are the commercial centres of: Appletree Drive Cherrybrook, Carlingford Court, David Road, Castle Hill, Edgeworth David Avenue (Waitara), Epping, Galston, Galston Road (Hornsby Heights), Myrtle Street (Normanhurst), Normanhurst, Pennant Hills Road (Thornleigh), Plympton Road Shops, Epping, Somerville Road (Hornsby Heights), Thornleigh, Waitara, Wisemans Ferry, Yallambee Road.

However, the supply shortfall at most of these centres is relatively small. The centres with significant levels of supply shortfall are the commercial centres of: Carlingford Court, Galston, Pennant Hills, Thornleigh and Waitara.

Of particular note is that after the Subregional targets have been applied – including the 3,000 jobs target for Hornsby centre, the demand shortfall is Epping is reduced. This is the result of Hornsby taking a greater share of the LGA total.

There are also a number of centres/ precincts with very large levels of 'excess supply' after accommodating forecast demand growth. Centre/ precincts where supply is more than ten times forecast demand in the 2006-2031 period are the industrial areas of: Asquith, Kookaburra Road, Dural Service Centre, Mt Ku-ring-gai, and Thornleigh, and the commercial centres of Asquith, Beecroft Berowra, Berowra Heights, Berowra Waters, Cherrybrook, Cowan, Mt Ku-ring-gai, Mt Colah Shops, Pennant Hills Road (Thornleigh), Sefton Road (Thornleigh), West Pennant Hills and Westleigh.

Table 23. Hornsby Supply-Demand Gaps by Centre After Accommodating Subregional Targets (2006-2031)

		2006		2031 Demand			2031 Supply		GAP		
	HORNSBY	Floorspace	% Share	TDC Forecast	TDC + SR Target	ADD REQ	80%FSR	Max FSR	80	Max	Residential
Employment Land (i)	(E) Asquith	206161	14.5%	212,355	218,790	12,629	179059	267605	166,431	254,977	0
Employment Land (ii)	(E) Dural Service Centre	71934	5.1%	77,199	76,266	4,332	145414	196809	141,082	192,477	190
Employment Land (i)	(E) Mt Ku-ring-gai	115705	8.1%	113,515	119,670	3,964	354438	467910	350,473	463,946	1263
Employment Land (i)	(E) Thornleigh	140360	9.9%	134,966	139,319	- 1,041	51637	94372	52,678	95,413	0
Neighbourhood Centre	Appletree Dr-Cherrybrook	1589	0.1%	1,814	1,761	173	-11	324	- 184	151	0
Village	Asquith	7402	0.5%	8,550	8,204	802	13610	19305	12,809	18,503	2875
Village	Beecroft	11528	0.8%	13,054	11,976	448	10301	15813	9,853	15,365	1950
Small Village	Berowra	6151	0.4%	7,567	7,080	929	13166	17840	12,237	16,911	302
Small Village	Berowra Hts	11497	0.8%	13,740	12,794	1,296	13242	18990	11,946	17,693	0
Neighbourhood Centre	Berowra Waters	1359	0.1%	1,648	1,523	164	6583	8583	6,418	8,418	263
Neighbourhood Centre	Brooklyn	4368	0.3%	5,368	4,782	414	4052	6396	3,638	5,982	1613
Stand Alone Shopping Centre	Carlingford Court	45499	3.2%	51,569	49,368	3,869	-3024	5370	- 6,892	1,502	0
Village	Cherrybrook	12393	0.9%	14,408	12,995	601	17690	24597	17,088	23,995	0
-	Cowan	263	0.0%	299	282	19	198	360	180	341	223
-	Dangar Is	0	0.0%	-	-	-	-108	14	- 108	14	595
Neighbourhood Centre	David Rdr-Castle Hill	3013	0.2%	3,527	3,292	279	-116	496	- 395	217	0
Neighbourhood Centre	Edgeworth David Ave-Waitara	2489	0.2%	2,843	2,678	189	-12	513	- 202	324	0
Town Centre	Epping	62550	4.4%	71,063	68,136	5,586	5167	21831	- 420	16,244	8321
Neighbourhood Centre	Galston	4189	0.3%	4,686	4,219	30	-3792	-1759	- 3,822	- 1,790	8360
Neighbourhood Centre	Galston Rd-Hornsby Hts	1161	0.1%	1,344	1,245	84	-59	173	- 143	89	0
Major Centre	Hornsby	419696	29.5%	491,149	616,597	196,901	218658	394835	21,756	197,934	141979
-	Hospital Precinct	59788	4.2%	63,518	63,355	3,567	23936	42844	20,369	39,277	877
Employment Land-	(E) Kookaburra Road	6336	0.4%	6,488	6,764	427	4711	7235	4,284	6,808	0
-	Kuringai	1114	0.1%	1,291	1,156	43	486	844	443	801	0
Neighbourhood Centre	Malton Rd-North Epping	1808	0.1%	2,117	1,891	83	208	644	125	561	0
Neighbourhood Centre	Mt Colah Shops	2978	0.2%	3,376	3,094	116	5859	8153	5,743	8,038	789
Neighbourhood Centre	Mt Colah Stn	1502	0.1%	1,752	1,671	169	438	1032	269	864	664
Neighbourhood Centre	Myrtle St-Normanhurst	660	0.0%	762	690	30	-180	-85	- 210	- 115	0
Neighbourhood Centre	Normanhurst	1770	0.1%	2,116	1,864	94	-454	-83	- 548	- 177	432
Village	Pennant Hills	84349	5.9%	99,193	93,267	8,918	1158	19371	- 7,761	10,453	644
Neighbourhood Centre	Pennant Hills Rd-Thornleigh	12941	0.9%	10,591	9,913	- 3,029	-22	3013	3,006	6,042	1165
Neighbourhood Centre	Plymton Rd Shops-Epping	1522	0.1%	1,741	1,652	130	-25	292	- 155	162	0
Neighbourhood Centre	Sefton Rd-Thornleigh	1292	0.1%	1,521	1,456	164	8353	10823	8,189	10,659	429
Neighbourhood Centre	Somerville Rd-Hornsby Hts	0	0.0%	-	-	-	-118	269	- 118	269	1665
Village	Thornleigh	63204	4.4%	73,574	70,647	7,443	-5361	6522	- 12,804	- 921	94
Village	Waitara	33929	2.4%	39,725	37,799	3,869	-4678	2136	- 8,547	- 1,733	3954
Small Village	West Pennant Hills	7385	0.5%	8,721	8,151	765	7732	11234	6,966	10,469	0
Small Village	Westleigh	8399	0.6%	9,231	8,315	- 84	6365	9741	6,449	9,825	0
Neighbourhood Centre	Wiseman's Ferry	3051	0.2%	4,146	3,683	632	282	1043	- 350	412	169
0	Yallambee Road	559	0.0%	642	624	65	-102	209	- 167	144	869
	TOTAL			1,561,244	1,677,041	255,064			819,617	1,430,550	180453
	Mt Ku-ring-gai constrained land								134,901	194,480	
	TOTAL minus constrained land								604,038	1,161,078	

Supply capacity is less than forecast 2006-2031 demand

Supply capacity is more than ten times forecast 2006-2031 demand

Table 24 shows floorspace demand in Ku-ring-gai as a result of the TDC employment forecasts for 2031 and the Subregional employment targets. In the LGA as a whole there is enough supply potential in each scenario to accommodate the floorspace demand driven by the Subregional Strategy employment target. For Gordon centre, there is sufficient supply under all three supply scenarios to accommodate the demand figure.

There are several centres/ precincts where the existing supply potential is not sufficient to meet the forecast demand. These are the commercial centres of: East Lindfield, Fox Valley, Pymble Office Park, Roseville chase, West Gordon, West Lindfield. However, in most cases the shortfall is small. The centre with significant supply shortfall to meet the forecast demand is Pymble Office Park.

The centres with more than ten times the supply potential to meet the demand forecast are the commercial centres of: Hampden Avenue Shops, North Wahroonga, Killara, Roseville, South Turramurra and Turramurra.

Table 24. Ku-ring-gai Subregional Target Supply-Demand Gaps by Centre (2006-2031)

		2006		2031 Demand			Supply DLEP		Supply KPSO		GAP DLEP		Gap KPSO		
	KRG	Floorspace	% Share	TDC Forecast	TDC + SR Target	ADD REQ	80% of Max	Max	80% of Max	Max	80% of Max	Max	80% of Max	Max	Residential
Neighbourhood Centre	East Killara	1137	0.3%	4,263	1,250	113	720	1141	720	1141	607	1028	607	1028	0
Neighbourhood Centre	East Lindfield	1309	0.3%	4,910	1,478	168	-295	-91	-295	-91	-464	-259	-464	-259	0
Neighbourhood Centre	Eastern Rd-Turramurra	1290	0.3%	4,837	1,404	114	704	1154	704	1154	590	1041	590	1041	0
Neighbourhood Centre	Fox Valley	2863	0.8%	10,735	3,140	277	-121	456	-121	456	-399	179	-399	179	0
Town Centre	Gordon	99034	26.1%	371,363	121,115	22,081	97387	141590	93726	137929	75306	119508	71645	115847	12712
Neighbourhood Centre	Hampden Ave Shops	868	0.2%	3,255	944	76	1901	2561	1761	2421	1826	2486	1686	2345	140
Neighbourhood Centre	Killara	378	0.1%	1,416	482	104	509	717	509	717	405	613	405	613	0
Village	Lindfield	37631	9.9%	141,110	43,381	5,751	30622	46274	29941	45593	24871	40523	24191	39843	1772
Neighbourhood Centre	North Turramurra	4989	1.3%	18,708	5,966	977	1648	3121	1648	3121	671	2144	671	2144	0
Neighbourhood Centre	Princes St-Turramurra	1328	0.4%	4,981	1,496	167	591	1021	473	903	424	854	306	736	118
Small Village	Pymble	18775	5.0%	70,403	22,186	3,411	12525	19646	12302	19423	9114	16235	8891	16012	642
	Pymble Office Park	88999	23.5%	333,734	114,323	25,324	6349	26848	11255	31754	-18975	1524	-14070	6430	3386
Small Village	Roseville	17528	4.6%	65,729	20,067	2,539	15802	23258	15029	22486	13263	20720	12491	19947	1229
Neighbourhood Centre	Roseville Chase	2383	0.6%	8,937	2,639	255	249	817	249	817	-7	562	-7	562	0
Neighbourhood Centre	South Turramurra	1210	0.3%	4,536	1,385	176	2011	2771	2011	2771	1836	2596	1836	2596	0
Village	St Ives	47122	12.4%	176,701	50,754	3,632	38602	57854	43048	62299	34971	54222	39416	58668	651
Neighbourhood Centre	St Ives Chase	927	0.2%	3,476	1,016	89	172	411	172	411	82	322	82	322	0
Neighbourhood Centre	St Ives North	2092	0.6%	7,845	2,326	234	2086	3052	2086	3052	1852	2818	1852	2818	0
Village	Turramurra	28712	7.6%	107,666	30,848	2,136	54118	73746	49490	69119	51982	71611	47354	66983	4758
Small Village	Wahroonga	11511	3.0%	43,164	12,579	1,068	5782	9674	5307	9198	4714	8605	4238	8130	475
Neighbourhood Centre	West Gordon	961	0.3%	3,605	1,110	148	-83	100	-83	100	-232	-48	-232	-48	0
Neighbourhood Centre	West Lindfield	4485	1.2%	16,817	5,400	915	374	1420	-480	567	-542	505	-1395	-349	853
Neighbourhood Centre	West Pymble	3622	1.0%	13,583	4,136	514	3953	3048	3953	3048	3440	2534	3440	2534	667
	TOTAL	379153	100.0%	1,421,775	449,423	70,270	275606	420592	275977	421606	205,337	350,323	205,707	351,336	27404

Supply capacity is less than forecast 2006-2031 demand

Supply capacity is more than ten times forecast 2006-2031 demand

6.4 Centre/ Precinct Positioning

Current Floorspace Shares between Centres

The current shares of BLC floorspace by centre are illustrated in Table 33 and Table 34.

Table 25. Hornsby Existing Floorspace (BLC) Shares Between Centres

	HORNSBY	AST	BP	D	FL	LL	MH	ML	O	RB	RBG	RES	RM	S	US
Employment Land (i)	(E) Asquith	0.4%	13.1%	2.3%	32.8%	13.7%	31.1%	30.3%	10.8%	5.18%	9.9%	3.5%	5.61%	1.1%	19.4%
Employment Land (ii)	(E) Dural Service Centre	3.3%	3.6%	1.8%	6.0%	6.5%	2.0%	2.4%	2.7%	4.05%	6.1%	3.2%	4.34%	3.3%	12.4%
Employment Land (i)	(E) Mt Ku-ring-gai	0.2%	6.6%	0.8%	21.4%	6.1%	26.0%	24.8%	4.4%	0.89%	2.5%	0.9%	1.38%	0.5%	12.2%
Employment Land (i)	(E) Thornleigh	0.0%	8.9%	2.0%	11.6%	8.2%	35.7%	33.3%	7.3%	3.18%	5.4%	4.0%	3.75%	4.3%	12.4%
Neighbourhood Centre	Appletree Dr-Cherrybrook	0.1%	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.12%	0.2%	0.3%	0.13%	0.4%	0.0%
Village	Asquith	0.3%	0.3%	0.3%	0.1%	0.8%	0.0%	0.1%	0.3%	0.66%	1.1%	0.6%	0.63%	0.6%	0.2%
Village	Beecroft	0.5%	0.6%	1.0%	0.2%	0.8%	0.0%	0.1%	0.6%	0.97%	1.0%	1.2%	0.88%	1.2%	0.3%
Small Village	Berowra	1.6%	0.3%	0.1%	0.3%	0.4%	0.0%	0.0%	0.3%	0.56%	0.4%	0.3%	0.66%	0.4%	0.3%
Small Village	Berowra Hts	1.8%	0.3%	1.6%	0.1%	0.9%	0.0%	0.1%	0.4%	1.04%	1.3%	0.9%	1.30%	0.5%	0.3%
Neighbourhood Centre	Berowra Waters	0.4%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.13%	0.1%	0.1%	0.17%	0.1%	0.0%
Neighbourhood Centre	Brooklyn	1.4%	0.2%	0.2%	0.0%	0.2%	0.0%	0.0%	0.1%	0.46%	0.2%	0.2%	0.52%	0.3%	0.1%
Stand Alone Shopping Centre	Carlingford Court	0.8%	1.5%	1.3%	0.6%	5.1%	0.0%	0.4%	0.9%	4.11%	7.1%	3.2%	3.91%	2.3%	1.4%
Village	Cherrybrook	1.1%	0.4%	0.8%	0.1%	1.1%	0.0%	0.1%	0.2%	1.26%	1.5%	1.0%	1.12%	0.3%	0.3%
-	Cowan	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.03%	0.0%	0.0%	0.03%	0.0%	0.0%
-	Dangar Is	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.00%	0.0%	0.0%
Neighbourhood Centre	David Rdr-Castle Hill	0.4%	0.1%	0.3%	0.0%	0.2%	0.0%	0.0%	0.1%	0.27%	0.3%	0.4%	0.28%	0.6%	0.1%
Neighbourhood Centre	Edgeworth David Ave-Waitara	0.0%	0.0%	0.1%	0.0%	0.3%	0.0%	0.0%	0.0%	0.25%	0.4%	0.1%	0.21%	0.0%	0.1%
Town Centre	Epping	0.4%	8.8%	3.6%	7.4%	3.1%	0.1%	0.4%	10.4%	2.80%	1.7%	6.1%	3.01%	1.9%	1.6%
Neighbourhood Centre	Galston	0.1%	0.1%	0.4%	0.1%	0.3%	0.0%	0.0%	0.1%	0.38%	0.5%	0.4%	0.31%	0.3%	0.1%
Neighbourhood Centre	Galston Rd-Hornsby Hts	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.12%	0.2%	0.0%	0.10%	0.0%	0.0%
Major Centre	Hornsby	63.3%	35.6%	59.1%	11.8%	34.4%	3.4%	5.4%	38.0%	53.59%	40.0%	36.8%	48.51%	32.7%	30.6%
-	Hospital Precinct	0.0%	0.9%	14.7%	0.0%	0.0%	0.0%	0.0%	3.2%	2.09%	0.9%	20.6%	3.34%	40.2%	-1.0%
Employment Land	(E) Kookaburra Road	0.0%	0.3%	0.0%	1.4%	0.4%	0.7%	0.7%	0.2%	0.14%	0.4%	0.1%	0.15%	0.0%	0.2%
-	Kuringai	0.3%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.12%	0.1%	0.0%	0.12%	0.0%	0.1%
Neighbourhood Centre	Malton Rd-North Epping	0.2%	0.0%	0.1%	0.0%	0.2%	0.0%	0.0%	0.0%	0.20%	0.2%	0.1%	0.16%	0.0%	0.1%
Neighbourhood Centre	Mt Colah Shops	0.0%	0.1%	0.2%	0.0%	0.3%	0.0%	0.0%	0.0%	0.30%	0.5%	0.2%	0.23%	0.1%	0.1%
Neighbourhood Centre	Mt Colah Stn	0.1%	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	0.1%	0.14%	0.2%	0.1%	0.13%	0.1%	0.1%
Neighbourhood Centre	Myrtle St-Normanhurst	0.0%	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.06%	0.1%	0.0%	0.04%	0.0%	0.1%
Neighbourhood Centre	Normanhurst	0.4%	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	0.1%	0.18%	0.1%	0.1%	0.18%	0.1%	0.1%
Village	Pennant Hills	11.0%	8.7%	3.3%	2.1%	5.5%	0.2%	0.5%	9.4%	6.38%	5.4%	8.7%	7.68%	3.7%	3.1%
Neighbourhood Centre	Pennant Hills Rd-Thornleigh	2.9%	0.3%	0.0%	0.8%	0.5%	0.0%	0.0%	0.16%	0.70%	0.3%	0.1%	0.95%	0.1%	1.2%
Neighbourhood Centre	Plymton Rd Shops-Epping	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.15%	0.3%	0.1%	0.13%	0.0%	0.1%
Neighbourhood Centre	Sefton Rd-Thornleigh	0.1%	0.1%	0.1%	0.1%	0.1%	0.0%	0.0%	0.1%	0.08%	0.1%	0.1%	0.08%	0.1%	0.0%
Neighbourhood Centre	Somerville Rd-Hornsby Hts	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.00%	0.0%	0.0%	0.00%	0.0%	0.0%
Village	Thornleigh	2.4%	6.4%	3.2%	2.1%	5.4%	0.6%	0.9%	7.9%	4.56%	5.7%	3.7%	4.78%	1.6%	2.9%
Village	Waitara	4.1%	1.5%	0.6%	0.4%	3.1%	0.0%	0.3%	1.0%	3.08%	4.2%	2.0%	3.37%	2.3%	0.9%
Small Village	West Pennant Hills	0.5%	0.5%	0.5%	0.1%	0.6%	0.0%	0.0%	0.6%	0.65%	0.8%	0.5%	0.64%	0.3%	0.2%
Small Village	Westleigh	0.3%	0.3%	1.3%	0.2%	0.6%	0.0%	0.0%	0.5%	0.68%	0.7%	0.5%	0.64%	0.6%	0.3%
Neighbourhood Centre	Wiseman's Ferry	1.6%	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%	0.37%	0.1%	0.0%	0.47%	0.0%	0.0%
	Yallambee Road	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.06%	0.1%	0.0%	0.05%	0.0%	0.0%
	TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Village
Town Centre
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Table 26. Ku-ring-gai Existing Floorspace (BLC) Shares Between Centre

	KRG	AST	BP	D	FL	LL	MH	ML	O	RB	RBG	RES	RM	S	US
Neighbourhood Centre	East Killara	0.5%	0.1%	0.1%	0.1%	0.4%	0.0%	0.1%	0.0%	0.5%	0.7%	0.1%	0.4%	0.0%	0.1%
Neighbourhood Centre	East Lindfield	0.0%	0.1%	0.2%	0.1%	0.5%	0.0%	0.1%	0.0%	0.5%	0.8%	0.4%	0.4%	0.4%	0.1%
Neighbourhood Centre	Eastern Rd-Turramurra	0.0%	0.1%	0.1%	0.1%	0.6%	0.0%	0.1%	0.0%	0.5%	0.9%	0.2%	0.4%	0.0%	0.1%
Neighbourhood Centre	Fox Valley	2.2%	0.1%	1.7%	0.1%	0.4%	0.0%	0.1%	0.2%	0.8%	0.6%	1.8%	0.9%	3.4%	0.1%
Town Centre	Gordon	41.7%	35.6%	23.5%	17.1%	25.2%	4.1%	5.5%	38.2%	28.5%	22.8%	26.0%	28.5%	20.7%	18.5%
Neighbourhood Centre	Hampden Ave Shops-Nth Wahroonga	0.3%	0.1%	0.2%	0.1%	0.3%	0.2%	0.2%	0.1%	0.3%	0.4%	0.1%	0.3%	0.1%	0.1%
Neighbourhood Centre	Killara	0.5%	0.1%	0.0%	0.1%	0.1%	0.0%	0.0%	0.1%	0.1%	0.1%	0.0%	0.2%	0.0%	0.3%
Village	Lindfield	7.4%	8.3%	10.6%	7.9%	9.3%	0.6%	1.5%	8.4%	10.0%	10.6%	13.0%	10.3%	16.0%	16.3%
Neighbourhood Centre	North Turramurra	3.7%	1.1%	1.9%	0.5%	1.0%	0.0%	0.1%	1.2%	1.6%	1.1%	2.0%	1.6%	3.2%	0.2%
Neighbourhood Centre	Princes St-Turramurra	0.0%	0.1%	0.2%	0.1%	0.5%	0.0%	0.1%	0.0%	0.5%	0.8%	0.4%	0.4%	0.5%	0.1%
Small Village	Pymble	8.6%	5.4%	7.4%	4.7%	4.5%	1.7%	1.9%	5.5%	4.9%	4.1%	5.9%	5.4%	6.0%	2.8%
	Pymble Office Park	0.0%	33.3%	16.7%	50.6%	22.3%	92.7%	84.9%	32.7%	13.2%	9.4%	14.0%	15.6%	10.5%	44.1%
Small Village	Roseville	11.9%	3.0%	12.0%	2.4%	3.4%	0.5%	0.8%	3.2%	5.2%	4.1%	5.2%	5.9%	8.7%	2.0%
Neighbourhood Centre	Roseville Chase	1.1%	0.2%	0.4%	0.1%	0.9%	0.0%	0.1%	0.1%	1.0%	1.3%	0.4%	0.8%	0.2%	0.2%
Neighbourhood Centre	South Turramurra	0.0%	0.0%	0.0%	0.1%	0.6%	0.0%	0.1%	0.0%	0.5%	0.9%	0.2%	0.4%	0.0%	0.1%
Village	St Ives	2.3%	5.0%	9.7%	5.6%	16.1%	0.0%	2.3%	3.7%	15.6%	23.2%	15.1%	13.4%	13.6%	4.4%
Neighbourhood Centre	St Ives Chase	0.0%	0.0%	0.1%	0.0%	0.4%	0.0%	0.1%	0.0%	0.4%	0.6%	0.2%	0.3%	0.1%	0.1%
Neighbourhood Centre	St Ives North	2.5%	0.1%	0.4%	0.1%	0.6%	0.0%	0.1%	0.0%	0.9%	0.9%	0.4%	0.8%	0.4%	0.1%
Village	Turramurra	6.9%	4.6%	10.8%	6.6%	7.0%	0.2%	1.1%	4.1%	8.3%	8.8%	8.7%	7.7%	10.2%	5.8%
Small Village	Wahroonga	2.3%	1.8%	2.2%	2.4%	3.4%	0.1%	0.5%	1.6%	3.5%	4.3%	3.6%	3.3%	2.8%	3.2%
Neighbourhood Centre	West Gordon	1.9%	0.1%	0.2%	0.2%	0.1%	0.0%	0.0%	0.0%	0.4%	0.2%	0.3%	0.4%	0.5%	0.0%
Neighbourhood Centre	West Lindfield	4.0%	0.8%	0.9%	1.1%	1.1%	0.0%	0.1%	0.7%	1.5%	1.3%	1.2%	1.6%	1.7%	0.8%
Neighbourhood Centre	West Pymble	2.0%	0.2%	0.5%	0.2%	1.3%	0.0%	0.2%	0.1%	1.4%	2.0%	0.9%	1.3%	1.0%	0.3%
	TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Village
Town Centre

Table 27. Hornsby Existing Floorspace (BLC) Shares Within Centres

	HORNSBY	AST	BP	D	FL	LL	MH	ML	O	RB	RBG	RES	RM	S	US	TOTAL
Employment Land (i)	(E) Asquith	0.0%	6.7%	0.2%	35.3%	10.4%	8.3%	9.8%	5.3%	9.1%	4.4%	0.2%	6.9%	0.5%	2.7%	100.0%
Employment Land (ii)	(E) Dural Service Centre	0.9%	5.4%	0.5%	18.5%	14.2%	1.5%	2.3%	3.8%	20.5%	7.9%	0.4%	15.3%	3.8%	4.9%	100.0%
Employment Land (i)	(E) Mt Ku-ring-gai	0.0%	6.2%	0.1%	42.2%	8.5%	12.7%	14.7%	3.9%	2.9%	2.1%	0.1%	3.1%	0.4%	3.1%	100.0%
Employment Land (i)	(E) Thornleigh	0.0%	7.2%	0.3%	19.6%	9.7%	15.0%	16.9%	5.7%	8.8%	3.8%	0.3%	7.2%	2.7%	2.7%	100.0%
Neighbourhood Centre	Appletree Dr-Cherrybrook	1.3%	1.8%	1.8%	1.0%	10.5%	0.0%	0.4%	2.3%	27.1%	9.3%	1.6%	20.4%	22.0%	0.5%	100.0%
Village	Asquith	0.7%	4.0%	0.7%	2.3%	15.7%	0.0%	0.5%	3.6%	31.2%	12.8%	0.7%	20.8%	6.2%	0.8%	100.0%
Village	Beecroft	0.9%	5.8%	1.8%	3.7%	11.3%	0.0%	0.3%	5.8%	31.3%	8.5%	1.1%	19.7%	9.1%	0.7%	100.0%
Small Village	Berowra	4.7%	4.8%	0.4%	8.8%	9.0%	0.1%	0.5%	4.0%	30.4%	6.0%	0.5%	25.2%	4.5%	1.2%	100.0%
Small Village	Berowra Hts	2.8%	2.9%	2.6%	2.7%	11.9%	0.0%	0.4%	3.4%	31.4%	9.7%	0.8%	27.4%	3.4%	0.6%	100.0%
Neighbourhood Centre	Berowra Waters	5.0%	3.3%	0.4%	1.8%	9.4%	0.0%	0.3%	0.6%	34.2%	7.7%	0.5%	29.2%	7.0%	0.5%	100.0%
Neighbourhood Centre	Brooklyn	6.0%	4.1%	0.8%	2.2%	7.0%	0.0%	0.2%	2.4%	36.9%	5.1%	0.4%	29.5%	4.7%	0.6%	100.0%
Stand Alone Shopping Centre	Carlingford Court	0.3%	3.4%	0.6%	2.7%	17.0%	0.0%	0.6%	2.0%	32.2%	14.2%	0.7%	21.3%	4.1%	0.9%	100.0%
Village	Cherrybrook	1.7%	3.1%	1.2%	2.5%	13.7%	0.0%	0.5%	1.6%	37.4%	11.4%	0.8%	23.1%	2.3%	0.8%	100.0%
-	Cowan	3.1%	1.9%	0.0%	3.9%	15.3%	0.0%	0.5%	0.6%	35.3%	12.3%	0.3%	25.5%	0.1%	1.2%	100.0%
-	Dangar Is	-	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Neighbourhood Centre	David Rdr-Castle Hill	2.5%	2.0%	1.8%	1.0%	9.4%	0.0%	0.3%	2.0%	31.4%	8.2%	1.3%	22.7%	16.8%	0.5%	100.0%
Neighbourhood Centre	Edgeworth David Ave-Waitara	0.0%	1.7%	0.5%	1.9%	19.2%	0.0%	0.7%	0.7%	36.5%	16.3%	0.5%	21.0%	0.0%	1.0%	100.0%
Town Centre	Epping	0.1%	14.5%	1.1%	25.6%	7.5%	0.1%	0.4%	16.3%	15.9%	2.4%	1.0%	11.9%	2.4%	0.7%	100.0%
Neighbourhood Centre	Galston	0.5%	3.8%	1.9%	3.2%	13.0%	0.0%	0.4%	3.0%	35.2%	10.6%	1.0%	20.1%	6.5%	0.8%	100.0%
Neighbourhood Centre	Galston Rd-Hornsby Hts	0.9%	1.9%	0.7%	1.8%	17.5%	0.0%	0.6%	0.7%	37.7%	14.7%	0.4%	22.2%	0.0%	1.0%	100.0%
Major Centre	Hornsby	2.1%	6.5%	2.0%	4.5%	9.3%	0.3%	0.6%	6.6%	33.6%	6.4%	0.6%	21.2%	4.7%	1.5%	100.0%
-	Hospital Precinct	0.0%	1.7%	4.9%	0.0%	0.1%	0.0%	0.0%	5.3%	12.7%	1.3%	3.5%	14.2%	56.6%	-0.5%	100.0%
Neighbourhood Centre-	Kookaburra Road	0.0%	4.4%	0.0%	50.1%	9.0%	6.4%	7.8%	2.5%	8.0%	5.2%	0.1%	5.8%	0.0%	0.8%	100.0%
-	Kuringai	4.7%	2.5%	0.7%	2.6%	10.6%	0.0%	0.3%	0.9%	39.1%	8.3%	0.2%	28.3%	0.0%	1.7%	100.0%
Neighbourhood Centre	Malton Rd-North Epping	1.8%	2.1%	1.2%	1.6%	14.8%	0.0%	0.5%	0.9%	40.2%	12.4%	0.4%	23.3%	0.1%	0.8%	100.0%
Neighbourhood Centre	Mt Colah Shops	0.0%	1.9%	1.2%	1.8%	17.2%	0.0%	0.6%	1.0%	37.7%	14.6%	0.5%	20.4%	2.1%	1.0%	100.0%
Neighbourhood Centre	Mt Colah Stn	1.3%	4.3%	0.6%	2.4%	14.8%	0.0%	0.5%	4.2%	31.7%	11.7%	0.7%	21.5%	5.4%	0.9%	100.0%
Neighbourhood Centre	Myrtle St-Normanhurst	0.0%	2.9%	1.6%	6.5%	17.0%	0.8%	1.5%	1.2%	34.8%	11.9%	0.4%	17.3%	0.1%	4.1%	100.0%
Neighbourhood Centre	Normanhurst	4.0%	4.8%	1.4%	2.4%	8.9%	0.0%	0.2%	4.3%	37.8%	6.5%	0.4%	25.5%	2.9%	1.0%	100.0%
Village	Pennant Hills	2.4%	10.5%	0.8%	5.3%	9.7%	0.2%	0.4%	10.8%	26.4%	5.7%	1.0%	22.2%	3.6%	1.0%	100.0%
Neighbourhood Centre	Pennant Hills Rd-Thornleigh	5.9%	3.0%	0.0%	20.0%	8.9%	0.0%	0.1%	1.7%	27.2%	3.4%	0.1%	25.7%	0.5%	3.5%	100.0%
Neighbourhood Centre	Plymton Rd Shops-Epping	0.0%	1.7%	0.4%	1.9%	19.5%	0.0%	0.7%	0.7%	36.0%	16.5%	0.5%	21.0%	0.0%	1.0%	100.0%
Neighbourhood Centre	Sefton Rd-Thornleigh	1.1%	9.4%	1.3%	16.4%	8.5%	0.0%	0.3%	10.9%	21.8%	4.8%	0.8%	15.4%	9.0%	0.4%	100.0%
Neighbourhood Centre	Somerville Rd-Hornsby Hts	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Village	Thornleigh	0.7%	10.2%	1.0%	7.1%	12.7%	0.5%	0.9%	12.0%	25.0%	8.0%	0.6%	18.2%	2.0%	1.2%	100.0%
Village	Waitara	2.2%	4.5%	0.3%	2.5%	13.7%	0.1%	0.5%	2.9%	31.5%	11.0%	0.6%	24.0%	5.4%	0.7%	100.0%
Small Village	West Pennant Hills	1.3%	6.7%	1.3%	3.2%	13.1%	0.0%	0.4%	7.5%	30.8%	9.5%	0.6%	21.0%	3.7%	0.8%	100.0%
Small Village	Westleigh	0.7%	4.6%	3.4%	4.3%	11.2%	0.0%	0.3%	6.2%	31.8%	8.4%	0.7%	20.8%	6.7%	0.9%	100.0%
Neighbourhood Centre	Wiseman's Ferry	8.6%	4.1%	0.0%	1.3%	5.7%	0.0%	0.1%	2.5%	39.2%	3.7%	0.1%	34.2%	0.1%	0.3%	100.0%
0	Yallambee Road	0.0%	1.6%	0.0%	1.9%	20.5%	0.0%	0.7%	0.6%	34.5%	17.4%	0.5%	21.3%	0.0%	1.1%	100.0%
	TOTAL	1.2%	6.7%	1.3%	14.1%	9.9%	3.5%	4.2%	6.4%	23.0%	5.9%	0.6%	16.1%	5.3%	1.8%	100.0%

Village
Town Centre
Major Centre

Table 28. Ku-ring-gai Existing Floorspace (BLC) Shares Within Centres

	KRG	AST	BP		D	FL	LL	MH	ML	O	RB	RBG	RES	RM	S	US	TOTAL
Neighbourhood Centre	East Killara	1.3%	1.9%	0.0%	0.5%	1.7%	17.2%	0.0%	0.6%	0.7%	37.2%	14.5%	0.4%	23.1%	0.0%	0.9%	100.0%
Neighbourhood Centre	East Lindfield	0.0%	1.6%	0.0%	0.6%	1.6%	17.7%	0.0%	0.6%	1.2%	31.5%	15.2%	0.9%	20.2%	7.9%	0.9%	100.0%
Neighbourhood Centre	Eastern Rd-Turramurra	0.0%	1.7%	0.0%	0.5%	1.9%	19.4%	0.0%	0.7%	0.7%	36.3%	16.4%	0.5%	21.0%	0.0%	1.0%	100.0%
Neighbourhood Centre	Fox Valley	2.3%	1.9%	0.0%	2.5%	0.6%	5.7%	0.0%	0.2%	3.0%	24.3%	5.3%	2.1%	20.6%	31.1%	0.3%	100.0%
Town Centre	Gordon	1.1%	13.3%	0.0%	0.9%	5.2%	10.0%	0.3%	0.5%	16.2%	22.3%	5.0%	0.8%	17.7%	5.0%	1.7%	100.0%
Neighbourhood Centre	Hampden Ave Shops-Nth Wahroonga	1.1%	3.5%	0.0%	1.0%	2.2%	14.8%	1.9%	2.6%	2.8%	34.2%	11.7%	0.5%	20.6%	2.2%	0.9%	100.0%
Neighbourhood Centre	Killara	3.1%	8.5%	0.0%	0.1%	9.3%	8.9%	0.0%	0.1%	8.9%	26.4%	4.2%	0.2%	23.9%	0.2%	6.2%	100.0%
Village	Lindfield	0.5%	8.7%	0.0%	1.1%	6.8%	10.3%	0.1%	0.4%	10.0%	21.8%	6.5%	1.1%	17.8%	10.7%	4.1%	100.0%
Neighbourhood Centre	North Turramurra	2.0%	8.5%	0.0%	1.5%	2.9%	8.2%	0.0%	0.2%	10.4%	24.8%	5.1%	1.2%	19.6%	15.4%	0.4%	100.0%
Neighbourhood Centre	Princes St-Turramurra	0.0%	1.6%	0.0%	0.7%	1.6%	17.2%	0.0%	0.6%	1.3%	31.1%	14.8%	1.0%	20.1%	9.2%	0.9%	100.0%
Small Village	Pymble	1.2%	11.1%	0.0%	1.5%	7.9%	9.8%	0.7%	0.9%	12.8%	20.8%	4.9%	1.0%	18.2%	7.9%	1.4%	100.0%
	Pymble Office Park	0.0%	13.2%	0.0%	0.7%	16.4%	9.4%	7.0%	7.9%	14.7%	10.9%	2.2%	0.4%	10.2%	2.7%	4.2%	100.0%
Small Village	Roseville	1.9%	6.7%	0.0%	2.8%	4.5%	8.3%	0.2%	0.4%	8.2%	24.8%	5.4%	0.9%	22.1%	12.6%	1.1%	100.0%
Neighbourhood Centre	Roseville Chase	1.3%	3.1%	0.0%	0.7%	2.0%	15.7%	0.0%	0.5%	2.5%	35.2%	12.9%	0.5%	22.3%	2.5%	0.8%	100.0%
Neighbourhood Centre	South Turramurra	0.0%	1.6%	0.0%	0.0%	1.9%	20.5%	0.0%	0.7%	0.6%	34.5%	17.4%	0.5%	21.3%	0.0%	1.1%	100.0%
Village	St Ives	0.1%	4.4%	0.0%	0.9%	4.1%	15.3%	0.0%	0.5%	3.7%	29.2%	12.2%	1.1%	19.7%	7.8%	0.9%	100.0%
Neighbourhood Centre	St Ives Chase	0.0%	1.7%	0.0%	0.7%	1.7%	18.3%	0.0%	0.6%	1.0%	34.3%	15.6%	0.7%	20.5%	4.0%	1.0%	100.0%
Neighbourhood Centre	St Ives North	3.5%	2.1%	0.0%	0.8%	1.3%	12.3%	0.0%	0.4%	1.0%	36.6%	10.2%	0.6%	25.8%	4.7%	0.7%	100.0%
Village	Turramurra	0.7%	6.8%	0.0%	1.6%	7.9%	11.0%	0.0%	0.4%	6.9%	25.7%	7.7%	1.0%	18.8%	9.6%	2.1%	100.0%
Small Village	Wahroonga	0.6%	6.5%	0.0%	0.8%	7.1%	13.1%	0.0%	0.4%	6.4%	26.3%	9.1%	1.0%	19.4%	6.4%	2.7%	100.0%
Neighbourhood Centre	West Gordon	5.6%	2.6%	0.0%	1.0%	7.5%	5.7%	0.0%	0.3%	1.9%	30.8%	4.4%	0.9%	26.7%	12.4%	0.3%	100.0%
Neighbourhood Centre	West Lindfield	2.4%	6.6%	0.0%	0.7%	7.2%	9.8%	0.0%	0.3%	6.8%	26.3%	6.7%	0.8%	21.6%	9.2%	1.7%	100.0%
Neighbourhood Centre	West Pymble	1.6%	1.8%	0.0%	0.6%	1.5%	15.5%	0.0%	0.5%	1.1%	33.0%	13.1%	0.8%	22.8%	6.9%	0.8%	100.0%
	TOTAL	0.7%	10.1%	0.0%	1.0%	8.3%	10.7%	1.9%	2.4%	11.5%	21.1%	5.9%	0.8%	16.7%	6.5%	2.4%	100.0%

Village
Town Centre

There are a number of issues emerging with the analysis of shares of floorspace between and within centres in the Subregion. These can be summarised as follows:

- **Some higher order retail exists at lower levels in the hierarchy**. In general terms there are higher levels of retail activity (RB, RM and RBG) in the smaller centres. Typically, we would expect to see more RB and RBG land uses in the larger centres as these draw trade from larger catchment areas. However, some of the smaller centres in Ku-ring-gai have higher proportions in these categories.
- **Broadly higher levels of office BLC floorspace at higher levels in the hierarchy**. As we would expect, the larger centres in the sub-region have a greater proportion of their total floorspace taken up by office functions.
- **Consistent levels of residential BLC floorspace throughout the hierarchy**. There is a consistent and small proportion of total audited floorspace in the centres taken up by residential use.
- **High office shares at the Town Centre level**. Both Epping and Gordon have high levels of office floorspace. While we would expect some office floorspace at this level in the hierarchy the Town Centres would not typically be expected to have a more pronounced office profile than the Major Centre. In Gordon, office BLC floorspace makes up 16.2% of total employment floorspace. This reflects the important employment role that Gordon plays in the LGA. Epping also has a high share of office BLC floorspace at 16.3%.
- **Low office shares in Hornsby Major Centre**. The low share of office floorspace within Hornsby centre is a contrast to the levels of office floorspace in Epping. Within Hornsby, just 6.6% of total employment floorspace is in the office BLC category.
- **High level of industrial BLC floorspace in Epping**. Industrial land use is high in Epping. This is driven by a high proportion of freight and logistics business at the centre.

Adjusting BLC Floorspace Shares

Not all of the patterns emerging from the audit data in terms of the BLC shares by centre are consistent with the centres hierarchy or indeed the competitive position of the centres to seize the economic opportunities discussed in this Study. For these reasons, we have examined the implications of adjusting the land use split in centres.

The first step in adjusting the BLC floorspace shares by centre in the sub-region is to re-examine the centres hierarchy. The Metropolitan Strategy’s broad description of the characteristics of centres is summarised below:

- **Major Centre**. Major shopping and business centre serving immediate Subregional residential population usually with a full scale shopping mall, council offices, taller office and residential buildings, central community facilities and a minimum of 8,000 jobs.
- **Town Centre**. Town Centres have one or two supermarkets, community facilities, medical centres, schools, etc. They contain between 4,500 and 9,500 dwellings and are usually a residential origin rather than an employment destination.

- **Stand Alone Shopping Centre**. Internalised, privately owned centres, located away from other commercial areas, containing many of the attributes of Town Centres but without housing and public open space – they may have the potential to become a traditional Town Centre in the long term.
- **Village**. A strip of shops and surrounding residential area within a 5-10 minute walk contains a small supermarket, hairdresser, and take-away food shops. They contain between 2,100-5,500 dwellings.
- **Small Village**. A small strip of shops and adjacent residential area within a 5-10 minute walk. Contain between 800 and 2,700 dwellings.
- **Neighbourhood Centre**. One or a small cluster of shops and services. They contain between 150 and 900 dwellings.

The sub-region's centres generally fit within this framework. There are however, a number of emerging issues. These are summarised as follows:

- **Ku-ring-gai 'Village' centres perform some higher order functions**. Lindfield, Turramurra and St Ives, each with Village status, host a significant share of the total LGA's office floorspace 8.4%, 4.1% and 3.7% respectively. Although the absolute totals in these centres are still small, within the context of the LGA, these centres are clearly housing some higher order functions that would not be expected given their status in the centres hierarchy.

  St Ives hosts very high shares of the LGA's RB and RBG functions – both of which would be expected to draw trade from wide catchments and generate significant trips. However, St Ives does not occupy the best strategic position with respect to public transport infrastructure. Despite the existence of planned strategic bus corridors for the centre, we would suggest that Gordon is a better prospect to accommodate shares of forecast growth in these categories.
- **Epping and Hornsby profiles**. Although the total volume of office and retail activity are acceptable in the sense of Epping and Hornsby's respective places in the centres hierarchy, the share of land uses *within* each centre does not reflect their relative positions. Epping has a very high proportion of its total floorspace taken up by office functions and a relatively low level of retail floorspace. The situation in Hornsby is reversed, with the Major Centre having a relatively small office profile. While the picture for Epping may be partially explained away by the fact that some of centre lies within Parramatta LGA and was not audited, for Hornsby, the low office proportion gives some cause for concern given the Major Centre status. There is scope for some policy intervention to redress the balance of land use in Hornsby centre.
- **Pymble office park**. Pymble office park sits between Gordon and Pymble on the North Shore train line and Pacific Highway and does not have its own classification in the Subregional Strategy. However, Pymble office park hosts a significant proportion of the total office space in the LGA (15%) in addition to substantial business park and light industrial land uses. This amount of office space outside a large centre is unusual.
- **Dural Service Centre**. Dural service centre is operates as a predominantly as a centre for local services but also houses significant Bulky Goods Retail, some freight and logistics and some light industry. Its distance from arterial infrastructure and transport nodes presents a problem for hosting functions that generate high numbers of trips drawn from a wide

catchment yet its industrial zoning at the moment presents problems for the functioning of the centre.

After confirming the hierarchy, we will now examine the share of BLC floorspace in more detail. Table 29 summarises the broad spatial requirements of the BLCs.

Table 29. BLCs and Suitable Spatial Attributes

	Description	Location Requirements
AST	Hotels and Motels (not including pubs), backpacker establishments.	Good accessibility and visibility. Businesses in this category tend to be in high population density areas, on close to arterial infrastructure.
BP	Integrated warehouse, storage, R&D, 'back-room' management and administration with up to 40% office component	Traditional business park environments offer large land parcels and attractive site aspects. Business park locations are heavily driven by strategic positioning with respect to arterial infrastructure. For business park land uses with higher industrial components proximity to population centres is not desirable.
CAR	Stand-alone car parking stations	Busy commercial centre locations
D	Primary and secondary education, lower level health, social and community services, trades construction, other 'nomads'	Institutions are dispersed but need to be accessible and well served by public transport.
FL	Warehousing and distribution activities. Includes buildings with a number of docking facilities; 'hard stand' areas with trucks or goods awaiting distribution; and large storage facilities	Warehousing and distribution is a metro level issue with activities preferably locating close to air, sea and inter-modal inland ports, or with access to the motorway system
LL	Car service and repair; joinery, construction and building supplies; and domestic storage	Wide range of businesses that service other business (components, maintenance and support) and Subregional populations. Need to be accessible for population centres
MH	Large scale production activity. Likely to be characterised by high noise emission; emission stacks; use of heavy machinery; and frequency of large trucks	Industrial areas. Heavy manufacturing is in decline in Sydney, but will continue to cluster in some locations such as Wetherill Park, Campbelltown/ Ingleburn etc. There are strong arguments for collocation in terms of raw material delivery and to concentrate externalities (though impacts on surrounding uses are generally moderate).
ML	Small scale production with lower noise and emission levels than heavy manufacturing	Industrial areas but with a lower requirement for distance from population than heavy manufacturing/
O	Office buildings	Typically require commercial centre locations. Need to have good accessibility for office workers .
RB	Large shopping complexes	Commercial centre locations. Require high visibility high traffic locations. Should be easily accessible with good public transport links
RBG	Typically large, one-story buildings surrounded by car-parking,	Usually located out of centre and in high exposure (main road) locations.
RES	Residential development	
RM	Main Street Retailing services.	Traditionally found in main street locations (e.g., supermarkets) and small cluster or strips of stores located next to a street or road
S	Tertiary level education, health, and community services	Typically require strategic locations and needed in each sub-region.
US	Concrete batching, waste recycling and transfer, construction and local and state government depots, sewerage, water supply, electricity construction yards	These typically have noise dust and traffic implications and need to be isolated or buffered from other land uses. Needed in each sub-region

Table 30 simplifies this further by describing levels in the centre hierarchy where particular BLCs would be encouraged or discouraged. For example, big box retail BLC (e.g. shopping centres) would be strongly encouraged in Major Centres and discouraged at Village level and lower in the hierarchy.

Table 30. Centre Hierarchy and Suitability for Employment BLCs

		Major	Town	Village	S Village	Neighbourhood	Industrial	Specialised	Health/ Uni
Retail	Big Box	Strong Yes	indifferent	No	No	No	indifferent	indifferent	indifferent
	Main Street	Strong Yes	Strong Yes	Strong Yes	Strong Yes	Strong Yes	indifferent	indifferent	Strong Yes
	Bulky Goods	Strong Yes	indifferent	indifferent	indifferent	indifferent	Strong Yes	indifferent	No
Comm	Office	Strong Yes	Yes	indifferent	indifferent	indifferent	No	indifferent	indifferent
	Business Park	Yes	No	No	No	No	indifferent	Strong Yes	indifferent
Industrial	Local Light Ind	Yes	Yes	indifferent	indifferent	indifferent	Strong Yes	Yes	indifferent
	Manuf Heavy	No	No	No	No	No	Strong Yes	indifferent	No
	Manuf Light	Yes	indifferent	indifferent	indifferent	No	Strong Yes	Yes	indifferent
	Freight Logistics	indifferent	indifferent	indifferent	indifferent	No	Strong Yes	Yes	No
Other	Dispersed	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Special Uses	Strong Yes	Yes	indifferent	indifferent	No	indifferent	indifferent	Strong Yes
	Urban Services	Yes	indifferent	No	No	No	Strong Yes	indifferent	indifferent
	Short term accom	Strong Yes	Strong Yes	indifferent	indifferent	indifferent	No	Yes	Yes

No	red
indifferent	grey
Yes	light yellow
Strong Yes	orange

The shares of BLC floorspace with centres have been re-examined using this broad framework in addition to:

- the existing economic profile and forecast employment growth
- existing and planned population concentrations
- proximity to magnet institutions
- access to infrastructure and services

The BLC split within each centre type before and after adjustments have been made are shown in Table 31 and Table 32. Once the adjustment has been made, the floorspace by BLC at a centre level is shown in Table 33 and Table 34

Table 31. [Before Adjustment] BLC Split within Centre Types

Hornsby	AST	BP	D	FL	LL	MH	ML	O	RB	RBG	RES	RM	S	US	TOTAL
Major Centre	2%	6%	2%	5%	9%	0%	1%	7%	34%	6%	1%	21%	5%	1%	100.0%
Town Centre	0%	14%	1%	26%	8%	0%	0%	16%	16%	2%	1%	12%	2%	1%	100.0%
Village	2%	6%	1%	11%	11%	1%	2%	6%	27%	7%	1%	20%	3%	2%	100.0%
Small Village	2%	5%	2%	5%	11%	0%	0%	6%	31%	8%	1%	22%	5%	1%	100.0%
Neighbourhood	2%	3%	1%	8%	13%	0%	1%	2%	33%	10%	1%	22%	3%	1%	100.0%
Industrial Precincts	0%	6%	0%	29%	11%	9%	11%	5%	10%	5%	0%	8%	2%	3%	100.0%
Health & Education Precincts	0%	2%	5%	0%	0%	0%	0%	5%	13%	1%	4%	14%	57%	0%	100.0%

KRG	AST	BP	D	FL	LL	MH	ML	O	RB	RBG	RES	RM	S	US	TOTAL
Major Centre															
Town Centre	1%	13%	1%	5%	10%	0%	0%	16%	22%	5%	1%	18%	5%	2%	100.0%
Village	0%	6%	1%	6%	13%	0%	0%	5%	27%	10%	1%	19%	9%	2%	100.0%
Small Village	2%	6%	1%	4%	11%	0%	0%	7%	26%	8%	1%	21%	11%	2%	100.0%
Neighbourhood	1%	3%	1%	2%	15%	0%	1%	2%	33%	13%	1%	22%	6%	1%	100.0%
Industrial Precincts															
Health & Education Precincts															

Table 32. [After Adjustment] BLC Split within Centre Types

Hornsby	AST	BP	D	FL	LL	MH	ML	O	RB	RBG	RES	RM	S	US	TOTAL
Major Centre	2%	7%	2%	3%	8%	0%	1%	9%	34%	6%	1%	21%	5%	1%	100.0%
Town Centre	0%	13%	1%	19%	7%	0%	0%	12%	24%	2%	1%	13%	2%	1%	100.0%
Village	2%	6%	1%	11%	15%	1%	2%	5%	25%	7%	1%	21%	3%	2%	100.0%
Small Village	2%	5%	2%	4%	12%	0%	0%	5%	31%	6%	1%	24%	5%	1%	100.0%
Neighbourhood	2%	3%	1%	8%	13%	0%	1%	2%	32%	10%	1%	22%	3%	1%	100.0%
Industrial Precincts	0%	6%	0%	31%	11%	10%	11%	3%	10%	5%	0%	8%	2%	3%	100.0%
Health & Education Precincts	0%	2%	6%	0%	0%	0%	0%	5%	13%	1%	4%	14%	63%	0%	100.0%

KRG	AST	BP	D	FL	LL	MH	ML	O	RB	RBG	RES	RM	S	US	TOTAL
Major Centre															
Town Centre	1%	13%	1%	5%	10%	0%	0%	16%	24%	7%	1%	17%	5%	2%	100.0%
Village	0%	6%	1%	6%	14%	0%	0%	6%	26%	9%	1%	20%	9%	2%	100.0%
Small Village	2%	6%	1%	4%	11%	0%	0%	6%	26%	5%	1%	21%	12%	2%	100.0%
Neighbourhood	1%	3%	1%	2%	15%	0%	1%	2%	33%	13%	1%	22%	6%	1%	100.0%
Industrial Precincts															
Health & Education Precincts															

Increased share	
Decreased share	

Table 33. Hornsby Adjusted Shares by Centre

	HORNSBY	2006		Adjusted Target			Supply		GAP	
		Floorspace	% Share	Adjusted Target	% Share	Addl F.Space	80%FSR	Max FSR	80	Max
Employment Land (i)	(E) Asquith	206,161	14.5%	223,322	13.3%	17,161	179,059	267,605	161,899	250,445
Employment Land (ii)	(E) Dural Service Centre	71,934	5.1%	76,266	4.5%	4,332	145,414	196,809	141,082	192,477
Employment Land (i)	(E) Mt Ku-ring-gai	115,705	8.1%	125,475	7.5%	9,769	354,438	467,910	344,668	458,140
Employment Land (i)	(E) Thornleigh	140,360	9.9%	132,879	7.9%	- 7,482	51,637	94,372	59,118	101,854
Neighbourhood Centre	Appletree Dr-Cherrybrook	1,589	0.1%	1,761	0.1%	173	- 11	324	- 184	151
Village	Asquith	7,402	0.5%	11,921	0.7%	4,519	13,610	19,305	9,092	14,786
Village	Beecroft	11,528	0.8%	15,595	0.9%	4,067	10,301	15,813	6,234	11,746
Small Village	Berowra	6,151	0.4%	6,693	0.4%	541	13,166	17,840	12,624	17,299
Small Village	Berowra Hts	11,497	0.8%	11,635	0.7%	138	13,242	18,990	13,104	18,852
Neighbourhood Centre	Berowra Waters	1,359	0.1%	1,523	0.1%	164	6,583	8,583	6,418	8,418
Neighbourhood Centre	Brooklyn	4,368	0.3%	4,782	0.3%	414	4,052	6,396	3,638	5,982
Stand Alone Shopping Centre	Carlingford Court	45,499	3.2%	49,368	2.9%	3,869	- 3,024	5,370	- 6,892	1,502
Village	Cherrybrook	12,393	0.9%	12,830	0.8%	436	17,690	24,597	17,254	24,160
-	Cowan	263	0.0%	282	0.0%	19	198	360	180	341
-	Dangar Is	-	0.0%	-	0.0%	-	- 108	14	- 108	14
Neighbourhood Centre	David Rdr-Castle Hill	3,013	0.2%	3,292	0.2%	279	- 116	496	- 395	217
Neighbourhood Centre	Edgeworth David Ave-Waitara	2,489	0.2%	2,678	0.2%	189	- 12	513	- 202	324
Town Centre	Epping	62,550	4.4%	70,639	4.2%	8,089	5,167	21,831	- 2,922	13,742
Neighbourhood Centre	Galston	4,189	0.3%	4,219	0.3%	30	- 3,792	- 1,759	- 3,822	- 1,790
Neighbourhood Centre	Galston Rd-Hornsby Hts	1,161	0.1%	1,245	0.1%	84	- 59	173	- 143	89
Major Centre	Hornsby	419,696	29.5%	615,681	36.7%	195,984	218,658	394,835	22,673	198,851
-	Hospital Precinct	59,788	4.2%	61,112	3.6%	1,324	23,936	42,844	22,612	41,520
Neighbourhood Centre-	(E) Kookaburra Road	6,336	0.4%	6,568	0.4%	232	4,711	7,235	4,479	7,003
-	Kuringai	1,114	0.1%	1,156	0.1%	43	486	844	443	801
Neighbourhood Centre	Malton Rd-North Epping	1,808	0.1%	1,891	0.1%	83	208	644	125	561
Neighbourhood Centre	Mt Colah Shops	2,978	0.2%	3,094	0.2%	116	5,859	8,153	5,743	8,038
Neighbourhood Centre	Mt Colah Stn	1,502	0.1%	1,671	0.1%	169	438	1,032	269	864
Neighbourhood Centre	Myrtle St-Normanhurst	660	0.0%	690	0.0%	30	- 180	- 85	- 210	- 115
Neighbourhood Centre	Normanhurst	1,770	0.1%	1,864	0.1%	94	- 454	- 83	- 548	- 177
Village	Pennant Hills	84,349	5.9%	87,154	5.2%	2,805	1,158	19,371	- 1,648	16,565
Neighbourhood Centre	Pennant Hills Rd-Thornleigh	12,941	0.9%	9,151	0.5%	- 3,790	- 22	3,013	3,768	6,804
Neighbourhood Centre	Plympton Rd Shops-Epping	1,522	0.1%	1,652	0.1%	130	- 25	292	- 155	162
Neighbourhood Centre	Sefton Rd-Thornleigh	1,292	0.1%	1,456	0.1%	164	8,353	10,823	8,189	10,659
Neighbourhood Centre	Somerville Rd-Hornsby Hts	-	0.0%	-	0.0%	-	- 118	269	- 118	269
Village	Thornleigh	63,204	4.4%	67,906	4.0%	4,702	- 5,361	6,522	- 10,063	1,820
Village	Waitara	33,929	2.4%	40,300	2.4%	6,370	- 4,678	2,136	- 11,048	- 4,234
Small Village	West Pennant Hills	7,385	0.5%	7,099	0.4%	- 287	7,732	11,234	8,019	11,521
Small Village	Westleigh	8,399	0.6%	7,869	0.5%	- 530	6,365	9,741	6,895	10,271
Neighbourhood Centre	Wiseman's Ferry	3,051	0.2%	3,683	0.2%	632	282	1,043	- 350	412
	Yallambee Road	559	0.0%	624	0.0%	65	- 102	209	- 167	144
	TOTAL	1,421,897	100.0%	1,677,024	100.0%	255,127	1,074,681	1,685,614	819,554	1,430,487
	Mt Ku-rin-gai constrained land								129,096	188,675
	TOTAL minus constrained land								603,982	1,161,022

(orange)	Supply capacity is less than forecast 2006-2031 demand
(green)	Supply capacity is more than ten times forecast 2006-2031 demand

Table 34. Ku-ring-gai Adjusted Shares by Centre

	KRG	2006		Adjusted Target			Supply DLEP		Supply KPSO		Gap DLEP		Gap KPSO	
		Floorspace	% Share	Share	Floorspace	Addl FSpace	80%	Max	80%	Max	80% Max	Max	80%	Max
Neighbourhood Centre	East Killara	1,137	0.3%	0.3%	1,250	113	720	1,141	720	1141	607	1028	607	1028
Neighbourhood Centre	East Lindfield	1,309	0.3%	0.3%	1,478	168	- 295	- 91	-295	-91	-464	-259	-464	-259
Neighbourhood Centre	Eastern Rd-Turramurra	1,290	0.3%	0.3%	1,404	114	704	1,154	704	1154	590	1041	590	1041
Neighbourhood Centre	Fox Valley	2,863	0.8%	0.7%	3,140	277	- 121	456	-121	456	-399	179	-399	179
Town Centre	Gordon	99,034	26.1%	28.4%	127,659	28,625	97,387	141,590	93726	137929	68762	112964	65101	109303
Neighbourhood Centre	Hampden Ave Shops	868	0.2%	0.2%	944	76	1,901	2,561	1761	2421	1826	2486	1686	2345
Neighbourhood Centre	Killara	378	0.1%	0.1%	482	104	509	717	509	717	405	613	405	613
Village	Lindfield	37,631	9.9%	9.7%	43,381	5,751	30,622	46,274	29941	45593	24871	40523	24191	39843
Neighbourhood Centre	North Turramurra	4,989	1.3%	1.3%	5,966	977	1,648	3,121	1648	3121	671	2144	671	2144
Neighbourhood Centre	Princes St-Turramurra	1,328	0.4%	0.3%	1,496	167	591	1,021	473	903	424	854	306	736
Small Village	Pymble	18,775	5.0%	4.7%	21,236	2,462	12,525	19,646	12302	19423	10063	17184	9840	16961
	Pymble Office Park	88,999	23.5%	25.5%	114,580	25,581	6,349	26,848	11255	31754	-19232	1267	-14326	6173
Small Village	Roseville	17,528	4.6%	3.9%	17,363	- 165	15,802	23,258	15029	22486	15967	23424	15195	22651
Neighbourhood Centre	Roseville Chase	2,383	0.6%	0.6%	2,639	255	249	817	249	817	-7	562	-7	562
Neighbourhood Centre	South Turramurra	1,210	0.3%	0.3%	1,385	176	2,011	2,771	2011	2771	1836	2596	1836	2596
Village	St Ives	47,122	12.4%	10.6%	47,573	451	38,602	57,854	43048	62299	38151	57403	42597	61848
Neighbourhood Centre	St Ives Chase	927	0.2%	0.2%	1,016	89	172	411	172	411	82	322	82	322
Neighbourhood Centre	St Ives North	2,092	0.6%	0.5%	2,326	234	2,086	3,052	2086	3052	1852	2818	1852	2818
Village	Turramurra	28,712	7.6%	7.0%	31,458	2,746	54,118	73,746	49490	69119	51372	71001	46745	66373
Small Village	Wahroonga	11,511	3.0%	2.8%	12,579	1,068	5,782	9,674	5307	9198	4714	8605	4238	8130
Neighbourhood Centre	West Gordon	961	0.3%	0.2%	1,110	148	- 83	100	-83	100	-232	-48	-232	-48
Neighbourhood Centre	West Lindfield	4,485	1.2%	1.2%	5,174	689	374	1,420	-480	567	-316	731	-1169	-122
Neighbourhood Centre	West Pymble	3,622	1.0%	0.8%	3,727	104	3,953	3,048	3953	3048	3849	2944	3849	2944
	TOTAL	379,153	100.0%	100.0%	449,364	70,211	275,606	420,592	275977	421606	205,395	350,381	205,766	351,395

Supply capacity is less than forecast 2006-2031
Supply capacity is more than ten times forecast

After share adjustment, the centres in Hornsby with a significant supply shortfall are: Carlingford Court, Epping, Galston, Pennant Hills, Thornleigh, and Waitara. However, the shortfall in Carlingford Court and Galston is driven by a recorded current supply demand gap rather than strong demand after the share adjustment.

The centres with more than ten times the supply potential to accommodate forecast demand are the industrial areas of: Asquith, Kookaburra Road, Dural Service Centre, Mt Ku-ring-gai, Thornleigh (employment land) and the commercial centres of: Asquith, Beecroft, Berowra, Berowra Heights, Berowra Waters, Cherrybrook, Cowan, Hospital Precinct, Mt Ku-ring-gai centre, Mt Colah Shops, Pennant Hills Road (Thornleigh), Sefton Road (Thornleigh), West Pennant Hills and Westleigh.

After share adjustment, the Ku-ring-gai centres where the existing supply potential is not sufficient to meet the forecast demand are: East Lindfield, Fox Valley, Pymble Office Park, Roseville chase, West Gordon, West Lindfield. However, in most cases the shortfall is small. The only centre with significant supply shortfall to meet the forecast demand is Pymble Office Park.

The centres with more than ten times the supply potential to meet the demand forecast are: Hampden Avenue Shops, Roseville North Wahroonga, Killara, Roseville, South Turramurra, St Ives and Turramurra.

Consideration of Housing Strategies

The additional dwellings proposed in the housing strategies are illustrated in Table 35.

Table 35. Dwelling Additions Implied by the Housing Strategies

Hornsby Centres	Dwelling Additions	Ku-ring-gai Centres	Dwelling Additions
Total	3,625	Total	9,105
TDC	9,161	TDC	8,573
Dwellings Difference	-5,546	Dwellings Difference	532
Persons	**-11,036**	**Persons**	**1,058**

Projected dwelling increases implied by the TDC forecasts have been compared to these additional dwelling numbers to calculate the additional population that is not already accounted for in the 2004 TDC figures.

The notional retail expenditure of this population has been calculated using figures from the ABS Household expenditure survey (inflating to current dollars using CPI and deriving a per capita number). The resultant retail expenditure at each level in the retail hierarchy is shown in Table 37 and Table 36.

Table 36. Hornsby Retail Demand Implied by Housing Strategy Dwelling Additions

Additional Persons in Catchment:	-11,036
Annual P.Capita Expenditure on Shopfront Retailing (NSW Ave.)	$12,185
Total Annual Catchment Expenditure on Shopfront Retailing	-$134,473,660

	Percent Share of Total Expenditure*	Expenditure Capture	Retail Turnover Density ($/sqm)	Supportable Floorspace (sqm)	Existing Floorspace (sqm)	Floorspace Differential (sqm)
Outside Region e.g. Sydney	9.5%	-$12,774,998	NA	NA	0	NA
Major	36.5%	-$49,082,886	$6,000	-8,180	0	-8,180
Town	25.0%	-$33,618,415	$5,850	-5,747	0	-5,747
Village	16.0%	-$21,515,786	$5,250	-4,098	0	-4,098
Small Village	10.0%	-$13,447,366	$4,600	-2,923	0	-2,923
Neighbourhood	3.0%	-$4,034,210	$3,850	-1,048	0	-1,048
	100.0%					

Floorspace Required for new population	-21,997
Assumed 10% Capture of ‘Major Centre’ Spend by Hornsby	78
Total Floorspace Required	-21,918

Table 37. Ku-ring-gai Retail Demand Implied by Housing Strategy Dwelling Additions

Additional Persons in Catchment:	1,058
Annual P,Capita Expenditure on Shopfront Retailing (NSW Ave.)	$12,185
Total Annual Catchment Expenditure on Shopfront Retailing	$12,891,730

	Percent Share of Total Expenditure*	Expenditure Capture	Retail Turnover Density ($/sqm)	Supportable Floorspace (sqm)	Existing Floorspace (sqm)	Floorspace Differential (sqm)
Outside Region e.g. Sydney	9.5%	$1,224,714	NA	NA	0	NA
Major	36.5%	$4,705,481	$6,000	784	0	784
Town	25.0%	$3,222,933	$5,850	551	0	551
Village	16.0%	$2,062,677	$5,250	393	0	393
Small Village	10.0%	$1,289,173	$4,600	280	0	280
Neighbourhood	3.0%	$386,752	$3,850	100	0	100
	100.0%					

Floorspace Required for new population	1,325
Assumed 60% Capture of ‘Major Centre’ Spend by Gordon	471
Total Floorspace Required	1,795

In this modelling we have assumed that 100% of the town, Village, Small Village and neighbourhood expenditure is captured within each LGA. For retail expenditure at the Major Centre, for Hornsby we have assumed 100% capture of expenditure from Hornsby residents plus 10% capture of the Major Centre expenditure of Ku-ring-gai residents. For Ku-ring-gai we have assumed that Gordon is able to capture 60% of the ‘Major Centre’ expenditure that would otherwise leak from the LGA. We should point out that these assumptions are optimistic in terms of retail expenditure capture, in practice the expenditure capture and thus the required retail floorspace is likely to be smaller.

The resultant retail floorspace demand is added to the total adjusted floorspace target for each centre. The distribution of retail is made according to the adjusted retail shares within each centre/ precinct in each LGA and the supply-demand gaps are recalculated.

Given the assumptions outlined above, this part of the analysis should be thought of as a worst case scenario in terms of additional retail demand for the purposes of testing the capacity of the current controls. The results of this process are shown in Table 38 and Table 39

Table 38. Hornsby Supply-Demand Gaps After Consideration of Housing Strategy

			2031 Demand					Supply		Gap	
	Hornsby	2006 FS	Target FS	Addl	Target & Addl	Addl F.Space	80% of	Max FSR	80% of Max	Max FSR
Employment Land (i)	(E) Asquith	206161	223,322	-1328	221994	15833	179059	267605	163,227	251,773
Employment Land (ii)	(E) Dural Service Centre	71934	76,266	-974	75292	3358	145414	196809	142,056	193,451
Employment Land (i)	(E) Mt Ku-ring-gai	115705	125,475	-212	125263	9558	354438	467910	344,880	458,352
Employment Land (i)	(E) Thornleigh	140360	132,879	-692	132186	-8174	51637	94372	59,811	102,546
Neighbourhood Centre	Appletree Dr-Cherrybrook	1589	1,761	-29	1732	143	-11	324	154	180
Village	Asquith	7402	11,921	-155	11766	4364	13610	19305	9,246	14,941
Village	Beecroft	11528	15,595	-208	15387	3859	10301	15813	6,441	11,954
Small Village	Berowra	6151	6,693	-127	6566	414	13166	17840	12,752	17,426
Small Village	Berowra Hts	11497	11,635	-231	11405	-93	13242	18990	13,335	19,082
Neighbourhood Centre	Berowra Waters	1359	1,523	-32	1492	133	6583	8583	6,450	8,450
Neighbourhood Centre	Brooklyn	4368	4,782	-100	4682	315	4052	6396	3,738	6,081
Stand Alone Shopping	Carlingford Court	45499	49,368	-974	48394	2895	-3024	5370	5,918	2,475
Village	Cherrybrook	12393	12,830	-272	12558	164	17690	24597	17,526	24,433
-	Cowan	263	282	-6	276	13	198	360	186	347
-	Dangar Is	0		0	0	0	-108	14	108	14
Neighbourhood Centre	David Rdr-Castle Hill	3013	3,292	-60	3233	219	-116	496	335	277
Neighbourhood Centre	Edgeworth David Ave-Waitara	2489	2,678	-58	2620	132	-12	513	144	382
Town Centre	Epping	62550	70,639	-844	69795	7245	5167	21831	2,078	14,586
Neighbourhood Centre	Galston	4189	4,219	-81	4138	-50	-3792	-1759	3,741	1,709
Neighbourhood Centre	Galston Rd-Hornsby Hts	1161	1,245	-27	1218	57	-59	173	116	116
Major Centre	Hornsby	419696	615,681	-10919	604761	185065	218658	394835	33,592	209,770
-	Hospital Precinct	59788	61,112	-471	60641	853	23936	42844	23,083	41,991
Employment Land	(E) Kookaburra Road	6336	6,568	-37	6531	195	4711	7235	4,516	7,040
-	Kuringai	1114	1,156	-26	1131	17	486	844	469	827
Neighbourhood Centre	Malton Rd-North Epping	1808	1,891	-42	1849	41	208	644	167	603
Neighbourhood Centre	Mt Colah Shops	2978	3,094	-66	3028	50	5859	8153	5,808	8,103
Neighbourhood Centre	Mt Colah Stn	1502	1,671	-32	1639	137	438	1032	301	895
Neighbourhood Centre	Myrtle St-Normanhurst	660	690	-13	677	17	-180	-85	197	102
Neighbourhood Centre	Normanhurst	1770	1,864	-38	1826	56	-454	-83	510	139
Village	Pennant Hills	84349	87,154	-1437	85717	1368	1158	19371	211	18,002
Neighbourhood Centre	Pennant Hills Rd-Thornleigh	12941	9,151	-140	9011	-3931	-22	3013	3,908	6,944
Neighbourhood Centre	Plymton Rd Shops-Epping	1522	1,652	-35	1617	94	-25	292	120	197
Neighbourhood Centre	Sefton Rd-Thornleigh	1292	1,456	-18	1438	146	8353	10823	8,207	10,677
Neighbourhood Centre	Somerville Rd-Hornsby Hts	0	-	0	0	0	-118	269	118	269
Village	Thornleigh	63204	67,906	-1071	66835	3631	-5361	6522	8,992	2,891
Village	Waitara	33929	40,300	-806	39493	5564	-4678	2136	10,242	3,428
Small Village	West Pennant Hills	7385	7,099	-121	6978	-407	7732	11234	8,139	11,642
Small Village	Westleigh	8399	7,869	-142	7727	-672	6365	9741	7,037	10,413
Neighbourhood Centre	Wiseman's Ferry	3051	3,683	-83	3600	549	282	1043	267	494
	Yallambee Road	559	624	-13	610	51	-102	209	153	157
	TOTAL	1421897	1,677,024	-21997	1655027	233131	1074681	1685614	841,550	1,452,483
	Mt Ku-rin-gai constrained land						138865	198445	129,308	188,887
	TOTAL minus constrained land						859109	1416149	625,900	1182940

Supply capacity is less than forecast 2006-2031 demand

Supply capacity is more than ten times forecast 2006-2031

Table 39. Ku-ring-gai Supply-Demand Gaps after Consideration of Housing Strategy

			2031 Demand				Supply DLEP		Supply KPSO		Gap DLEP		Gap KPSO	
	KRG	2006 FS	Addl Retail	Target FS	Target & Addl	Total Addl FS	80% of Max	Max	80% of Max	Max FSR	80% of Max	Max FSR	80%of Max	Max FSR
Neighbourhood Centre	East Killara	1137	6	1,250	1256	119	720	1141	720	1141	601	1,022	601	1,022
Neighbourhood Centre	East Lindfield	1309	7	1,478	1484	175	-295	-91	-295	-91	- 470	- 266	- 470	- 266
Neighbourhood Centre	Eastern Rd-Turramurra	1290	7	1,404	1411	121	704	1154	704	1154	583	1,034	583	1,034
Neighbourhood Centre	Fox Valley	2863	11	3,140	3151	288	-121	456	-121	456	- 409	169	- 409	169
Town Centre	Gordon	99034	881	127,659	128540	29507	97387	141590	93726	137929	67,881	112,083	64,219	108,422
	Grosvenor Street	0	0	-	0	0	0	0	0	0	-	-	-	-
Neighbourhood Centre	Hampden Ave Shops	868	4	944	948	80	1901	2561	1761	2421	1,822	2,482	1,681	2,341
Neighbourhood Centre	Killara	378	2	482	484	106	509	717	509	717	403	611	403	611
Village	Lindfield	37631	135	43,381	43516	5886	30622	46274	29941	45593	24,737	40,389	24,056	39,708
Neighbourhood Centre	North Turramurra	4989	20	5,966	5986	997	1648	3121	1648	3121	652	2,124	652	2,124
Neighbourhood Centre	Princes St-Turramurra	1328	7	1,496	1502	174	591	1021	473	903	417	847	299	729
Small Village	Pymble	18775	59	21,236	21296	2521	12525	19646	12302	19423	10,004	17,125	9,781	16,902
	Pymble Office Park	88999	180	114,580	114760	25761	6349	26848	11255	31754	- 19,412	1,088	- 14,506	5,993
Small Village	Roseville	17528	60	17,363	17423	-106	15802	23258	15029	22486	15,907	23,364	15,135	22,592
Neighbourhood Centre	Roseville Chase	2383	13	2,639	2651	268	249	817	249	817	- 19	550	- 19	550
Neighbourhood Centre	South Turramurra	1210	7	1,385	1392	183	2011	2771	2011	2771	1,829	2,589	1,829	2,589
Village	St Ives	47122	187	47,573	47760	638	38602	57854	43048	62299	37,964	57,216	42,409	61,661
Neighbourhood Centre	St Ives Chase	927	5	1,016	1021	94	172	411	172	411	78	318	78	318
Neighbourhood Centre	St Ives North	2092	11	2,326	2337	245	2086	3052	2086	3052	1,841	2,807	1,841	2,807
Village	Turramurra	28712	108	31,458	31566	2854	54118	73746	49490	69119	51,264	70,893	46,636	66,265
Small Village	Wahroonga	11511	46	12,579	12626	1115	5782	9674	5307	9198	4,667	8,559	4,192	8,084
Neighbourhood Centre	West Gordon	961	5	1,110	1114	153	-83	100	-83	100	- 236	-53	- 236	- 53
Neighbourhood Centre	West Lindfield	4485	18	5,174	5192	708	374	1420	-480	567	- 334	712	- 1,187	- 141
Neighbourhood Centre	West Pymble	3622	16	3,727	3743	121	3953	3048	3953	3048	3,832	2,927	3,832	2,927
	TOTAL	379153	1325	449,364	450689	71536	275606	420592	275977	421606	204,071	349,057	204,441	350,070

Supply capacity is less than forecast 2006-2031 demand
Supply capacity is more than ten times forecast 2006-2031

After taking account of the additional retail floorspace implications of the housing strategy, the centres in Hornsby with a significant supply shortfall are the commercial centres of: Carlingford Court, Epping, Galston, Thornleigh and Waitara. However, again, we should note that the shortfall in Carlingford Court and Galston is driven by a recorded current supply demand gap rather than strong forecast demand growth.

The centres with more than ten times the supply potential to accommodate forecast demand are the industrial areas of: Asquith, Kookaburra Road, Dural Service Centre, Mt Ku-ring-gai, Thornleigh and the commercial centres of: Berowra, Berowra Heights, Berowra Waters, Brooklyn, Cherrybrook, Cowan, Hospital Precinct, Ku-ring-gai, Malton Road, Mt Colah Shops, Pennant Hills Road (Thornleigh), Sefton Road (Thornleigh), West Pennant Hills and Westleigh.

After taking account of the additional retail floorspace implications of the housing strategy, the Ku-ring-gai centres where the existing supply potential (under the Draft LEP) is not sufficient to meet the forecast demand are: East Lindfield, Fox Valley, Pymble Office Park, Roseville chase, St Ives chase, West Gordon and West Lindfield. However, in most cases the shortfall is small and the only centre with significant supply shortfall to meet the forecast demand is Pymble Office Park.

The centres with more than ten times the supply potential to meet the demand forecast are: Hampden Avenue Shops, Roseville, South Turramurra, St Ives, Turramurra and West Pymble.

In Ku-ring-gai, the HillPDA Retail strategy has previously derived retail floorspace forecasts for the requirements for key retail centres. Comparison of the outputs of this study with the Hill PDA figures is given in Table 40.

Table 40. Comparing Projected Floorspace Additions (sqm)

	HillPDA	SGS (baseline & SR targets)	SGS (after share adjustment)	SGS (after share adjustment + housing strategy addl retail)
Gordon	45,000	22,081	28,625	29,507
St Ives	12,000	3,632	451	638
Turramurra	4,000	2,135	2,746	2,854
Lindfield	6,000	5,751	5,751	5,886

The SGS additional floorspace forecasts are generally lower than the Hill PDA forecasts when the additional retail requirements of the housing strategy are considered. This is likely to be the result of optimistic retail expenditure capture assumptions in the Hill PDA retail modelling. Likely differences are also driven by the different methodological approaches of the two studies. In the HillPDA work, retail floorspace requirements have been calculated from the estimated capture of retail expenditure and the translation of these dollar values to floorspace figures given the estimated retail turnover densities for retail operations. In this study, the floorspace requirements have been calculated from TDC forecast employment figures with an adjustment for any difference between TDC assumed population numbers and current planning for residential development.

The difference between the SGS and Hill PDA figures for Gordon reflect the high aspirations for Gordon in the HillPDA work (in contrast, the minimal expansion figures in the HillPDA study are for 15,000 sqm). The greatest contrast between the two sets of figures is for St Ives. At the share adjustment phase in this study, attention has been focussed on the largest centres and most accessible centres for office type land uses and higher order retail. For St Ives, this means a reduced share of the projected growth in higher order retail and office based employment and floorspace. This gives a low additional floorspace total of 638 sqm. Without any share adjustment, the total additional floorspace requirement for St Ives is 2,135 sqm.

7 Recommendations

7.1 Economic Trends & Opportunities

Industry & Occupation Trends

The research completed as part of this Study has uncovered a numbers of economic trends and opportunities for the sub-region. These are summarised as follows:

- **Balance of 'local service' and 'employment destinations'**. Both the Metropolitan Strategy and the Draft North Subregional Strategy provide a clear indication that economic growth should be concentrated in centres – particularly those at the top end of the centres hierarchy. For the North Subregion, this means a renewed focus on Hornsby as an employment and activity centre. However, the land use audit has clearly shown that many of the smaller centres in the sub-region are fulfilling 'higher order' functions - providing destination employment opportunities and in some cases regional service functions.
- **Importance of health and education**. Employment in health and education is very high in the sub-region. In 2006, health and education were among the top 5 employing sectors in both LGAs. In addition, health and education industry sectors have displayed the strongest growth in the 2001-2006 period.

  There are several key institutions responsible for some of these jobs. In Hornsby, the Hospital and TAFE are key employers. In Ku-ring-gai, the two most significant 'magnet institutions' are the Sydney Adventist Hospital and UTS Lindfield campus.

  One of the challenges for the Study is that while these institutions are large employers, Councils will typically have limited control in their planning and future growth
- **Leakage of employment activity**. In broad terms, origin-destination analysis has shown that there are fewer jobs in the Manager and Administrator and Professionals & Associate Professional categories than there are workers – suggesting a 'leakage' of employment. This is particularly marked for these occupation categories in the construction sector. While this is true for both LGAs, for Ku-ring-gai, there is a greater level of employment leakage in general and as with Hornsby, the leakage is more pronounced in the Managers and Administrators and Professionals & Associate Professionals categories.

  While the leakage of higher order employment may simply be related to the fact that the sub-region has a disproportionate level of executive housing. On the business side of the equation, it is just as possible that there is a lack of higher order job opportunities in the sub-region for its executive resident workers.
- **Declining Industrial employment**. Driven by forecast decline in manufacturing employment, demand for heavy manufacturing (MH) and light manufacturing (ML) floorspace is forecast to decline by 11,275 sqm and 11,806 sqm respectively. Declining industrial employment and associated land requirements will obviously impact on the demand for land in the industrial areas.

- **Home based work**. Compared with other regions in Sydney GMR, Hornsby-Ku-ring-gai has the highest levels of home based work and has shown significant growth in the 1996-2001 period. In Hornsby, the highest incidence of home based work occurs in the 'Professionals' and 'Associate Professionals' category followed by 'Clerical and Service' workers. Particularly high levels occur in the 'Property & Business Services' and 'Construction', 'Manufacturing' and 'Wholesale Trade' categories. In Ku-ring-gai, the highest incidence of home based work occurs in the 'Professionals' and 'Associate Professionals' category followed by 'Clerical and Service' workers. Particularly high levels occur in the Communication Services industry category with significant proportions also in Government Administration & Defence.

  Home based work does not appear to be a temporary state of business operation. Through consultation home based workers in the sub-region have suggested that work from home is driven by the benefits of this way of working rather than any shortage of suitable business space elsewhere.

  The attraction of home based work is flexibility in work hours and the avoidance of a commute to work. Thus, incidence of home based work is usually highest in areas that are distant from employment centres. Home based work is also often high in areas with high quality natural environments. Home-based work is also attractive to mature age and disabled workers. With older populations of Hornsby and Ku-ring-gai may benefit from the lifestyle change that home-based work can offer and as with all fringe areas in the Sydney Metropolitan area it can provide greater employment opportunities, particularly in places where there is not a large variety of work options.

  While home based work certainly present economic opportunities in the sub-region, it is also important to note that (i) home based occupations are not necessarily 'higher order' jobs and (ii) that the promotion of home based work should not compromise centres strategy.

- **Actual and perceived accessibility**. Both of the LGAs in the sub-region have arterial infrastructure as a spine for economic activity. The North Shore rail line, with the Pacific Highway running in parallel dominate Ku-ring-gai LGA with the commercial centres scattered along its length. Similarly, in Hornsby, the Northern Line and the North Shore line with the Pacific Highway running to the north dominate patterns of economic activity.

  The accessibility of employment lands to this infrastructure is vital for many industries. Most obviously, time dependant industries such as transport and storage, distribution, and logistics functions require arterial road access. However, many other sectors require both accessibility to and visibility from he main roads. Examples here include Bulky Goods Retail, larger office functions and 'business park' land uses.

  Proximity to transport nodes is important for land uses that generate large numbers of trips – especially those that draw activity from a wide catchment. These types of uses are higher order retail functions (larger shopping centres and Bulky Goods Retail), office functions and central community services.

- **Movement of low-density operations**. With the growth in logistics and warehousing the amount of land consumed per employee has increased and this has accelerated demand for large lots on the urban fringe. At face value, high levels of land availability and good infrastructure access should make the sub-region an attractive location for these industries.

7.2 Strategic Directions

Table 41. Strategic Directions

Strategic Direction	Issue	Action
Strengthen Hornsby's Position as the Major Centre	- Evidence of residential encroachment in commercial centre - There is a leakage of professional jobs from the sub-region - Hornsby centre has a low level of existing office activity - Hornsby is the administrative centre for the LGA - Hornsby has a strategic position with respect to transport infrastructure	- Zone commercial core to discourage residential development with adjoining Business Development zone to 'free up employment opportunities - Provide planning incentives for office activity - Examine potential to redevelop sites in public ownership ('build in' additional commercial floorspace potential) - Initiate place making activity - Work with owners and target pre-commitments for strategic commercial sites
Consolidate the Position of Gordon/ Pymble Office Park	- Gordon/ Pymble acts as a key employment centre for Ku-ring-gai - Gordon is the administrative centre for the LGA - Gordon has a strategic position with respect to transport infrastructure - Gordon and Pymble office park are currently considered as separate centres	- Increase FSRs in Pymble Office Park - Encourage retention of office in north Gordon - Improve connectivity between Gordon and Pymble office park - Discourage retail development at Pymble office park - Consider combined approach to Pymble/ Gordon as a single centre
Strengthen Town Centre Roles with Office and Higher Order Retail	- Gordon and Epping should have some higher order retail and office activity - Office activity at Epping should not detract from Hornsby's Major Centre status - Growth at St Ives should not detract from growth at Gordon	- Limit development capacity at centres with very high excess supply - Increase FSRs at Epping - Encourage centralised services for HBW and live-work developments in centres - Limit development capacity at St Ives - No change to development capacity at Carlingford Court
Reinforce the Local Service Role of Villages, Small Villages & Neighbourhood Centres	- Significant higher order retail and employment use exists at some smaller centres - these would be more appropriate at town & Major Centres	- Limit development capacity at Village, Small Village and Neighbourhood Centres that have very high excess supply - Encourage centralised services for HBW in centres - No change to development capacity at Galston
Expand the Local Service Role of Dural Service Centre	- Current zoning does not permit significant retail or service activity - Centre has inadequate infrastructure for higher order retail and employment functions	- Apply Light Industrial and Local Centre zones to broaden permissible uses - Discourage uses that draw on a wide catchment and generate significant trips - Broaden the range of permissible uses to include local level retail and professional services
Protect Existing Strategic Industrial Centres	- There is forecast decline in industrial employment in the subregion - Hornsby Shire's industrial land is competitively placed to attract industrial activity	- Maintain capacity at strategic industrial areas - Initiate economic development activity to target industrial users

Figure 68. Strategic Directions for Hornsby North

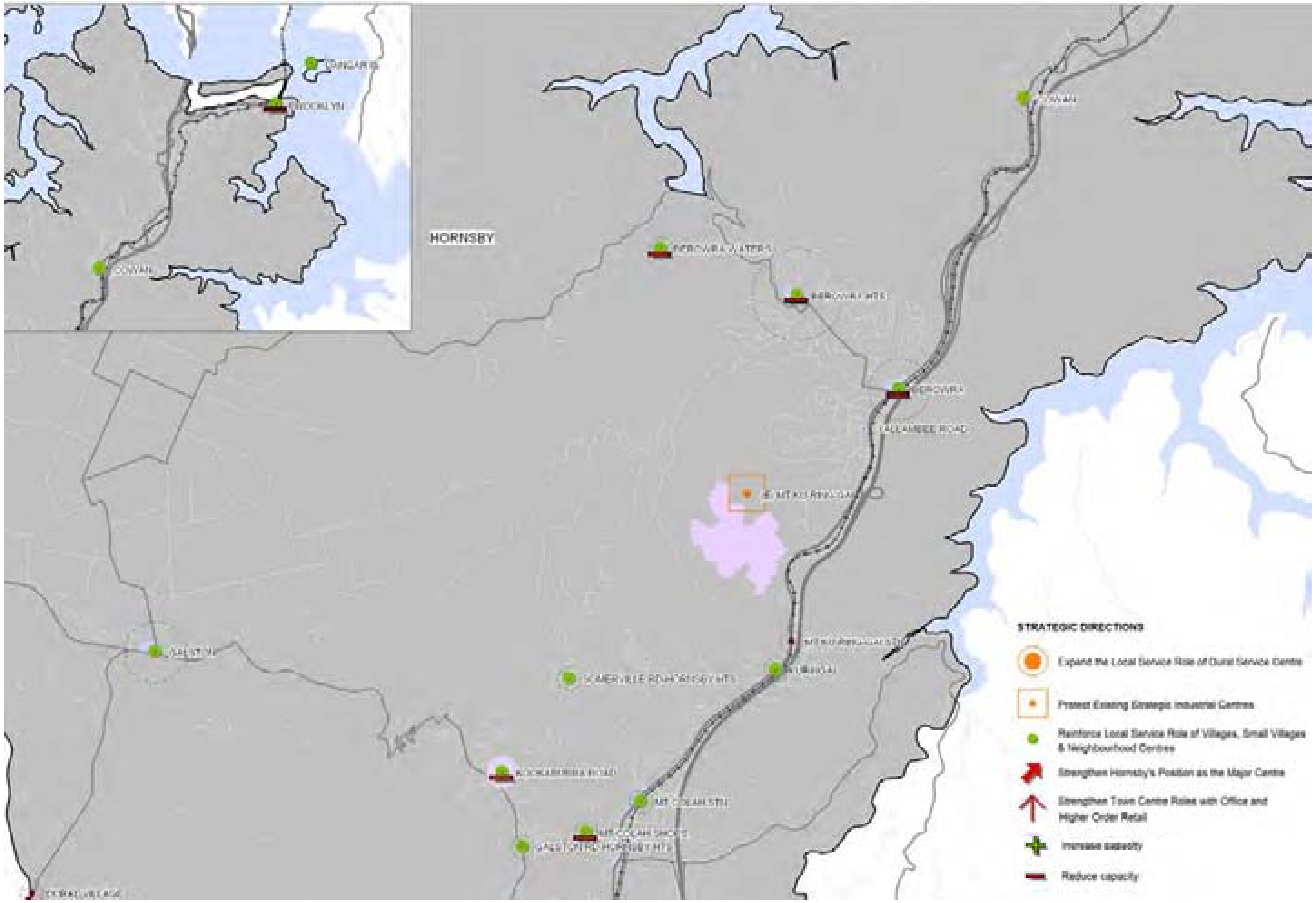


Figure 69. Strategic Directions for Hornsby South

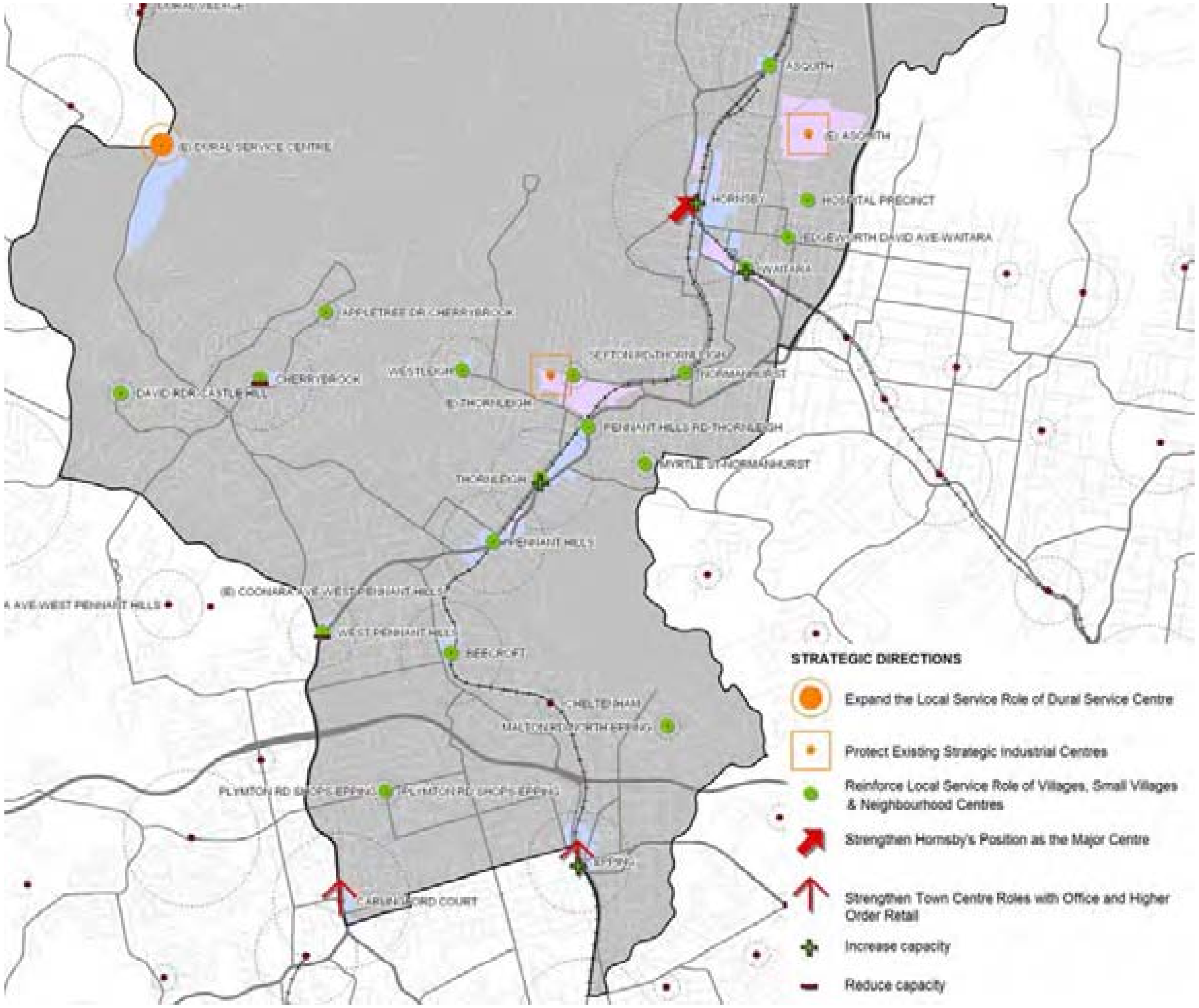
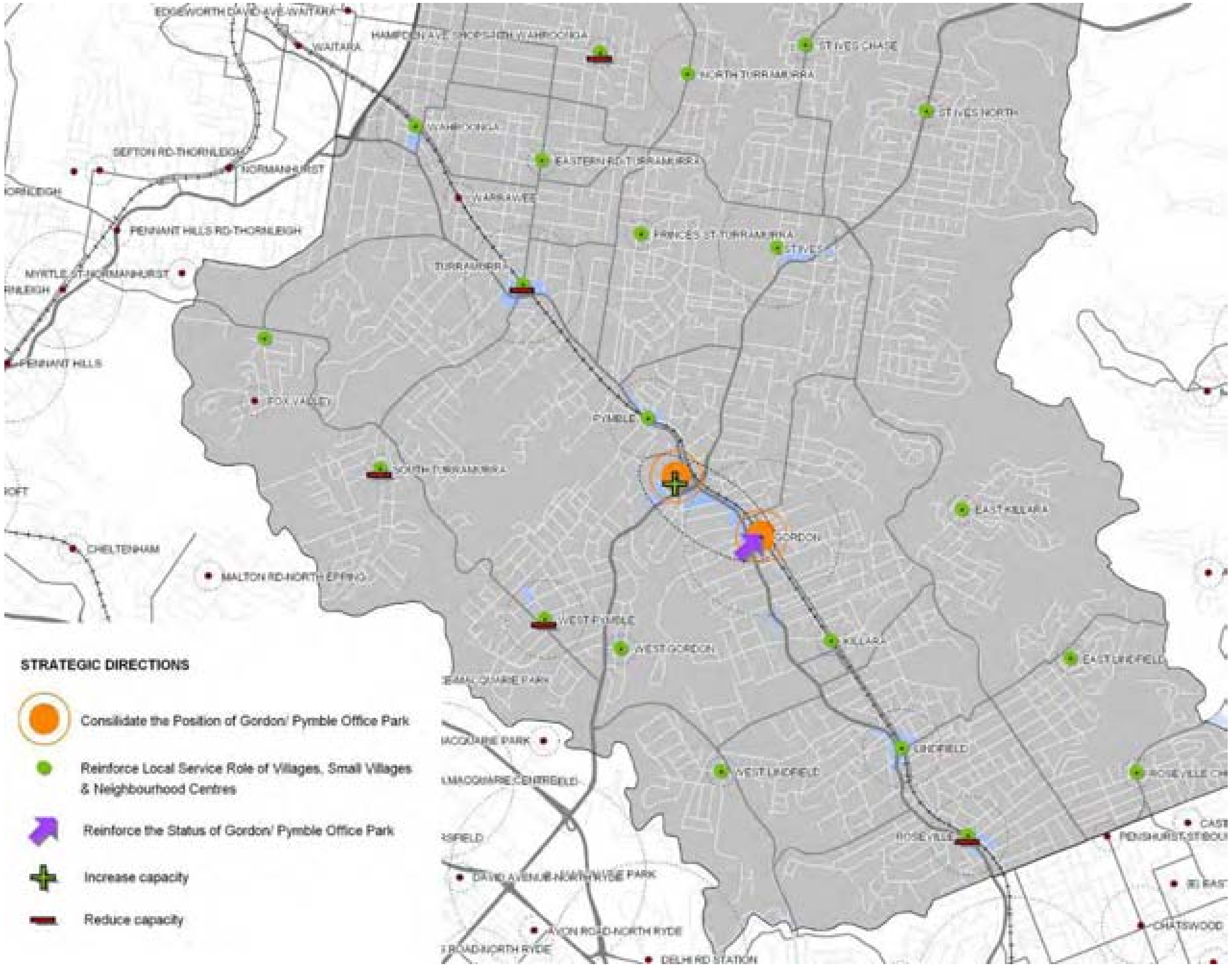


Figure 70. Strategic Directions for Ku-ring-gai



Consideration of Subregional Strategy

Table 42. Consideration of Subregional Strategy elements

Subregional Strategy Direction	Notes
Job target of 13,500 jobs for the sub-region	There is sufficient potential supply to accommodate the Subregional target and forecast demand in the period 2006-2031.
Job target of 4,500 jobs for Hornsby	There is sufficient potential supply to accommodate the Subregional target and forecast demand in the period 2006-2031.
Job target of 3,000 jobs for Ku-ring-gai	There is sufficient potential supply to accommodate the Subregional target and forecast demand in the period 2006-2031.
Wider uses at Dural Service Centre	The Standard Instrument contains three industrial zonings. The IN3 Heavy Industrial zone includes a number of heavy and hazardous usages and as a result is unlikely to be appropriate in Hornsby. Therefore there are just two industrial zones that can be used throughout the industrial areas of the LGA. Recommended zoning for the Dural Service Centre is IN2 – light industrial. In order to allow a wider range of uses a specific area could be set aside as B2 Local Centre to permit additional desirable uses that are not permissible in the IN2 zone.
Wider uses for Hornsby industrial zones	Given the proximity to rail and Hornsby commercial centre, additional employment uses are desirable in these locations. B5 Business Development zone is proposed for the area north of Linda Street bound by Hunter and George Streets and for the industrial strip running along Jersey Street. By permitting light industry uses in the B5 Business Development zone this change of zoning will not restrict the operation of business currently in the area. It might typically be expected that retail uses are restricted in the B5 zone (perhaps to neighbourhood shops and bulky retail) to ensure these areas do not draw retail away from established centres. However given the dominance of retailing in the southern portion of the Hornsby this restriction may not be necessary in the Hornsby version of the Standard Instrument.
Expansion of Hornsby commercial centre	The expansion of Hornsby centre is appropriate given its status in the centres hierarchy. Attention should be given to the low proportion of office floorspace in the centre. B3 is recommended for the central area. As a Major Centre Hornsby needs to provide opportunities for significant future employment growth, particularly office based employment. A designated commercial core area must be protected from residential encroachment if the centre is to realise this aspiration. In additional to a commercial core on the eastern side of the centre,

	increasing opportunities for large-scale commercial development on the western side of the centre, in locations close proximity to the station, would increase capacity of the centre considerably and should be considered. Hornsby Station itself and the adjacent areas currently occupied by commuter parking would also be a potential catalyst location for commercial development. Redevelopment of the station would provide the means of achieving a better knitting together of the eastern and western sides of the centre. Exclusion of residential development and expansion of the commercial core area would provide a strong signal to the market that Hornsby has serious aspirations as a Major Centre.
Enterprise Corridors	Enterprise Corridors are appropriate on Pennant Hills Road at Thornleigh, Pennant Hills and along the Pacific Highway at Waitara. Enterprise Corridors zoning should generally be applied to areas that are immediately adjacent busy roads and therefore have high expose to passing traffic and good access to major arterial routes. In these locations in Hornsby the Enterprise Corridor zoning should be applied to those lots that immediately adjacent the busy road. Other employment land that is located within the same corridor but not immediately adjoining the road may be zoned for industrial use or an alternative commercial zoning as is appropriate.

'Major' and 'Town' Centres

- **Current position**. As detailed in the Subregional Strategy, a Major Centre is expected to be a major shopping and business centre serving immediate and the Subregional residential population usually with a full range shopping mall, council offices, taller office and residential buildings, central community facilities, and a minimum of 8,000 jobs.

  Hornsby is the Major Centre in the sub-region. It accounts for a very high proportion of the total employment and floorspace in all non-industrial BLCs. Hornsby provides as an administrative and commercial centre for the sub-region, hosts as TAFE and hospital precinct and has a target of 3,000 additional jobs in the 2006-2031 period. Hornsby centre currently has a predominantly retail focus with the Westfield shopping centre contributing to a substantial total retail floorspace figure. The broad split of land uses is 15% industrial, 61% retail, 13% office, 10% special uses, 1% residential.

  Town Centres are expected to have one or two supermarkets, community facilities, medical centre, schools, etc. They are expected to contain between 4,500 and 9,500 dwellings and are usually a residential origin rather than an employment destination.

  Epping Town Centre with a total of 62,550 sqm of employment floorspace is much smaller than Hornsby but still accounts for a significant share of office floorspace (over 10% of the total in the Shire). This proportion is high considering the existence of Hornsby as a Major Centre and the Town Centre status of Epping. At a very broad level, the land use split in Epping is 34% industrial, 30% retail, 31% office, 4% special uses, and 1% retail.

In Ku-ring-gai, Gordon is the only Town Centre. Gordon is the administrative centre for the LGA and provides large volumes retail and service floorspace. However, the bulk of the office floorspace is provided at the neighbouring Pymble office park. In the case of Gordon Town Centre, its role as a residential origin rather than employment destination is not well defined. In very broad terms, the split of land use in Gordon is 16% industrial, 45% retail, 30% office, 9% special uses, and 1% residential.

- **Forecast**. For Hornsby centre, after taking into account the baseline TDC forecast, the Subregional targets, additional retail demand implied by the housing strategy and adjusting for a greater share of office employment, there is still excess supply of 33,592 sqm.

  For Epping centre, after taking into account the baseline TDC forecast, the Subregional targets, additional retail demand implied by the housing strategy and adjusting for a greater share of office employment, there is a small supply shortfall of 2,078 sqm.

  For Gordon centre, after taking into account the baseline TDC forecast, the Subregional targets, additional retail demand implied by the housing strategy and adjusting for a greater share of office employment, there is still excess supply of 67,887 sqm.

- **Opportunities and threats**. For Hornsby, there is an opportunity to increase the profile of the centre as a commercial office centre as well as retail centre. From an economic development perspective this may play an important role in helping to achieve a higher proportion of resident professional workers remaining within the Shire. Hornsby centre has the advantage of its central position, railway station, and status as the administrative and service centre of the LGA. However, the centre is divided by the railway line and is perceived as a retail rather than employment centre.

  For Gordon, the existence of the Pymble office park, while helping to grow employment, may also threaten to shift the centre of gravity away from the 'Village heart' of the centre. Care should be taken to limit the degree of retail development permissible in Pymble Office Park.

  For the development of Hornsby and Gordon/ Pymble Office Park as employment destination, we must also consider the 'threat' of competitor employment locations outside of the sub-region. Macquarie Park and Chatswood should be considered the most significant threats to retail/ business attraction to Gordon/ Pymble Office Park and both have the advantage of high quality arterial road access.

  There is an opportunity for Gordon to create a distinct 'niche' here – to become a unique destination, not compete head to head with Major Centres. It could aim to develop as an 'upmarket' fashion and food precinct. A limited 'non retail' employment base at Gordon reduces the effective catchment of this Town Centre if it operates predominantly for resident shopping, and residents work elsewhere; need to create a more complex Town Centre dynamic with mix of retail and other employment, and attractive centre for nearby residents

- **Strategy**. To re-position Hornsby as a commercial (office) centre as well as a regional retail and service centre will require some intervention. There are several strands to this, including:
  - *Application of the zones recommended in this Study*. The 'accepted' wisdom for commercial centre is that they don't really work where residential development is also a permissible use. This is for a couple of reasons (i) Potential for residential development pushes up land values making commercial development less (and usually

not) viable, (ii) Larger commercial tenants are looking for purely commercial address/environment, i.e. they want to operate their business among commercial developments. For these reasons, a zoned commercial core is important.

- *Planning incentives for office activity*. Some planning control incentives, such as FSR bonuses, may also be beneficial in attracting a higher share of office activity.
- *Achieving critical mass through key site development.* A critical mass of potential commercial development is probably also important. A small commercial 'core' will always struggle to achieve the same quality of business address when compared to larger centres. Of course, overcoming the inertia of the centre will be difficult. The development of key sites in public ownership can play a key role here. The council offices on George Street may have some potential in this respect.
- *Economic development action to attract 'pre-commitments' to the commercial sites.* After a site by site assessment of development sites and amalgamation possibilities, industry targeting would be appropriate to encourage pre-commitments for commercial development sites.
- *Place making activity. Dominance of retail (particularly in Hornsby) is also likely to reduce the appeal for large scale commercial development.* The perception of the centre *as* a retail destination, whilst convenient for workers, may not attract 'big business'. Some of the required action here is at the marketing level and links with the economic development point above. Also important here is some consideration of the environment for business in the centre. Increased modal spilt to public transport, improved links between the east and west side of the centre and other urban design improvements will assist in re-positioning the centre.

In additional to a commercial core on the eastern side of the centre, increasing opportunities for large-scale commercial development on the western side of the centre, in locations close proximity to the station, would increase capacity of the centre considerably and should be considered.

Hornsby Station itself and the adjacent areas currently occupied by commuter parking would also be a potential catalyst location for commercial development. Redevelopment of the station would provide the means of achieving a better knitting together of the eastern and western sides of the centre.

Exclusion of residential development and expansion of the commercial core area would provide a strong signal to the market that Hornsby has serious aspirations as a Major Centre.

It is important here that the activity is seen as part of a *real change* in the centre and not merely superficial activity. For this reason, the actions should combine as a suite of activity to re-position the centre as an employment destination.

For Epping, developing strategic directions is difficult (if not impossible) without having equally detailed knowledge of land use on the Parramatta LGA side centre. While the centre is strategically located with respect to transport infrastructure, its position as employment centre should not be allowed to compromise the position of Hornsby centre if the strategy for Hornsby centre is to succeed. Epping's location also makes the centre a good candidate for increased residential density to encourage local population growth and support growth in local retail and services. While we expect that retail activity on the Parramatta side of the centre gives the centre a better economic balance than is evident in the analysis of the Hornsby LGA side's data alone, increased residential density will further drive the need for local retail and services. Coordination with Parramatta Council is recommended to achieve consistent approaches to zoning, development densities, parking rates and public domain strategies. We understand that the Department of Planning, in conjunction with Hornsby Council, is progressing a study of Epping and its immediate environs.

For Gordon, Business Park zoning in the adjacent Pymble office park with strict limits on retail activity will assist in promotion of economic growth in Gordon centre. Gordon should be positioned to accommodate a greater share of the LGA's growth in the future – particularly against the growth of St Ives given Gordon's position with respect to transport infrastructure and its status as the administrative centre of the LGA. However, it is not reasonable to expect Gordon to recapture *all* of the retail expenditure that currently 'escapes' outside of the LGA. As stated above, there may be opportunity for Gordon to position itself as a centre with a 'premium' retail offer aimed at the upper end of the socio-economic spectrum. Possible interventions to help achieve this might include:

– *Increased activity around the station*. Taking the retail activity closer to the station entrance will enhances safety and security and will create passing traffic for retailers. Ground level retail frontages to both sides of Wade Lane are desirable (this will require some reconfiguration, the creation of arcades, amalgamation of shops, and new servicing arrangements. Opportunities should also be seized to take retailing closer to the station entrance.

– *Limitation of the length of the centre 'strip'.* The length of the retail at Gordon should be limited to about 600 metres (the current distance between Merriwa Street and Church Hill Lane) to provide for as compact and 'walkable' a centre as possible.

– *Encourage further development of community/ cultural hub*. Develop civic precinct as a community activities 'hub' in any redevelopment, e.g. look to redevelop library in time as a learning / education centre (with private colleges etc, to bring additional activity to centre).

– *Promotion of Gordon Centre as the Retail Anchor.* The enclosed Gordon centre should be supported as the retail anchor. The existing bridge connection across the road may be too narrow to create a sense of continuity of activity.

– *Increased connectivity between Gordon and Pymble Office Park*. There is an opportunity to help develop Gordon and Pymble Office Park through considering the two areas together in planning activity and encouraging a greater level of connectivity between the two.

In further developing strategy for Gordon and Pymble Office Park it may be appropriate to consider both areas together. An expanded role for the Gordon/ Pymble Office Park area may help to address the noted decline in professional services jobs that Ku-ring-gai has experienced in the inter-censal period. This aim should be to promote greater connectivity between the two areas while recognising the different economic and social function that each area performs.

Villages and Small Villages

- **Current position**. As described in the Subregional Strategy, a Village Centre is expected to have a strip of shops, and surrounding residential area, within a 5 to 10 minute walk and containing a supermarket, hairdresser, take-away food shops, and containing between 2,100 to 2,700 dwellings. A Small Village is expected to consist of a small strip of shops and adjacent residential area within a 5 to 10 minute walk and contain between 800 and 2,700 dwellings

  In both Hornsby and Ku-ring-gai, centres at the Village and Small Village level host relatively high proportions of land uses usually found in larger centres. This is particularly pronounced in Ku-ring-gai where Lindfield, Turramurra and St Ives, each with Village status, host a significant share of the total LGA's office floorspace 8.4%, 4.1% and 3.7% respectively.

  Despite the high office component however, Villages and Small Villages in the sub-region do have higher retail (especially Main Street Retail) proportions than town and Major Centres. This is in line with expectations of the role of centres at this position in the hierarchy.

- **Forecast**. Forecast growth at the Village and Small Village level is generally much lower than the potential supply at this level. Many of the centres at this level in the hierarchy have more than ten times the supply to accommodate the forecast demand in the 2006-2031 period.

- **Opportunities and threats**. With such high growth potential at this level in the hierarchy, there is a risk that floorspace uptake will jeopardise the strategy to concentrate growth in the major and Town Centres.

- **Strategy**. In Hornsby, consideration should be given to reducing capacity at the employment land in the commercial centres of: Berowra, Berowra Heights, West Pennant Hills and Cherrybrook as these centres have more than ten times the supply potential to accommodate demand. Westleigh is not included here as it is an area of high historic population growth. Capacity should also be increased at Thornleigh given the supply shortfall.

  In Ku-ring-gai consideration should be given to reducing capacity at Roseville, and Turramurra as these centres have more than ten times the supply potential to accommodate demand. While capacity reduction at St Ives may also be considered given the high excess capacity at this centre we are aware of the considerable planning for growth around this centre given the proposed residential additions and strategic bus corridors. We recommend that capacity is not increased and that careful attention should be given to development that might jeopardise strategy for Gordon centre.

  Reducing capacity at some of these centres with very high levels of excess supply will help to focus economic activity on the key centres as identified in the centres hierarchy.

Neighbourhood Centres

- **Current position**. As described in the Subregional Strategy, Neighbourhood Centres are expected to consist of one or a small cluster of shops and services with between 150 and 300 dwellings. We would expect Neighbourhood Centres to host predominantly local service functions with very small trade areas.

  In Hornsby, the Neighbourhood Centres typically fit the template, with retail activities (usually Main Street Retail) dominating activity. In very broad terms the land use split in Neighbourhood Centres is: 22% industrial, 64% retail, 6% office, 8% special uses and 1%

residential. Industrial activity at this level is almost exclusively local light industry. Similarly, office land uses are typically small service operations rather than major employers.

In Ku-ring-gai, the Neighbourhood Centres have a similar profile. In broad terms, the land use split is: 18% industrial, 67% retail, 5% office, 9% special uses and 1% residential. Again, industrial activity at this level is almost exclusively local light industry.

- **Forecast**. The forecast floorspace demand at some of the Neighbourhood Centres in both LGAs is low compared to the available supply. In Hornsby, there are 6 Neighbourhood Centres with capacity at more than ten times the demand forecast in the 2006-2031 period. These are Berowra Waters, Brooklyn, Mt Colah Shops, Pennant Hills Road (Thornleigh), and Sefton Road (Thornleigh).

  In Ku-ring-gai, most of the Neighbourhood Centres are closer to the demand forecast – though several Neighbourhood Centres show small supply shortfalls. Hampden Avenue Shops, South Turramurra and West Pymble are the only Neighbourhood Centres with capacity at ten times forecast demand.

- **Opportunities and threats**. As with some of the Village and Small Village Centres, there are numerous centres at the neighbourhood level that perform some higher order functions.

- **Strategy**. In Hornsby, consideration should be given to reducing capacity at the commercial centre of: Berowra Waters, Hornsby Heights, My Colah shops, where there are very high levels of excess supply. Pennant Hills Road (Thornleigh) and Sefton Road (Thornleigh) have been excluded from this list as Thornleigh centre itself has a supply shortfall. Increasing capacity at Galston is not recommended given its out of centre location.

  In Ku-ring-gai, consideration should be given to reducing capacity at Hampden Avenue shops where there is a very high level of excess supply.

  Reducing capacity in some of these centres with very high levels of excess supply will help to focus economic activity on the key centres as identified in the centres hierarchy.

Industrial Areas

- **Current position**. Industrial areas identified as ‘employment lands’ in the Subregional Strategy are expected to be traditional industrial areas and business and technology parks for higher order employment. They are expected to incorporate light industries, heavy industry manufacturing, urban services, warehousing and logistics and high tech based activities.

  In broad terms, the industrial areas in the sub-region fit this template. The broad land use split in the industrial areas is: 60% industrial, 23% retail, 11% office, and 6% special uses. However, the ‘retail’ category here is dominated by Bulky Goods Retail. Similarly, the office component is mostly the ‘business park’ (BP) land use.

- **Forecast**. Hornsby has four identified ‘employment lands’ in the Subregional Strategy, Asquith, Dural Service Centre, Mt Ku-ring-gai and Thornleigh. In addition, Kookaburra Road is a light industrial area identified as a Neighbourhood Centre in the Subregional Strategy. Four of these areas have supply potential more than ten times the forecast additional demand in the 2006-2031 period – Dural Service Centre, Mt Ku-ring-gai (after taking account of constrained land), Kookaburra Road and Thornleigh. This position is largely driven by the very low employment forecasts for industrial sectors.

- **Opportunities and threats**. Although, the employment forecasts for industrial sectors are poor, Hornsby's industrial areas should have the potential to attract some of those businesses requiring cheaper land, larger lots and arterial access. Transport, logistics, warehousing and distribution are key sectors here.

  For Dural Service Centre, a broader range of permissible uses is appropriate given its role in providing service for the surrounding community. However, uses at this centre should not jeopardise the strategy to encourage economic growth in existing centres, especially where Dural Service Centre is less well served by transport infrastructure than many other centres in the LGA. For this reason, commercial functions at the centre should not draw trade from a wide catchment. Industrial zoning with a focus on light industry and additional local service functions is appropriate.

- **Strategy**. The potential for the attraction of transport, distribution sectors should be explored through a targeted economic development strategy. This should take into account the competitive position of Hornsby's land offer in terms of site and location attributes against the nature of competing industrial areas elsewhere.

  Economic development action should build from this study to establish value-chain details and the links between industrial land and location needs and the existing 'offer' of the sub-region's sites in light of competition elsewhere.

Other (non employment) Zones

- **Current position**. There are a number of 'other' significant areas for employment activity in the sub-region that do not fall under the centres hierarchy and are not industrial areas. The most obvious of these are the health and education precincts.

  In Hornsby, the broad land use split in the hospital precinct is 61% special uses, 28% retail, 7% office and 7% residential. In Ku-ring-gai, the SAN is a major employer, with an estimated 2,200 to 2,730 jobs – the single largest employer in the LGA.

  There are numerous education employers scattered throughout the sub-region. In Hornsby, the TAFE and in Ku-ring-gai the Lindfield UTS campus are significant employers.

  In addition, we have seen that there is significant employment in residential zones in the form of home-based work.

- **Forecast**. The TDC baseline employment forecast anticipates strong growth in education employment in both Hornsby and Ku-ring-gai LGAs. Hornsby in particular is expected to experience very strong growth in education employment in the 2006-2031 period. Growth in health and community services employment is more moderate.

  The position of the existing health and education land to accommodate the floorspace demand forecast is not possible to quantify completely as not all of the health and education land was audited. Indeed, in practice this would be difficult as many of these institutions are small and dispersed.

- **Opportunities and threats**. The proposed development at the SAN has the potential to adversely affect strategy for the promotion of economic growth in centres.

  The potential closure of UTS Lindfield will obviously result in a loss of education jobs in the LGA.

Home based work presents an opportunity for economic growth to build on the sub-region's assets but also may present a threat to centres if growth in home-based work occurs at the expense of growth in employment in centres.

- **Strategy**. Recommended zoning for the hospital precincts (both Hornsby and the SAN) is Infrastructure zoning: SP2 (Health Service Facility). Permissible land uses would then be: The purpose shown on the Land Zoning Map, including any development that is ordinarily incidental or ancillary to development for that purpose. It would be the role of the DOP to determine whether the retail, commercial and residential uses proposed are "ordinarily incidental or ancillary to development".

  In Ku-ring-gai, in considering the proposal for the development at the SAN site, a key issues to be considered is the potential impact of this development of other higher order centres (particularly those with better public transport access). Would this development and/or the associated retail, commercial and residential components be better accommodated in existing higher order centres and how likely is it that this would be the case? We feel that a specialised centre status for the SAN site is not justified and would risk encouraging out of centre development that may adversely impact on the centres strategy.

- In terms of facilitating home based work, provided that 'home occupation' and/ or 'home business' are permissible in the appropriate residential areas, there is little else that can be done to facilitate HBW in residential zones (In the NSW LEP template 'home occupation' involves only residents of the dwelling where as 'home business' can involve up to two non-residents)

  The 50 sqm maximum area control in the Hornsby LEP is probably unnecessary as the limiting factor of 2-4 people and amenity criteria should be sufficient.

  From consultation with home based business it is clear that, the role of business services in centres is likely to have a greater impact than any adjustment to planning controls. Services such as post offices, photocopying/printing/binding services or even fully fledged (but small scale) business centres are likely to make HBW a viable option for more people.

7.3 Planning Controls

Comment on Current Controls

In Ku-ring-gai, the following comments are made where adjustment to the Draft LEP is recommended:

- **B2 Local Centre**. In general, we support the list of permissible land uses in this zone. However, there is some question whether 'Vehicle showrooms' are desirable in Local Centre zoned areas. Perhaps here it is better to restrict this use to specific locations on edges of centres, through either use of the B5 Business Development zoning or identifying specific locations where this use is desirable using Clause 2.5 and Schedule 1 of the Standard Instrument "Additional permitted uses for particular land".

  There is also a question about the desirability of 'Multi dwelling housing' in Local Centre zoned areas as this has the potential to deliver lower dwelling yields than are desirable within centres. Although housing choice is desirable in and around centres (apartments, townhouses, detached housing), 'prime' locations that are close to local services and public transport should generally aim to deliver high yields.

- **B4 Mixed Use**. In the current iteration of the Standard Instrument, both 'Seniors housing' and 'Shop top housing' and compulsory land uses in the B4 Mixed Use zone. If the intention is to prohibit future additional residential development in these areas, a non-residential zone such as B5 Business Development or B7 Business Park should be used. Additional zone objectives should be introduced to ensure that the amenity of existing residential development in these areas is protected. Use of the B4 zone should be restricted to areas where a mix of residential and non-residential uses to be encouraged in the future.

- **B5 Business Development**. Depending on where there zoning is used, Council may wish to consider restricting the types of retail premises that are permissible. That is, rather than using the group term 'Retail premises', specific types of premises should be selected that are desirable in these locations. The main concern here is to ensure that other commercial zones (e.g. B1, B2, B3) are the focus areas for retail activities by limiting retail activities in B5 (and possible B4 and B7) zoned areas.

- **B7 Business Park**. The zone objective of the B5 Business Development zone suggests a mix of uses that includes specialised retail, where as the B7 Business Park zoning suggests a more 'traditional' employment focus with support retail only. Given that Pymble Office Park is a key concentration of office employment, and there is demand for growth of this type of employment, the B7 zoning is thought to be more appropriate. Additional retail uses could be added to this zoning.

  The area south of Ryde Road could be zoned either B5 or B7 depending on the desired mix of land uses. As suggested above, whichever zoning is used for this area, additional zone objectives relating to the amenity of existing residential development should be considered. The area to the south of Fitzsimmons land and north of Merriwa Street could be zoned B4 – mixed use.

For Hornsby, the following issues have been identified in the current planning controls:

- **Residential land uses in commercial zones**. It's generally accepted that the development of commercial centre is hampered where residential development is also a permissible. Permitting residential development in the Business F (Town Centre) and Business G (Town Centre Support) zones is therefore not ideal for the core of an aspiring Major Centre.
- **Floor space ratios**. Existing floor space ratios are generally low for commercially zoned land areas, particularly in areas where mixed use residential developments might be desirable (in centres and near transport). For example: Business A (General) 1.0:1 and Business B (Neighbourhood) 0.5:1. It is noted that there are some exceptions to these standards in Schedule B of the 1994 LEP, however again these are generally modest.

  Floor space ratios in Hornsby centre are generally higher (between 2 and 5:1, which minimum requirement for 'employment generating' uses). As suggested above, consideration should be given to prohibiting residential uses completely from the core area. Higher floor space ratios for larger site areas might also be a useful incentive for site amalgamation.

  The floor space ratio in the Business G (Town Centre Support) 1.0 is also modest given the proximity of this location to the centre and major transport infrastructure.
- **Parking rates**. It is understood that rates apply to land uses 'across the board' however as a result parking rates for development in centres that are located on major transport routes are high. In particular, rates for commercial, retail and food & beverage outlets should be lower where good public transport access is available. High parking rates add to development costs and encourage private vehicle usage.
- **Active frontage, awnings, retail frontage widths**. Detailed controls for centres generally lack guidance of important public domain interface issues such as the location (and definition) of active frontages, location of awnings and maximum frontage widths for retail areas. The latter is particularly true in areas where consolidation of adjoining allotments is likely however retaining 'fine grain' development is an import expression of traditional main street character of a centre.
- **Work from home and out of centre activity**. The 50 sqm maximum area control in the Hornsby LEP is probably unnecessary. The limiting factor of 2-4 people and amenity criteria should be sufficient.

  The role of business services in centres is worth considering here. Functions such as post offices, photocopying/printing/binding services or even fully fledged (but small scale) business centres are likely to make HBW a viable option for more people.

  Provided that 'home occupation'* and/or 'home business'* are permissible in the appropriate residential areas, there is little else that can be done to facilitate HBW in residential zones. Additional zone objectives could be added in the Standard Instrument residential zones to help facilitate home based work/employment but also protect residential amenity. (*In the NSW LEP template 'home occupation' involves only residents of the dwelling where as 'home business' can involve up to two non-residents.)

Application of the Template Zones

Table 43 and Table 44 show zones drawn from the template to be applied in the areas surveyed as part of this Study in Hornsby and Ku-ring-gai. Additional land uses permissible with consent are highlighted in red text. Similarly, recommended prohibited land uses are highlighted in red text. <u>This is not an exhaustive list but is intended to be a guide from a strategic perspective</u>.

Table 43. Zones to be Applied in Hornsby

ZONE		Zone objectives	Compulsory land uses permissible with consent	Recommended additional land uses, permissible with consent	Recommended prohibited land uses.	Application of zone.
B1	Neighbourhood Centre	To provide a range of small-scale retail, business and community uses that serve the needs of people who live or work in the surrounding neighbourhood.	Business premises Child care centres Community facilities Neighbourhood shops Shop top housing	Health Consulting Rooms Mixed use development Multi unit housing Service Station +additional land uses as appropriate	Office premise Vehicle repair stations Warehouse or distribution centre +additional land uses as appropriate	Commercial areas of Neighbourhood Centres. Range of services should limited so as not to detract draw activity away from higher order centres.
B2	Local Centre	To provide a range of retail, business, entertainment and community uses that serve the needs of people who live in, work in and visit the local area. To encourage employment opportunities in accessible locations. To maximise public transport patronage and encourage walking and cycling.	Business premises Child care centres Community facilities Educational establishments Entertainment facilities Function centres Information and education facilities Office premises Passenger transport facilities Recreation facilities (indoor) Registered clubs Retail premises Service stations Shop top housing Tourist and visitor accommodation	Medical Centre Mixed use development Multi unit housing Residential flat buildings +additional land uses as appropriate	Bulky goods premises Vehicle showroom Warehouse or distribution centre +additional land uses as appropriate	Commercial areas of Villages, Small Villages and in some cases Neighborhood Centres. (Generally Neighbourhood Centre in more remote locations where a broader range of land uses in would be appropriate).

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B3	Commercial Core	To provide a wide range of retail, business, office, entertainment, community and other suitable land uses that serve the needs of the local and wider community. To encourage appropriate employment opportunities in accessible locations. To maximise public transport patronage and encourage walking and cycling.	Business premises Child care centres Community facilities Educational establishments Entertainment facilities Function centres Hotel or motel accommodation Information and education facilities Office premises Passenger transport facilities Recreation facilities (indoor) Registered clubs Retail premises	Medical Centre Public administration building Sex Service Premises +additional land uses as appropriate	Residential flat building Multi unit housing	Core of Hornsby Major Centre and potentially areas within Epping Town Centre pending the outcome of further planning investigations being completed by the Department of Planning, Parramatta and Hornsby Councils.
B4	Mixed Use	To provide a mixture of compatible land uses. To integrate suitable business, office, residential, retail and other development in accessible locations so as to maximise public transport patronage and encourage walking and cycling.	Boarding houses Business premises Child care centres Community facilities Educational establishments Entertainment facilities Function centres Hotel or motel accommodation Information and education facilities Office premises Passenger transport facilities Recreation facilities (indoor) Registered clubs Retail premises Seniors housing Shop top housing	Multi unit housing Residential flat buildings +additional land uses as appropriate	Bulky goods premises Warehouse or distribution centre	Areas in higher order centres where a mix of residential and appropriate non-residential uses is desirable. May be applicable in Village and Small Village Centres

B5	Business Development	To enable a mix of business and warehouse uses, and specialised retail uses that require a large floor area, in locations that are close to, and that support the viability of, centres.	Child care centres Passenger transport facilities Warehouse or distribution centres	Bulky goods premises Depot Food and drink premises Office premises Light industries Neighbourhood shops Medical centre Recreation facility (indoor) Service station Vehicle showroom +additional land uses as appropriate	Residential flat building Multi unit housing +additional land uses as appropriate	Areas generally adjacent centres which can support a range of retail, industrial and other employment and service functions. Retail uses should be managed so as not to detract from core areas. In the case of Hornsby Town Centre, the area recommended for this zone may eventually transition to the B3 or B4
B6	Enterprise Corridor	To promote businesses along main roads and to encourage a mix of compatible uses. To provide a range of employment uses (including business, office, retail and light industrial uses) and residential uses (but only as part of a mixed use development). To maintain the economic strength of centres by limiting retailing activity.	Business premises Community facilities Hotel or motel accommodation Landscape and garden supplies Light industries Passenger transport facilities Timber and building supplies Warehouse or distribution centres	Bulky Goods Premises Function centre Recreation Facility (indoor) Registered club Service station Vehicle showroom +additional land uses as appropriate	Residential flat building Multi unit housing +additional land uses as appropriate	Areas immediately adjacent busy arterial roads where a range of retail, industrial and other employment and service functions are appropriate. In Hornsby these areas are generally thought to be inappropriate for residential development due to traffic volumes and the need to retain these areas for employment and service uses.

IN1	General Industrial	To provide a wide range of industrial and warehouse land uses. To encourage employment opportunities. To minimise any adverse effect of industry on other land uses.	Depots Freight transport facilities Light industries Neighbourhood shops Warehouse or distribution centres	Industries Materials recycling or recovery centre Vehicle body repair workshops Vehicle repair stations +additional land uses as appropriate	Bulky good premises Heavy industry Hazardous industry Offensive industry +additional land uses as appropriate	Industrial areas, or parts thereof, where heavier industrial uses are appropriate.
IN2	Light Industrial	To provide a wide range of light industrial, warehouse and related land uses. To encourage employment opportunities and to support the viability of centres. To minimise any adverse effect of industry on other land uses. To enable other land uses that provide facilities or services to meet the day to day needs of workers in the area.	Depots Light industries Neighbourhood shops Warehouse or distribution centres	Food and drink premises Landscape and garden supplies Timber and building supplies Vehicle body repair workshops Vehicle repair stations +additional land uses as appropriate	Bulky goods premises +additional land uses as appropriate	Industrial areas, or parts thereof, where light industrial uses and selected retail uses are appropriate.

SP1	Special Activities	To provide for special land uses that are not provided for in other zones. To provide for sites with special natural characteristics that are not provided for in other zones. To facilitate development that is in keeping with the special characteristics of the site or its existing or intended special use, and that minimises any adverse impacts on surrounding land.	The purpose shown on the Land Zoning Map, including any development that is ordinarily incidental or ancillary to development for that purpose.	Zone for special land uses or sites that cannot be accommodate within other zones.
SP2	Infrastructure	To provide for infrastructure and related uses. To prevent development that is not compatible with or that may detract from the provision of infrastructure.	The purpose shown on the Land Zoning Map, including any development that is ordinarily incidental or ancillary to development for that purpose.	Zone for infrastructure such as health service facilities, arterial roads and rail.

Table 44. Zones to be Applied in Ku-ring-gai

ZONE		Zone objectives	Land uses permissible with consent	Recommended additional land uses, permissible with consent	Recommended prohibited land uses.	Where zone will generally be used.
B1	Neighbourhood Centre	To provide a range of small-scale retail, business and community uses that serve the needs of people who live or work in the surrounding neighbourhood.	Business premises Child care centres Community facilities Neighbourhood shops Shop top housing	Health Consulting Rooms Mixed use development Multi unit housing Service Station +additional land uses as appropriate	Office premise Vehicle repair stations Warehouse or distribution centre +additional land uses as appropriate	Commercial areas of Neighbourhood Centres. Range of services should limited so as not to detract draw activity away from higher order centres.
B2	Local Centre	To provide a range of retail, business, entertainment and community uses that serve the needs of people who live in, work in and visit the local area. To encourage employment opportunities in accessible locations. To maximise public transport patronage and encourage walking and cycling.	Business premises Child care centres Community facilities Educational establishments Entertainment facilities Function centres Information and education facilities Office premises Passenger transport facilities Recreation facilities (indoor) Registered clubs Retail premises Service stations Shop top housing Tourist and visitor accommodation +additional land uses as appropriate	Medical Centre Mixed use development Multi unit housing Residential flat building +additional land uses as appropriate	Bulky goods premises Vehicle showroom Warehouse or distribution centre +additional land uses as appropriate	Commercial areas of Villages and Small Villages.

B4	Mixed Use	To provide a mixture of compatible land uses. To integrate suitable business, office, residential, retail and other development in accessible locations so as to maximise public transport patronage and encourage walking and cycling.	Boarding houses Business premises Child care centres Community facilities Educational establishments Entertainment facilities Function centres Hotel or motel accommodation Information and education facilities Office premises Passenger transport facilities Recreation facilities (indoor) Registered clubs Retail premises Seniors housing Shop top housing	Multi unit housing Residential flat buildings +additional land uses as appropriate	Warehouse or distribution centre	Areas in higher order centres where a mix of residential and appropriate non-residential uses is desirable. (Recommended use of this zone is limited to a small area to the north of the Gordon Town Centre.)
B5	Business Development	To enable a mix of business and warehouse uses, and specialised retail uses that require a large floor area, in locations that are close to, and that support the viability of, centres.	Child care centres Passenger transport facilities Warehouse or distribution centres	Bulky goods premises Depot Food and drink premises Office premises Light industries Neighbourhood shops Medical centre Recreation facility (indoor) Service station Vehicle showroom +additional land uses as appropriate	Residential flat building Multi unit housing +additional land uses as appropriate	Areas generally adjacent centres which can support a range of retail, industrial and other employment and service functions. Retail uses should be managed so as not to detract from core areas.

B7	Business Park	To provide a range of office and light industrial uses. To encourage employment opportunities. To enable other land uses that provide facilities or services to meet the day to day needs of workers in the area.	Child care centres Light industries Neighbourhood shops Office premises Passenger transport facilities Warehouse or distribution centres	Function centre Health consulting rooms Medical centre Recreation facility (indoor) Registered clubs Restaurant +additional land uses as appropriate	Residential flat building Multi unit housing +additional land uses as appropriate	Likely to be utilized at the Pymble Office Park. Protect the core employment function of this area by the application of a specific employment zoning that prohibits residential development and limits retail land uses.
SP1	Special Activities	To provide for special land uses that are not provided for in other zones. To provide for sites with special natural characteristics that are not provided for in other zones. To facilitate development that is in keeping with the special characteristics of the site or its existing or intended special use, and that minimises any adverse impacts on surrounding land.	The purpose shown on the Land Zoning Map, including any development that is ordinarily incidental or ancillary to development for that purpose.			Zone for special land uses or sites that cannot be accommodate within other zones.
SP2	Infrastructure	To provide for infrastructure and related uses. To prevent development that is not compatible with or that may detract from the provision of infrastructure.	The purpose shown on the Land Zoning Map, including any development that is ordinarily incidental or ancillary to development for that purpose.			Zone for infrastructure such as health service facilities, arterial roads and rail.

The application of the Standard zones by centre is shown in Table 45 and Table 46.

The study recommends the application of five commercial zones in Hornsby (B1, B2, B3, B4, B5, B6). It is not intended the this study provides a direct correlation between the existing zones and the template zones, however in general the following relationship could be used as a general guide:

EXISTING ZONE	PROPOSED ZONE
Business A (General)	B2 Local Centre
Business B (Special)	B3 Commercial Core and/or
Business C (Neighbourhood)	B1 Neighbourhood Centre
Business F (Town Centre)	B3 Commercial Core
Business G (Town Centre Support)	B5 Business Development

We recommend the retention of two separate industrial zonings that roughly correspond to Industrial A and Industrial B. through the use of IN1 General Industry and IN2 Light Industry.

The full details of zone objectives and permissible and prohibited land uses are required before decisions regarding appropriate application of these zones can be been determined.

Table 45. Application of Zones by Centre in Hornsby

Hornsby	Designation	Planning Controls		Notes
(E) Asquith	Employment Land (i)	IN1	IN2	The Shire's largest industrial precinct with 206,161 sqm floorspace. The precinct has almost one third of the total freight and logistics floorspace for the Shire (32.8%) with significant shares of heavy manufacturing and light manufacturing floorspace (31% and 30% respectively. Within the precinct itself, freight and logistics land uses take up a large proportion (35% of the precinct's floorspace). The precinct has a potential supply of 179,059 sqm. In light of forecast demand in the 2006-2031 period, the precinct has 'excess supply' of 163,227 sqm. Recommended zoning for the precinct is IN1 – general industrial and IN2 - light industrial reflecting the current division between Industrial A and B.
(E) Dural Service Centre	Employment Land (ii)	IN2	B2	Dural Service Centre has a mixed industrial and local service profile. The precinct accounts for a significant share of the Shires Urban Services (US) floorspace (12.4%) with significant shares of Freight and Logistics (6%) and Bulky Goods Retail (6.1%). Within the centre, big box retail, Bulky Goods Retail and freight logistics occupy the majority of the land. The precinct has 145,414 sqm potential floorspace supply. In light of forecast demand in the 2006-2031 period, the precinct has excess supply of 142,056 sqm of floorspace. This precinct has supply potential more than ten times the demand forecast in the 2006-2031 period There is no zone within the Standard Instrument that, either through its objectives or compulsory permissible land uses, reflects the current range of land uses permissible under the Business E zoning that currently applies to the Dural Service Centre. The recommended strategy for future zoning of this area would be to apply the IN2 zoning and as far is possible including as many permissible land uses in the zone that would be desirable in this area, bearing in mind that these uses would then also be permissible on all other IN2 zoned land. In order to introduce some additional variety of local service uses, a part of the Dural Service Centre could be zoned B2 Local Centre. The area of land with this commercial zoning should be limited so as not to encourage significant additional employment and services in an out of centre locations. In addition to the permissible uses (with consent) in the LEP standard instrument, we have added a range of additional retail and local service uses. Additional zone objectives should be introduced reflect the broader range of anticipated uses.
(E) Mt Ku-ring-gai	Employment Land (i)	IN1		Mt Ku-ring-gai is a significant industrial precinct with 115,705 sqm of floorspace. The precinct has high shares of the total heavy and light manufacturing in the Shire (26% and 25% respectively). Within the precinct, the predominant land is freight and logistics which accounts for 42% of the total floorspace. The precinct has very high potential floorspace supply of 354,438 sqm. However, some of the land in this precinct is constrained. After taking this into account, the potential floorspace supply figure is 138,865 sqm. Using this smaller potential supply figure, the precinct still has an excess supply of 129,309 sqm to accommodate forecast demand. This precinct has supply potential more than ten times the demand forecast in the 2006-2031 period. Recommended zoning for the precinct is IN1 – general industrial.

(E) Thornleigh	Employment Land (i)	**IN1** **IN2**	Thornleigh is the Shire's second largest industrial precinct with a total floorspace of 140,360 sqm. The precinct has significant shares of the heavy and light manufacturing with 36% and 33% of the total Shire's floorspace in these categories. Within the precinct itself, the predominant land uses are freight and logistics (20%), light manufacturing 17% and 'heavy manufacturing' 15%. The precinct has a floorspace supply potential of 51,637 sqm. In light of forecast demand in the 2006-2031 period, the precinct has excess supply of 59,811 sqm. This precinct has supply potential more than ten times the demand forecast in the 2006-2031 period. This result is driven by a forecast decline in demand for the predominant industrial land uses. Recommended zoning for the precinct is IN1 – general industrial and IN2 - light industrial reflecting the current division between Industrial A and B.
(E) Kookaburra Road	Employment Land	**IN2**	Kookaburra Rd is a small light industrial area with 6,336 sqm of employment floorspace. Within the centre the predominant use is freight and logistics (50%). The centre has a floorspace supply potential of 4,711 sqm. After the share adjustment, the centre has excess supply of 4,516 sqm. Recommended zoning for the area is IN2 – light industrial.
Appletree Dr-Cherrybrook	Neighbourhood Centre	**B1**	Appletree Drive, Cherrybrook is a small Neighbourhood Centre with 1,589 sqm of floorspace. Within the centre the predominant land uses are big box retail (27%), Main Street Retail (20%) and special uses (22%). The centre has supply potential of -11sqm in the 80% of max FSR scenario. This apparent shortfall is typically the result retail operations having significant proportions of *internal* space that do not count towards the total floorspace in the FSR calculations. The centre has a supply shortfall of 154 sqm to accommodate the forecast demand in the 2006-2031 period. We would not suggest altering controls to accommodate the small floorspace gap. Recommended zoning is B1 - Neighbourhood Centre.
Asquith	Village	**B2**	Asquith is a Village Centre with 7,402 sqm of floorspace. Within the centre the predominant land uses are big box retail (31%), Main Street Retail (21%). The centre has a supply potential of 13,610 sqm. In light of forecast demand in the 2006-2031 period, the centre has excess supply of 9,246 sqm. Recommended zoning is B2 - Local Centre.
Beecroft	Village	**B2**	Beecroft is a Village Centre with 11,528 sqm of floorspace. Within the centre, the predominant land uses are big box retail (31%), Main Street Retail (20%). The centre has a supply potential of 10,301 sqm. In light of forecast demand in the 2006-2031 period, the centre has excess supply of 6,441 sqm. Recommended zoning is B2 - Local Centre.
Berowra	Small Village	**B2**	Berowra is a Small Village with 6,151 sqm of floorspace. Within the centre, the predominant land uses are: big box retail (30%) and Main Street Retail (25%). The centre has a supply potential of 13,155 sqm. In light of forecast demand in the 2006-2031 period, the centre has an excess supply of 12,752 sqm. This centre has floorspace supply potential more than ten times the demand forecast – attention should be given to reducing some of the supply capacity. Recommended zoning is B2 – Local Centre.

Berowra Hts	Small Village	**B2**	Berowra Heights is a Small Village with 11,497 sqm of floorspace. Within the centre, the predominant land uses are big box retailing (31%) and Main Street Retail (27%). The centre has a floorspace supply potential of 13,242 sqm. In light of forecast demand in the 2006-2031 period, the centre has excess supply of 13,335 sqm. This centre has floorspace supply potential more than ten times the demand forecast – attention should be given to rezoning some of the existing employment land Recommended zoning at this centre is B2 – Local Centre. As the potential supply at this centre is more than ten times the forecast demand, some reduction of the employment area is recommended.
Berowra Waters	Neighbourhood Centre	**B1**	Berowra Waters is a Neighbourhood Centre with 1,359 sqm of floorspace. Within the centre, the predominant uses are big box retail (34%) and Main Street Retail (29%). The centre has a floorspace supply potential of 6,583 sqm. In light of forecast demand in the 2006-2031 period, the centre has an excess supply of 6,450 sqm. This centre has floorspace supply potential more than ten times the demand forecast – attention should be given to rezoning some of the existing employment land Recommended zoning in B1 – Neighbourhood Centre. .
Brooklyn	Neighbourhood Centre	**B1**	Brooklyn is a Neighbourhood Centre with 4,368 sqm of floorspace. Within the centre, the predominant uses are: big box retail (37%) and Main Street Retail (30%). The centre has supply potential of 4,052 sqm. In light of forecast demand in the 2006-2031 period, the centre has an excess floorspace supply of 3,738 sqm – attention should be given to reducing capacity at this centre. Recommended zoning at the centre is B1 – Neighbourhood Centre. The status of this centre as Neighbourhood Centres reflects the relatively modest local residential catchments and limited non-residential development. The commercial areas of these centre could be zoned B2 Local Centre (as opposed to B1) as such a broader range of land uses may be appropriate in these more remote Neighbourhood Centre locations.
Carlingford Court	Stand Alone Shopping Centre	**B2** **B5**	Carlingford Court is a stand alone shopping centre with 45,499 sqm of floorspace. The centre accounts for a significant share of the total Shire bulky goods and big box retail (7% and 4% respectively). The centre also hosts a significant share of the Shire's local light industry at 5%. Within the centre itself, the predominant uses are: big box retail (32%) and Main Street Retail (21%). The centre has a supply potential of -3,024 sqm. This apparent existing shortfall is the result of some of the internal space of buildings not counting towards the floorspace in the FSR calculation under the existing controls. In light of forecast demand in the 2006-2031 period, the centre has a supply shortfall of 5,918 sqm. B2- Local Centre and B5 – Business Development zoning is appropriate generally corresponding to the existing Business A and Business B areas respectively; this will permit a range of retail, light industrial. No change to the FSR controls is recommended, this will limit the amount of office activity as the centre is already close or at capacity. The designation of Carlingford Court as a stand alone shopping centre acknowledges that whilst this facility provides the functions of a local or subregional centre, it does not have the spatial structure, public domain quality or civic character of a traditional Local Centre.

Cherrybrook	Village	**B2**	Cherrybrook is a Village Centre with 12,393 sqm of floorspace. Within the centre, the dominant uses are: big box retail (37%) and Main Street Retail (23%). The centre has potential floorspace supply of 17,690 sqm. In light of forecast demand in the 2006-2031 period, the centre has an excess supply of 17,526. This centre has floorspace supply potential more than ten times the demand forecast – attention should be given to rezoning some of the existing employment land Recommended zoning for the centre is B2 – Local Centre.
Cowan	Neighbourhood Centre	**B1**	Cowan is a Neighbourhood Centre with 263 sqm of floorspace – predominantly in the retail trade categories. Potential supply at the centre is 183sqm. In light of forecast demand in the 2006-2031 period, the centre has excess supply of 186 sqm to accommodate the forecast demand in the period 2006-2031. Recommended zoning for the centre is B2 – Local Centre.
David Rd-Castle Hill	Neighbourhood Centre	**B1**	David Road, Castle Hill is a Neighbourhood Centre with 3,013 sqm of employment floorspace. Within the centre the predominant uses are: big box retail (311%) and Main Street Retail (23%). The centre has supply potential of -116 sqm. This apparent existing shortfall is the result of some of the internal space of buildings not counting towards the floorspace in the FSR calculation under the existing controls. In light of forecast demand in the 2006-2031 period, the centre has a supply shortfall of 335 sqm. Given the very small supply-demand gap we would not suggest altering the planning controls. Recommended zoning for the centre is B1 – Neighbourhood Centre.
Edgeworth David Ave-Waitara	Neighbourhood Centre	**B1**	Edgeworth David Avenue, Waitara is a Neighbourhood Centre with 2,489 sqm of employment floorspace. Within the centre, the predominant uses are: big box retail (37%) and Main Street Retail (21%) and the centre also has a significant proportion of local light industry (19%). The centre has floorspace supply potential of -12 sqm. This apparent existing shortfall is the result of some of the internal space of buildings not counting towards the floorspace in the FSR calculation under the existing controls. In light of forecast demand in the 2006-2031 period, the centre has a supply shortfall of 144 sqm. Given the very small supply-demand gap we would not suggest altering the planning controls. Recommended zoning for the centre is B1 – Neighbourhood Centre.
Epping	Town Centre	**B2** **B4**	Epping is a Town Centre with 62,550 sqm of employment floorspace (in the surveyed area within Hornsby LGA). The centre accounts for high shares of the total Shire floorspace in office (10%), business park (9%) and freight and logistics (7%) categories. Within the centre, uses with the most significant shares of floorspace are: freight and logistics (26%), office (16%) and big box retail (16%). Epping has potential floorspace supply of 5,167sqm. In light of forecast demand in the 2006-2031 period, the centre has a supply shortfall of 2,078 sqm. This is driven largely by very strong forecast demand for office space. Increasing FSR limits would accommodate the supply-demand gap. Recommended zoning for the centre is predominantly B2 – Local Centre. The B4 mixed use zone would apply in areas of existing and future high density residential and where future residential growth and additional retail and commercial floor space is desirable given transport infrastructure and amenity and in light of Subregional dwelling and employment targets. B3 zoning may be appropriate spending on the outcomes of the joint Council and DoP study.

Galston	Local Centre	**B1**	Galston is a Neighbourhood Centre with 4,189 sqm of floorspace. Within the centre, the predominant uses are: big box retail (35%) and Main Street Retail (20%). The centre has a potential floorspace supply of -3,792 sqm. This apparent existing shortfall is the result of some of the internal space of buildings not counting towards the floorspace in the FSR calculation under the existing controls. In light of forecast demand in the 2006-2031 period, the centre has a supply shortfall of 3,741 sqm. Given Galston's existing status in the hierarchy, economic profile, size, location and infrastructure access alterations to the controls to address the supply-demand gap are not recommended. Recommended zoning for the centre is B2 – Local Centre.
Galston Rd-Hornsby Hts	Neighbourhood Centre	**B1**	Galston Rd, Hornsby Heights is a Neighbourhood Centre with 1,161 sqm of employment floorspace. Within the centre, the predominant uses are: big box retail (38%) and Main Street Retail (22%). The centre has a floorspace supply potential of -59sqm. This apparent existing shortfall is the result of some of the internal space of buildings not counting towards the floorspace in the FSR calculation under the existing controls. In light of forecast demand in the 2006-2031 period, the centre has a supply shortfall of 116 sqm. We do not recommend changing the planning controls to address this gap. Recommended zoning for the centre is B1 – Neighbourhood Centre.
Hornsby	Major Centre	**B3 B4 B5**	Hornsby is the sub-region's Major Centre and has a total of 419,696 sqm of employment floorspace. The centre is by far the centre in the Shire and in terms of floorspace accounts for: 63% of the short term accommodation, 59% of dispersed activities, 34% of local light industry, 54% of big box retail, 40% of Bulky Goods Retail and 48% of Main Street Retail. Within the centre, the predominant uses are: big box retail 34% and Main Street Retail; (21%). Hornsby centre has floorspace supply potential for 218,658 sqm. In light of forecast demand in the 2006-2031 period (including the accommodation of Subregional Strategy targets), the centre has excess supply of 33,592 sqm. Recommended zoning for the central commercial area (the east side of the railway line) encompassing Westfield up to Linda Street is B3 – Commercial Core. A dedicated commercial core is important given the need to increase the degree of office land use in the centre. B3 - Commercial core zoning or B4 – Mixed use zoning should also be considered on the west side, given that further commercial activity on the east side is compromised by residential development. B3 zoning here would be a more conservative option to try to 'secure' commercial development on the west side. Recommended zoning for the area north of Linda Street bound by Hunter and George Streets is B5 – Business Development. This will allow a range of commercial and industrial uses that require larger lot sizes to operate close to the centre. This area would also serve as land bank for the future expansion of the commercial core area to the north. Some B4 – mixed use zoning may be appropriate outside the commercial core where high density residential is desirable in addition to commercial operations. The industrial strip running along Jersey Street is recommended to be zoned B5 – Business Development.

Hospital Precinct	Health Services Facility	**SP2**	The hospital precinct has 59,788 sqm of employment floorspace and accounts for substantial share of the Shire's special use floorspace (40%). Within the precinct, the predominant use is special use (57%). The precinct has floorspace supply potential of 23,936 sqm. In light of forecast demand in the 2006-2031 period, there is excess supply of 23,083 sqm. Recommended zoning for the precinct is SP2 – Health Services Facility. Permissible land uses would then be: The purpose shown on the Land Zoning Map, including any development that is ordinarily incidental or ancillary to development for that purpose.
Mt Ku-ring-gai Shops	Neighbourhood Centre	**B1**	The Mt Ku-ring gai shops area is a small Neighbourhood Centre with 1,114 sqm of employment floorspace. The centre has some small retail businesses and has potential floorspace supply of 486 sqm. In light of forecast demand in the 2006-2031 period, the centre has an excess supply of 469 after accommodating the forecast demand in the 2006-2031 period. Recommended zoning for the centre is B1 – Neighbourhood Centre.
Malton Rd-North Epping	Neighbourhood Centre	**B1**	Malton Road, North Epping is a Neighbourhood Centre with 1,808 sqm of employment floorspace. The centre has some small retail businesses and has potential floorspace supply of 167 sqm. In light of forecast demand in the 2006-2031 period, the centre has an excess supply of 89sqm. Recommended zoning for the centre is B1 – Neighbourhood Centre.
Mt Colah Shops	Neighbourhood Centre	**B1**	Mt Colah shops is a Neighbourhood Centre with 2,978 sqm of employment floorspace. The centre has some small retail businesses and has potential floorspace supply of 5,859 sqm. In light of forecast demand in the 2006-2031 period, the centre has an excess supply of 5,808 sqm after accommodating the forecast demand in the 2006-2031 period. The centre has capacity of more than ten times the demand forecast and some reduction in capacity is recommended. Recommended zoning for the centre is B1 – Neighbourhood Centre. The status of this centre as Neighbourhood Centres reflects the relatively modest local residential catchments and limited non-residential development. The commercial areas of these centre could be zoned B2 Local Centre (as opposed to B1) as such a broader range of land uses may be appropriate in these more remote Neighbourhood Centre locations.
Mt Colah Stn	Neighbourhood Centre	**B1**	Mt Colah station is a Neighbourhood Centre with 1,502 sqm of employment floorspace. The centre has some small retail businesses and has potential floorspace supply of 438 sqm. In light of forecast demand in the 2006-2031 period, the centre has an excess supply of 301 sqm. Recommended zoning for the centre is B1 – Neighbourhood Centre.
Myrtle St-Normanhurst	Neighbourhood Centre	**B1**	Myrtle Street, Normanhurst is a Neighbourhood Centre with 660 sqm of employment floorspace. The centre has some small retail businesses and has potential floorspace supply shortfall of 180 sqm. This apparent existing shortfall is the result of some of the internal space of buildings not counting towards the floorspace in the FSR calculation under the existing controls In light of forecast demand in the 2006-2031 period, the centre has a supply shortfall of 197 sqm after accommodating the forecast demand in the 2006-2031 period. Given the very small shortfall, no adjustment to the planning controls is recommended zoning for the centre is B1 – Neighbourhood Centre.

Normanhurst	Neighbourhood Centre	**B1**	Normanhurst is a Neighbourhood Centre with 1,770sqm of employment floorspace**.** The centre has some small retail businesses and has potential floorspace supply shortfall of 454 sqm. This apparent existing shortfall is the result of some of the internal space of buildings not counting towards the floorspace in the FSR calculation under the existing controls The centre has a supply shortfall of 510 sqm after accommodating the forecast demand in the 2006-2031 period. Given the very small shortfall, no adjustment to the planning controls is recommended. Recommended zoning for the centre is B1 – Neighbourhood Centre.
Pennant Hills	Village	**B2 B5 B6**	Pennant Hills is a Village Centre with 84,349 sqm of employment floorspace. The centre accounts for a significant share of the total office floorspace in the Shire with 9%. The centre also has a significant share of total residential floorspace (in employment zones) with 9% and 11% of short term accommodation floorspace. Within the centre, the predominant uses are: big box retail (26%) and Main Street Retail (22%). The centre has potential floorspace supply of 1,158 sqm. The centre has a shortfall of 211 sqm to accommodate forecast demand in the 2006-2031 period. We would not recommend adjusting the controls at this centre. Recommended zonings are: B2 for the 'traditional' centre (area generally north of Pennant Hills Road and West of the rail line); B5 for the triangular area generally south of Pennant Hills Road and West of the rail line; and B6 for areas that are immediately adjacent Pennant Hills Road, generally north of the Crescent. B6 may also be appropriate for land that is current commercially zoned, adjacent Pennant Hills Road and south of Fischer Avenue. NOTE: These recommendations are only intended to provide broad guidance regarding the spatial application of different land use zones within the centre. Further on the ground analysis is recommended to determine the optimal utilisation of the new Standard Instrument zones.
Pennant Hills Rd-Thornleigh	Enterprise Corridor	**B6 B5**	Pennant Hills Rd, Thornleigh is a Neighbourhood Centre with 12,941 sqm of employment floorspace. Within the centre, the predominant uses are: big box retail (27%) and Main Street Retail (26%). The centre has floorspace supply shortfall of 22 sqm. This apparent shortfall is the result of some of the internal space of buildings not counting towards the floorspace in the FSR calculation under the existing controls. The centre has excess supply of 3,908 sqm to accommodate the demand forecast in the period 2006-2031. Pennant Hills Road, Thornleigh is recommended as an Enterprise Corridor by virtue of it's location on and exposure to Pennant Hills Road. The B6 Enterprise Corridor Zoning should be applied to those areas immediately adjacent to Pennant Hills Road (currently both Business B and C). Other adjacent employment land, located adjacent the rail line and not immediately adjacent Pennant Hills Road may be zoned B5 Business Development. The proposed Bulky Goods Retail development at 180-190 Pennant Hills Road should be within a proposed B6 Enterprise Corridor zone. Bulky Goods Retail should be included as a permissible development in the B6 zone. As such we do not feel that it would jeopardise the viability of the industrial precinct or the centre.

Plympton Rd Shops-Epping	Neighbourhood Centre	**B1**	Plympton Road shops, Epping is a Neighbourhood Centre with 1522 sqm of employment floorspace and characterised by a selection of small retail and service businesses. The centre has floorspace supply shortfall of 25 sqm. This apparent existing shortfall is the result of some of the internal space of buildings not counting towards the floorspace in the FSR calculation under the existing controls. In light of forecast demand in the 2006-2031 period, the centre has a supply shortfall of 120 sqm. Adjustment to the planning controls to accommodate the small supply demand gap is not recommended. Recommended zoning for the centre is B1 – Neighbourhood Centre.
Sefton Rd-Thornleigh	Neighbourhood Centre	**B1**	Sefton Road, Thornleigh is a Neighbourhood Centre with 1,292 sqm of employment floorspace. Within the centre, the predominant uses are local retail and services with a significant proportion of freight and logistics activity. The centre has floorspace supply potential of 8,353 sqm. After share adjust6ment, the centre has excess supply of 8,207 sqm. This centre has floorspace supply potential more than ten times the demand forecast. Recommended zoning the centre is B1 – Neighbourhood Centre.
Thornleigh	Village	**B2** **B5** **B6**	Thornleigh is a Village Centre with 63,204 sqm of employment floorspace. The centre accommodates a significant share of the Shire's total office and business park floorspace (9% and 9%). Within the centre, the key uses are big box retail (25%) and Main Street Retail (18%). The centre has a floorspace supply shortfall of 5,361 sqm. This apparent existing shortfall is the result of some of the internal space of buildings not counting towards the floorspace in the FSR calculation under the existing controls. In light of forecast demand in the 2006-2031 period the centre has a supply shortfall of 8,992 sqm. The demand at Thornleigh is largely driven by growth in demand for office space at the centre. Increasing FSRs could address the demand supply gap. Recommended zoning is a combination of B2 - Local Centre for the area immediately adjacent to the station; B6 Enterprise Corridor for areas that are immediately adjacent to Pennant Hills Road; and B5 Business Development for land located adjacent to the rail line and not immediately adjacent to Pennant Hills Road. NOTE: These recommendations are only intended to provide broad guidance regarding the spatial application of different land use zones within the centre. Further on the ground analysis is recommended to determine the optimal utilisation of the new Standard Instrument zones.
Waitara	Village	**B2** **B6**	Waitara is a Village Centre with 33,929 sqm of employment floorspace. Within the centre the predominant land uses are: big box retail (32%) and Main Street Retail (24%). The centre has a floorspace supply shortfall of 4,678 sqm. This apparent existing shortfall is the result of some of the internal space of buildings not counting towards the floorspace in the FSR calculation under the existing controls. Some action to address the shortfall is advised for Waitara bust this should compromise the growth of Hornsby – especially in terms of the re-positioning of Hornsby as an employment destination. In light of forecast demand in the 2006-2031 period the centre has a supply shortfall of 10,242 sqm. Alexandria Parade, Waitara is a Village Centre reflecting the size of the residential population within walking distance of this centre. The existing industrial land is recommended as an Enterprise Corridor by virtue of it's location on and exposure to the Pacific Highway. The northern portion of this area that is further from the Pacific Highway may be retained as industrial zoned land if there is thought to be a need to provide for a wider range of uses in the area.

West Pennant Hills	Small Village	**B2**	West Pennant Hills, on Pennant Hills Road, has been classified as a Small Village. In 2006, total employment floorspace on business zoned land was 7,569 sqm, which is a relatively small share of all floorspace across the LGA. Retailing in the primary land use within this centre, with some Local Light. There is scope to accommodate future demand within existing controls. Zone B2 – Local Centre and Zone B4 – Mixed Use are the most appropriate zone for this location. This centre has floorspace supply potential more than ten times the demand forecast – attention should be given to rezoning some of the existing employment land – attention should be given to rezoning some of the existing employment land. There is sufficient capacity under existing controls to accommodate future demand.
Westleigh	Small Village	**B2**	Located on Duffy Avenue, this small centre consists primarily of Retail Main Street, and includes a supermarket. In 2006, total employment floorspace on business zoned land was 8,315 sqm. The centre accounts for a relatively small share of all floorspace across the LGA. Zone B2 – Local Centre is most appropriate zones for this location. While this centre has floorspace supply potential more than ten times the demand forecast this is also an area of high historical population growth. No action to reduce capacity is recommended.
Wiseman's Ferry	Neighbourhood Centre	**B1**	Wiseman's Ferry is one of many small Neighbourhood Centres, it also plays a role as a day-trip destination. In 2006, total employment floorspace on business zoned land was 3,622 sqm. The centre only account for a very small share of all floorspace across the LGA. There is insufficient potential floorspace within the centre to meet future demand, with a shortfall of 267 sqm. This reflects limited capacity within the existing controls. Zone B1 – Neighbourhood Centre is the most appropriate zone for this location.
Yallambee Road	Neighbourhood Centre	**B1**	Yallambee Rd contains a very small share of Hornsby LGA's total floorspace. In 2006, total employment floorspace on business zoned land was 624 sqm. Retailing is the primary land use. Demand forecasts indicate a small increase in the required floorspace, which is unable to be accommodated within the current controls. Zone B1 – Neighbourhood Centre is the most appropriate zone for this location.

Table 46. Application of Zones by Centre in Ku-ring-gai

KRG	Designation	Planning Controls			Notes
East Killara	Neighbourhood Centre	B1			East Killara is one of many small Neighbourhood Centres. In 2006, total employment floorspace on business zoned land was 1,137sqm in this centre, which only accounts for a very small share of all floorspace across the LGA. There is sufficient potential floorspace within the centre to meet future demand, with excess capacity of 601 sqm. This reflects the relatively low forecast of future demand within this centre. Zone B1 – Neighbourhood Centre is the most appropriate zone for this location.
East Lindfield	Neighbourhood Centre	B1			East Lindfield is one of many small Neighbourhood Centres. In 2006, total employment floorspace on business zoned land, in this centre, was 1,309 sqm. The centre accounts for a very small share of all floorspace across the LGA. Within the centre the primary BLC is Retail Main Street, with some Local Light industry. There is insufficient potential floorspace within the centre to meet future demand, with unmet demand for 470 sqm. This reflects the relatively limited potential supply. Zone B1 – Neighbourhood Centre is the most appropriate zone for this location.
Eastern Rd-Turramurra	Neighbourhood Centre	B1			Eastern Road Turramurra is a small Neighbourhood Centre with a predominantly retail focus. In 2006, the centre had a total of 1,290sqm. After taking account of the forecast demand in the 2006-2031 period, this centre has an excess supply of 583 sqm. Recommended zoning for this centre is B1 – Neighbourhood Centre.
Fox Valley	Neighbourhood Centre	B1			Fox Valley is a small Neighbourhood Centre, located in proximity to the SAN hospital. In 2006, total employment floorspace on business zoned land, in this centre, was 2,863. Special Activities (31%) and Retail Main Street are the primary land uses within this centre. There is insufficient potential floorspace within the centre to meet future demand, with unmet demand for 409 sqm. This reflects the relatively limited potential supply. Zone B1 – Neighbourhood Centre is the most appropriate zone for this location.
Gordon	Town Centre	B2	B7	B4	Gordon is the primary centre within Ku-ring-gai LGA and will be the focus for future retail, commercial and residential growth. In 2006, total employment floorspace on business zoned land was 99,034 sqm. Retail Big Box, Retail Main Street, Office and Business Park are the primary uses within Gordon Town Centre, with Gordon accommodating 38.2% of Ku-ring-gai LGA's total office floorspace. The centre also includes over 40% of the LGA's floorspace which is used for short-term accommodation, 35.6% of the LGA's Business Park and 28.5% of the LGA's Retail Big Box. There is sufficient potential floorspace within the centre to meet future demand, with excess capacity of 67,881 sqm. This reflects the relatively large potential supply of floorspace under the Draft LEP. While for Ku-ring-gai's principal centres, there is ample floorspace to accommodate 2031 forecast demand, some intensification around transport nodes may be desirable for broader planning purposes. In Gordon, increased FSRs may be appropriate. Zone B2 – Local Centre would be appropriate for the Main Street Retail areas. Zone B7 – Business park would be appropriate for the area north of Fitzsimmons Lane. Zone B4 – Mixed Use is recommended for the area north of Merriwa Street and South of Fitzsimmons Lane.

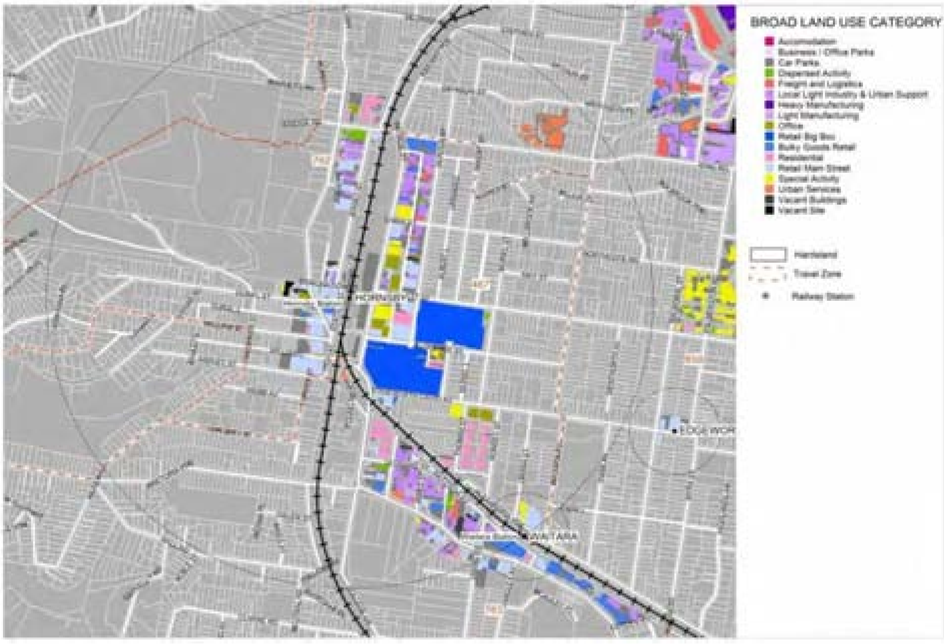
Hampden Ave -N Wahroonga	Neighbourhood Centre	**B1**	Hampden Avenue Shop, North Wahroonga is one of many small Neighbourhood Centres. In 2006, total employment floorspace on business zoned land was 868 sqm. The centre only accounts for a very small share of all floorspace across the LGA. Land uses within the centre are primarily Retail Main Street and Local Light. There is sufficient potential floorspace within the centre to meet future demand, with excess capacity of 1,822 sqm. This centre has floorspace supply potential more than ten times the demand forecast – attention should be given to rezoning some of the existing employment land. This reflects the relatively low forecast of future demand within this centre. Zone B1 – Neighbourhood Centre is the most appropriate zone for this location.
Killara	Neighbourhood Centre	**B1**	Killara is one of many small Neighbourhood Centres. In 2006, total employment floorspace on business zoned land, in this centre, was 378sqm. The centre accounts for a very small share of all floorspace across the LGA. Retail Main Street is the primary land use. There is sufficient potential floorspace within the centre to meet future demand, with excess capacity of 403 sqm. This reflects the relatively low forecast of future demand within this centre. Zone B1 – Neighbourhood Centre is the most appropriate zone for this location.
Lindfield	Village	**B2**	Lindfield, located on the train line, contains a range of retailing to meet the needs of local residents. In 2006, total employment floorspace on business zoned land in the centre was 37,631 sqm. Lindfield accounts for 16% of the LGA's Special land uses, and approximately 10% of the LGA's Main Street Retail and Dispersed activities. Within the centre, the primary land use is Main Street Retail. There is sufficient potential floorspace within the centre to meet future demand, with excess capacity of 24,737 sqm. This reflects the large potential supply of floorspace. Zone B2 – Local Centre would be appropriate for this location.
North Turramurra	Neighbourhood Centre	**B2**	North Turramurra is one of many Neighbourhood Centres, and it contains a range of retailers and service providers to meet the needs of local residents. In 2006, total employment floorspace on business zoned land, in this centre, was 4,989 sqm. Retail Main Street is the primary land use within this centre. There is sufficient potential floorspace within the centre to meet future demand, with excess capacity of 652 sqm. This reflects the relatively low forecast of future demand within this centre. Zone B2 – Local Centre would be appropriate for this location.
Princes St-Turramurra	Neighbourhood Centre	**B1**	Princess Street Turramurra is one of many small Neighbourhood Centres. In 2006, total employment floorspace on business zoned land, in this centre, was 1,328 sqm. The centre only accounts for a very small share of all floorspace across the LGA. Retail Main Street is the primary land use within the centre. There is sufficient potential floorspace to meet future demand in this location, with excess capacity of 417 sqm. This reflects the relatively low forecast of future demand within this centre. Zone B1 – Neighbourhood Centre is the most appropriate zone for this location.

Pymble	Small Village	**B2**	Located on the train line, Pymble accommodates predominantly retailers and service providers, however, there are also some office buildings within the centre. In 2006, total employment floorspace on business zoned land was 18,775 sqm. Pymble accommodates over 5% of the LGA's floorspace within the following categories: Business Park, Dispersed activities, Office, Retail Main Street and Special use. Within the centre the primary land use is Retail Main Street. Office accounts for 12.8% of floorspace within the centre. There is sufficient potential floorspace within the centre to meet future demand, with excess capacity of 10,004 sqm. This reflects the relatively low forecast of future demand within this centre. The centre contains some office buildings and potential for further office space should be considered in the application of zoning. Zone B2 – Local Centre would be appropriate
Pymble Office Park	Business Park	**B7**	Pymble office park is located in proximity to the junction of Lane Cove Road and Pacific Highway. It accommodates a range of businesses in modern commercial buildings. In 2006, total employment floorspace in this area, on business zoned land, was 88,999 sqm. The key land uses are Freight and Logistics, Office, Business Park and Local Light. The area accounts for one third of the LGA's Office and Business Park floorspace. Considering future demand and potential supply, there is a shortfall of 19,412 sqm in this area. This is driven by increasing office based employment. We recommend increasing FSRs to accommodate this shortfall. Zone B7 – Business park is recommended with retail restricted to neighbourhood shops.
Roseville	Small Village	**B2**	Roseville centre is divided by Pacific Highway and the train line. Roseville Cinema is a key attractor to this centre. In 2006, total employment floorspace on business zoned land was 17,528 sqm. Retail Main Street is the primary land use within the centre. Roseville accounts for approximately 5% of the LGA's retail floorspace. There is sufficient potential floorspace within the centre to meet future demand, with excess capacity of 15,907 sqm. This reflects the forecast of negative future demand within this centre (-165sqm). This centre has floorspace supply potential more than ten times the demand forecast – attention should be given to reducing capacity at this centre. Zone B2 – Local Centre would be appropriate for this location.
Roseville Chase	Neighbourhood Centre	**B1**	Roseville Chase is one of many small Neighbourhood Centres. In 2006, total employment floorspace on business zoned land, in this centre, was 2,383 sqm. The centre accounts for a very small share of all floorspace across the LGA. Retail Main Street is primary land use. There is a very small shortfall of 19 sqm when capacity against the demand forecast. Zone B1 – Neighbourhood Centre is the most appropriate zone for this location.

Seventh Day Adventist Site	Health Services Facility	**SP2**	Recommended zoning for the hospital precincts (both Hornsby and the SAN) is Infrastructure zoning: SP2 (Health Services Facility). Permissible land uses would then be: The purpose shown on the Land Zoning Map, including any development that is ordinarily incidental or ancillary to development for that purpose. It would be the role of the DOP to determine whether the retail, commercial and residential uses proposed are "ordinarily incidental or ancillary to development". In terms of the proposed expansion of the precinct, the question is whether this development and/or the associated retail, commercial and residential components are better accommodated in existing higher order centres. We feel that a specialised centre status for the SAN site is not justified and would risk encouraging out of centre development that may adversely impact on the centres strategy.
South Turramurra	Neighbourhood Centre	**B1**	South Turramurra is one of many small Neighbourhood Centres. In 2006, total employment floorspace on business zoned land was 1,210 sqm. The centre only accounts for a very small share of all floorspace across the LGA. Retailing was the primary land use within this centre. There is sufficient potential floorspace within the centre to meet future demand, with excess capacity of 1,829 sqm. This centre has floorspace supply potential more than ten times the demand forecast – attention should be given to rezoning some of the existing employment land. This reflects the relatively low forecast of future demand within this centre. Zone B1 – Neighbourhood Centre is the most appropriate zone for this location.
St Ives	Village	**B2**	St Ives is the key location offering comparison goods retailing within Ku-ring-gai LGA. It consists of an enclosed shopping centre and some Main Street Retailing. St Ives Village Shopping centre performs strongly, with a relatively high retail turnover density (RTD). In 2006, total employment floorspace on business zoned land was 47,122 sqm. There is sufficient potential floorspace within the centre to meet future demand, with excess capacity of 37,946 sqm. This reflects the relatively low forecast of future demand within this centre following share adjustment. While there may be pressure for increasing floorspace, particularly at the shopping centre based on demand for retail, this is not in line with the Metropolitan or Subregional Strategies which seek to locate retailing in areas which are easily accessible by public transport. Zone B2 – Local Centre would allow for appropriate uses in this location.
St Ives Chase	Neighbourhood Centre	**B1**	St Ives Chase is one of many small Neighbourhood Centres. In 2006, total employment floorspace on business zoned land, in this centre was 927 sqm. The centre only accounts for a very small share of all floorspace across the LGA. Retailing was the primary land use within this centre. There is sufficient potential floorspace within the centre to meet future demand, with a supply shortfall of 78 sqm. This reflects the relatively low forecast of future demand within this centre. Zone B1 – Neighbourhood Centre is the most appropriate zone for this location.

St Ives North	Neighbourhood Centre	**B1**	St Ives North is one of many small Neighbourhood Centres. In 2006, total employment floorspace on business zoned land was 2,092 sqm. The centre accounts for a very small share of all floorspace across the LGA. Retailing is the primary land use within this centre. St Ives North has sufficient potential floorspace within the centre to meet future demand, with excess capacity of 1,841 sqm. This reflects the relatively low forecast of future demand within this centre. Zone B1 – Neighbourhood Centre is the most appropriate zone for this location.
Turramurra	Village	**B2**	Located on the train line, Turramurra offers a range of retailing including a supermarket. In 2006, total employment floorspace on business zoned land was 28,712 sqm. Retailing is the primary land use, with some Local Light, Business Park and Office. Turramurra accommodates approximately 8% of the LGA's retail floorspace and over 10% of the LGA's Dispersed activities. There is sufficient potential floorspace within the centre to meet future demand, with excess capacity of 51,264 sqm. Given that capacity is ten times the demand forecast in the 2006-2031 period, attention should be given to reducing capacity at this centre. Zone B2 – Local Centre would allow for appropriate uses in this location.
Wahroonga	Small Village	**B2**	Located on the train line, Wahroonga offers a range of retailing and encompasses high quality open space. In 2006, total employment floorspace on business zoned land, in this centre, was 11,510 sqm. Retail Main Street is a key land use. There is sufficient potential floorspace within the centre to meet future demand, with excess capacity of 4,667 sqm. This reflects the relatively large potential supply of floorspace. Zone B2 – Local Centre is the most appropriate zone for this location.
West Gordon	Neighbourhood Centre	**B1**	West Gordon is one of many small Neighbourhood Centres. In 2006, total employment floorspace on business zoned land, in this centre was 961 sqm. The centre only accounts for a very small share of all floorspace across the LGA. Retailing is the primary land use within this centre. There is insufficient potential floorspace within the centre to meet future demand, with a capacity shortfall of 236 sqm. This reflects a relatively small demand forecast, but fairly limited supply. Zone B1 – Neighbourhood Centre is the most appropriate zone for this location.
West Lindfield	Neighbourhood Centre	**B1**	West Lindfield is one of many small Neighbourhood Centres. In 2006, total employment floorspace on business zoned land was 4,484sqm. The centre accounts for a very small share of all floorspace across the LGA. Retailing is the primary land use within this centre. There is insufficient potential floorspace within the centre to meet future demand, with a capacity shortfall of 334 sqm. Zone B1 – Neighbourhood Centre is the most appropriate zone for this location.
West Pymble	Neighbourhood Centre	**B1**	West Pymble is one of many small Neighbourhood Centres. In 2006, total employment floorspace on business zoned land was 3,622 sqm.. The centre only account for a very small share of all floorspace across the LGA. Retailing is the primary land use within this centre. There is sufficient potential floorspace within the centre to meet future demand, with excess capacity of 3,832 sqm. This reflects the relatively low forecast of future demand within this centre. Zone B1 – Neighbourhood Centre would allow for appropriate uses in this location.

Appendix A – Assessment of Key Centres (Village and Larger)

<table>
<tr><th colspan="5">Hornsby: Major Centre - 3,000 new jobs to 2031</th></tr>
<tr><td rowspan="3">Available Floor</td><td>Scenario 1</td><td colspan="3">176,249 sqm</td></tr>
<tr><td>Scenario 2</td><td colspan="3">382,166 sqm</td></tr>
<tr><td>Scenario 3</td><td colspan="3">205,989 sqm</td></tr>
<tr><td rowspan="2">Current Land Use</td><td>BLC</td><td colspan="3">

Dominated by the Westfield development ‘Retail Big Box’ category
‘Special Activities’ along George Street including the library and recreational facilities and also in proximity to Hospital.
Low scale retail characterises the western side of Hornsby, which is ‘Retail Main Street’
Considerable number of residential lots in Hornsby centre
Light industrial uses support the centre along Jersey and Hunter Streets
</td></tr>
<tr><td>Vacancies</td><td colspan="3">
A small number of vacancies were noted - some in Waitara, and one on both Dural and Hunter Streets.
Vacant Sites accounted for 5,783sqm or 5% of all vacant unconstrained sites across the LGA.
</td></tr>
<tr><td rowspan="15">Current Attributes</td><td rowspan="15">Share of LGA Occupied Employment FS by BLC</td><td>Broad Land Use Category</td><td>sqm</td><td>%</td></tr>
<tr><td>Accommodation - Short Term</td><td>0</td><td>0.0%</td></tr>
<tr><td>Business / Office Parks</td><td>631</td><td>0.7%</td></tr>
<tr><td>Dispersed Activities</td><td>6,406</td><td>35.2%</td></tr>
<tr><td>Freight and Logistics</td><td>4,025</td><td>1.9%</td></tr>
<tr><td>Local light industrial and urban support</td><td>39,851</td><td>28.9%</td></tr>
<tr><td>Manufacturing - Heavy</td><td>0</td><td>0.0%</td></tr>
<tr><td>Manufacturing - Light</td><td>929</td><td>1.2%</td></tr>
<tr><td>Office</td><td>27,490</td><td>32.5%</td></tr>
<tr><td>Retail - Big Box</td><td>239,852</td><td>78.8%</td></tr>
<tr><td>Bulky Goods Retail</td><td>13,518</td><td>16.8%</td></tr>
<tr><td>Residential</td><td>8,950</td><td>94.6%</td></tr>
<tr><td>Retail - Main Street</td><td>60,017</td><td>28.3%</td></tr>
<tr><td>Special Activities</td><td>12,789</td><td>15.9%</td></tr>
<tr><td>Urban Services</td><td>5,239</td><td>17.5%</td></tr>
</table>

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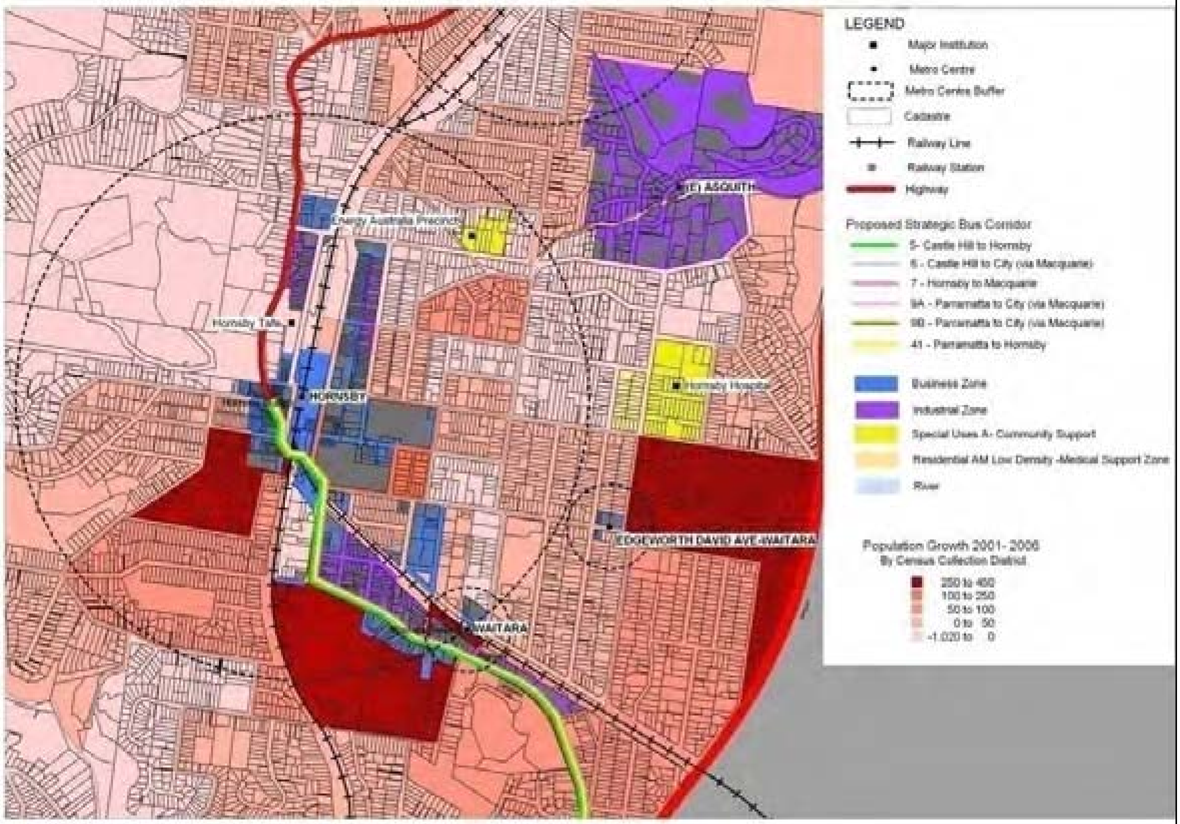
<table>
<tr><td></td><td></td><td>Total</td><td>419,696</td><td>29.5%</td></tr>
<tr><td></td><td>Vacancies</td><td>Vacant Floorspace</td><td>56,372</td><td>33.3%</td></tr>
<tr><td></td><td></td><td>Vacant Unconstrained Land</td><td>5,783</td><td>4.9%</td></tr>
<tr><td></td><td>Key attributes</td><td colspan="3">



Good public transport connections, with further investment occurring to provide an additional platform at Hornsby Station
TAFE and Council buildings including Library
Large enclosed shopping centre and pedestrian mall
Small amount of adjacent industrial land along Hunter and Jersey Street. The sub regional strategies identify an opportunity to broaden permissible uses in these locations.
High density residential development occurring in proximity to the centre
Small scale retailing on western side of station
Employment lands within Hornsby Major Centre are located within TZs 467,762 and 763. In this area, 2001 employment numbers show a relative concentration of employment in ‘Retail Trade’, ‘Education’ and ‘Government Administration and Defence’, reflecting Hornsby’s role a retail centre, as well as the presence of the TAFE and government buildings including the Council Chambers.

</td></tr>
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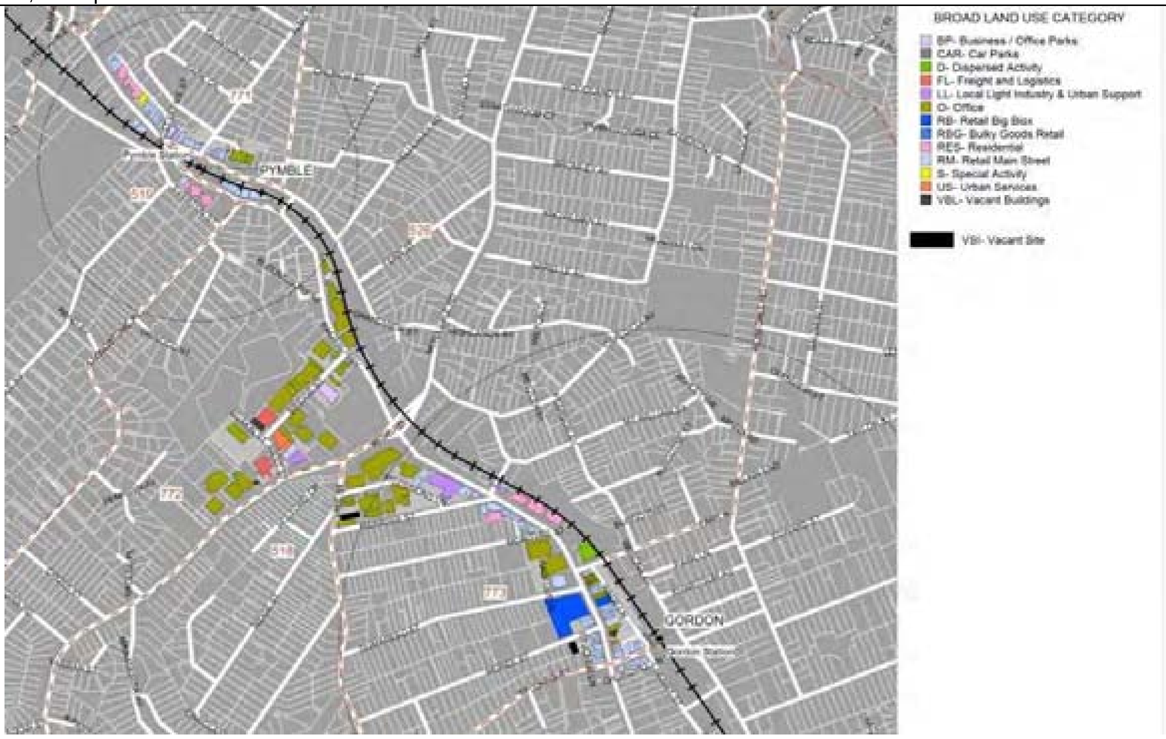
Gordon: Town Centre

Available Floor	Scenario 1	46,452 sqm
	Scenario 2	129,931 sqm
	Scenario 3	85,729 sqm

Current Land Use

BLC



- Gordon accounts for 26.1% of Ku-ring-gai LGA's employment floorspace.
- 'Retail Main Street' activity along Pacific Highway and the Gordon Centre, 'Big Box Retail'
- To the north of the centre is the Pymble /Gordon business area which consists of a large amount of 'Office' activity
- Other uses include 'Residential', 'Dispersed Activities' and 'Local Light Industrial'

Vacancies

- A significant amount of vacant floorspace is located within Gordon, accounting for 44.2% of all vacant floorspace within Ku-ring-gai LGA.
- Vacant sites equate to 1,637sqm representing 22.5% of all vacant land area in Ku-ring-gai LGA

Current Attributes

Share of LGA Occupied Employment FS by BLC

Broad Land Use Category	sqm	%
Accommodation - Short Term	0	-
Business / Office Parks	0	0.0%
Dispersed Activities	3,018	35.2%
Freight and Logistics	0	0.0%
Local light industrial and urban support	3,298	27.1%
Manufacturing - Heavy	0	-
Manufacturing - Light	0	-
Office	52,316	37.4%
Retail - Big Box	13,391	28.7%
Bulky Goods Retail	439	34.3%
Residential	0	0.0%
Retail - Main Street	26,573	18.8%
Special Activities	0	0.0%
Urban Services	0	0.0%
Total	**99,034**	**26.1%**

<table>
<tr><td rowspan="2"></td><td rowspan="2">Vacancies</td><td>Vacant Floorspace</td><td>10,967</td><td>44.2%</td></tr>
<tr><td>Vacant Unconstrained Land</td><td>1,637</td><td>22.5%</td></tr>
<tr><td></td><td>Key attributes</td><td colspan="3">


Train line
Shopping centre including supermarket
Public parking available
Council building including a library
Commercial area located to the north of the centre
TZ 773, which encompasses the retailing centre of Gordon, as well as the commercial area to the north, employed approximately 2,400 people in 2001. Industry strengths in this area include Communication Services (LQ 4.4) and Government Administration and Defence, reflecting the location of the Council offices.

</td></tr>
</table>

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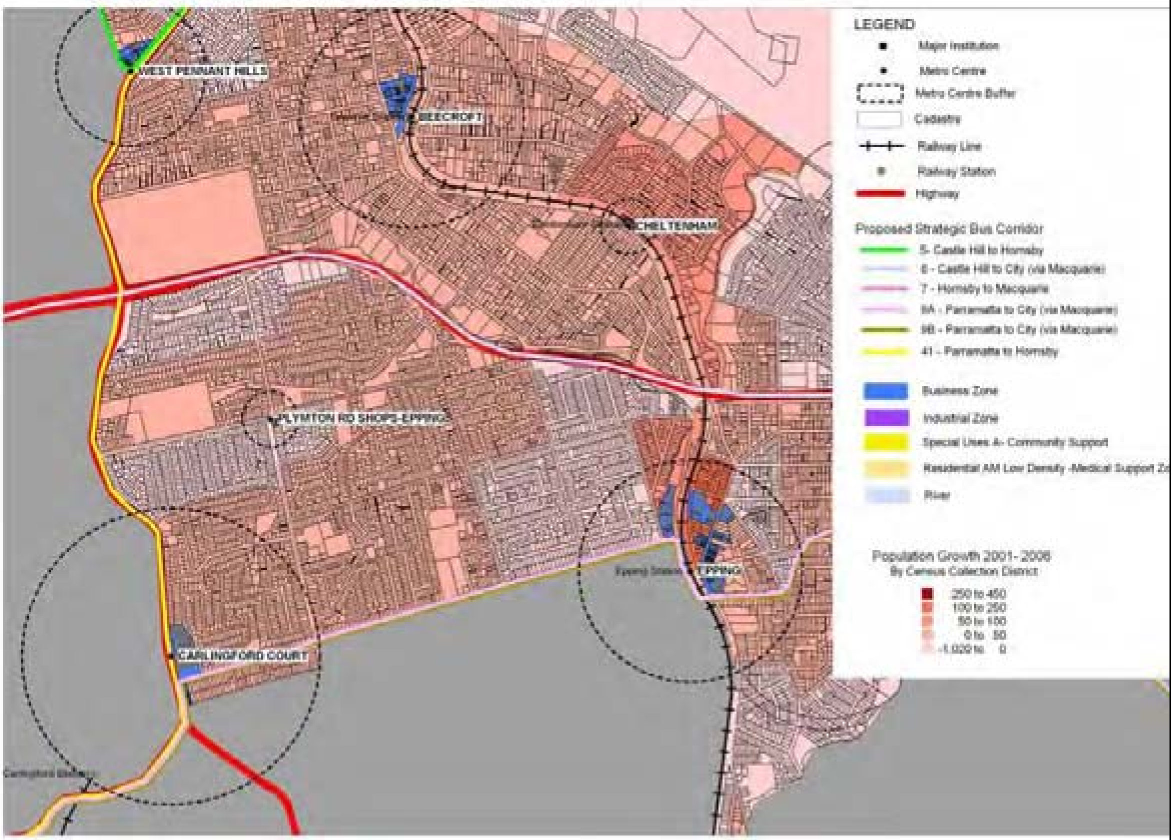
Epping: Town Centre				
Available Floor	Scenario 1	23,854 sqm		
	Scenario 2	21,831 sqm		
	Scenario 3	5,167 sqm		
Current Land Use	BLC	 • Epping accounts for 38.1% of the LGA's floorspace within the office land use category, while only accounting for 4.4% of total floorspace. • A significant amount of 'Office' BLC • 'Retail Main Street' is located opposite the eastern exit of the station, and along Oxford St. • 'Dispersed Activity' includes medical services and places of worship. • Within the centre, but outside the LGA (Travel Zone 828), there are additional 'Retail Main Street' uses, including a supermarket. In the same area, there is also the Epping Club and Epping Hotel.		
	Vacancies	• There is very limited capacity at Epping in terms of vacant floorspace or vacant sites		
Current Attributes	Share of LGA Occupied Employment FS by BLC	**Broad Land Use Category**	**sqm**	**%**
		Accommodation - Short Term	0	0.0%
		Business / Office Parks	0	0.0%
		Dispersed Activities	6,699	36.8%
		Freight and Logistics	16,227	7.5%
		Local light industrial and urban support	324	0.2%
		Manufacturing - Heavy	0	0.0%
		Manufacturing - Light	0	0.0%
		Office	32,272	38.1%
		Retail - Big Box	0	0.0%
		Bulky Goods Retail	0	0.0%
		Residential	0	0.0%
		Retail - Main Street	6,818	3.2%
		Special Activities	172	0.2%
		Urban Services	38	0.1%
		Total	**62,550**	**4.4%**
	Vacancies	Vacant Floorspace	2,721	1.6%
		Vacant Unconstrained Land	492	0.4%

SGS Economics & Planning

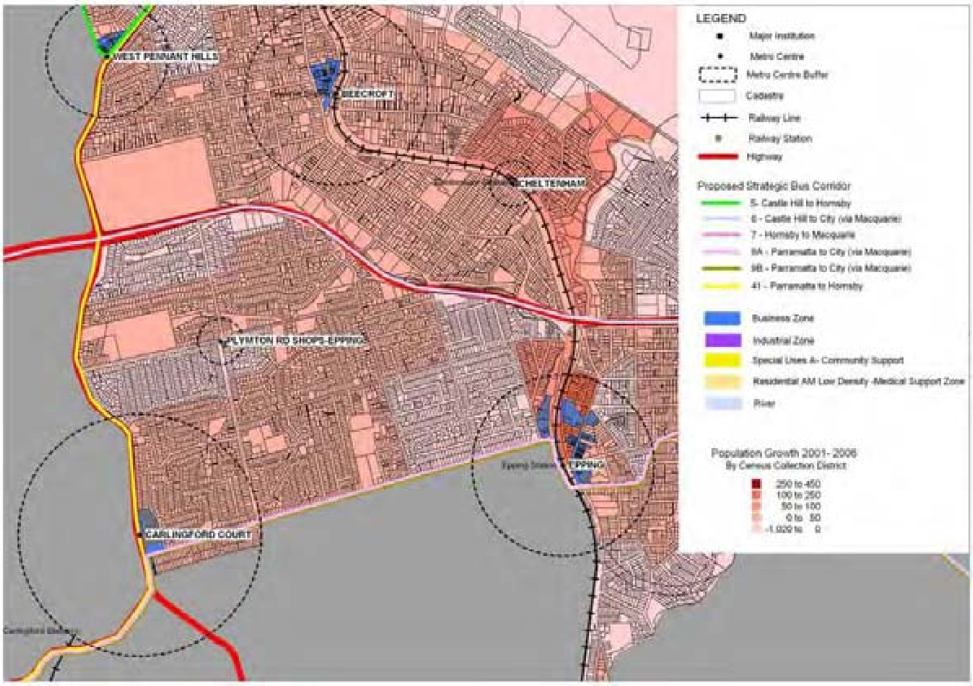
Key attributes



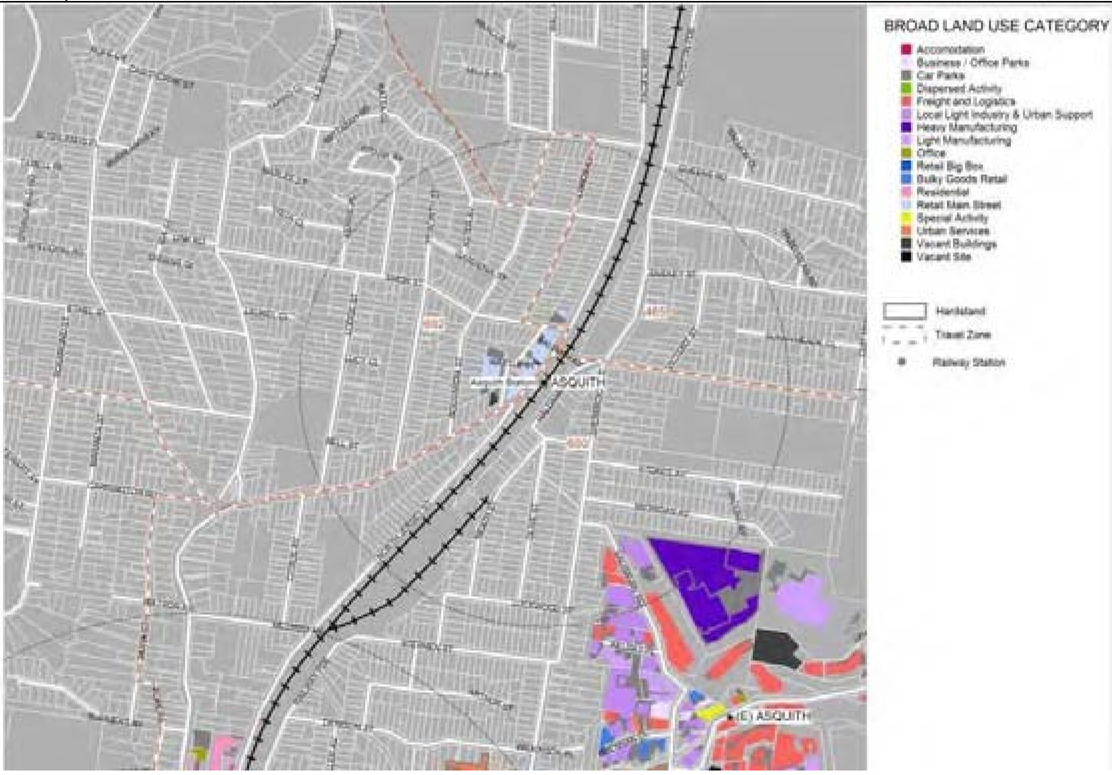
- Significant investment in infrastructure – new rail connection
- Proximity to Macquarie Park where significant growth is expected to occur
- 20 km (an estimated 25 minutes travel time) from Sydney CBD
- Centre is split between LGAs
- In 2001, TZs 829 and 830 employed approximately 2,100 people, within a concentration of employment in the 'Finance and Insurance' industry.

SGS Economics & Planning

Carlingford Court: Stand Alone Shopping Centre				
Availabl e Floor	Scenario 1	32,219 sqm		
	Scenario 2	3,294 sqm		
	Scenario 3	-5,100 sqm		
Current Land Use	BLC	 • ‘Retail Big Box’ is the primary broad land use category within this centre		
	Vacancies	• Very minimal vacancies		
Current Attributes	Share of LGA Occupied Employment FS by BLC	**Broad Land Use Category**	**sqm**	**%**
		Accommodation - Short Term	0	0.0%
		Business / Office Parks	0	0.0%
		Dispersed Activities	0	0.0%
		Freight and Logistics	0	0.0%
		Local light industrial and urban support	375	0.3%
		Manufacturing - Heavy	0	0.0%
		Manufacturing - Light	0	0.0%
		Office	0	0.0%
		Retail - Big Box	41,520	13.6%
		Bulky Goods Retail	0	0.0%
		Residential	0	0.0%
		Retail - Main Street	3,605	1.7%
		Special Activities	0	0.0%
		Urban Services	0	0.0%
		Total	**45,499**	**3.2%**
	Vacancies	Vacant Floorspace	724	0.4%
		Vacant Unconstrained Land	0	0%

	Key attributes	 • Located along the boundary of the LGA • Identified in the sub regional strategy as a stand-alone shopping centre

SGS Economics & Planning

Asquith: Village				
Available Floor	Scenario 1	2,747 sqm		
	Scenario 2	19,305 sqm		
	Scenario 3	13,610 sqm		
Current Land Use	BLC	 • Land use within Asquith is primarily 'Retail Main Street'		
	Vacancies	• The audit recorded 1,008sqm of vacant floorspace and 702sqm of vacant land		
Current Attributes	Share of LGA Occupied Employment FS by BLC	**Broad Land Use Category**	**sqm**	**%**
		Accommodation - Short Term	0	0.0%
		Business / Office Parks	0	0.0%
		Dispersed Activities	0	0.0%
		Freight and Logistics	0	0.0%
		Local light industrial and urban support	0	0.0%
		Manufacturing - Heavy	0	0.0%
		Manufacturing - Light	0	0.0%
		Office	0	0.0%
		Retail - Big Box	0	0.0%
		Bulky Goods Retail	0	0.0%
		Residential	0	0.0%
		Retail - Main Street	7,402	3.5%
		Special Activities	0	0.0%
		Urban Services	0	0.0%
		Total	**7,402**	**0.5%**
	Vacancies	Vacant Floorspace	1,008	0.6%
		Vacant Unconstrained Land	702	0.6%

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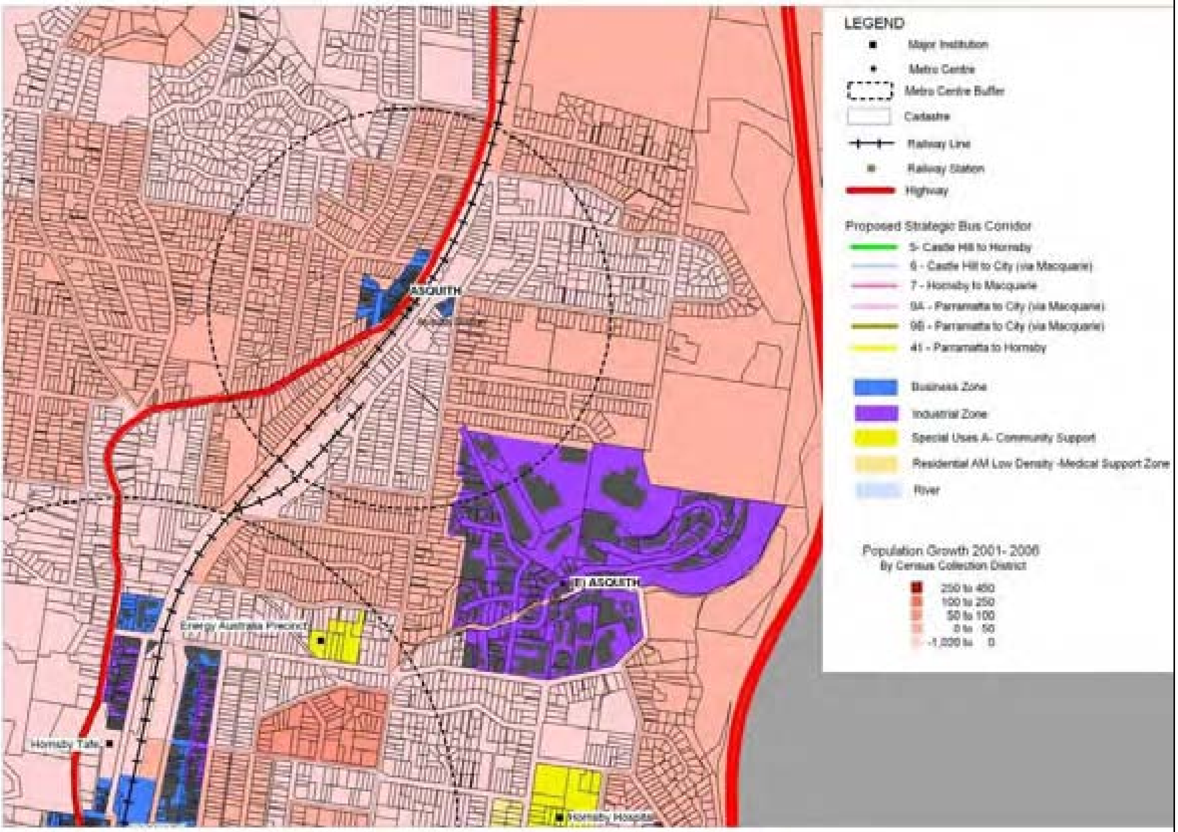
<td>Key attributes</td>
<td>


Poorly performing centre, in close proximity to Hornsby
Provides local services, including doctor's surgery, post office and dry cleaners.
Train line
Entry to F3 south-bound from Ku-ring-gai Chase Road
Proximity to employment lands
TZ 692 employed approximately 900 people in 2001, with apparent strengths in a range of industry sectors, however in terms of the absolute numbers; these represent a small number of employees. The travel zone also covers an area significant wider than Asquith centre.

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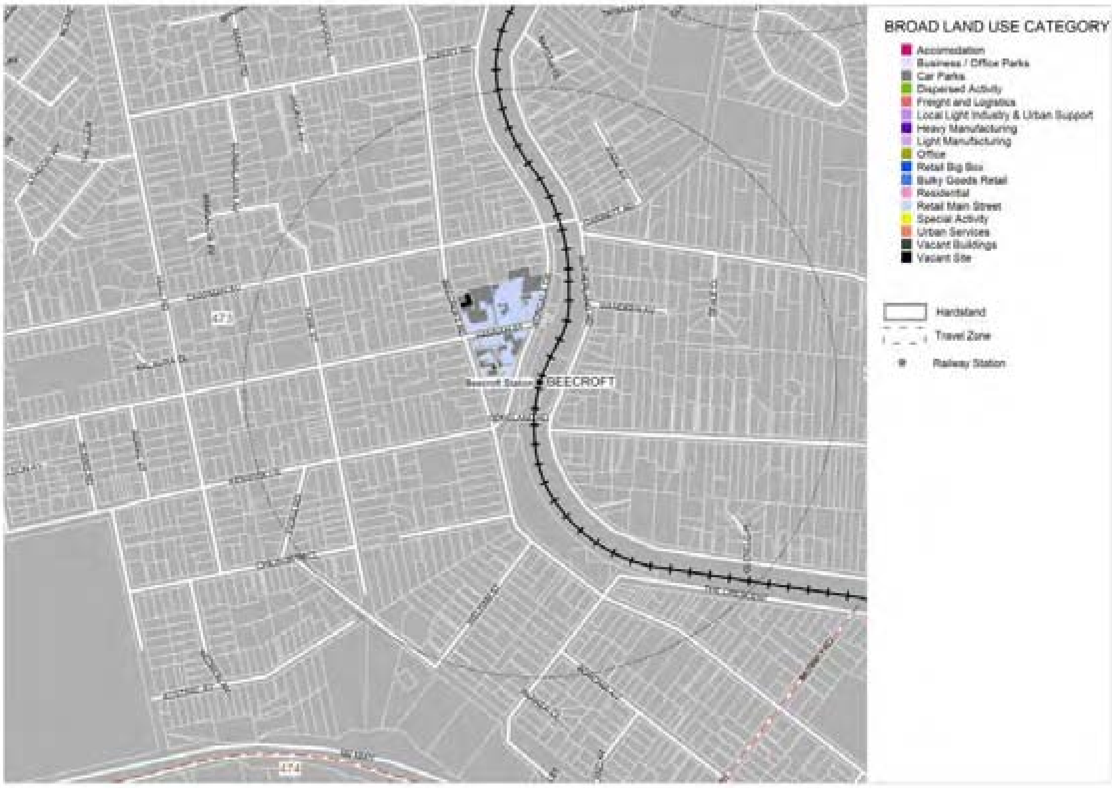
</table>

Beecroft: Village			
Availabl e Floor	Scenario 1	4,303 sqm	
	Scenario 2	15,813 sqm	
	Scenario 3	10,301 sqm	

Current Land Use

BLC



- 'Retail Main Street' is the Broad Land Use within Beecroft.
- Beecroft accounts for less than 1% of Hornsby LGA's total floorspace

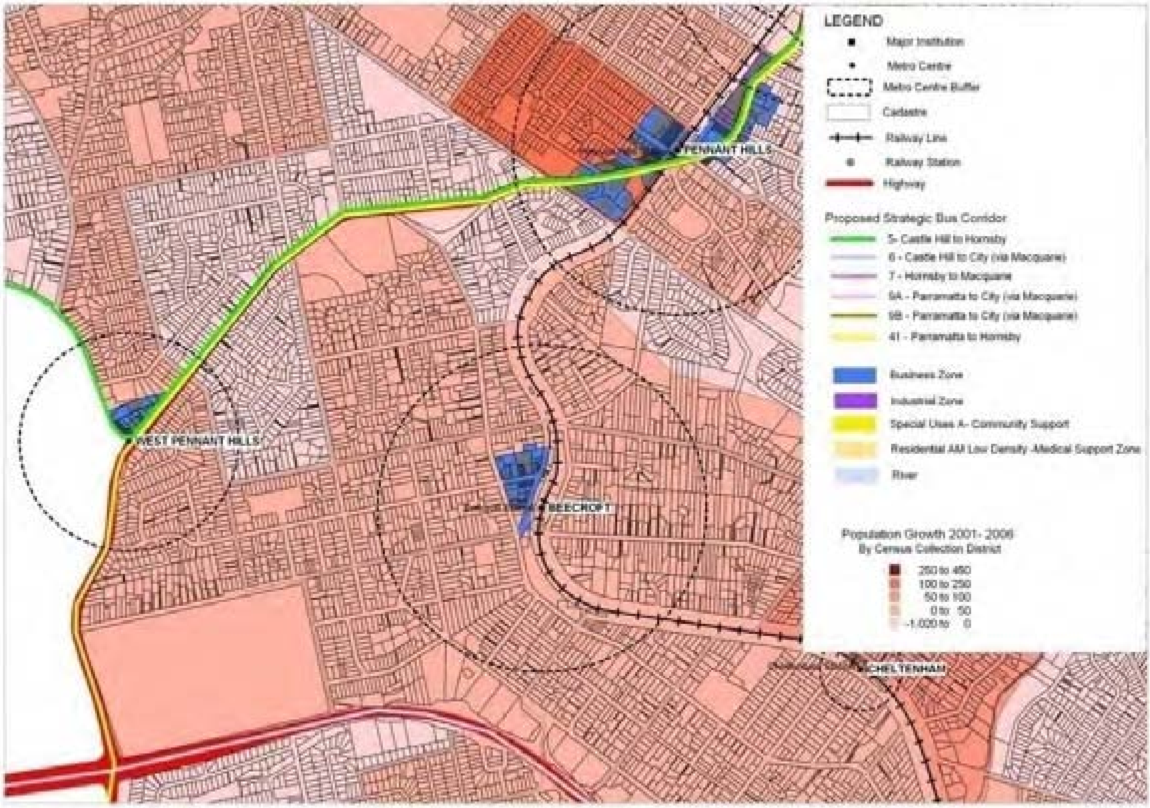
Vacancies

- There is minimal capacity within the centre in terms of vacant sites or floorspace

Current Attributes

Share of LGA Occupied Employment FS by BLC

Broad Land Use Category	**sqm**	**%**
Accommodation - Short Term	0	0.0%
Business / Office Parks	0	0.0%
Dispersed Activities	0	0.0%
Freight and Logistics	0	0.0%
Local light industrial and urban support	0	0.0%
Manufacturing - Heavy	0	0.0%
Manufacturing - Light	0	0.0%
Office	0	0.0%
Retail - Big Box	0	0.0%
Bulky Goods Retail	0	0.0%
Residential	0	0.0%
Retail - Main Street	11,528	5.4%
Special Activities	0	0.0%
Urban Services	0	0.0%
Total	**11,528**	**0.8%**

	Vacancies	Vacant Floorspace	428	0.3%
		Vacant Unconstrained Land	1,028	0.9%
	Key attributes	 • Train line • Good access to the M2 via Beecroft Road • Good quality housing stock • Close to open space and sporting facilities (such as Pennant Hills Park, Cheltenham Park and Pennant Hills Golf Course). • The travel zone in which Beecroft is located covers a broad area which includes West Pennant Hills. As such employment numbers do not provide a clear picture of the nature of employment within Beecroft.		

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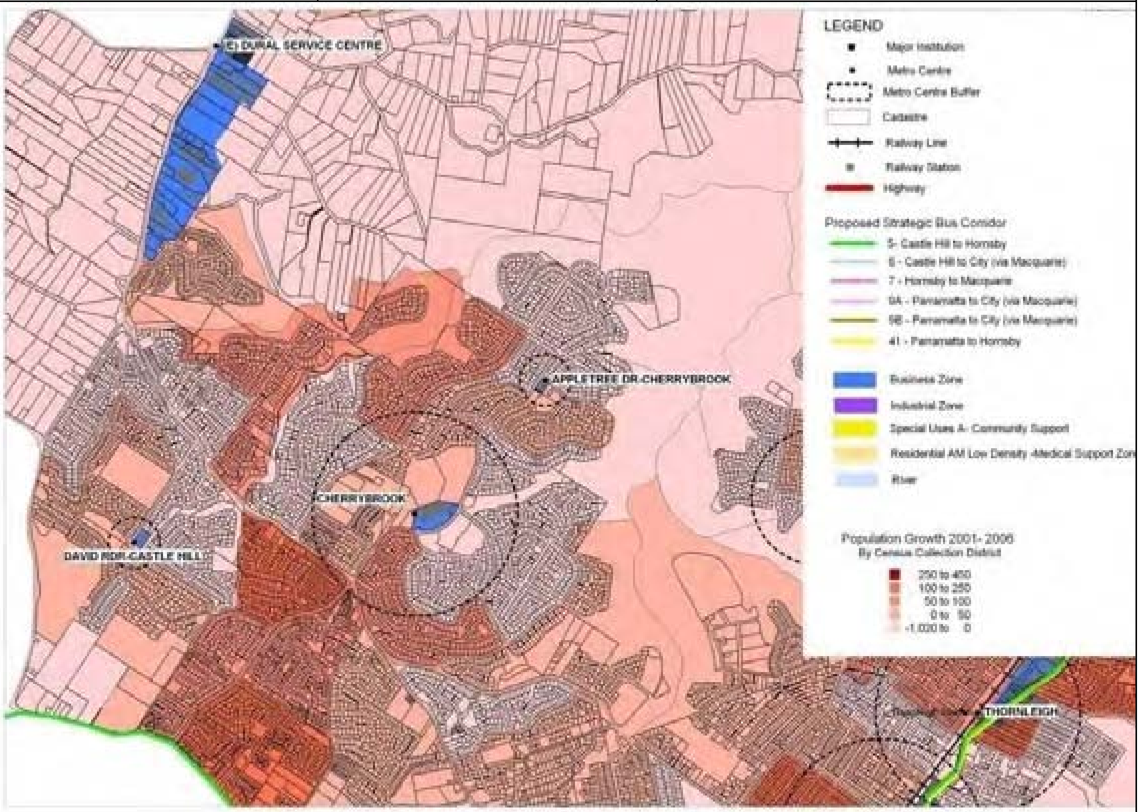
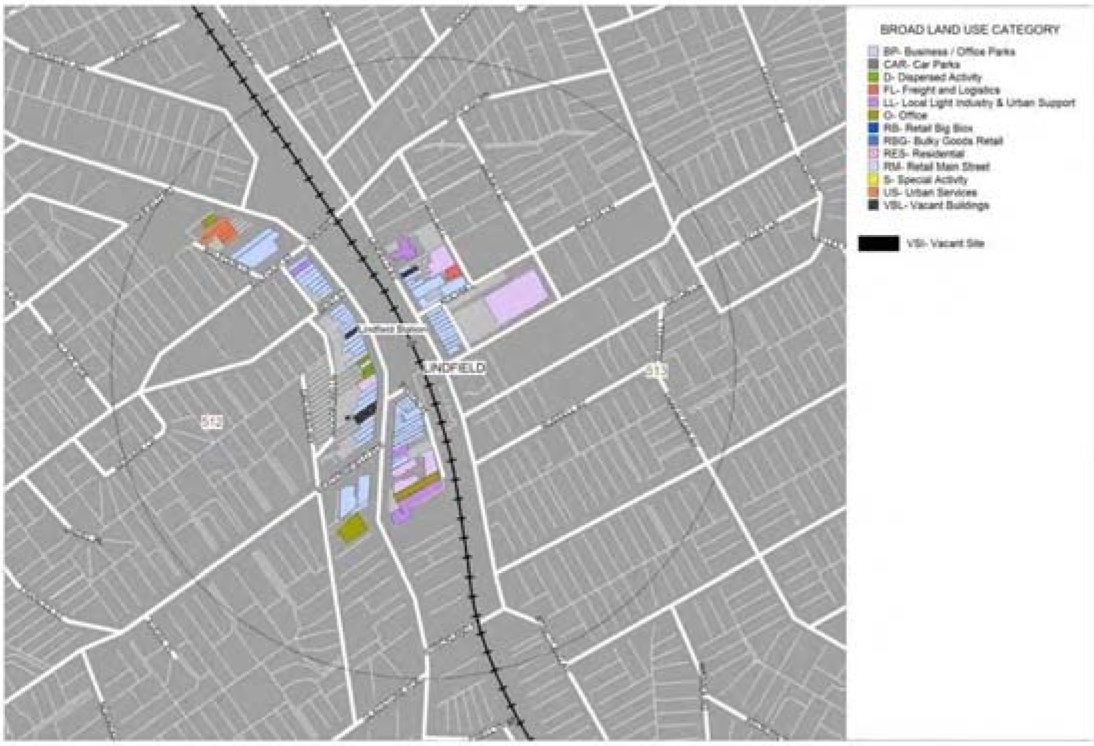
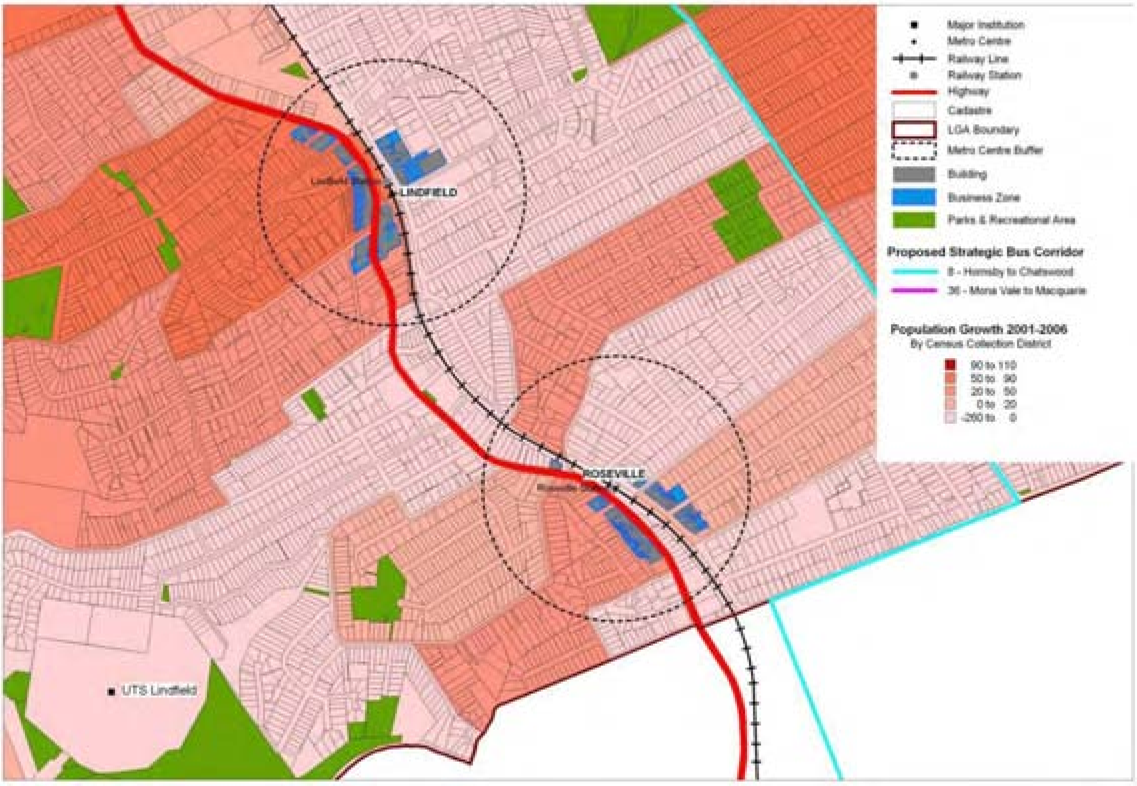
Cherrybrook: Village				
Available Floor	Scenario 1	1,859 sqm		
	Scenario 2	24,000 sqm		
	Scenario 3	17,093 sqm		
Current Land Use	BLC	 • 'Retail Main Street' is the primary land use within Cherrybrook Centre • Cherrybrook accounts for less than 1% of Hornsby LGA's total floorspace		
	Vacancies	• No vacant sites or buildings were recorded within the centre		
Current Attributes	Share of LGA Occupied Employment FS by BLC	**Broad Land Use Category**	**sqm**	**%**
		Accommodation - Short Term	0	0.0%
		Business / Office Parks	0	0.0%
		Dispersed Activities	461	2.5%
		Freight and Logistics	0	0.0%
		Local light industrial and urban support	0	0.0%
		Manufacturing - Heavy	0	0.0%
		Manufacturing - Light	0	0.0%
		Office	0	0.0%
		Retail - Big Box	11,933	3.9%
		Bulky Goods Retail	0	0.0%
		Residential	0	0.0%
		Retail - Main Street	0	0.0%
		Special Activities	0	0.0%
		Urban Services	0	0.0%
		Total	**12,393**	**0.9%**

<table>
<tr><td rowspan="3"></td><td rowspan="2">Vacancies</td><td>Vacant Floorspace</td><td>0</td><td>0%</td></tr>
<tr><td>Vacant Unconstrained Land</td><td>0</td><td>0%</td></tr>
<tr><td>Key attributes</td><td colspan="3">

Good quality housing stock
Close to open space (such as adjacent sporting fields and Berowra Valley Regional Park).
The travel zone in which Cherrybrook is located covers a broad area and as such employment numbers do not provide a clear picture of the nature of employment within the centre. There is likely to be a significant amount of out of centre employment within travel zone.
</td></tr>
</table>

Lindfield: Village				
Available Floor	Scenario 1	16,974 sqm		
	Scenario 2	47,366 sqm		
	Scenario 3	31,714 sqm		
Current Land Use	BLC	 The primary land use within Lindfield centre is Retail Main Street, with some office and office park uses. • Lindfield accounts for 9.9% of Ku-ring-gai LGA's total floorspace.		
	Vacancies	• At the time of the audit, there was 1,772sqm of vacant floorspace within Lindfield centre.		
Current Attributes	Share of LGA Occupied Employment FS by BLC	**Broad Land Use Category**	**sqm**	**%**
		Accommodation - Short Term	0	-
		Business / Office Parks	12,751	76.2%
		Dispersed Activities	93	1.1%
		Freight and Logistics	474	8.0%
		Local light industrial and urban support	2,682	22.0%
		Manufacturing - Heavy	0	-
		Manufacturing - Light	0	-
		Office	4,064	2.9%
		Retail - Big Box	0	0.0%
		Bulky Goods Retail	0	0.0%
		Residential	0	0.0%
		Retail - Main Street	16,415	11.6%
		Special Activities	59	2.5%
		Urban Services	1,092	29.6%
		Total	37,631	9.9%
	Vacancies	Vacant Floorspace	1,772sqm	7.1%

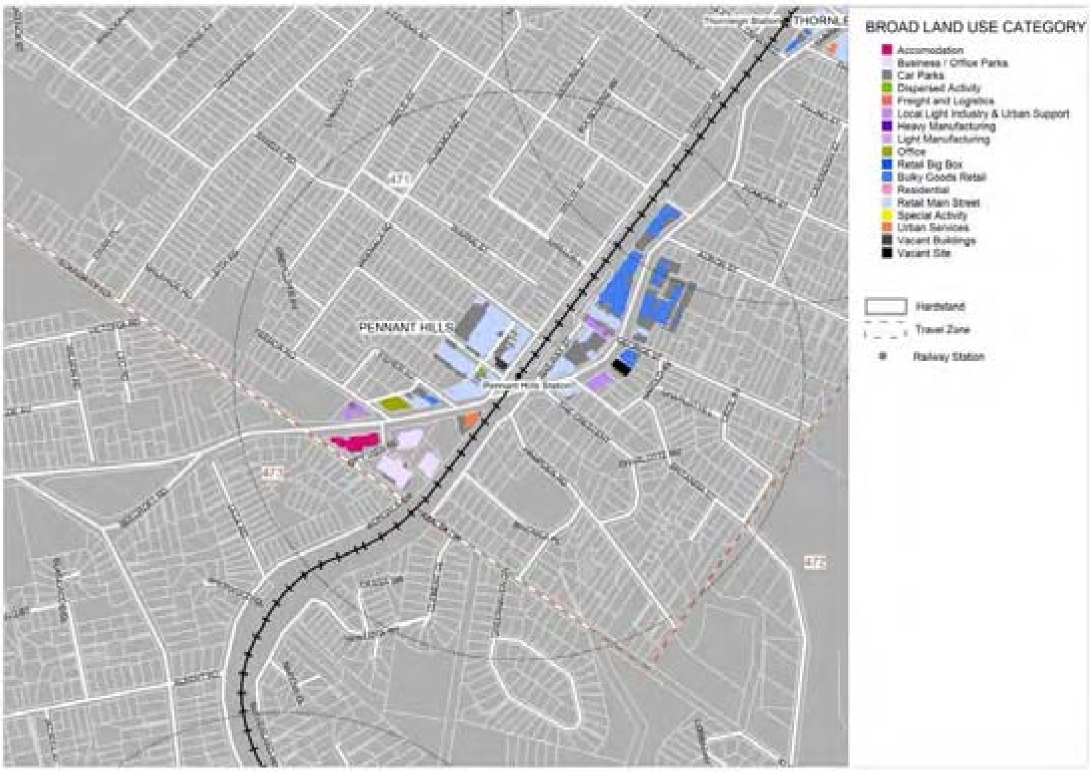
		Vacant Unconstrained Land	0	-
	Key attributes	 • Train line • Close to Chatswood and Sydney's CBD • High quality housing stock and relatively affluent demographic • Business zoned land within Lindfield is split between TZs 512 and 513, and only makes up a small proportion of the area included within these TZs.		

Pennant Hills: Village

Available Floor	Scenario 1	42,454 sqm
	Scenario 2	18,725 sqm
	Scenario 3	512 sqm

Current Land Use

BLC



- Various land uses are located within Pennant Hills, including Business/Office Park, Retail Main Street and Bulky Goods Retail.
- Pennant Hills accounts for 5.9% of Hornsby LGA's total floorspace

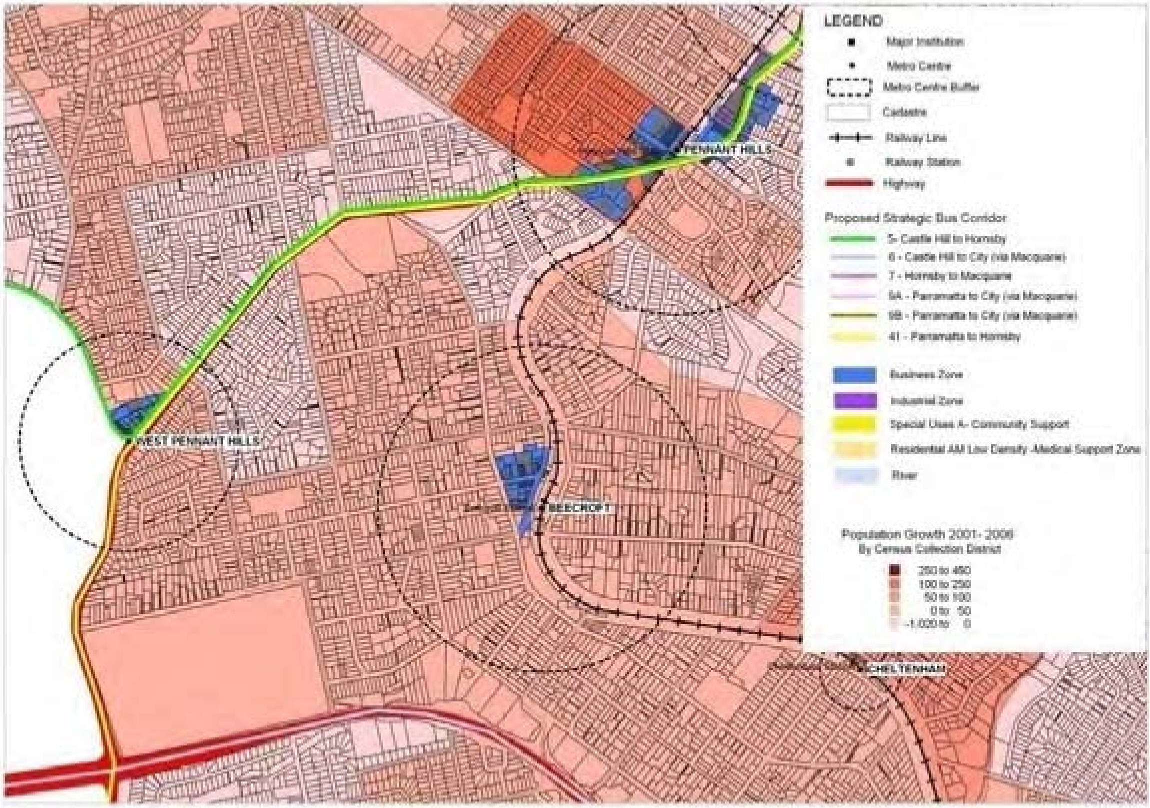
Vacancies

- Vacant floorspace accounts for 2,848sqm and vacant land accounts for 1,492sqm.

Current Attributes

Share of LGA Occupied Employment FS by BLC

Broad Land Use Category	sqm	%
Accommodation - Short Term	8,918	67.6%
Business / Office Parks	30,664	33.8%
Dispersed Activities	152	0.8%
Freight and Logistics	0	0.0%
Local light industrial and urban support	2,310	1.7%
Manufacturing - Heavy	0	0.0%
Manufacturing - Light	122	0.2%
Office	1,994	2.4%
Retail - Big Box	0	0.0%
Bulky Goods Retail	12,914	16.1%
Residential	0	0.0%
Retail - Main Street	25,568	12.0%
Special Activities	0	0.0%
Urban Services	1,707	5.7%
Total	**84,349**	**5.9%**

	Vacancies	Vacant Floorspace	2,848	1.7%
		Vacant Unconstrained Land	1,491	1.3%
	Key attributes	 • Train line • Good access to the CBD via the M2 • Sporting Facilities (Pennant Hills Park) • The travel zone in which Pennant Hills is located, covers a broad area and as such employment numbers do not provide a clear picture of the nature of employment within the centre. This travel zone also encompasses Thornleigh and Westleigh. Total employment in 2001 was approximately 4,000.		

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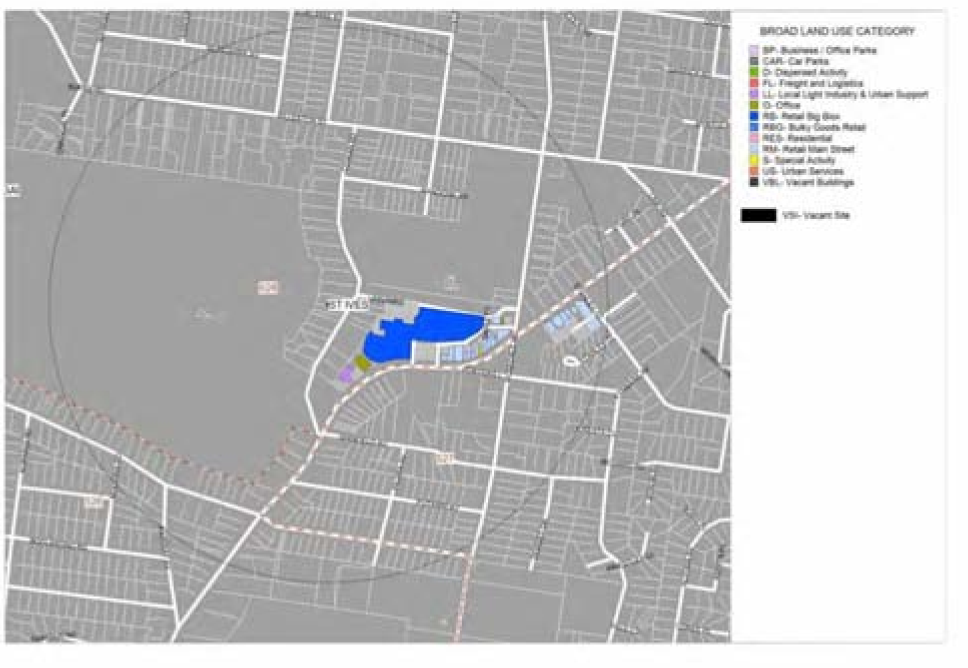
St Ives: Village

Available Floor	Scenario 1	18,294 sqm
	Scenario 2	55,554 sqm
	Scenario 3	36,302 sqm

Current Land Use

BLC



- Primary land uses include 'Retail Main Street' and 'Retail Big Box'.
- Floorspace within St Ives accounts for 12.4% of total floor space within Ku-ring-gai LGA.

Vacancies

- At the time of the audit there was 651sqm of vacant floorspace

Current Attributes

Share of LGA Occupied Employment FS by BLC

Broad Land Use Category	sqm	%
Accommodation - Short Term	0	-
Business / Office Parks	0	0.0%
Dispersed Activities	0	0.0%
Freight and Logistics	0	0.0%
Local light industrial and urban support	639	5.3%
Manufacturing - Heavy	0	-
Manufacturing - Light	0	-
Office	1,481	1.1%
Retail - Big Box	32,988	70.7%
Bulky Goods Retail	0	0.0%
Residential	0	0.0%
Retail - Main Street	11,912	8.4%
Special Activities	101	4.3%
Urban Services	0	0.0%
Total	**47,122**	12.4%

Vacancies

Vacant Floorspace	651	2.6%
Vacant Unconstrained Land	0	0%

SGS Economics & Planning

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<td>Key attributes</td>
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Well performing shopping centre in a relatively affluent area
High quality housing stock
Access to open space (St Ives Village Green and Pymble Golf Course)
Poor public transport access
Some Council owned carparking
St Ives is mostly located within TZ 528, which in 2001, had approximately 800 retail employees

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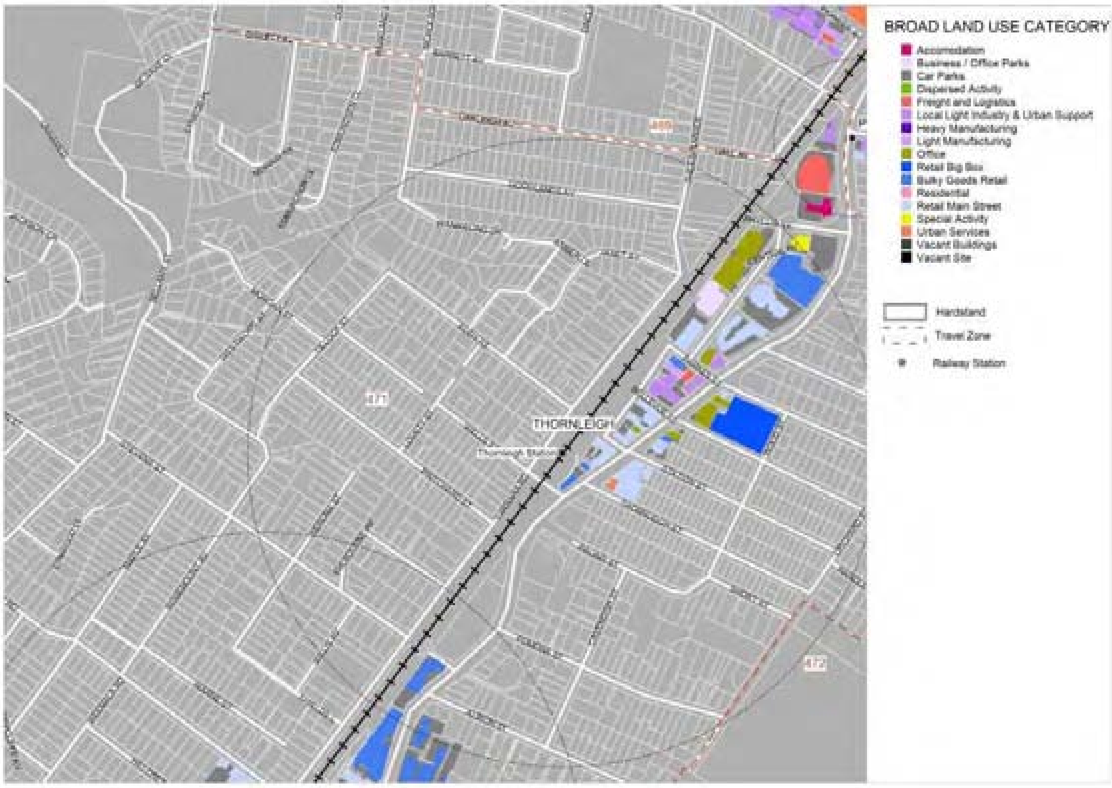
</table>

Thornleigh: Village

Available Floor		
	Scenario 1	49,899 sqm
	Scenario 2	5,596 sqm
	Scenario 3	-6,287 sqm

Current Land Use

BLC



- Key land uses within Thornleigh include Office, Retail Main Street and Retail Big Box, as well as Business/Office Park and Local Light Industry.
- Thornleigh accounts for 4.4% of Hornsby LGA's total floorspace

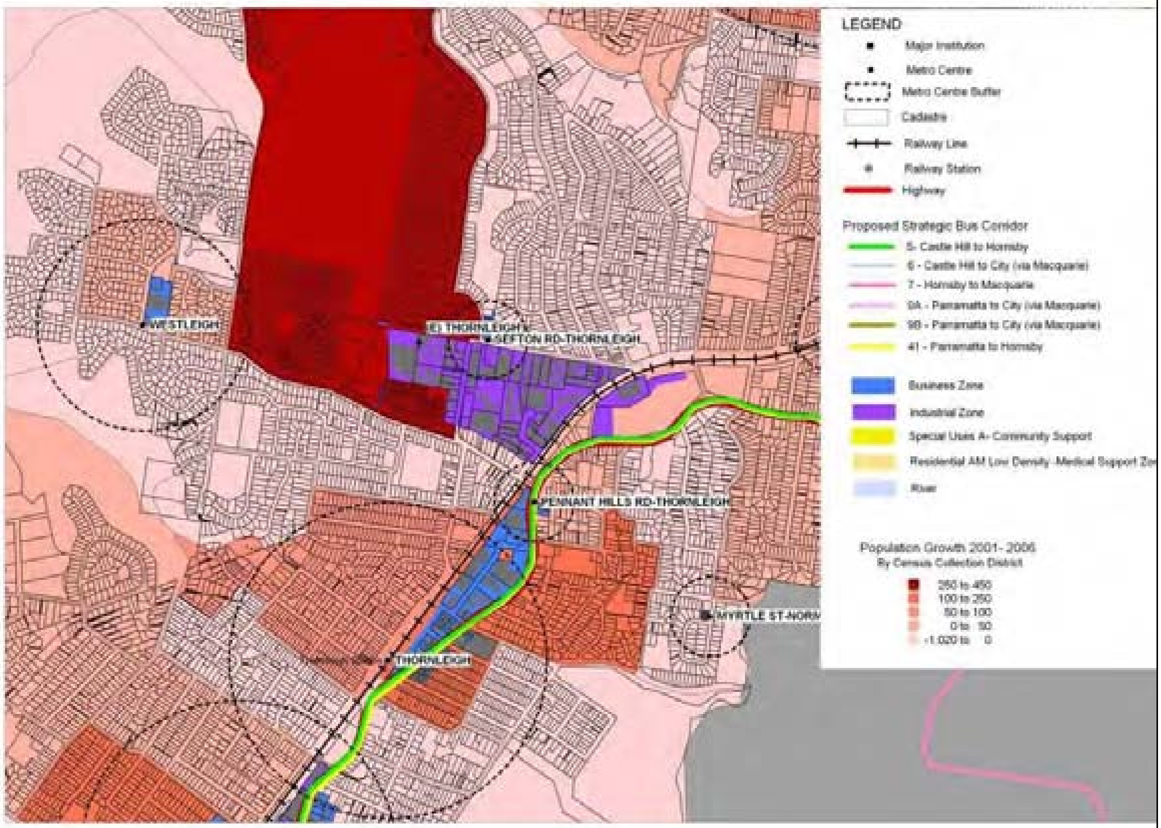
Vacancies

- At the time of the audit, there was 5,204sqm of vacant floorspace within Thornleigh

Current Attributes

Share of LGA Occupied Employment FS by BLC

Broad Land Use Category	**sqm**	**%**
Accommodation - Short Term	0	0.0%
Business / Office Parks	4,637	5.1%
Dispersed Activities	0	0.0%
Freight and Logistics	396	0.2%
Local light industrial and urban support	4,785	3.5%
Manufacturing - Heavy	0	0.0%
Manufacturing - Light	791	1.0%
Office	17,283	20.4%
Retail - Big Box	11,254	3.7%
Bulky Goods Retail	7,269	9.0%
Residential	0	0.0%
Retail - Main Street	16,312	7.7%
Special Activities	0	0.0%
Urban Services	478	1.6%
Total	**63,204**	**4.4%**

	Vacancies	Vacant Floorspace	5,204	3.1%
		Vacant Unconstrained Land	0	0%
	Key attributes	 • Train line • Close to employment lands • The travel zone in which Thornleigh is located, covers a broad area and as such employment numbers do not provide a clear picture of the nature of employment within the centre. This travel zone also encompasses Pennant Hills and Westleigh. Total employment in 2001 was approximately 4,000.		

Turramurra: Village				
Available Floor	Scenario 1	13,166 sqm		
	Scenario 2	68,980 sqm		
	Scenario 3	49,352 sqm		
Current Land Use	BLC	 • The primary broad land use within the centre is 'Retail Main Street' including a supermarket, cafes and restaurants, and local service providers, with a small amount of 'Special Activities' which encompasses uses such as the Senior Citizen Centre. • Turramurra accounts for 7.6 % of the floorspace within Ku-ring-gai LGA.		
	Vacancies	• There is 1,932sqm of vacant land in Turramurra which represents 26.5% of all vacant land recorded by the LGA in the audit. • A significant amount of vacant floorspace was recorded in Turramurra at the time of the audit		
Current Attributes	Share of LGA Occupied Employment FS by BLC	**Broad Land Use Category**	**sqm**	**%**
		Accommodation - Short Term	0	-
		Business / Office Parks	0	0.0%
		Dispersed Activities	1,570	18.3%
		Freight and Logistics	0	0.0%
		Local light industrial and urban support	628	5.2%
		Manufacturing - Heavy	0	-
		Manufacturing - Light	0	-
		Office	1,031	0.7%
		Retail - Big Box	0	0.0%
		Bulky Goods Retail	177	13.8%
		Residential	0	0.0%
		Retail - Main Street	23,199	16.4%
		Special Activities	1,755	74.9%
		Urban Services	351	9.5%
		Total	**28,712**	**7.6%**
	Vacancies	Vacant Floorspace	4,758	19.2%
		Vacant Unconstrained Land	1,932	26.5%

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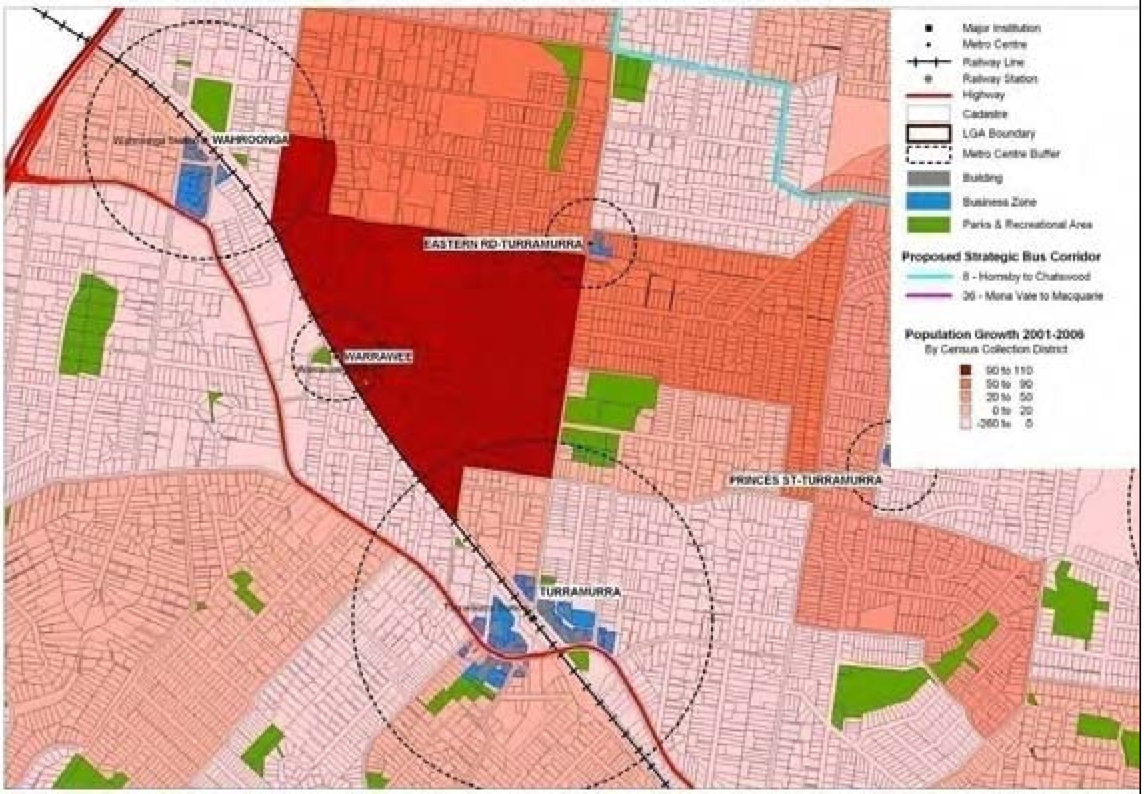

Train line
Community facilities including a Senior Citizens Centre and Health Centre.
Access to the F3
High quality housing stock
Public carpark
Turramurra is divided into two travel zones, 522 and 525, both of which cover a broad area, hence it is difficult to determine precise employment numbers for these centres.

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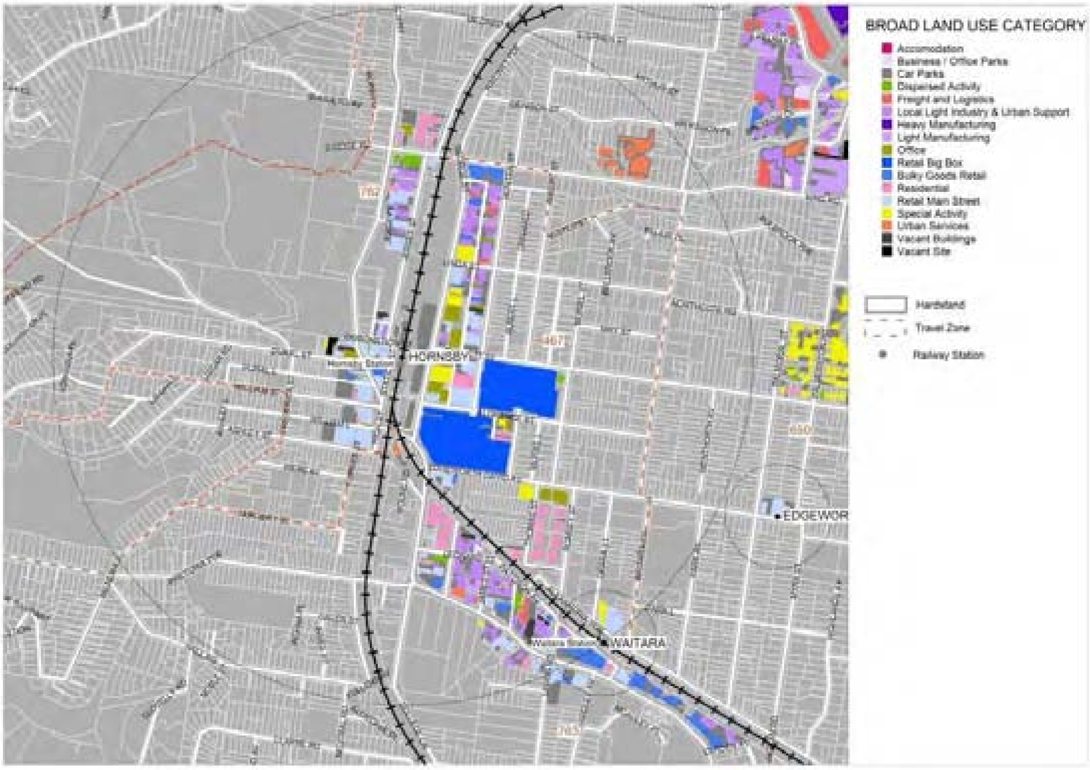
Waitara: Village				
Available Floor	Scenario 1	5,303 sqm		
	Scenario 2	1,277 sqm		
	Scenario 3	-5,537 sqm		
Current Land Use	BLC			
	Vacancies	• There are no vacancies within Waitara		
Current Attributes	Share of LGA Occupied Employment FS by BLC	**Broad Land Use Category**	**sqm**	**%**
		Accommodation - Short Term	0	0.0%
		Business / Office Parks	0	0.0%
		Dispersed Activities	0	0.0%
		Freight and Logistics	0	0.0%
		Local light industrial and urban support	3,338	2.4%
		Manufacturing - Heavy	0	0.0%
		Manufacturing - Light	0	0.0%
		Office	0	0.0%
		Retail - Big Box	0	0.0%
		Bulky Goods Retail	17,180	21.4%
		Residential	0	0.0%
		Retail - Main Street	11,374	5.4%
		Special Activities	2,037	2.5%
		Urban Services	0	0.0%
		Total	**33,929**	**2.4%**
	Vacancies	Vacant Floorspace	0	0%
		Vacant Unconstrained Land	93	0.1%

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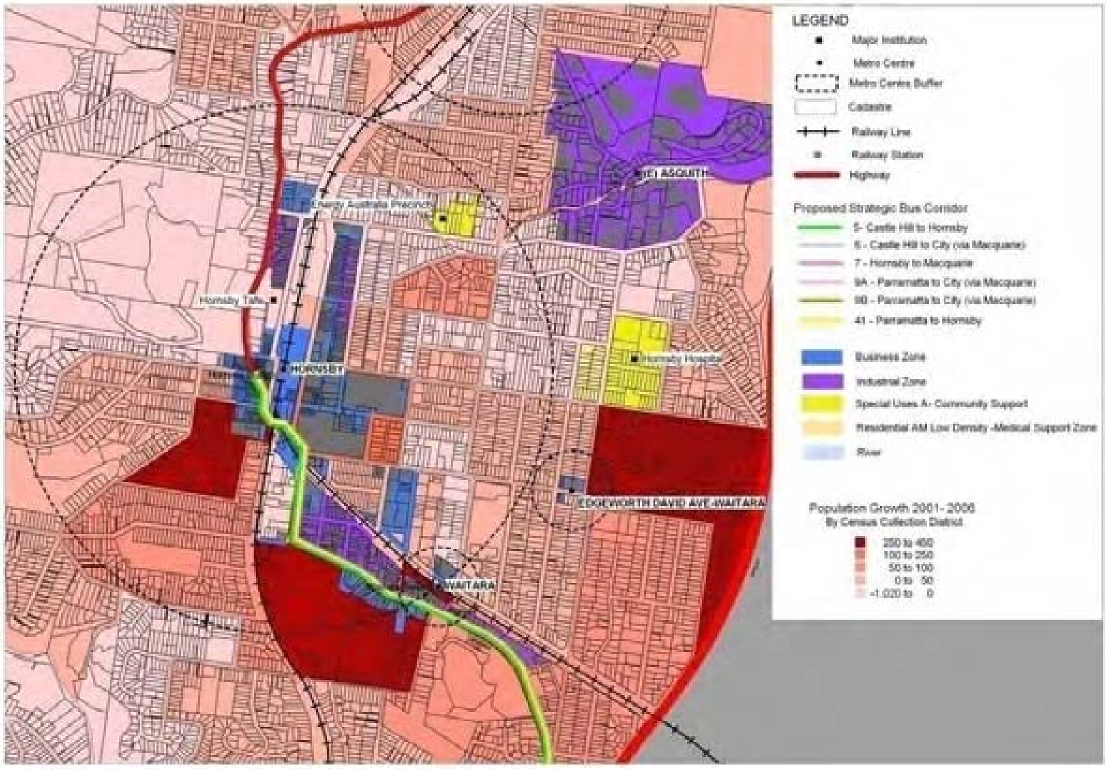

Significant high density residential development
Close proximity to Hornsby Centre
Rail-line
Access to the F3
Good access to a range of public, private and catholic schools.
The suburb is divided by the train line and Pacific Highway
Waitara is located within Travel Zone 763 which employed approximately 1,800 people in 2001, with a relative concentration of employment in ‘Education’ located in Special Use Zones.

</td>
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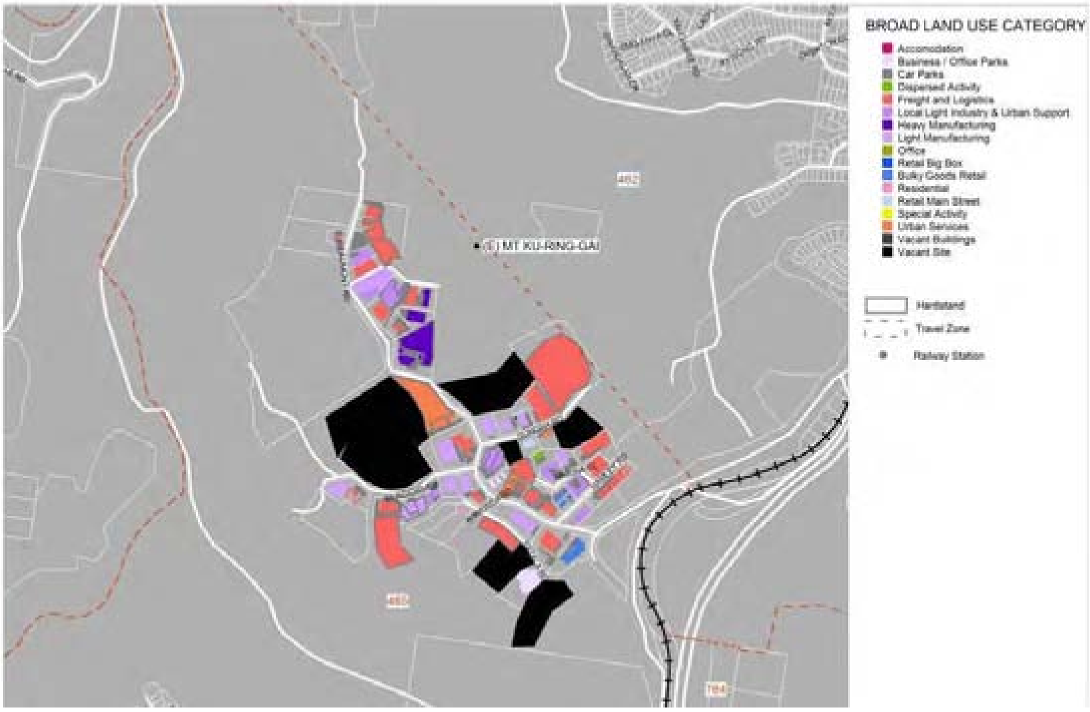
</table>

<table>
<tr><td colspan="5">Mt Ku-ring-gai: Employment Lands</td></tr>
<tr><td rowspan="3">Available Floor</td><td>Scenario 1</td><td colspan="3">93,729 sqm</td></tr>
<tr><td>Scenario 2</td><td colspan="3">467,748 sqm</td></tr>
<tr><td>Scenario 3</td><td colspan="3">354,276 sqm</td></tr>
<tr><td rowspan="2">Current Land Use</td><td>BLC</td><td colspan="3">

Land uses are dominated by ‘Freight and Logistics’, ‘Local Light Industry’ and ‘Light Manufacturing’. ‘Urban Services’ located at Mt Ku-ring-gai include the Shorelink bus depot.</td></tr>
<tr><td>Vacancies</td><td colspan="3">25.0% of unconstrained vacant sites across Hornsby LGA, are located in Mt Ku-ring-gai</td></tr>
<tr><td rowspan="17">Current Attributes</td><td rowspan="15">Share of LGA Occupied Employment FS by BLC</td><td>Broad Land Use Category</td><td>sqm</td><td>%</td></tr>
<tr><td>Accommodation - Short Term</td><td>0</td><td>0.0%</td></tr>
<tr><td>Business / Office Parks</td><td>8,062</td><td>8.9%</td></tr>
<tr><td>Dispersed Activities</td><td>539</td><td>3.0%</td></tr>
<tr><td>Freight and Logistics</td><td>52,333</td><td>24.2%</td></tr>
<tr><td>Local light industrial and urban support</td><td>14,926</td><td>10.8%</td></tr>
<tr><td>Manufacturing - Heavy</td><td>5,638</td><td>8.6%</td></tr>
<tr><td>Manufacturing - Light</td><td>26,299</td><td>33.8%</td></tr>
<tr><td>Office</td><td>0</td><td>0.0%</td></tr>
<tr><td>Retail - Big Box</td><td>0</td><td>0.0%</td></tr>
<tr><td>Bulky Goods Retail</td><td>3,236</td><td>4.0%</td></tr>
<tr><td>Residential</td><td>0</td><td>0.0%</td></tr>
<tr><td>Retail - Main Street</td><td>1,042</td><td>0.5%</td></tr>
<tr><td>Special Activities</td><td>0</td><td>0.0%</td></tr>
<tr><td>Urban Services</td><td>3,631</td><td>12.1%</td></tr>
<tr><td></td><td>Total</td><td>115,705</td><td>8.1%</td></tr>
<tr><td rowspan="2">Vacancies</td><td>Vacant Floorspace</td><td>9,958</td><td>5.9%</td></tr>
<tr><td></td><td>Vacant Unconstrained Land</td><td>171,333 in total
29,505 unconstrained</td><td>25.0%</td></tr>
</table>

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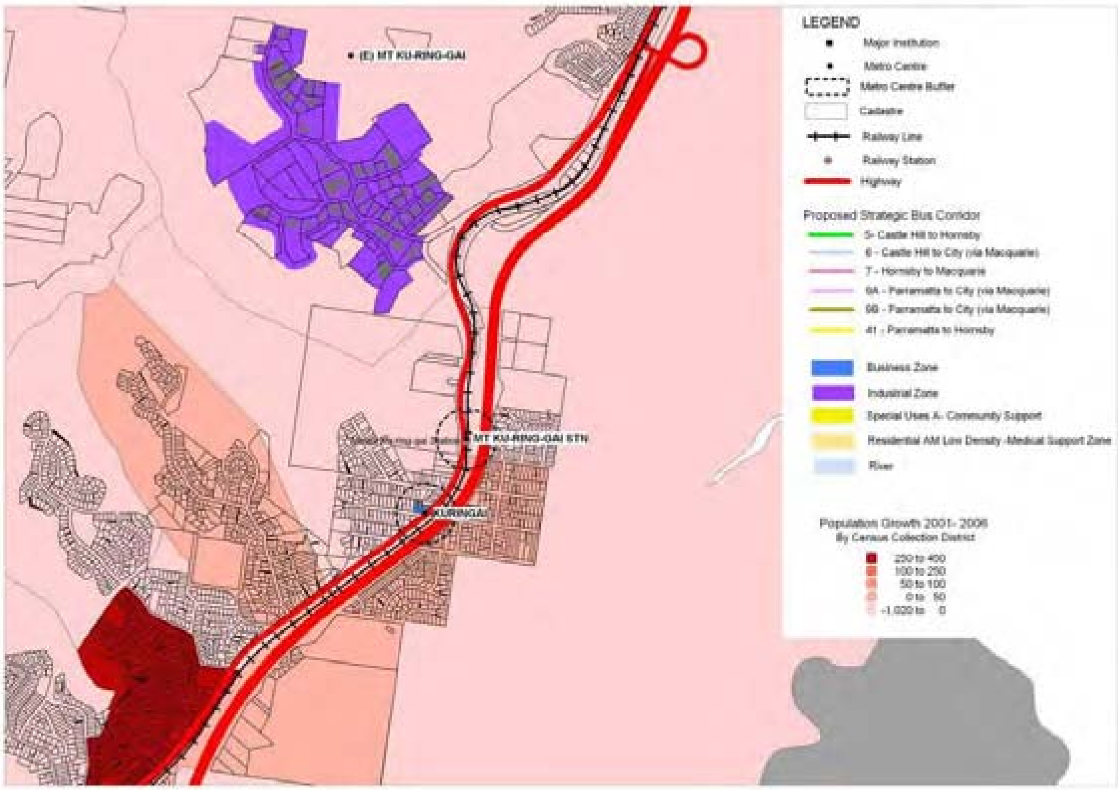
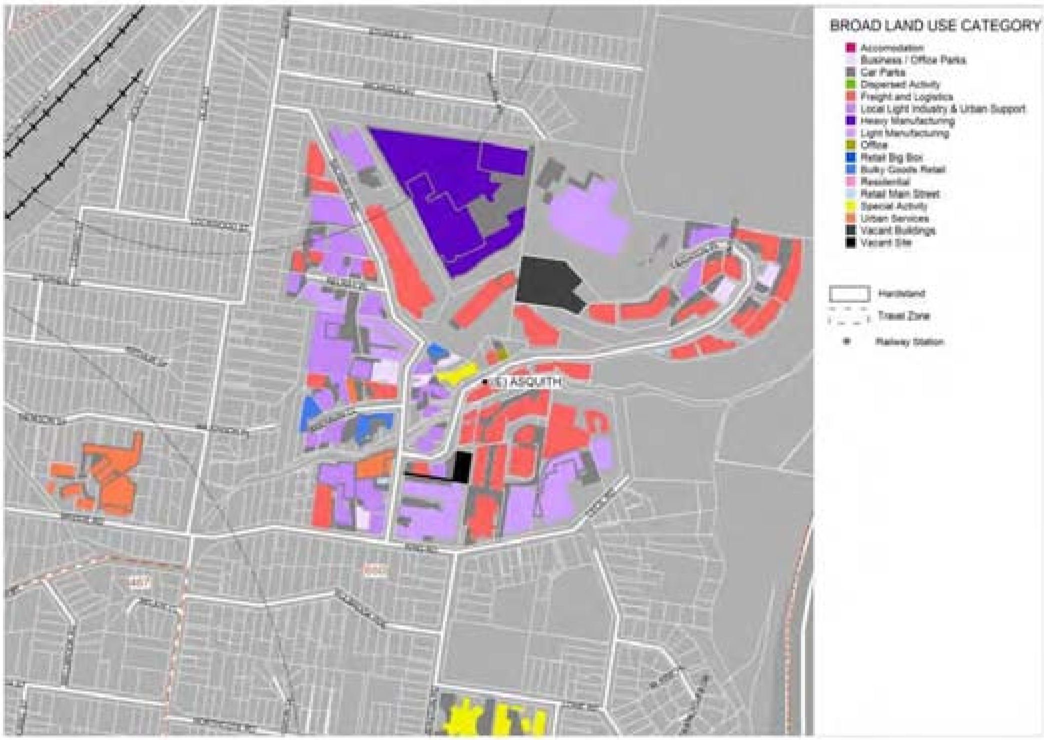
	Key attributes	 • Easy access to Pacific Highway and the F3. • Separated from residential uses. • Much recent development has occurred in this area, and some of the building stock is new. • Previous employment lands studies, as well as the Draft North Subregional Strategy, highlight that this area is constrained by Berowra Valley Regional Park and land zoned for environmental protection. • Mt Ku-ring-gai is located within travel zone 465. This covers a broad area and employees approximately 1,800 people in 2001. Relative concentrations of employment occur in manufacturing, wholesale trade and construction.

Asquith: Employment Lands				
Available Floor	Scenario 1	134,311 sqm		
	Scenario 2	267,493 sqm		
	Scenario 3	178,947 sqm		
Current Land Use	BLC	 • 'Freight and Logistics' features strongly in this area along with 'Light Manufacturing', 'Local Light Industry' and 'Heavy Manufacturing'. Additionally, some 'Bulky Goods Retail' has been identified within the area. Asquith Employment Lands account for 14.5% of floorspace within the Hornsby LGA.		
	Vacancies	• A significant amount of capacity is available at Asquith in terms of both vacant land and floorspace		
Current Attributes	Share of LGA Occupied Employment FS by BLC	**Land Use**	**sqm**	**%**
		Accommodation - Short Term	0	0.0%
		Business / Office Parks	10,492	11.6%
		Dispersed Activities	0	0.0%
		Freight and Logistics	95,090	44.0%
		Local light industrial and urban support	47,941	34.7%
		Manufacturing - Heavy	13,521	20.5%
		Manufacturing - Light	34,107	43.9%
		Office	509	0.6%
		Retail - Big Box	0	0.0%
		Bulky Goods Retail	2,253	2.8%
		Residential	0	0.0%
		Retail - Main Street	243	0.1%
		Special Activities	1,179	1.5%
		Urban Services	827	2.8%
		Total	**206,161**	**14.5%**
	Vacancies	Vacant Floorspace	43,604	25.7%
		Vacant Unconstrained Land	42,531	36.1%

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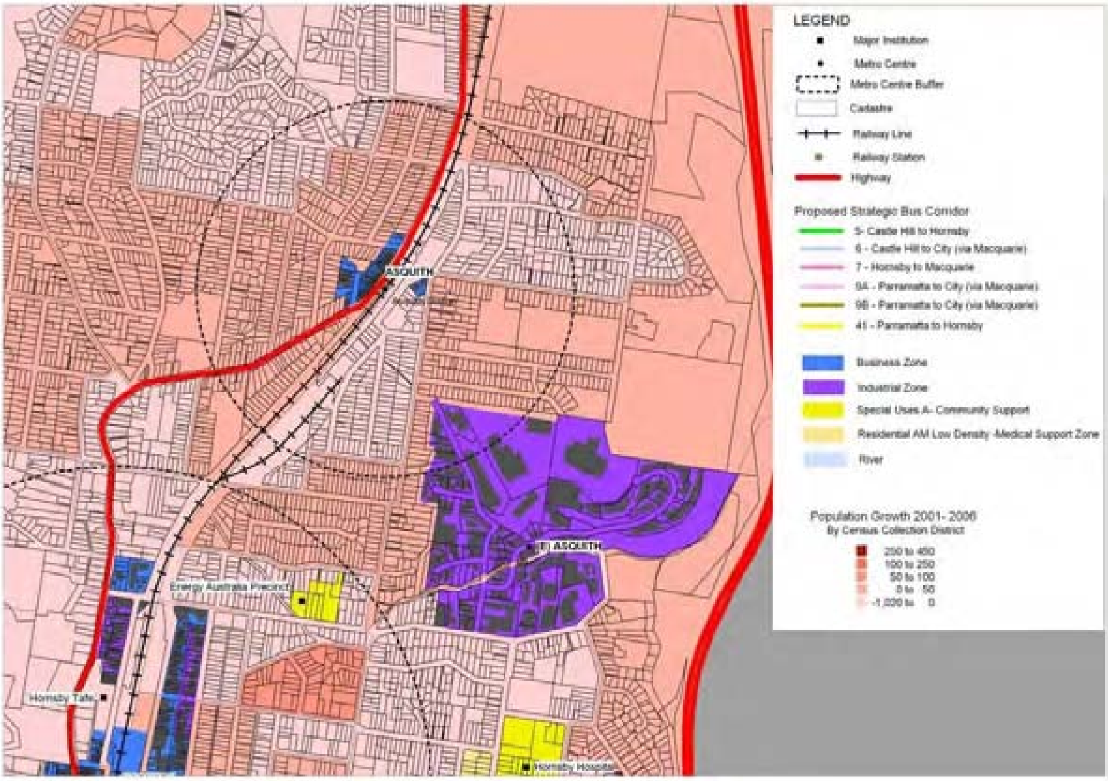
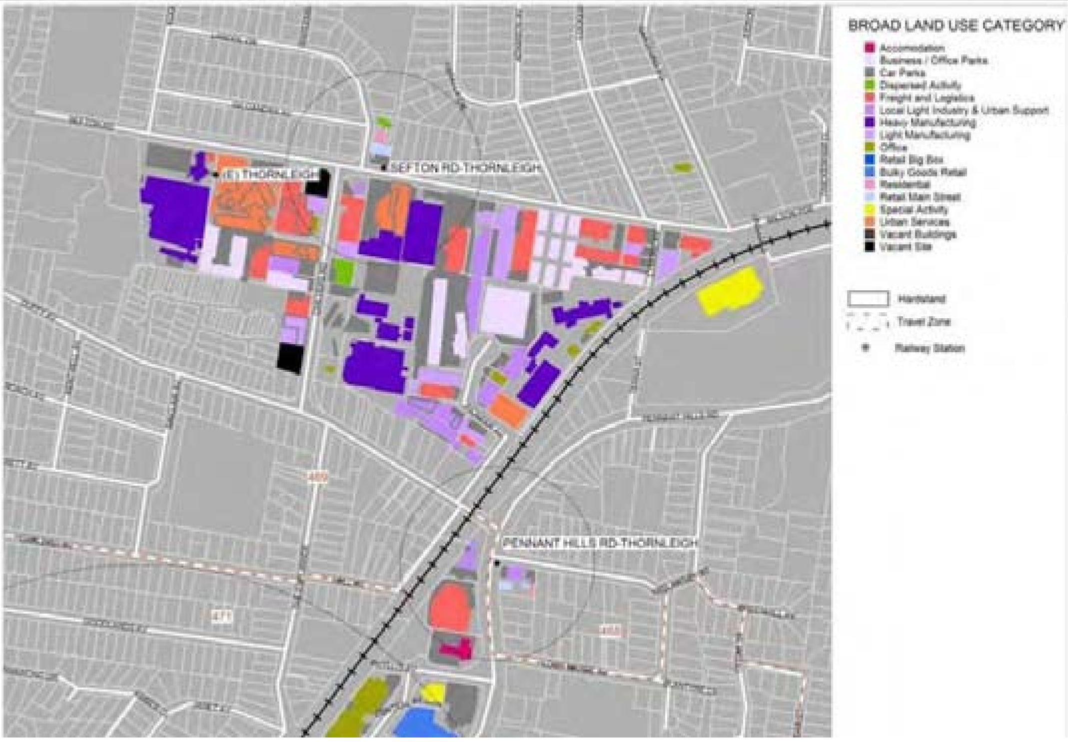
	Key attributes	 • Located primarily along Leighton Place, Salisbury and King Roads. • Vehicles travelling to and from Asquith Employment Lands, must travel through residential areas. At the time of the audit, one vacant building and one vacant site were recorded. Topography may influence the types of businesses that seek to locate here in future, and like Mt Ku-ring-gai, expansion of these employment lands is limited by environmental constraints. • The travel zone in which Asquith is located (650), covers a broad area including Hornsby Hospital.

Thornleigh: Employment Lands		
Available Floor	Scenario 1	47,866 sqm
	Scenario 2	94,372 sqm
	Scenario 3	51,637 sqm

Current Land Use

BLC



- Uses within this area include ‘Light Manufacturing’, ‘Local Light Industry’ , ‘Urban Services’, ‘Freight and Logistics’ and ‘Heavy Manufacturing’. Activities located here support the local population and include a Council depot and concrete batching plant.
- Approximately 10% of all audited floorspace in Hornsby LGA is located within Thornleigh employment lands

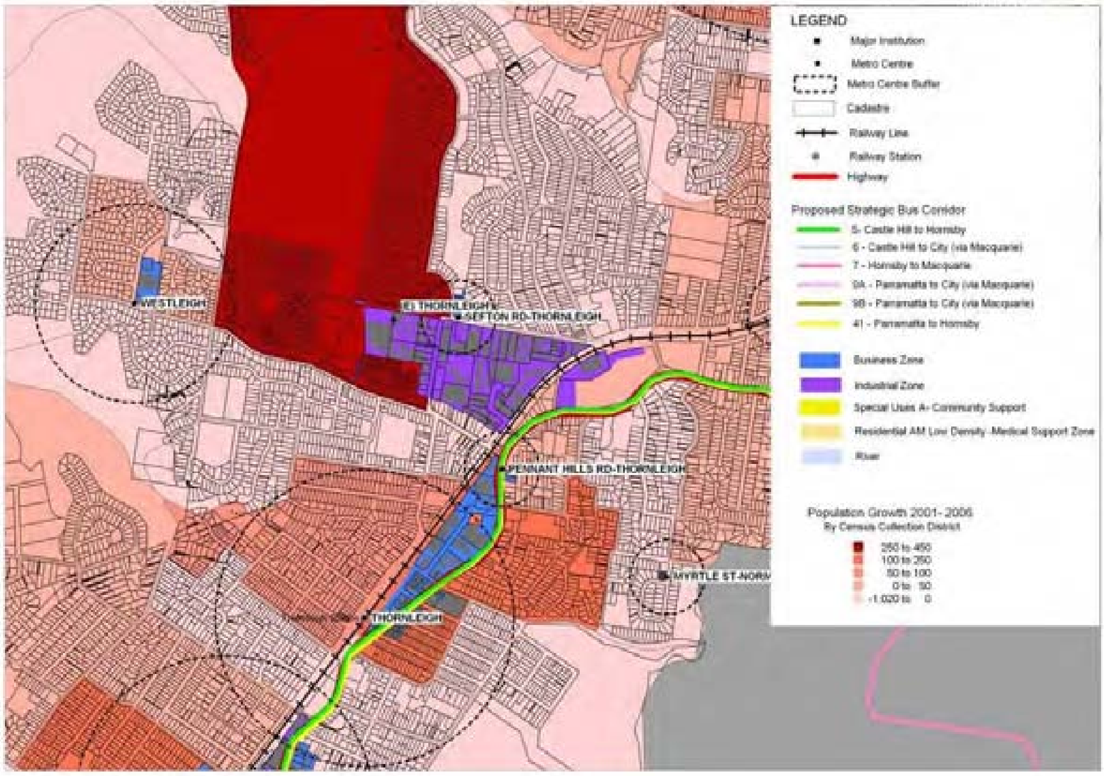
Vacancies

- 8.1% of Hornsby LGA’s vacant floorspace is located in Thornleigh

Current Attributes

Share of LGA Occupied Employment FS by BLC

Broad Land Use Category	**sqm**	**%**
Accommodation - Short Term	0	0.0%
Business / Office Parks	28,130	31.0%
Dispersed Activities	1,011	5.5%
Freight and Logistics	22,966	10.6%
Local light industrial and urban support	14,148	10.2%
Manufacturing - Heavy	46,751	70.9%
Manufacturing - Light	13,644	17.5%
Office	1,344	1.6%
Retail - Big Box	0	0.0%
Bulky Goods Retail	0	0.0%
Residential	0	0.0%
Retail - Main Street	0	0.0%
Special Activities	4,319	5.4%
Urban Services	8,047	26.8%
Total	**140,360**	**9.9%**

	Vacancies	Vacant Floorspace	13,733	8.1%
		Vacant Unconstrained Land	1,619	1.4%
	Key attributes	 • The Draft North Subregional Strategy notes the important role that Thornleigh plays in providing urban services and in accommodating local light industry. • Surrounded by low density residential areas and bounded by a train line on one side. • The proximity of residential development may constrain industrial development at this location in future, as vehicles travelling to and from Sefton Rd - Thornleigh must pass through residential areas.		

Dural Service Centre: Employment Lands				
Available Floor	Scenario 1	53,853 sqm		
	Scenario 2	195,640 sqm		
	Scenario 3	144,245 sqm		
Current Land Use	BLC	 • Bulky Goods Retail' features in this area, along with 'Freight and Logistics' and 'Urban Services'. • Additional uses identified include 'Local Light Industry', 'Business/Office Parks'. 'Light Manufacturing' and 'Special Activities'.		
	Vacancies	• Significant capacity exists at Dural Service Centre in terms of both vacant sites and vacant floorspace		
Current Attributes	Share of LGA Occupied Employment FS by BLC	**Broad Land Use Category**	**sqm**	**%**
		Accommodation - Short Term	0	0.0%
		Business / Office Parks	8,186	9.0%
		Dispersed Activities	678	3.7%
		Freight and Logistics	13,884	6.4%
		Local light industrial and urban support	2,493	1.8%
		Manufacturing - Heavy	0	0.0%
		Manufacturing - Light	560	0.7%
		Office	3,301	3.9%
		Retail - Big Box	0	0.0%
		Bulky Goods Retail	23,388	29.1%
		Residential	0	0.0%
		Retail - Main Street	8,461	4.0%
		Special Activities	1,307	1.6%
		Urban Services	9,676	32.2%
		Total	**71,934**	**5.1%**
	Vacancies	Vacant Floorspace	28,150	16.6%
		Vacant Unconstrained Land	21,724	18.4%

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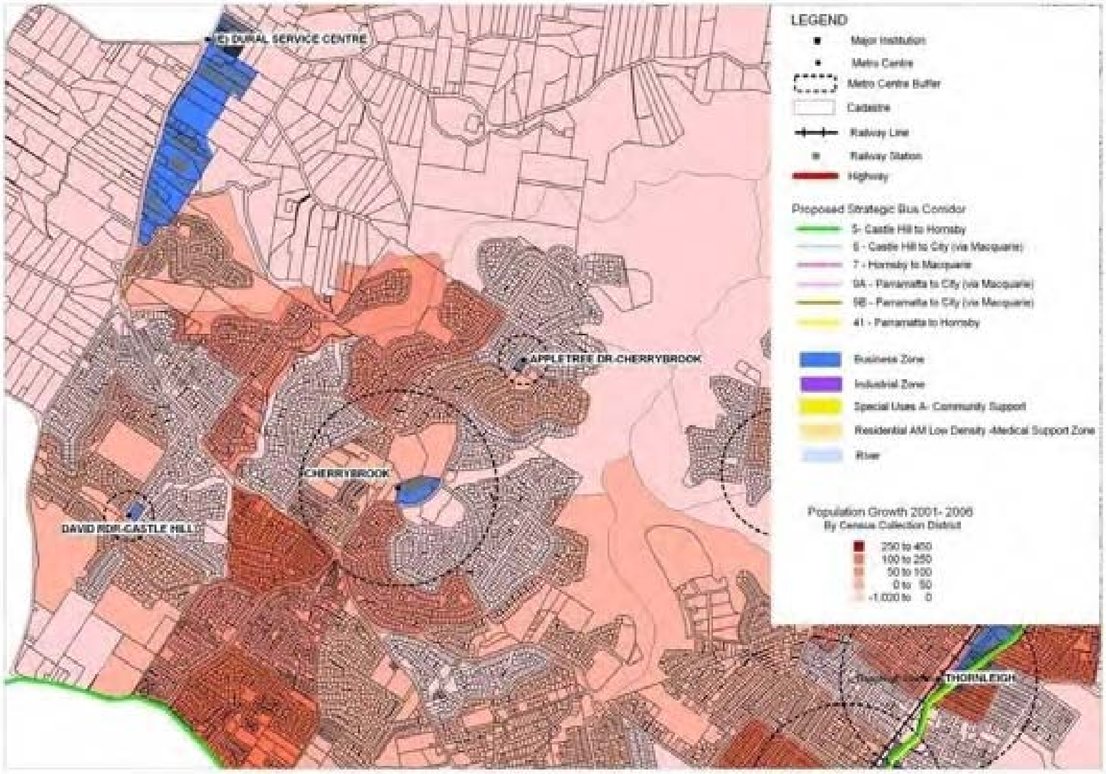
Key attributes



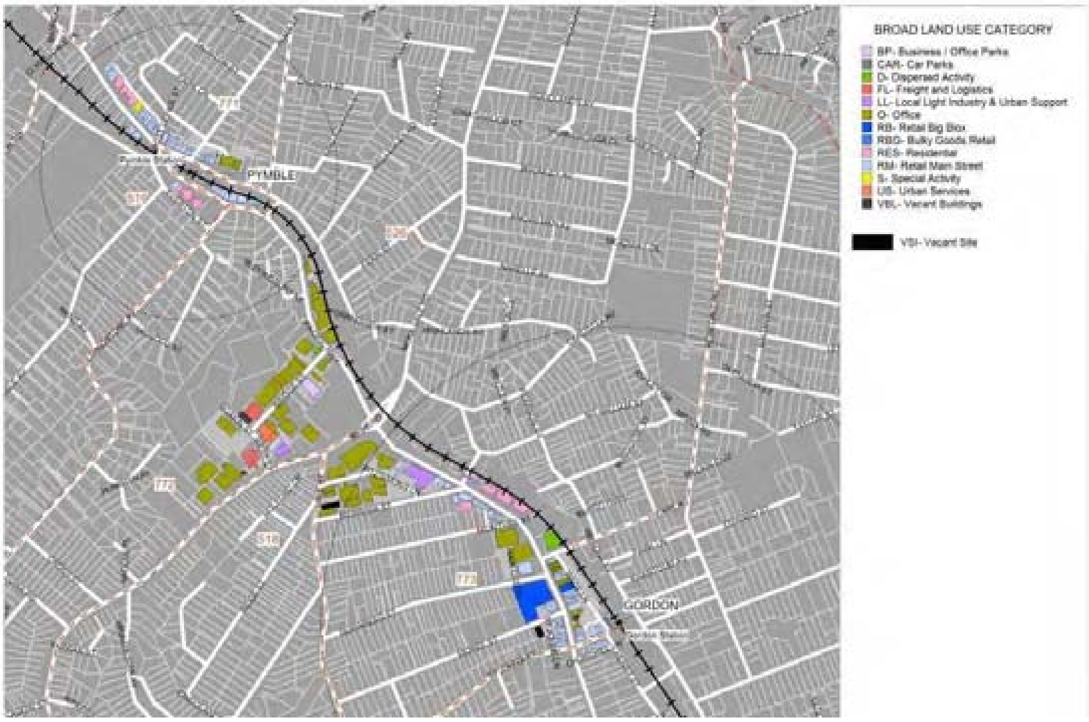
- Area is undergoing change
- Desirable rural residential location
- The Dural Service Centre (DSC) was originally envisaged as a centre for rural business and local services for the local resident population. However, over the years land use in the area has moved away from a 'rural service' focus and many businesses now serve a much broader market than the immediately surrounding rural area.
- There are arguments that the current limitations of the planning controls may now be constraining the centres economic potential and that a broader
- The diversity of uses present indicates a lack of clarity in the role of this area. This issue will be considered within the broader picture of supply and demand for employment lands across the whole study area.
- The Subregional Strategy identifies the DSC as land with potential to allow for a wider range of employment uses.

Pymble Office Park

Available Floor	Scenario 1	34,386 sqm
	Scenario 2	23,462 sqm
	Scenario 3	2,963 sqm

Current Land Use

BLC



- The primary land use within this area is 'office', with some 'freight and logistics' activities.
- This area account for 23.5% of Ku-ring-gai LGA's employment floorspace.

Vacancies

- 3,386sqm of vacant floorspace is located within this area

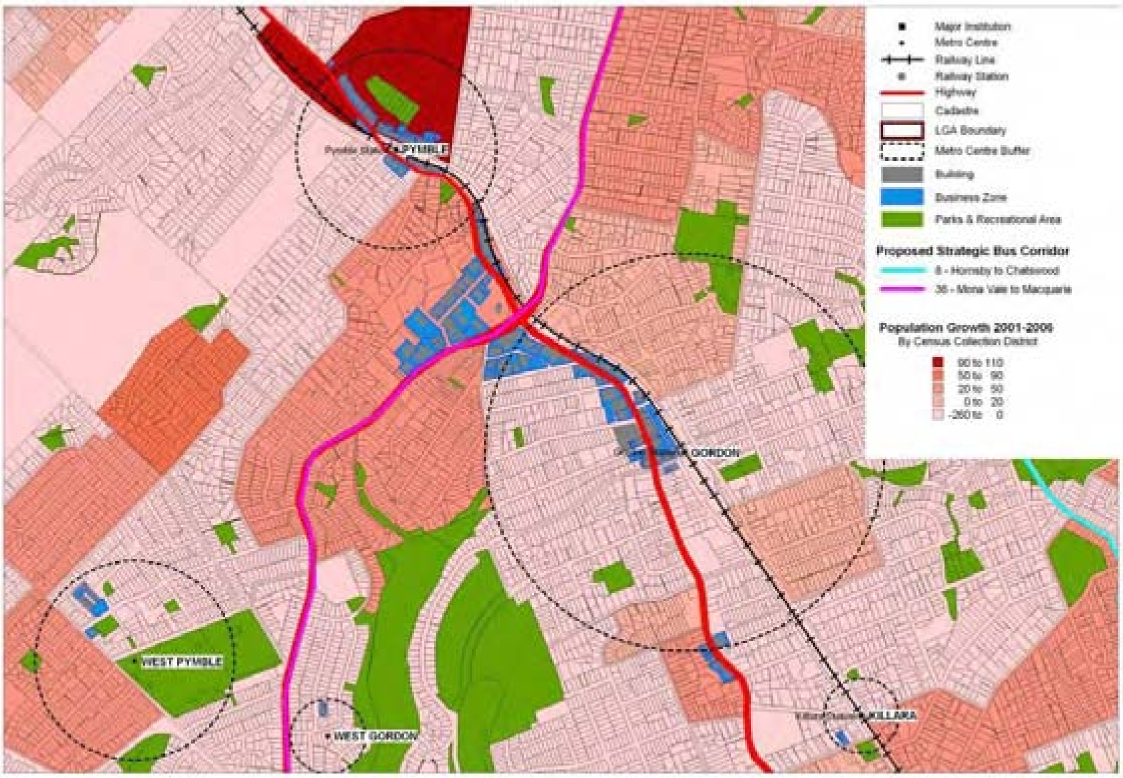
Current Attributes

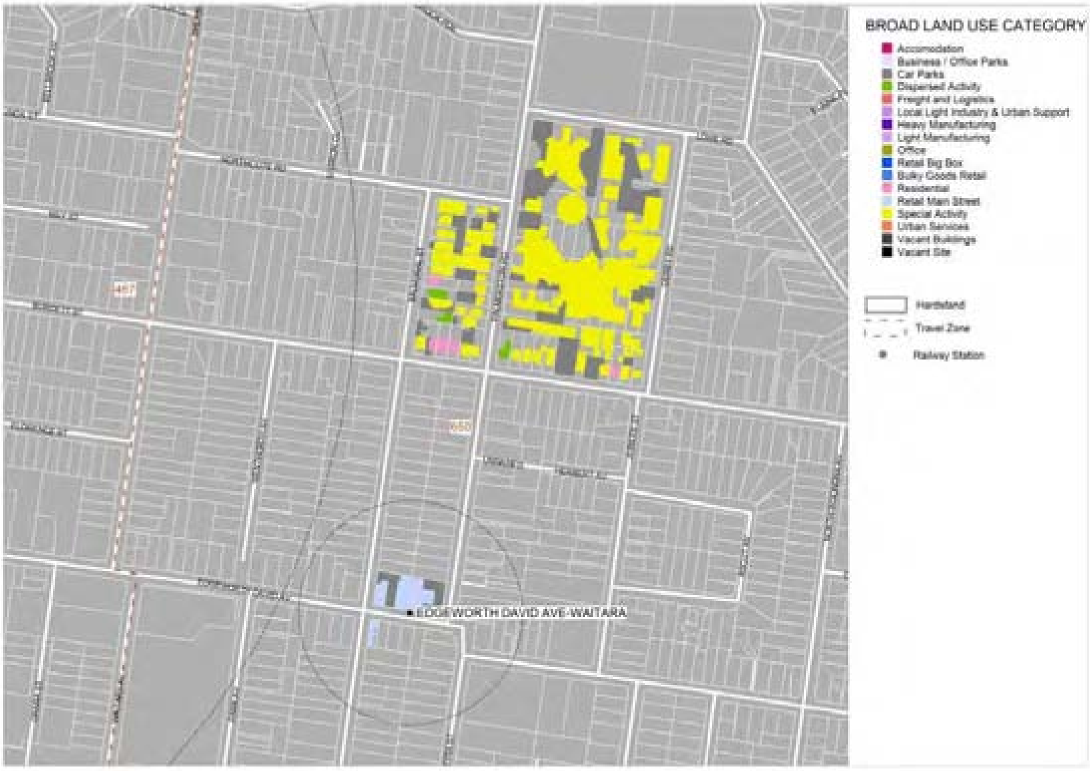
Share of LGA Occupied Employment FS by BLC

Broad Land Use Category	Pymble Office Park	%
Accommodation - Short Term	0	-
Business / Office Parks	3,986	23.8%
Dispersed Activities	500	5.8%
Freight and Logistics	5,488	92.0%
Local light industrial and urban support	1,396	11.5%
Manufacturing - Heavy	0	-
Manufacturing - Light	0	-
Office	75,440	53.9%
Retail - Big Box	0	0.0%
Bulky Goods Retail	0	0.0%
Residential	0	0.0%
Retail - Main Street	654	0.5%
Special Activities	0	0.0%
Urban Services	1,536	41.6%
Total	**88,999**	**23.5%**

Vacancies

Vacant Floorspace	3,386	13.6%
Vacant Unconstrained Land	0	0%

	Key attributes	 • Located between two train stations • Well connected by road to Macquarie Park, the Northern Beaches and Sydney's CBD • Close to Gordon centre which provides retailing and services for employees

<table>
<tr><th colspan="5">Hornsby Hospital: Health Precinct</th></tr>
<tr><td rowspan="3">Available Floor</td><td>Scenario 1</td><td colspan="3">11,423 sqm</td></tr>
<tr><td>Scenario 2</td><td colspan="3">42,844 sqm</td></tr>
<tr><td>Scenario 3</td><td colspan="3">23,936 sqm</td></tr>
<tr><td rowspan="2">Current Land Use</td><td>BLC</td><td colspan="3">

• The area is dominated by ‘Special Activity’ BLC, which includes the hospital and numerous medical practitioners and specialists on Balmoral Street. Some ‘Dispersed Activity’ and ‘Residential’ BLCs occur.</td></tr>
<tr><td>Vacancies</td><td colspan="3">• Effectively no vacancies</td></tr>
<tr><td rowspan="17">Current Attributes</td><td rowspan="15">Share of LGA Occupied Employment FS by BLC</td><td>Broad Land Use Category</td><td>sqm</td><td>%</td></tr>
<tr><td>Accommodation - Short Term</td><td>0</td><td>0.0%</td></tr>
<tr><td>Business / Office Parks</td><td>0</td><td>0.0%</td></tr>
<tr><td>Dispersed Activities</td><td>1,099</td><td>6.0%</td></tr>
<tr><td>Freight and Logistics</td><td>0</td><td>0.0%</td></tr>
<tr><td>Local light industrial and urban support</td><td>0</td><td>0.0%</td></tr>
<tr><td>Manufacturing - Heavy</td><td>0</td><td>0.0%</td></tr>
<tr><td>Manufacturing - Light</td><td>0</td><td>0.0%</td></tr>
<tr><td>Office</td><td>0</td><td>0.0%</td></tr>
<tr><td>Retail - Big Box</td><td>0</td><td>0.0%</td></tr>
<tr><td>Bulky Goods Retail</td><td>0</td><td>0.0%</td></tr>
<tr><td>Residential</td><td>219</td><td>2.3%</td></tr>
<tr><td>Retail - Main Street</td><td>0</td><td>0.0%</td></tr>
<tr><td>Special Activities</td><td>58,469</td><td>72.5%</td></tr>
<tr><td>Urban Services</td><td>0</td><td>0.0%</td></tr>
<tr><td></td><td>Total</td><td>59,788</td><td>4.2%</td></tr>
<tr><td rowspan="2">Vacancies</td><td>Vacant Floorspace</td><td>37</td><td>0%</td></tr>
<tr><td></td><td>Vacant Unconstrained Land</td><td>0</td><td>0%</td></tr>
</table>

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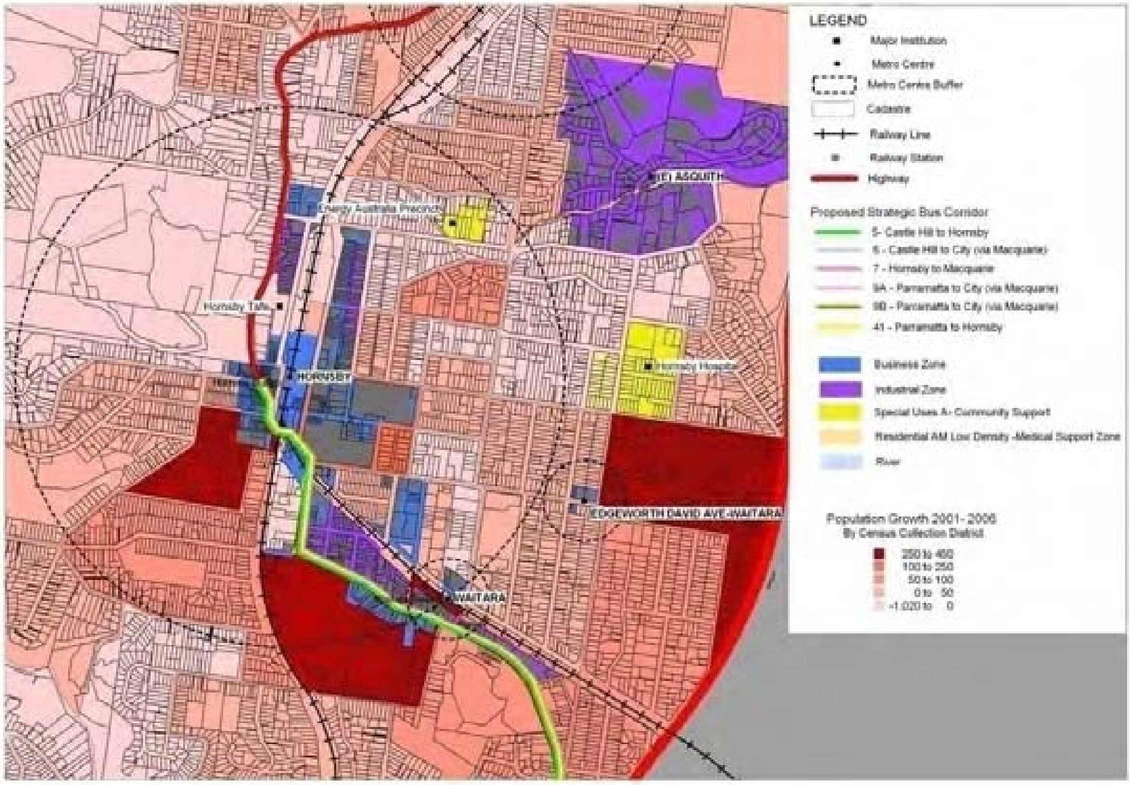
<table>
<tr>
<td></td>
<td>Key attributes</td>
<td>


The hospital itself is bounded by Palmerston, Lowe, and Derby Road and Burdett Street. It was established in 1933 and provides a range of services including for emergency services, services for children and adolescents, rehabilitation, maternity care, allied health services and mental health services. A new $23 million Maternity, Paediatrics and Emergency building has been completed, and was opened in March 2007.
A number of other medical practices are located in the streets surrounding Hornsby Hospital, providing complementary services.

</td>
</tr>
</table>

Appendix B – Employment Densities

Employment Density Benchmarks

Typical Floorspace and Workspace Ratios for Industrial Uses

Activity	Sector	Jobs	SQM Floorspace for Every Job	Floorspace	Floorspace to Site Area Ratio	Site Area (Business)
Manufacturing						
	Meat and dairy products	1	100	100	50%	200
	Other food products	1	80	80	50%	161
	Beverages, tobacco products	1	80	80	50%	161
	Textiles	1	60	60	50%	120
	Clothing and footwear	1	90	90	50%	180
	Wood and wood products	1	45	45	50%	90
	Paper, printing and publishing	1	70	70	50%	140
	Petroleum and coal products	1	200	200	50%	400
	Chemicals	1	200	200	50%	400
	Rubber and plastic products	1	150	150	50%	300
	Non-metallic mineral products	1	80	80	50%	160
	Basic metals and products	1	120	120	50%	240
	Fabricated metal products	1	30	30	50%	60
	Transport equipment	1	50	50	50%	100
	Other machinery and equipment	1	60	60	50%	120
	Miscellaneous manufacturing	1	65	65	50%	130
Freight Oriented						
	Wholesale trade	1	220	220	30%	733
	Transport and storage	1	220	220	30%	733
	Sub-Total	**2**		**440**		**1,467**
Service Industry						
	Construction	1	150	150	60%	250
	Repairs	1	55	55	60%	92
Utilities						
	Electricity, gas and water	1	120	120	30%	400
	Communication services	1	120	120	40%	300
Total Industrial		**22**		**2,366**		**5,470**

Source: SGS Composite

Typical Floorspace and Workspace Ratios for Retail/Commercial Uses

Activity	Sector	Jobs	SQM Floorspace for Every Job	Floorspace	Floorspace to Site Area Ratio	Site Area (Business)
Office						
	Finance and insurance	1	25	25	100%	25
	Property and business services	1	25	25	100%	25
	Government administration	1	35	35	100%	35
Retail						
	Supermarkets	1	30	30	40%	76
	Department Stores	1	57	57	40%	143
	Other Food	1	13	13	40%	33
	Clothing and Soft Goods	1	32	32	40%	81
	Household Goods	1	58	58	40%	144
	Other Retail	1	29	29	40%	73
Hospitality						
	Hospitality and Services	1	29	29	40%	73
	Accommodation	1	29	29	40%	73
	Sub-Total	**2**		**58**		**145**
Total Activity Centre		**11**		**364**		**781**

Source: SGS Composite

The tables above are derived from various land uses studies undertaken by SGS Economics and Planning. Experience in other land use audits suggests that the floor area per employee estimates are widely applicable, but that the floor space to site area ratios (FSR) vary widely with local market conditions. In particular, they are much lower (i.e. use more land for the same floor area) in lower cost regional centres and metropolitan fringe locations. Similarly, areas where supply is restricted and demand is high, would typically expect to yield higher land uses densities, than areas with less demand and greater supply of land for employment uses.

Studies undertaken by the City of Sydney (2001), Arup Economics + Planning (2001) and Gerald Eve (2001) reveal that higher office workspace ratios are evident in the ICT, Finance and Business Services sectors, whilst manufacturing offices record the lowest densities because of the costs of occupation generally tend to be lower in industrial parks, ports and larger manufacturing plants.

Generally sectors such as warehousing and transport have a larger floor area per employee than manufacturing. There are typically differences in site coverage for different sectors as well.

Factors Affecting Employment Densities

It is clear employment densities vary considerably across different land use categories and industry sectors. However within each of these categories and sectors, employment densities have expanded and contracted over time as result of technological advancement and changing work practices. These factors have affected industrial and office/commercial uses differently.

Factors Affecting Office Employment Densities

The most equivocal and widely researched factor in office employment densities is the impact on New Work Practices (NwP). New Work Practices is a generic name that is used to describe the way in which work practices are changing. It is associated with technological improvements but also the rise in flexible labour markets. Specifically, the gradual incorporation of new information communication technologies (ICTs) has had an impact on 'how' work is organised by presenting an unprecedented range of organisational options for companies and institutions. New work practices include:

- 24 hour working;
- Team working – a team assembled for a specific project and disbanded on its completion;
- Teleworking and homeworking – advances in communication allowing employees to work away from the office;
- Hot-desking – workstations are not delegated to specific employees but instead served on a first come first served basis, where connectivity and basic essentials are provided;
- Hotelling – reserving in advance a workstation with support
- Virtual office – a laptop with connectivity

Many of these new work practices are space saving techniques, that also allow for more interaction, collaboration, and flexibility associated with how work is performed in the knowledge economy. The result, over time, has been an increase in office employment densities.

Factors Affecting Industrial Employment Densities

There has been a long term trend to higher developed floor area per employee in many of the industrial sectors. This has been driven by greater capital intensiveness of most industry sectors leading to larger floor area per employee, with technological change underpinning the productivity increases required to maintain competitiveness.

There has also been a tendency for firms relocating to the fringe of urban areas to increase their land take relative to their previous location, including 'occupying' more land than immediately required to allow some room for future expansion without relocating again. In effect they are privately banking land for their own future use, the relatively lower cost of the land making this affordable. Over time, they will intensify this land use again, but in the short term there is a significant increase in land use for each firm that relocates.

Factors Affecting the Intensification of Industrial Land Use

Intensification typically occurs as an individual firm's activity grows while remaining on the same site. Many firms are motivated to remain at a site as long as possible due to:

- Availability of additional space on site
- High relocation costs
- Closeness to market or suppliers/familiar location for customers
- Closeness to location of employees

Intensification usually involves increasing the site coverage, rather than increasing the number of employees per unit of built floor area[4]. In fact, as will be seen below, the trend is toward larger floor area per employee. Intensification will therefore be strongest on sites that currently have relatively large land areas for the size of the buildings on site.

However, when a firm does move due to expansion, it inevitably moves to a larger site, usually (but not always) further from the centre of town.

Intensification is reinforced by high land values. Firms located in higher cost locations tend to use the available land more intensively to offset the higher cost. Zoning allowances in higher cost areas may also permit greater site coverage and smaller set backs than in lower cost outer areas.

Intensification is most evident in larger urban areas where a central location may be important for quick market access and land costs are high. It also occurs to a lesser extent in smaller centres, where a high visibility central location offers a market advantage for some industrial operations with a local market focus.

[4] Intensification of employees per unit of floor area can occur by working more hours (six/seven day operation or multiple shifts). This is more likely to occur in already capital intensive firms to better utilise equipment or in areas of very high land cost (central parts of urban areas).

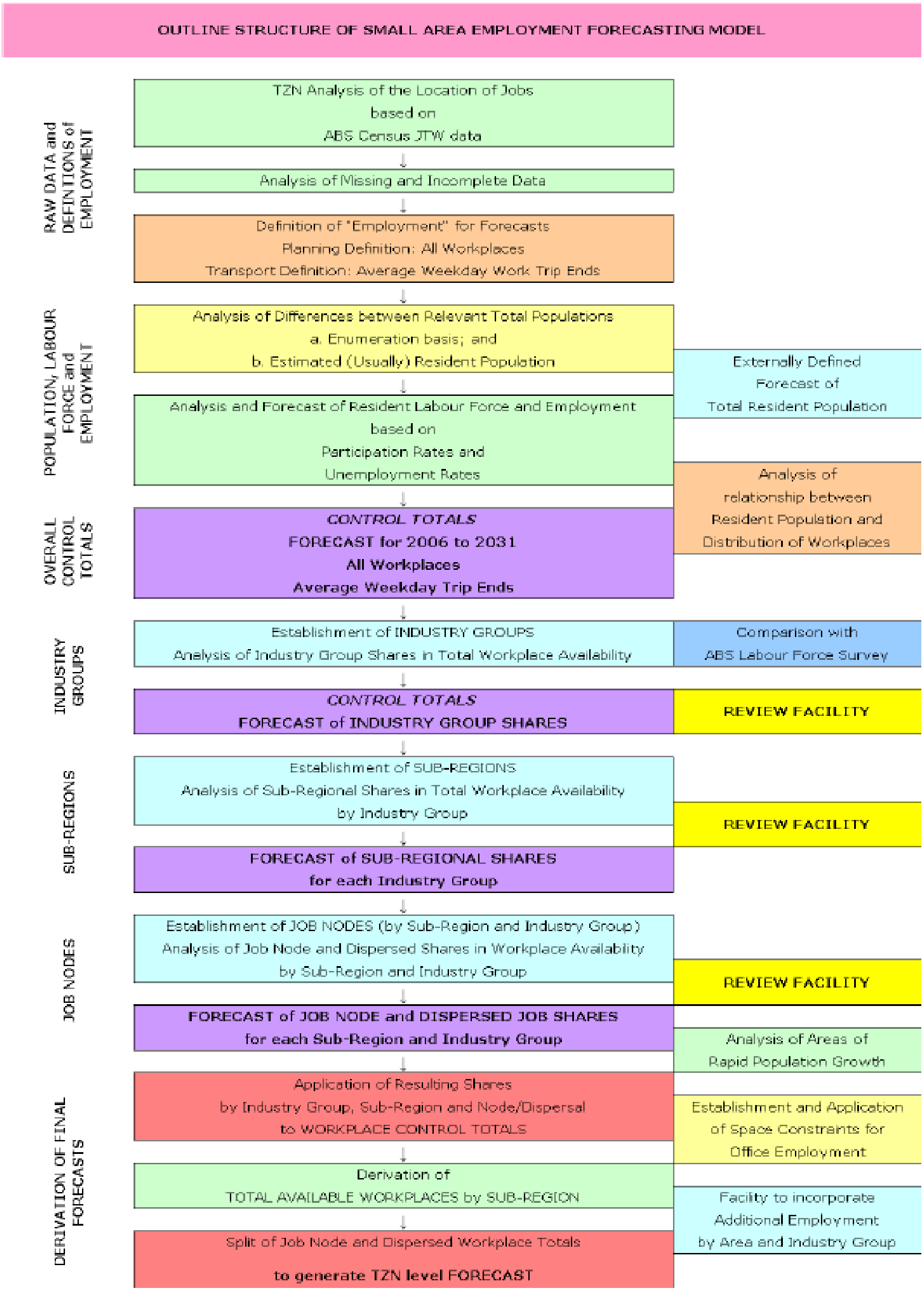
Appendix C – Glossary

TDC	Transport Data Centre. A State Government Unit devoted to interpreting ABS Census data and producing population and employment analysis.
ABS	Australian Bureau of Statistics
ANZSIC	Australian and New Zealand Standard Industrial Classification
ASCO	Australian Standard Occupation Classification
BLC	Broad Land Use Category
CD	Collection District
DoP	NSW Department of Planning
FSR	Floorspace ratio. The ratio of built floorspace to site area.
HBB	Home based business
HBW	Home based work
LGA	Local Government Area
LQ	Location quotient. A statistical measure of the relative concentration of an particular industry in an area.
SD	Statistical Division
SME	Small to Medium Sized Enterprise
SSD	Statistical Sub-division
TZ	Travel Zone. The smallest statistical geography available fo r ABS Census employment data.

Appendix D – TDC Employment Forecast Method

Figure 71 shows the method used for the TDC employment forecasts.

Figure 71. TDC Employment Forecast Method Diagram



Source: PPM 2004

Employment forecasts for this Study have been sourced from the TDC. Produced in 2004, these forecasts provide an indication of the nature and distribution of employment across the Sydney Greater Metropolitan Region. The most significant assumptions have been made with respect to future trends by industry and future demand for retailing, driven by population and income growth.

The process of forecasting is based on the analysis and forecasting of share of total employment by industry, the share by sub-region of jobs by industry, the share of job in centres and dispersed jobs in each Subregional and industrial group. The process takes into account an analysis of space constraints for commercial floorspace, based on an analysis of employee-space ratios. It also takes into account user-defined additions of jobs to specific travel zones. Final travel zone forecasts are calculated based on these components.

Appendix E – Working Party

The Working Party for this project consisted of the following:

Antony Fabbro	Ku-ring-gai Council
Terri Southwell	Ku-ring-gai Council
Craige Wyse	Ku-ring-gai Council
Mayor Nick Ebbeck	Ku-ring-gai Council
James Farrington	Hornsby Shire Council
Karen Harragon	Hornsby Shire Council
Katherine Vickery	Hornsby Shire Council
Peter Adrian	Department of Planning
Cllr Janelle McIntosh	Hornsby Shire Council

Appendix F – Land Audit Results (Centre Floorspace by ANZSIC and BLC)

The following tables show the audit result for floorspace by BLC and ANZSIC category for centres and precincts n Hornsby and Ku-ring-gai. ANZSIC and BLC descriptions are given below.

Table 47. 1 Digit ANZSIC Categories

A Agriculture, Forestry and Fishing
B Mining
C Manufacturing
D Electricity, Gas and Water Supply
E Construction
F Wholesale Trade
G Retail Trade
H Accommodation, Cafes and Restaurants
I Transport and Storage
J Communication Services
K Finance and Insurance
L Property and Business Services
M Government Administration and Defence
N Education
O Health and Community Services
P Cultural and Recreational Services
Q Personal and Other Services

Table 48. Broad Land Use Categories (BLCs)

Land Use Category	Description
Freight and Logistics (FL)	• Warehousing and distribution activities. Includes buildings with a number of docking facilities; 'hard stand' areas with trucks or goods awaiting distribution; and large storage facilities. • Warehousing and distribution is a metro level issue with activities preferably locating close to air, sea and inter-modal inland ports, or with access to the motorway system.
Local light industrial and urban support (LL)	• Car service and repair; joinery, construction and building supplies; and domestic storage. • Wide range of businesses that service other business (components, maintenance and support) and Subregional populations. Needed at local (LGA) to Subregional level.
Manufacturing – Heavy (MH)	• Large scale production activity. Likely to be characterised by high noise emission; emission stacks; use of heavy machinery; and frequency of large trucks. • Heavy manufacturing is in decline in Sydney, but will continue to cluster in some locations such as Wetherill Park, Campbelltown/ Ingleburn etc. There are strong arguments for collocation in terms of raw material delivery and to concentrate externalities (though impacts on surrounding uses are generally moderate).
Manufacturing – Light (ML)	• Clothing manufacturing, boat building and electrical equipment manufacturing • Small scale production with lower noise and emission levels than heavy manufacturing.
Urban Services (US)	• Concrete batching, waste recycling and transfer, construction and local and state government depots, sewerage, water supply, electricity construction yards. • These typically have noise dust and traffic implications and need to be isolated or buffered from other land uses. Needed in each sub-region.
Office (O)	• Administration, clerical, business services, research. • Office buildings that are independent (i.e., are not ancillary to another use on site) and likely to accommodate a significant number of administration staff (>10 people).
Business / Office Parks (BP)	• Integrated warehouse, storage, R&D, 'back-room' management and administration with up to 40% office component.
Retail - Main Street (RM)	• Retailing services traditionally found in main street locations (e.g., supermarkets) and small cluster or strips of stores located next to a street or road.
Retail – Big Box (RB)	• Large shopping complexes, including Westfield. •
Retail Bulky Goods (RBG)	• Typically large, one-story buildings surrounded by car-parking, usually located out of centre and in high exposure (main road) locations.
Special Activities (S)	• Tertiary level education, health, and community services. Typically require strategic locations and needed in each sub-region.
Dispersed Activities (D)	• Primary and secondary education, lower level health, social and community services, trades construction, other 'nomads'.
Residential (R)	• Residential development.
Accommodation (Short Term) (AST)	• Hotels and Motels (not including pubs), backpacker establishments.
Car park (CP)	• Stand-alone car parking stations •

Table 49. Hornsby Floorspace by 1 Digit ANZSIC

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	Total	1997 ELS Data
(E) Asquith	0	0	53148	0	12282	70757	37133	607	6050	603	257	21346	0	303	0	1848	1826	206161	
(E) Dural Service Centre	0	0	1657	0	8839	7368	27438	4514	5636	3669	148	5069	0	0	2042	3915	1638	71934	11354
(E) Mt Ku-ring-gai	0	0	44860	0	8036	47323	5282	209	2864	0	209	5968	0	0	0	956	0	115705	
(E) Thornleigh	0	0	63175	0	4271	21260	21111	0	1758	1536	0	15887	3380	0	2088	5894	0	140360	
Appletree Dr-Cherrybrook	0	0	0	0	0	0	794	159	0	0	0	0	0	0	635	0	0	1589	
Asquith	0	0	0	0	0	0	5220	379	0	0	0	643	0	0	594	338	229	7402	6322
Beecroft	0	0	0	0	0	0	4931	756	305	0	400	1358	0	0	1626	176	1975	11528	6833
Berowra	0	0	0	0	132	450	1985	2278	110	86	0	569	0	0	436	106	0	6151	1774
Berowra Hts	0	0	0	0	0	0	6373	2432	53	0	575	0	0	1040	624	0	399	11497	3327
Berowra Waters	0	0	0	0	0	0	570	526	0	0	0	0	0	0	0	263	0	1359	
Brooklyn	0	0	0	0	0	0	1162	1947	85	62	0	216	0	0	120	365	411	4368	1209
Carlingford Court	0	0	0	0	0	83	35181	1133	0	0	667	1601	0	134	563	4113	2025	45499	
Cherrybrook	0	0	0	0	0	0	7577	1505	0	0	570	0	0	0	461	0	2281	12393	6060
Cowan	0	0	0	0	0	0	178	59	27	0	0	0	0	0	0	0	0	263	
Dangar Is	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
David Rdr-Castle Hill	0	0	0	0	0	0	1318	565	0	0	0	0	0	0	904	0	226	3013	
Edgeworth David Ave-	0	0	0	0	0	0	2249	0	0	0	0	0	0	0	0	0	240	2489	
Epping	0	0	171	38	0	14962	3342	570	369	0	4966	25746	2177	293	1996	172	7746	62550	
Galston	0	0	0	0	0	0	2248	146	86	0	177	134	0	0	436	0	963	4189	
Galston Rd-Hornsby Hts	0	0	0	0	0	0	946	73	0	0	0	0	0	0	0	0	142	1161	
Hornsby	0	0	4816	3849	1766	8514	143799	60158	1827	707	6708	67591	3380	4464	27876	11751	72490	419696	
Hospital Precinct	0	0	0	247	0	0	0	0	0	0	0	0	0	905	58635	0	0	59788	
Kookaburra Road	0	0	1315	0	0	3618	1403	0	0	0	0	0	0	0	0	0	0	6336	
Kuringai	0	0	0	0	0	0	495	371	0	124	0	0	0	0	0	0	124	1114	
Malton Rd-North Epping	0	0	0	0	0	0	1209	227	0	0	0	0	0	0	0	0	372	1808	
Mt Colah Shops	0	0	0	0	0	0	2328	0	0	0	0	0	0	0	104	0	546	2978	1703
Mt Colah Stn	0	0	0	0	0	0	981	145	0	28	0	155	0	0	145	0	47	1502	
Myrtle St-Normanhurst	0	0	0	0	75	0	411	0	0	0	0	0	0	0	0	0	174	660	
Normanhurst	0	0	0	0	0	0	592	505	0	77	0	169	0	0	84	0	343	1770	
Pennant Hills	0	0	430	0	0	0	23651	15316	349	2014	6621	23226	1852	647	1961	4418	3864	84349	12195
Pennant Hills Rd-	0	0	0	0	0	0	1374	3972	7227	0	0	368	0	0	0	0	0	12941	
Plymton Rd Shops-Epping	0	0	0	0	0	0	1410	0	0	0	0	0	0	0	0	0	112	1522	
Sefton Rd-Thornleigh	0	0	0	0	0	216	270	108	0	0	0	383	0	0	208	0	108	1292	
Somerville Rd-Hornsby Hts	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Thornleigh	0	0	1006	0	350	1858	25752	3291	77	2143	838	21330	610	1222	1499	535	2692	63204	15972
Waitara	0	0	89	0	0	0	20402	5752	0	0	0	2548	0	0	0	5050	89	33929	
West Pennant Hills	0	0	0	0	0	0	3788	703	0	98	82	1444	0	125	457	0	689	7385	3908
Westleigh	0	0	0	0	0	0	3383	425	638	0	0	851	0	476	851	0	1776	8399	3529
Wiseman's Ferry	0	0	0	0	0	0	679	2170	0	0	0	202	0	0	0	0	0	3051	
Yallambee Road	0	0	0	0	0	0	559	0	0	0	0	0	0	0	0	0	0	559	
TOTAL	0	0	170666	4134	35751	176411	397523	111001	27461	11147	22218	196806	11400	9609	104345	39980	103526	142197	

Table 50. Hornsby Floorspace by BLC

	AST	BP	CAR	D	FL	LL	MH	ML	O	RB	RBG	RES	RM	S	US	TOTAL	1997 ELS Data
(E) Asquith	0	10492	0	0	95090	47941	13521	34107	509	0	2253	0	243	1179	827	206161	
(E) Dural Service Centre	0	8186	0	678	13884	2493	0	560	3301	0	23388	0	8461	1307	9676	71934	11354
(E) Mt Ku-ring-gai	0	8062	0	539	52333	14926	5638	26299	0	0	3236	0	1042	0	3631	115705	
(E) Thornleigh	0	28130	0	1011	22966	14148	46751	13644	1344	0	0	0	0	4319	8047	140360	
Appletree Dr-Cherrybrook	0	0	0	0	0	0	0	0	0	0	0	0	1589	0	0	1589	
Asquith	0	0	0	0	0	0	0	0	0	0	0	0	7402	0	0	7402	6322
Beecroft	0	0	0	0	0	0	0	0	0	0	0	0	11528	0	0	11528	6833
Berowra	0	0	0	0	560	1156	0	0	0	0	0	0	4436	0	0	6151	1774
Berowra Hts	0	0	0	0	53	0	0	0	0	0	532	0	10912	0	0	11497	3327
Berowra Waters	0	0	0	0	0	307	0	0	0	0	0	0	1052	0	0	1359	
Brooklyn	0	0	0	412	85	0	0	0	0	0	74	0	3483	315	0	4368	1209
Carlingford Court	0	0	0	0	0	375	0	0	0	41520	0	0	3605	0	0	45499	
Cherrybrook	0	0	0	461	0	0	0	0	0	11933	0	0	0	0	0	12393	6060
Cowan	0	0	0	0	0	0	0	0	0	0	0	0	263	0	0	263	
Dangar Is	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
David Rdr-Castle Hill	0	0	0	0	0	0	0	0	0	0	0	0	3013	0	0	3013	
Edgeworth David Ave-Waitara	0	0	0	0	0	0	0	0	0	0	0	0	2489	0	0	2489	
Epping	0	0	0	6699	16227	324	0	0	32272	0	0	0	6818	172	38	62550	
Galston	0	0	0	0	0	0	0	0	0	0	0	0	4189	0	0	4189	
Galston Rd-Hornsby Hts	0	0	0	0	0	179	0	0	0	0	0	0	982	0	0	1161	
Hornsby	0	631	0	6406	4025	39851	0	929	27490	239852	13518	8950	60017	12789	5239	419696	
Hospital Precinct	0	0	0	1099	0	0	0	0	0	0	0	219	0	58469	0	59788	
Kookaburra Road	0	0	0	0	3089	1932	0	1315	0	0	0	0	0	0	0	6336	
Kuringai	0	0	0	0	0	0	0	0	0	0	0	0	1114	0	0	1114	
Malton Rd-North Epping	0	0	0	0	0	270	0	0	0	0	0	0	1538	0	0	1808	
Mt Colah Shops	0	0	0	0	0	418	0	0	0	0	0	94	2466	0	0	2978	1703
Mt Colah Stn	0	0	0	0	0	0	0	0	0	0	0	201	929	0	372	1502	
Myrtle St-Normanhurst	0	0	0	0	0	0	0	0	0	0	0	0	660	0	0	660	
Normanhurst	0	0	0	84	0	0	0	0	169	0	0	0	1517	0	0	1770	
Pennant Hills	8918	30664	0	152	0	2310	0	122	1994	0	12914	0	25568	0	1707	84349	12195
Pennant Hills Rd-Thornleigh	3972	0	0	0	7227	1502	0	0	0	0	0	0	240	0	0	12941	
Plymton Rd Shops-Epping	0	0	0	0	0	335	0	0	0	0	0	0	1187	0	0	1522	
Sefton Rd-Thornleigh	0	0	0	208	0	0	0	0	276	0	0	0	809	0	0	1292	
Somerville Rd-Hornsby Hts	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Thornleigh	0	4637	0	0	396	4785	0	791	17283	11254	7269	0	16312	0	478	63204	15972
Waitara	0	0	0	0	0	3338	0	0	0	0	17180	0	11374	2037	0	33929	
West Pennant Hills	0	0	0	0	0	657	0	0	0	0	0	0	6729	0	0	7385	3908
Westleigh	0	0	0	476	0	374	0	0	0	0	0	0	7549	0	0	8399	3529
Wiseman's Ferry	293	0	0	0	0	0	0	0	0	0	0	0	2758	0	0	3051	
Yallambee Road	0	0	0	0	0	418	0	0	0	0	0	0	141	0	0	559	
TOTAL	13183	90801	0	18224	215933	138041	65910	77767	84638	304558	80364	9463	212413	80667	30014	1421977	

Table 51. Ku-ring-gai Floorspace by 1 Digit ANZSIC

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	Total
East Killara	0	0	0	0	0	0	910	114	0	0	0	0	0	0	0	0	114	1137
East Lindfield	0	0	0	0	0	0	1113	0	0	0	0	0	0	0	196	0	0	1309
Eastern Rd-Turramurra	0	0	0	0	0	0	1157	0	0	0	0	0	0	0	0	0	133	1290
Fox Valley	0	0	0	0	0	0	725	483	0	0	0	0	0	0	1655	0	0	2863
Gordon	0	0	570	0	973	0	23314	9090	168	542	3126	41126	4986	830	6846	2777	4687	99034
Grosvenor Street	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Hampden Ave Shops-Nth Wahroonga	0	0	33	0	0	0	546	70	0	0	0	44	0	0	33	0	140	868
Killara	0	0	0	0	0	0	88	101	0	101	0	88	0	0	0	0	0	378
Lindfield	0	0	99	1092	0	507	12211	1610	336	2517	1634	8216	558	220	6362	1419	849	37631
North Turramurra	0	0	0	0	0	0	1237	811	0	0	0	1268	0	0	1524	0	149	4989
Princes St-Turramurra	0	0	0	0	0	0	1097	0	0	0	0	0	0	0	232	0	0	1328
Pymble	0	0	184	0	898	377	4128	1882	226	0	1291	5790	0	569	2209	662	559	18775
Pymble Office Park	0	0	14551	1626	5108	8062	4782	0	4660	5010	1790	37285	134	1100	3506	693	691	88999
Roseville	0	0	79	0	79	0	4554	2597	401	310	0	2754	0	1054	3013	1318	1368	17528
Roseville Chase	0	0	0	0	0	0	1681	242	0	0	0	106	0	0	106	0	248	2383
South Turramurra	0	0	0	0	0	0	1210	0	0	0	0	0	0	0	0	0	0	1210
St Ives	0	0	0	0	0	0	30040	510	970	0	3253	2759	0	0	4992	1798	2800	47122
St Ives Chase	0	0	0	0	0	0	790	0	0	0	0	0	0	0	69	0	69	927
St Ives North	0	0	0	0	0	0	1181	547	0	0	0	0	0	0	182	0	182	2092
Turramurra	0	65	0	351	289	963	10555	1499	676	413	1450	3726	0	369	3418	1611	3327	28712
Wahroonga	0	0	0	0	113	0	5402	509	360	754	1034	1391	0	0	1308	0	640	11511
West Gordon	0	0	0	0	0	85	220	423	0	0	0	0	0	0	233	0	0	961
West Lindfield	0	0	0	0	0	207	1598	879	0	242	0	710	0	0	661	186	0	4485
West Pymble	0	0	0	0	0	0	2694	443	0	0	0	0	0	0	485	0	0	3622
TOTAL	0	65	15517	3069	7460	10201	111233	21810	7799	9888	13577	105263	5678	4142	37032	10465	15955	379153

Table 52. Ku-ring-gai Floorspace by 1 Digit ANZSIC

	AST	BP	CAR	D	FL	LL	MH	ML	O	RB	RBG	RES	RM	S	US	TOTAL
East Killara	0	0	0	0	0	0	0	0	0	0	0	0	1137	0	0	1137
East Lindfield	0	0	0	0	0	0	0	0	0	0	0	0	1309	0	0	1309
Eastern Rd-Turramurra	0	0	0	0	0	0	0	0	0	0	0	0	1290	0	0	1290
Fox Valley	0	0	0	1655	0	0	0	0	0	0	0	0	1208	0	0	2863
Gordon	0	0	0	3018	0	3298	0	0	52316	13391	439	0	26573	0	0	99034
Grosvenor Street	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Hampden Ave Shops-Nth Wahroonga	0	0	0	0	0	111	0	0	0	0	0	0	757	0	0	868
Killara	0	0	0	0	0	0	0	0	0	0	0	0	378	0	0	378
Lindfield	0	12751	0	93	474	2682	0	0	4064	0	0	0	16415	59	1092	37631
North Turramurra	0	0	0	1122	0	0	0	0	0	0	0	0	3867	0	0	4989
Princes St-Turramurra	0	0	0	0	0	0	0	0	0	0	0	0	1328	0	0	1328
Pymble	0	0	0	0	0	184	0	0	4190	0	0	0	13971	429	0	18775
Pymble Office Park	0	3986	0	500	5488	1396	0	0	75440	0	0	0	654	0	1536	88999
Roseville	0	0	0	274	0	0	0	0	1315	310	665	0	14964	0	0	17528
Roseville Chase	0	0	0	0	0	534	0	0	0	0	0	0	1850	0	0	2383
South Turramurra	0	0	0	0	0	347	0	0	0	0	0	0	862	0	0	1210
St Ives	0	0	0	0	0	639	0	0	1481	32988	0	0	11912	101	0	47122
St Ives Chase	0	0	0	0	0	240	0	0	0	0	0	0	687	0	0	927
St Ives North	0	0	0	0	0	270	0	0	0	0	0	0	1822	0	0	2092
Turramurra	0	0	0	1570	0	628	0	0	1031	0	177	0	23199	1755	351	28712
Wahroonga	0	0	0	347	0	1362	0	0	0	0	0	142	8946	0	714	11511
West Gordon	0	0	0	0	0	0	0	0	0	0	0	0	961	0	0	961
West Lindfield	0	0	0	0	0	0	0	0	0	0	0	0	4485	0	0	4485
West Pymble	0	0	0	0	0	485	0	0	0	0	0	0	3138	0	0	3622
TOTAL	0	16736	0	8578	5962	12175	0	0	139837	46689	1282	142	141714	2344	3693	379153