



ShapingSEQ 2023 Background Paper 2: Prosper Theme

December 2023



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The Department of Housing, Local Government, Planning and Public Works connects industries, businesses, communities and government (at all levels) to leverage regions' strengths to generate sustainable and enduring economic growth that supports well-planned, inclusive and resilient communities.

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List of acronyms

CBD	Central Business District
GMP	Growth Monitoring Program
LGA	Local Government Area
LSDM	Land Supply and Development Monitoring
MEIA	Major Enterprise and Industrial Areas
MRAC	Major Regional Activity Centre
PFGA	Potential Future Growth Area
PRAC	Principal Regional Activity Centre
RACN	Regional Activity Centres Network
REC	Regional Economic Cluster
REP	Recycling Enterprise Precinct
RGCP	Regional Growth Corridor Plan
RLA	Rural Living Area
RLRPA	Regional Landscape and Rural Production Area
RSI	Region-shaping infrastructure
RTP	Regional Transport Plan
SEQ	South East Queensland
SEQIS	South East Queensland Infrastructure Supplement
TMR	Department of Transport and Main Roads
UUF	Underutilised Urban Footprint

Introduction

The South East Queensland Regional Plan, ShapingSEQ is the strategic land use plan for South East Queensland (SEQ), providing a regional framework for growth management. ShapingSEQ 2017 identified that an update of the plan was anticipated between 2022 and 2024. On 20 October 2022, the former Premier and Minister for the Olympic and Paralympic Games, the Honourable Anastacia Palaszczuk MP, committed to a review of ShapingSEQ as a key outcome from the Queensland Housing Summit, and ShapingSEQ 2023 was publicly released in December 2023.

The primary purpose of the review of ShapingSEQ was to ensure its land and housing supply settings are fit for purpose and responsive to current growth, and to provide for an enhanced framework to engage with local governments to accelerate delivery of more housing.

The scope of the review of ShapingSEQ was therefore limited to four focus areas including: housing supply and diversity; economic centres and jobs; policy and infrastructure alignment; and implementation assurance. Of relevance to Prosper, the scope was limited to:

- Providing new employment planning baselines and projections to better plan for local jobs.
- Analysing and reviving policy for areas of concentrated employment (Regional Economic Clusters (RECs) and Regional Activity Centres (RACs)) aligned to supporting development in the right areas.
- Reviewing adequacy and future need for industrial land to ensure sufficient industrial land is located where it is needed.

The purpose of this paper is to identify key data, policy, legislation, trends and other changes that have occurred since ShapingSEQ 2017 as they relate to the scope of the review for the Prosper theme. This paper informed, supports and provides background material for ShapingSEQ 2023, including key strategies under the Prosper theme.

The role of ShapingSEQ

Regional planning in Queensland and SEQ has been conducted since the 1990s, and originally provided non-statutory growth management policies for consideration. Statutory regional plans have since evolved to support the changing needs and aspirations of Queensland's regions and are now comprehensive statutory policy documents informed by detailed data modelling and with statutory mechanisms for policy implementation and review.

ShapingSEQ sets planning direction for sustainable growth, global economic competitiveness and high-quality living. The regional plan responds to the region's projected growth, and the opportunities and challenges associated with current and projected trends.

It guides the future of the SEQ region, encompassing the 12 local government areas (LGA) of Brisbane, Gold Coast, Ipswich, Lockyer Valley, Logan, Moreton Bay, Noosa, Redland, Scenic Rim, Somerset, Sunshine Coast and Toowoomba (urban extent).

ShapingSEQ allocates all land in SEQ into one of three regional land use categories: Regional Landscape and Rural Production Area (RLRPA), Urban Footprint, and Rural Living Area (RLA). In doing so, it provides a framework for delivering efficient urban and rural residential growth, a more compact urban form, economic agglomeration, and the protection and sustainable use of SEQ's natural assets, landscape and productive rural areas.

ShapingSEQ provides a framework of outcomes and strategies that support effective and sustainable regional planning and growth management. These include:

- » Geographically defined consolidation areas in relation to growth management (Urban Footprint).
- » Regional integration of governance that drives the relationship between policy direction and stakeholders and identifies goals, principles and stakeholder responsibilities in addressing these.
- » Infrastructure and economic development linked to the regional distribution of population and residential growth.

- » Protection of broader landscape values, services and amenities of natural, rural and agricultural production landscapes.
- » Prescribing ongoing monitoring and benchmarking of growth, development forms, land supply and the Urban Footprint.

A summary of the achievements from the last five years of implementing ShapingSEQ 2017 can be found in ShapingSEQ Background Paper 1: Grow.

ShapingSEQ 2023 is a part of the Queensland Government's response to the National Housing Accord and National Planning Reform Blueprint. The plan has a critical role to play in setting effective and responsive policies that facilitate the delivery of diverse and well-located homes to meet the housing needs of South East Queenslanders today and into the future.

In response to projected population growth to 2046 ShapingSEQ 2023 sets dwelling supply targets and diversity sub-targets for each LGA as well as a region wide social and affordable housing sub-target. The place-based allocation of dwelling targets with sub-targets for housing mix in each LGA is a nation-leading approach with the purpose of setting clear expectations around how SEQ will sustainably accommodate the projected population growth to 2046. This will assist in delivering on the State's commitment to the National Housing Accord target of 1.2 million well-located homes.

Implementing ShapingSEQ 2023 will require ongoing collaboration, commitment and coordination across all levels of government, First Nations peoples, the industry and the community. Each stakeholder has a role to play in responding to the current housing challenges experienced across SEQ and the overall achievement of the longer-term vision for SEQ. To guide this collaboration and provide greater assurance to all stakeholders and the community on the delivery of ShapingSEQ 2023, a new approach to implementation, governance, monitoring and reporting has been established (refer to Implementation Background Paper).

ShapingSEQ 2023 maintains the fundamental elements of ShapingSEQ 2017, including the five themes underpinning the 50-year vision for SEQ: Grow, Prosper, Connect, Sustain and Live.

Prosper theme defined

As the State's largest region in both population and economic activity, SEQ serves as a socioeconomic hub to the rest of Queensland, as well as interstate and foreign markets.

The Prosper theme seeks to address the opportunities and challenges of the region's economy with a priority of sustaining economic growth and prosperity. Prosper strengthens and raises the region's economic profile to ensure it remains prosperous and continues to compete globally. To do this, we will need to be able to keep pace with the rest of the world. We will have to continue to invest in and support our economic strengths and seek out new and emerging opportunities.

The Prosper theme also seeks to identify and describe appropriate land use responses to support the growth of the regional economy. It focuses on how ShapingSEQ advances the region's global and national relationships to ensure SEQ remains economically competitive by:

- » Ensuring there is sufficient supply of appropriately zoned land, so supply is not constrained.
- » Identifying and protecting strategic locations that have potential to provide future employment.
- » Identifying and protecting infrastructure corridors required to sustain and strengthen economic growth.
- » Identifying areas to focus regional economic growth.
- » Identifying regional and sub-regional opportunities.
- » Identifying infrastructure priorities to support areas of regional economic activity or significance.
- » Acknowledging that economic activity occurs across local government boundaries.
- » Supporting connections between place of residence and place of employment.

Prosper theme background

As Queensland's capital city region, SEQ is an economic powerhouse generating over 72% of the State's gross state product (GSP)¹. In 2022 SEQ provided over two million local jobs, supporting more than 80% of the State's employment in professional, scientific and technical services, financial and insurance services, and the information, media and telecommunication sectors. SEQ makes a large and unique contribution to the Queensland and Australian economies. As Queensland's capital and the third largest metropolitan region in the country, it is a diverse and rapidly growing economy that is also contributing to Australia's trade growth into the Asia-Pacific region.

SEQ is an economically diverse region with a range of economic drivers. These include, but are not limited to:

- » a major capital city
- » major port (sea and air) assets
- » an extensive land-based freight network
- » a network of regionally significant industry and enterprise areas
- » a network of higher order activity centres providing retail, commercial and personal services to their communities
- » major health and scientific research hubs
- » natural and developed tourism assets
- » fertile agricultural production areas.

The Prosper theme positions SEQ for success in the global economy. SEQ's economic strengths have been in manufacturing, agriculture, tourism and events, health, education, retail and construction. To remain economically diverse, SEQ will need to build upon these strengths and foster new industries and sectors – particularly those showing strong growth and provide greater opportunities for local employment and growth in First Nations economic development.

Employment

The total labour force in the region as of 2021 was 1,826,004, an 8.3% increase from 2016. There was a slight decrease during mid-2020, likely explained by indirect impacts of COVID-19 such as redundancy or inability to work.

There has since been an increase in response to greater job opportunities being available, as well as higher paying jobs, to attract employees post COVID-19. The number of employed people within the region increased by around 186,800 persons between 2016 and 2021, representing an average annual growth rate of 2.1%. Of the total labour force, Brisbane and Gold Coast were the LGAs with the highest percent of employees with 46% and 16% respectively. Moreton Bay and Sunshine Coast followed closely behind having 7.6% and 7.5% respectively.² It is also noted that Redland and Moreton Bay LGAs have a shortfall of local jobs with approximately 0.6 local workers per employed resident.³

Health care and social assistance, retail trade and construction have been the highest employing sectors of the region in recent years. It is particularly prominent in the Brisbane, Toowoomba, Sunshine Coast and Moreton Bay LGAs.

¹ .id community demographic resources. South East Queensland economic profile <https://economy.id.com.au/comseq>

² 2021 Australian Bureau of Statistics – Quick Stats (Census All Persons)

³ Department of Infrastructure, Transport, Regional Development, Communications and the Arts (2022). South East Queensland – Population, Housing, Jobs, Connectivity and Liveability

Journey to Work

While employment patterns have changed with the increase of working from home, a large proportion of people travel into other local governments for work with Brisbane, Gold Coast, Moreton Bay and Sunshine Coast being the main recipients.⁴

Over 70% of employed people in the region worked within their LGA with around 10% of people commuting to the Brisbane CBD for work in 2021. In 2016, the self-containment rates were highest in Toowoomba (89%) and Brisbane (85%) and lowest in Logan (40%) and Redland (43%).⁵

In 2021, 36.4% of SEQ workers resided in Brisbane, with the remainder living on the Gold Coast (15.8%), in Moreton Bay (11.8%), Sunshine Coast (8.3%), Logan (8.2%), Ipswich (5.7%), Toowoomba (4.3%), Redland (4.1%), Noosa (1.2%), Scenic Rim and Lockyer Valley (1%) and Somerset (0.5%). A total of 24.2% of people work in a different LGA to where they reside.

Data on the mode of travel to work in the 2021 Census reveals that most workers in SEQ generally travel to work by car (65.7%), with just over a quarter working from home (26.5%) and the remaining workers travelling by different methods of public transport.⁶ The proportion of people working from home is likely due to the impacts of COVID-19 pandemic. However, a large proportion of key workers are still required to attend their place of work during work hours and require affordable housing in proximity to efficient transport infrastructure and their place of employment.

Employment projections

Employment projections represent an anticipated outlook at a given point in time based on available information and an understanding of economic and social policy interactions. These projections are intended to form the basis for a discussion of economic and employment planning within SEQ. They are not intended to represent an employment target and as such local governments can aim for increased levels of employment if they choose to. It is important to note that ShapingSEQ does not adopt a policy position of employment 'self-containment', recognising that economic and employment activity occurs across local government boundaries, influenced by the complex 'push and pull' nature of economic activity. It is hoped however, that over time, ShapingSEQ 2023 policy will help influence regional employment outcomes, particularly in the context of Regional Economic Clusters (RECs).

Ahead of the review of ShapingSEQ, Queensland Treasury prepared an update of the Queensland Government employment projections, which form the employment baselines for SEQ. These were released after technical work was completed to inform the Prosper theme in the draft ShapingSEQ 2023 Update (consultation version). The 2023 edition employment projections have been reflected in ShapingSEQ 2023 and are reported in Table 1.

Table 1 - Employment planning baselines

Local government area	2020-21	2025-26	2030-31	2035-36	2040-41	2045-46
Brisbane	842,200	956,600	1,046,000	1,118,900	1,190,700	1,263,600
Gold Coast	293,500	333,400	366,400	399,800	433,300	467,300
Ipswich	80,800	97,400	110,500	123,900	138,800	153,900
Lockyer Valley	14,400	16,800	17,800	18,500	19,600	21,000
Logan	112,900	127,600	139,400	150,900	161,600	172,000
Moreton Bay	149,300	171,700	189,400	204,300	219,400	234,700
Noosa	25,200	28,400	30,300	32,500	34,900	37,300

⁴ Regional Transport Plans – South East Queensland – at 2021. Department of Transport and Main Roads

⁵ Department of Infrastructure, Transport, Regional Development, Communications and the Arts (2022). South East Queensland – Population, Housing, Jobs, Connectivity and Liveability

⁶ Australian Bureau of Statistics, Census of Population and Housing 2021.

Local government area	2020-21	2025-26	2030-31	2035-36	2040-41	2045-46
Redlands	50,200	56,300	60,200	63,900	67,900	71,900
Scenic Rim	15,800	18,200	19,700	20,800	22,000	23,300
Somerset	8,200	10,100	10,900	11,300	12,000	12,800
Sunshine Coast	147,600	166,800	181,500	197,800	215,000	232,200
Toowoomba (urban extent)	72,700	81,000	85,800	89,500	93,200	96,600
Total	1,812,800	2,064,300	2,257,900	2,432,100	2,608,400	2,786,600

Source: Queensland Treasury Regional Employment Projections, 2020-21 to 2045-46, Census employment basis

The Queensland Government Regional Employment Projections are based on, and consistent with, the Census 2021 employment counts, Queensland Government population projections 2023 edition update (medium series), State forecasts (2023-24), long term assumptions for productivity growth, investment (including energy investments and the Olympics), global demand for commodities, demographic factors and a range of other assumptions and variables. They have been developed with the assistance of economic modellers at the Centre of Policy Studies, Victoria University.

The projections are produced on a no policy change basis and should not be considered as forecasts of future employment growth. Rather, they are long term projections of possible future employment growth derived from the range of assumptions and information used in their construction. The projections are compiled using the latest information available at the time of production. However, these components change over time and, therefore, direct comparisons should not be made between these projections and any future projections that may be produced at a later date or other shorter-term forecasts of employment growth.

A further breakdown of these employment projections by industry sector for each local government area within SEQ are reported in Appendix A.

The department recognises that there are many possible future employment outcomes for SEQ, and these alternative inputs assist in formulating regional policy. In addition to the updated Queensland Government Employment Projections, the department considered an alternative scenario of employment projections for sensitivity testing.

These adjusted ShapingSEQ employment projections are not official Queensland Government projections. They were used to inform regional planning policy, and represent an alternative employment projection scenario used for sensitivity testing.

Table 2 – Alternative scenario ShapingSEQ 2023 employment projections by industry, SEQ, 2021-2046

Sector	2021	2026	2031	2036	2041	2046
Agriculture, Forestry and Fishing	19,970	20,917	21,632	21,310	22,493	25,244
Mining	14,755	16,122	15,401	14,187	13,753	13,829
Manufacturing	117,306	134,075	149,615	151,811	156,618	165,756
Electricity, Gas, Water and Waste Services	21,449	27,896	36,024	38,612	41,473	45,174
Construction	189,278	217,734	234,578	268,724	305,881	345,250
Wholesale Trade	49,287	52,635	57,878	60,953	63,075	65,213

Sector	2021	2026	2031	2036	2041	2046
Retail Trade	189,723	196,587	214,263	226,898	234,307	241,679
Accommodation and Food Services	144,405	162,617	175,302	190,590	204,723	221,024
Transport, Postal and Warehousing	96,422	105,510	122,297	132,478	137,504	143,628
Information Media and Telecommunications	22,596	24,439	27,241	27,813	27,515	27,389
Financial and Insurance Services	62,061	61,104	66,142	69,236	72,711	77,251
Rental, Hiring and Real Estate Services	39,220	46,892	53,637	59,196	64,112	66,560
Professional, Scientific and Technical Services	158,908	188,274	206,116	231,039	252,418	276,336
Administrative and Support Services	70,136	81,250	84,862	91,771	98,667	106,307
Public Administration and Safety	120,323	134,144	149,219	159,953	169,410	180,416
Education and Training	182,444	207,098	217,955	229,620	242,703	258,650
Health Care and Social Assistance	319,121	363,887	406,242	445,014	483,079	524,166
Arts and Recreation Services	35,663	38,400	44,498	46,784	47,003	47,316
Other Services	79,214	85,276	89,498	95,821	101,330	107,715
Total persons employed	1,932,283	2,164,859	2,372,401	2,561,810	2,738,774	2,938,902

Source: Alternative scenario ShapingSEQ employment projections by industry, 2021-2046

Table 4 – Alternative scenario ShapingSEQ 2023 employment projections by LGA, SEQ, 2021-2046

Local government area	2020-21	2025-26	2030-31	2035-36	2040-41	2045-46
Brisbane	921,500	1,011,600	1,109,800	1,198,300	1,269,800	1,353,700
Gold Coast	311,900	355,200	386,000	414,600	448,100	482,500
Ipswich	85,100	107,400	118,100	121,700	127,300	134,200
Lockyer Valley	14,800	16,800	18,600	19,800	21,400	23,400
Logan	116,600	136,900	152,700	171,200	188,900	209,200
Moreton Bay	153,400	168,700	182,900	198,400	212,000	227,200

Local government area	2020-21	2025-26	2030-31	2035-36	2040-41	2045-46
Noosa	27,000	31,000	32,200	33,700	35,500	37,700
Redlands	50,900	53,300	60,000	65,800	71,400	76,300
Scenic Rim	15,800	17,600	19,200	20,900	22,700	25,100
Somerset	7,800	9,400	11,100	11,700	12,500	13,300
Sunshine Coast	153,500	173,100	189,500	205,800	221,800	240,400
Toowoomba (urban extent)	73,900	83,700	92,100	99,900	107,500	115,800
Total persons employed	1,932,300	2,164,900	2,372,400	2,561,800	2,738,800	2,938,900

Source: *Alternative scenario ShapingSEQ 2023 employment projections by LGA, SEQ, 2021-2046*

The alternative employment projections serve the planning process by articulating alternative outcomes for regional and industry employment. Regular reviews of projections and planning instruments allows for intermittent calibration over time, including incorporation of policy change.

Policy Directions in ShapingSEQ 2023

The population growth projected for SEQ brings significant opportunity for jobs growth during the life of the regional plan. A balanced approach to how land is prioritised for both residential and employment uses is essential. While trade-offs between competing demands for land are inevitable, the most regionally important employment opportunities must be well-planned to meet the region's future needs.

To achieve the vision for SEQ, a range of different types of jobs and opportunities are needed. This includes jobs that can boost the economic growth of the region's high-value, specialised or 'outward facing' jobs and also a range of population-serving jobs. These jobs have different requirements in terms of their location, infrastructure and investment drivers.

ShapingSEQ 2023 carries forward land use policies to support jobs across the region through three key policies:

- » RECs
- » Regional Activity Centres Network (RACN)
- » Major Enterprise and Industry Areas (MEIAs).

These different types of employment areas benefit from the synergies that exist between them, with many of the regional activity centres and MEIAs located within RECs.

The key policy directions of ShapingSEQ 2023 include:

- » Providing updated employment projections.
- » Strengthening the role of RECs as the locations of regionally and nationally significant economic activity.
- » Retaining the Regional Activity Centres Network (RACN) with renewed focus on the importance of flexibility in local planning.
- » Maintaining Knowledge and Technology Precincts (KTPs) as areas where co-location of mutually-supportive activities are encouraged.
- » A new regional approach to strategic industrial land.
- » Strengthening planning and protection for MEIAs across SEQ.
- » Identifying possible locations for strategic Recycling Enterprise Precincts to help meet ambitious targets for recycling.

The following sections provide further detail on these.

Regional economic clusters

RECs were an economic land use concept introduced in Shaping SEQ 2017. RECs are formed by a confluence of a range of different land uses that deliver high levels of employment and specialisation in outwardly focused clusters. RECs comprise either a very significant cluster or multiple clusters of economic activity centred around high value sectors or industries (e.g. a well-established KTP or major industrial area), or multiple economic components creating a significant and diverse economic cluster or corridor.

RECs are important because they contain significant levels of high value or trade focussed economic activity. They also support the connection of SEQ to other regions, states and countries through sophisticated supply chain relationships and a range of infrastructure networks that enable the transmission of goods, services, information and knowledge. Strengthening our global and national relationships is a core priority for ShapingSEQ and will ensure that the region's economy continues to prosper.

RECs contain high concentrations of sectors that support the tradeable economy or business-to-business interactions. They are typically characterised by high levels of employment and specialise in knowledge intense and outward-facing (export oriented or import replacement) sectors. This form of trade facilitates employment and economic activity beyond what can be produced by local consumption alone. Sectors of the economy primarily dedicated to local consumption or business-to-household interactions are still important but the capacity to produce significant economic activity is limited to a local scale.

Agglomerations or corridors as opposed to centres

Economic interactions do not conform to specific planning boundaries. The typical planning response is to identify discrete centres or industrial areas, and at a statutory planning level this is appropriate. However, at a strategic level the confluence of economic activity across a broader geography than individual centres and industrial areas must be recognised. The RECs analysis identifies that at a broad level, economic activity occurs across corridors or within agglomerations.

Corridors have clearly arisen around major transport infrastructure. Obviously, industrial land uses benefit from freight corridors (i.e. road and rail corridors) and major freight assets (i.e. airports, ports, intermodal terminals, etc). Knowledge or professional services corridors have arisen around transport nexuses and transport corridors. Historically, car-based networks have seen corridors emerge around motorways, which have been subsequently reinforced by line haul public transport.

ShapingSEQ only identifies existing clustering or agglomerations of economic activity. This is because it is easier to build on existing agglomerations or their identified trajectories, rather than creating entirely new ones. However, it's important to note that RECs are dynamic and always evolving. This is in contrast to planning approaches that can be very static. This emphasises the need for ongoing monitoring of development activity, within or near existing or potential RECs, which might result in an expansion of existing RECs or the realisation of the potential for new RECs to emerge.

Role of enabling regional assets

Infrastructure plays a critical role in stimulating the economy and major regional assets which often contributes to the underlying strength of RECs. Examples include tertiary education institutions, hospitals, airports, ports and intermodal terminals. Concentrating these regional assets in logical locations or as part of a corridor extension can lead to more significant agglomerations. It is evident from the analysis (using the RECs methodology outlined below) that RECs occur around or near major transport infrastructure, particularly major freight routes and assets.

Method for identifying RECs

A key underpinning for identification of RECs is the significance of employment and specialisation in high value, knowledge intense, 'outward looking' industries. These industries were identified as part of ShapingSEQ 2017 and revised slightly for the regional plan review. These industries are grouped into clusters per Table 3.

Table 3 - Knowledge intense and outward looking industry sector groups

Industry Sector Groups	Two-Digit ANZSIC Category
Mining & Resources	Mining, nfd; Coal Mining; Oil & Gas Extraction; Metal Ore Mining; Non-Metallic Mineral Mining & Quarrying; Exploration & Other Mining Support Services; and Petroleum & Coal Product Manufacturing.
Final Manufactures	Food Product Manufacturing; Beverage and tobacco Product Manufacturing; Polymer Product & Rubber Product Manufacturing; Non-Metallic Mineral Product Manufacturing; Fabricated Metal Product Manufacturing; Transport Equipment Manufacturing; Machinery and Equipment Manufacturing; and Furniture & Other Manufacturing.
Tourism Related	Accommodation and Food Services, nfd;

Industry Sector Groups	Two-Digit ANZSIC Category
	Accommodation; Food and Beverage Services; and Air and Space Transport.
Finance & Professional Services	Financial and Insurance Services, nfd; Finance; Insurance and Superannuation Funds; Auxiliary Finance and Insurance Services; Professional, Scientific and Technical Services, nfd; Professional, Scientific and Technical Services (except Computer System Design and Related Services); and Computer System Design and Related Services.
Tertiary Education	Tertiary Education.
Health	Hospitals; and Medical and Other Health Care Services.
Creative & Cultural	Information Media and Telecommunications, nfd; Publishing (except Internet and Music Publishing); Motion Picture and Sound Recording Activities; Broadcasting (except Internet); Arts and Recreation Services, nfd; Heritage Activities; Creative and Performing Arts Activities; and Sports and Recreation Activities.

Note: NFD-not further defined

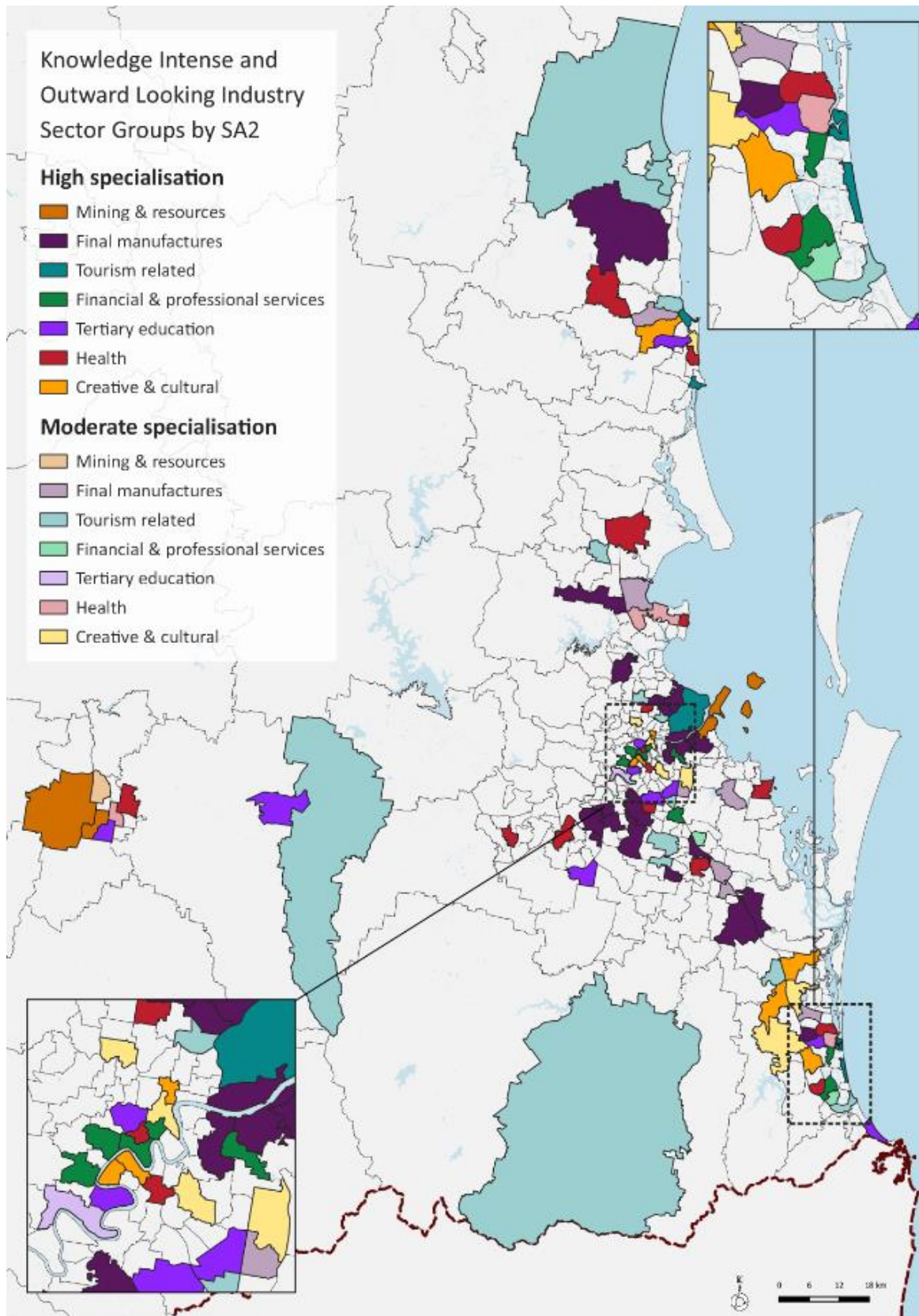
A methodology for identifying RECs was developed as part of Shaping SEQ 2017, and subsequently updated as part of ShapingSEQ 2023. The basis for this methodology is as follows:

- » Collate employment by place of work (POW) data at the two-digit Australian and New Zealand Standard Industrial Classification (ANZSIC) level for each SA2 in SEQ.
- » Identify the SA2s within SEQ which have above average levels of employment (significant employment areas).
- » Analyse the specialisation in significant employment areas within the high value, knowledge intense, 'outward looking' industry cluster groups (outlined in Table 3).
- » Identify those significant employment areas with moderate and high levels of specialisation within the high value, knowledge intense, 'outward looking' industry cluster groups.
- » Identify those significant employment areas with multiple specialisations within the high value, knowledge intense, 'outward looking' industry cluster groups.
- » Map and identify significant employment areas with multiple specialisations to identify areas of confluence or clustering of significant and specialised employment.

- » Undertake a moderation and adjustment process of geographies to consider future planned economic activity and refine geographies based on productive land use area (e.g. centres, industrial areas, KTPs, major tourism nodes, etc).

Figure 1 illustrates the outcomes of the RECs methodology prior to the moderation and adjustment phase and shows the SA2s with moderate and high levels of specialisation in high value, knowledge intense, 'outward looking' industry cluster groups.

Figure 1 - SA2s with High and Moderate Specialisation by Industry Sector Group



Source: Bull and Bear Economics (2023) ShapingSEQ Review: Regional Economic Clusters Technical Paper

The outcome of the review of RECs as part of ShapingSEQ 2023 was that RECs would be largely unchanged with the exception of:

- » Introduction of a new REC –
 - Helensvale-Coomera-Oxenford REC comprising the Helensvale, Coomera and Oxenford – Maudsland SA2s.
- » Extension of a REC –
 - Reconfiguration of the North Lakes – Mango Hill REC to the North Lakes – Redcliffe REC in recognition of the confluence of activity across North Lakes, Deception Bay, Narangba, Rothwell – Kippa-Ring and Redcliffe and the lack of specialisation identified in Mango Hill SA2.
- » Minor boundary changes of RECs due to SA2 boundary changes:
 - Yatala-Stapylton-Beenleigh REC: due to the division of the Ormeau – Yatala SA2, this REC now comprises Ormeau (East) – Stapylton, Ormeau (West) – Yatala and Beenleigh.
 - Southport-Broadbeach REC: due to the division of the Southport and Surfers Paradise SA2s, this REC now comprises Southport – North, Southport – South, Ashmore, Molendinar, Surfers Paradise – North, Surfers Paradise – South, Bundall, Mermaid Beach – Broadbeach.
 - Robina – Varsity Lakes REC: due to the division of the Robina SA2, this REC now comprises Robina – East, Robina – West and Varsity Lakes.
 - Springfield REC: due to the division of the Bellbird Park – Brookwater SA2 into Augustine Heights – Brookwater and Bellbird Park, this REC now encompasses Springfield, Springfield Lakes and Augustine Heights – Brookwater.

Table 4 summarises the total estimated employment within each REC as at 2016 and 2021, the broad SA2 geographies identified by the RECs analysis and the core components of each of the RECs, including KTPs, Regional Activity Centres (RACs) and MEIAs.

Table 4 - Revised Regional Economic Clusters

Regional Economic Cluster	SA2 Geographies	Core Components
Capital City Employment: 2016 - 269,855 persons 2021 - 315,802 persons	St Lucia Kelvin Grove - Herston Fairfield - Dutton Park Woolloongabba Auchenflower Newstead - Bowen Hills Spring Hill South Brisbane Paddington - Milton Fortitude Valley Brisbane City	Knowledge and Technology Precincts Auchenflower K1: Wesley Hospital Dutton Park/Buranda K2: Ecosciences Precinct Princess Alexandra Hospital Gardens Point K3: Queensland University of Technology, Gardens Point campus Herston K4: Royal Brisbane and Women's Hospital The University of Queensland, Herston campus Kelvin Grove K5: Queensland University of Technology, Kelvin Grove campus St Lucia K6: The University of Queensland, St Lucia campus South Brisbane K7: Queensland Children's Hospital Griffith University, South Bank campus Mater Private Hospital Brisbane Queensland Cultural Precinct

Regional Economic Cluster	SA2 Geographies	Core Components
		<p>South Bank Institute of Technology Brisbane Convention and Exhibition Centre</p> <p>Regional Activity Centres Capital City Centre Toowong</p> <p>Economic Enabling Infrastructure Radial heavy rail network (Cross River Rail) Busway and improved inner-city distribution to complement Cross River Rail, including the Brisbane Metro Pedestrian and cycle network including green bridges</p>
<p>Australia TradeCoast</p> <p>Employment: 2016 - 82,154 persons 2021 - 90,500 persons</p>	<p>Brisbane Airport Eagle Farm - Pinkenba Northgate - Virginia Nudgee - Banyo Geebung Wynnum West - Hemmant Brisbane Port - Lytton Murarrie</p>	<p>Knowledge and Technology Precincts Australia TradeCoast K8: Queensland University of Technology Da Vinci Precinct Aviation Australia</p> <p>Major Enterprise and Industrial Areas Eagle Farm M1 Geebung M2 Hemmant M3 Lytton M4 Murarrie/Colmslie M5 Nudgee/Banyo M6 Pinkenba/Bulwer Island M7 Virginia/Northgate M8</p> <p>Economic Enabling Infrastructure Port of Brisbane Brisbane Airport Brisbane Intermodal Terminal Heavy rail network Port of Brisbane Motorway Gateway Motorway</p>
<p>Australia TradeCoast - North</p> <p>Employment: 2016 - 57,226 persons 2021 - 61,308 persons</p>	<p>Brisbane Airport Eagle Farm - Pinkenba Northgate - Virginia Nudgee - Banyo Geebung</p>	<p>Knowledge and Technology Precincts Australia TradeCoast K8: Queensland University of Technology Da Vinci Precinct Aviation Australia</p> <p>Major Enterprise and Industrial Areas Eagle Farm M1</p>

Regional Economic Cluster	SA2 Geographies	Core Components	
		Geebung M2 Nudgee/Banyo M6 Virginia/Northgate M8 Economic Enabling Infrastructure Brisbane Airport Gateway Motorway	
Australia TradeCoast - South Employment: 2016 - 24,928 persons 2021 - 29,192 persons	Wynnum West - Hemmant Brisbane Port - Lytton Murarrie	Major Enterprise and Industrial Areas Hemmant M3 Lytton M4 Murarrie/Colmslie M5 Pinkenba/Bulwer Island M7 Economic Enabling Infrastructure Port of Brisbane Brisbane Intermodal Terminal Heavy rail network Port of Brisbane Motorway Gateway Motorway	
South West Industrial Corridor Employment: 2016 - 75,887 persons 2021 - 89,762 persons	Rocklea - Acacia Ridge Coopers Plains Salisbury - Nathan Darra - Sumner Oxley (Qld) Wacol Bundamba Riverview Carole Park Collingwood Park - Redbank New Chum Redbank Plains	Knowledge and Technology Precincts Nathan/Coopers Plains K9: Griffith University, Nathan and Mount Gravatt campuses Forensic and Scientific Services campus Health and Food Sciences Precinct, Coopers Plains Queen Elizabeth II Jubilee Hospital Major Enterprise and Industrial Areas Archerfield M9 Acacia Ridge M10 Bundamba/Riverview M11 Carole Park M12 Coopers Plains M13 Rocklea/Brisbane Markets M14 New Chum M15 Redbank M16 Richlands M17 Salisbury M18 Sumner/Darra M19 Swanbank M20 Wacol M21 Willawong M22 Regional Activity Centres Goodna	

Regional Economic Cluster	SA2 Geographies	Core Components
		<p>Economic Enabling Infrastructure</p> <p>Acacia Ridge Intermodal terminal</p> <p>Archerfield Airport</p> <p>Ipswich Motorway</p> <p>Heavy rail network</p> <p>Warrego Highway</p> <p>Cunningham Highway</p> <p>Logan Motorway</p>
<p>Pacific Motorway</p> <p>Employment:</p> <p>2016 - 36,974 persons</p> <p>2021 - 41,703 persons</p>	<p>Upper Mount Gravatt</p> <p>Eight Mile Plains</p> <p>Slacks Creek</p> <p>Springwood</p> <p>Underwood</p>	<p>Knowledge and Technology Precincts</p> <p>Eight Mile Plains K10: Brisbane Technology Park</p> <hr/> <p>Regional Activity Centres</p> <p>Upper Mount Gravatt</p> <p>Springwood</p> <hr/> <p>Economic Enabling Infrastructure</p> <p>Pacific Motorway</p> <p>South East Busway</p> <p>Also incorporates the Underwood-Slacks Creek industrial Corridor</p>
<p>Strathpine-Brendale-Petrie</p> <p>Employment:</p> <p>2016 - 20,470 persons</p> <p>2021 - 24,292 persons</p>	<p>Petrie</p> <p>Bray Park</p> <p>Lawnton</p> <p>Strathpine - Brendale</p>	<p>Knowledge and Technology Precincts</p> <p>Petrie K11: University of Sunshine Coast, Moreton Bay Campus</p> <hr/> <p>Major Enterprise and Industrial Areas</p> <p>Brendale M23</p> <hr/> <p>Regional Activity Centres</p> <p>Strathpine</p> <hr/> <p>Economic Enabling Infrastructure</p> <p>Direct arterial access to Gateway Motorway</p> <p>Direct arterial access to Bruce Highway</p> <p>Heavy rail network</p>
<p>Yatala-Stapylton-Beenleigh</p> <p>Employment:</p> <p>2016 - 24,899 persons</p>	<p>Ormeau (East) - Stapylton</p> <p>Ormeau (West) - Yatala</p> <p>Beenleigh</p>	<p>Major Enterprise and Industrial Areas</p> <p>Yatala/Stapylton M24</p> <hr/> <p>Regional Activity Centres</p> <p>Beenleigh</p>

Regional Economic Cluster	SA2 Geographies	Core Components
2021 - 30,362 persons		Economic Enabling Infrastructure Pacific Motorway
North Lakes - Redcliffe Employment: 2016 – 30,926 persons 2021 – 36,467 persons	North Lakes Deception Bay Narangba Rothwell - Kippa-Ring Redcliffe	Knowledge and Technology Precincts Redcliffe K27: Redcliffe Hospital Peninsula Private Hospital Major Enterprise and Industrial Areas Narangba M25 Regional Activity Centres North Lakes Redcliffe Economic Enabling Infrastructure Bruce Highway Heavy rail network Also incorporates the North Lakes Industrial Park.
Southport-Broadbeach Employment: 2016 - 80,626 persons 2021 - 90,338 persons	Southport - North Southport - South Ashmore Molendinar Surfers Paradise - North Surfers Paradise - South Bundall Mermaid Beach - Broadbeach Burleigh Heads	Knowledge and Technology Precincts Southport K12: Griffith University, Gold Coast campus Gold coast University Hospital Queensland Academy for Health Sciences Gold Coast Private Hospital Regional Activity Centres Southport Broadbeach Surfers Paradise Bundall Economic Enabling Infrastructure Light rail Heavy rail network
Robina - Varsity Lakes Employment: 2016 - 21,570 persons 2021 - 23,929 persons	Robina - East Robina - West Varsity Lakes	Knowledge and Technology Precincts Robina/Varsity Lakes K13: Robina Hospital Bond University Regional Activity Centres Robina

Regional Economic Cluster	SA2 Geographies	Core Components
		Economic Enabling Infrastructure Heavy rail network Pacific Motorway
Southern Gateway Employment: 2016 - 9,560 persons 2021 - 10,667 persons	Currumbin - Tugun Coolangatta	Knowledge and Technology Precincts Coolangatta K14: John Flynn Private Hospital Southern Cross University, Gold Coast campus Regional Activity Centres Coolangatta Economic Enabling Infrastructure Gold Coast Airport Pacific Motorway Extension of Light Rail from Broadbeach to Coolangatta
Western Gateway Employment: 2016 - 44,937 persons 2021 - 52,444 persons	Toowoomba - West Toowoomba - Central Toowoomba - East Wilsonton Darling Heights Drayton - Harristown	Knowledge and Technology Precincts Toowoomba K15: University of Southern Queensland, Toowoomba campus Toowoomba Hospital St Vincent's Private Hospital St Andrew's Private Hospital Toowoomba TAFE Major Enterprise and Industrial Areas Charlton/Wellcamp M26 Regional Activity Centres Toowoomba Economic Enabling Infrastructure Toowoomba Wellcamp Airport Potential future Intermodal Facility Heavy rail network Toowoomba Bypass Gore Highway Warrego Highway New England Highway
Springfield Employment: 2016 - 8,137 persons	Springfield Lakes Springfield Augustine Heights - Brookwater	Knowledge and Technology Precincts Springfield K16: University of Southern Queensland, Springfield campus Mater Private Hospital Springfield BioPark Australia

Regional Economic Cluster	SA2 Geographies	Core Components
2021 – 10,121 persons		<p>Regional Activity Centres Springfield</p> <p>Economic Enabling Infrastructure Heavy rail network Centenary Highway Logan Motorway</p>
<p>Ipswich</p> <p>Employment:</p> <p>2016 - 27,423 persons</p> <p>2021 - 31,233 persons</p>	<p>Ipswich - Central</p> <p>Ipswich - East</p> <p>North Ipswich - Tivoli</p> <p>Leichhardt - One Mile</p> <p>Rosewood</p>	<p>Knowledge and Technology Precincts</p> <p>Ipswich K17: University of Southern Queensland, Ipswich campus Ipswich Hospital St Andrews Ipswich Private Hospital</p> <p>Major Enterprise and Industrial Areas</p> <p>Amberley M27</p> <p>Wulkuraka/Karrabin M28</p> <p>Ebenezer M29</p> <p>Regional Activity Centres</p> <p>Ipswich</p> <p>Economic Enabling Infrastructure</p> <p>Heavy rail network</p> <p>Warrego Highway</p> <p>Cunningham Highway</p> <p>RAAF Base Amberley</p>
<p>Northern Gateway</p> <p>Employment:</p> <p>2016 - 20,393 persons</p> <p>2021 - 24,241 persons</p>	<p>Maroochydore - Kuluin</p> <p>Marcoola - Mudjimba</p>	<p>Major Enterprise and Industrial Areas</p> <p>Kunda Park M30</p> <p>Regional Activity Centres</p> <p>Maroochydore (Sunshine Coast CBD)</p> <p>Economic Enabling Infrastructure</p> <p>Sunshine Coast Airport</p> <p>Sunshine Motorway</p> <p>Maroochydore Road</p> <p>Direct Sunshine Coast Rail Line</p> <p>Sunshine Coast Public Transport project</p>
<p>Kawana</p> <p>Employment:</p>	<p>Wurtulla - Birtinya</p> <p>Parrearra - Warana</p>	<p>Knowledge and Technology Precincts</p> <p>Kawana Waters K18: Sunshine Coast University Hospital</p>

Regional Economic Cluster	SA2 Geographies	Core Components
2016 - 9,658 persons 2021 - 15,524 persons		Regional Activity Centres Kawana
		Economic Enabling Infrastructure Nicklin Way Kawana Way Direct Sunshine Coast Rail Line Sunshine Coast Public Transport project
Meadowbrook-Loganholme Employment: 2016 - 17,854 persons 2021 - 20,857 persons	Loganlea Shailer Park Loganholme - Tanah Merah	Knowledge and Technology Precincts Meadowbrook K19: Logan Hospital Griffith University, Logan campus Loganlea TAFE
		Regional Activity Centres Logan Hyperdome
		Economic Enabling Infrastructure Logan Motorway Pacific Motorway
Helensvale-Coomera-Oxenford Employment: 2016 - 16,808 persons 2021 - 21,615 persons	Helensvale Coomera Oxenford - Maudsland	Knowledge and Technology Precincts Coomera K22 (mixed): Coomera Hospital Coomera TAFE Village Roadshow Studios
		Regional Activity Centres Helensvale Coomera
		Economic Enabling Infrastructure Pacific Motorway Coomera Connector Heavy rail network

RECs fulfill a vital role in providing employment opportunities throughout SEQ. Table 5 identifies the proportion of a REC's workforce that:

- » live within the SA2s that make up the REC (primary proximity).
- » live in an SA2 abutting the REC (secondary proximity).
- » live proximate to a REC (i.e., within approximately five kilometres of the REC).

Table 5 shows that the larger RECs of the Capital City Centre and Australia TradeCoast draw in their workforce from the broadest of catchments, with less than half of their workforce living within, immediately adjacent or proximate to them. These RECs provide regional employment opportunities and need to be supported by transport

and accessibility infrastructure to maximise their workforce catchment. The data in Table 5 also highlights the importance of RECs when considering their ability to provide immediate and highly localised employment opportunities in locations other than the Brisbane CBD.

Table 5 - Proportion of workers residing within proximity of their REC employment area

Regional Economic Cluster	Live & Work in REC	Live Abutting REC	Proximate to REC	Total
Western Gateway	50.6%	40.4%	4.1%	95.1%
Northern Gateway	25.5%	20.2%	30.5%	76.3%
Kawana	20.2%	19.4%	36.6%	76.1%
Southport-Broadbeach	30.1%	26.6%	18.7%	75.5%
North Lakes-Redcliffe	37.0%	26.7%	10.5%	74.2%
Helensvale-Coomera-Oxenford	33.1%	24.1%	12.6%	69.8%
Ipswich	26.8%	35.7%	5.3%	67.8%
Springfield	38.3%	17.6%	11.9%	67.8%
Southern Gateway	25.0%	17.6%	22.7%	65.3%
Robina-Varsity Lakes	26.3%	16.8%	21.6%	64.7%
Strathpine-Brendale-Petrie	19.8%	20.0%	24.9%	64.7%
South West Industrial Corridor	13.8%	23.3%	26.0%	63.1%
Pacific Motorway	13.4%	18.1%	27.1%	58.6%
Meadowbrook-Loganholme	17.2%	13.5%	24.4%	55.2%
Yatala-Staplyton-Beenleigh	14.8%	17.3%	19.9%	52.0%
Capital City	13.6%	14.8%	14.4%	42.8%
Australia Trade Coast	7.6%	12.7%	11.7%	32.0%
Australia Trade Coast - North	6.1%	9.5%	11.8%	27.4%
Australia Trade Coast - South	8.2%	9.9%	9.0%	27.1%

Source: Bull and Bear Economics (2023) ShapingSEQ Review: Regional Economic Clusters Technical Paper

The review of the RECs as part of ShapingSEQ 2023 indicates that generally, RECs previously identified in Shaping SEQ 2017 continue to be relevant and supportable.

This detailed analysis identified the need to expand the former North Lakes REC into the North Lakes-Redcliffe REC and identify the new Helensvale-Coomera new REC.

Shaping SEQ 2017 identified a North Lakes-Mango Hill REC, which originally comprised the North Lakes-Mango Hill SA2 and Deception Bay SA2. Subsequent to the preparation of Shaping SEQ 2017, the North Lakes-Mango Hill REC was split into North Lakes and Mango Hill. The recent analysis indicated that North Lakes should be identified as a REC, but Mango Hill does not. This is due to the absence of major employment within Mango Hill. Deception Bay SA2 remains relevant due to it hosting the majority of the Narangba MEIA. It should be noted that the Narangba MEIA also extends west of the Bruce Highway outside of the Deception Bay SA2.

The analysis also indicated that there was significant employment and specialisation in Rothwell-Kippa Ring SA2 and Redcliffe SA2 (when there previously was not). This necessitated the revision of the North Lakes Mango Hill REC into a REC based on North Lakes, Deception Bay, Rothwell-Kippa Ring and Redcliffe SA2s (along with the balance portion of Narangba MEIA) to create a North Lakes-Redcliffe REC.

Analysis also indicated that subsequent to the preparation of Shaping SEQ 2017, a corridor of economic activity exists and meets the parameters for defining a REC across the area comprising Helensvale, Oxenford-Maudsland and Coomera SA2s. This corridor takes in Major Regional Activity Centres at Helensvale and Coomera, the Gold Coast Marine Precinct and industrial areas at Oxenford, Coomera and Helensvale, and major tourism attractions in the form of theme parks and Warner Bros studios.

ShapingSEQ 2023 includes a number of strategies aimed at prioritising investment in RECs, and planning for the growth and intensification of RECs.

Region-Shaping Infrastructure (RSI) have been identified in ShapingSEQ 2023 to align with the preferred growth pattern in SEQ through to 2046. RSI is focused on strategically shaping the future trajectory of land use in SEQ and includes infrastructure that:

- » is fundamental to realisation of the land use pattern set in ShapingSEQ 2023.
- » is fundamental to the movement of people to access employment and essential services as well as the movement of goods.
- » has a significant funding requirement across multiple levels of government.
- » is of regional economic significance.

RSI goes beyond addressing capacity and safety challenges, but instead focuses on improving connectivity between regional activity centres, RECs and MEIAs to promote economic growth, as well as supporting the establishment of new communities and increased density in key locations. RSI also seeks to encourage better use of existing infrastructure as people shift to more sustainable transport modes.

Implementation - RECs

The implementation of the RECs strategies requires involvement of both local and state government.

Priority Action 3 in ShapingSEQ 2023 acknowledges that the implementation of RECs requires recognition of RECs in local government planning schemes, firstly through recognition in their strategic frameworks and secondly through more detailed investigations of RECs within their local government area.

As well as local implementation, key to the ongoing success of RECs will be their prioritisation in terms of state government infrastructure and service delivery. For some RECs, the location of a major service delivery facility (e.g. hospital) is integral to their identification as RECs and also major underpinning of their employment significance. Similarly, some RECs have emerged around infrastructure (e.g. Australia Trade Coast, South West Industrial Corridor etc.) or have been enhanced by infrastructure investment (North Lakes-Redcliffe REC). While infrastructure agencies have an obvious influence over the performance of RECs, any agency involved in service delivery can significantly influence a REC. Decisions such as where satellite or branch offices of government departments might reasonably be located can also be important.

The SEQ Infrastructure Supplement also includes a priority action to 'assist Queensland Government infrastructure delivery agencies in 2024 to ensure infrastructure and service delivery is prioritised in RECs in SEQ as defined in ShapingSEQ 2023'.

Priority Action 3: Strengthening Regional Economic Clusters

ShapingSEQ 2023 seeks to ensure that all RECs are performing to maximise the region’s traditional strengths and to drive greater levels of high value employment throughout SEQ. Priority Action 3 supports this aim, providing detailed direction to achieve it.

Priority Action 3 – Strengthening Regional Economic Clusters	
Stakeholders: State and local governments	2024 – 2025
<p>Local governments will appropriately recognise and reflect RECs in planning schemes. The regional significance of RECs should be identified within strategic frameworks to provide highest-order recognition (along with other economic areas).</p> <p>Planning schemes should also support the growth of RECs with planning responses that address the opportunities and constraints of each REC. To support this, the Queensland Government will work with local governments on a detailed investigation of RECs across SEQ to aid understanding of:</p> <ul style="list-style-type: none"> • Factors which have given rise and underpin the REC. • What drives specialisation within the REC. • What opportunities there are to enhance the performance of the REC by leveraging existing competitive advantages or removing impediments to the efficient operation of the REC. 	

For this action, State and local government will work together to undertake detailed investigations of each REC to integrate findings into planning schemes. The priority action for RECs is closely related to the priority action for industrial land. Many of the region’s MEIAs are located within RECs, and benefit from synergies with core components of the RECs.

Detailed investigations undertaken by state or local governments should consider:

- Better understanding the scale, significance and specialisation of each REC in their LGA through both a quantitative and qualitative assessment of each REC.
- Identifying and recognising the major economic assets anchoring each REC (for example, major hospital, university, KTP, MEIA, etc.).
- Identifying measures to ensure economic assets are not compromised or adversely impacted by planning decisions or parameters.
- Identifying the competitive advantages of each REC and opportunities and constraints relating to economic growth.
- Engaging with key institutions and enterprises within each REC to identify what measures could be taken to improve the efficient operation of the REC or better leverage existing enterprises and infrastructure.
- Identifying key measures and actions required to facilitate the ongoing efficient and sustainable operation and growth of the REC.
- Ensuring that planning controls over RECs do not unduly compromise the efficient operation of the REC but allow for appropriate growth or intensification of activities within the REC.
- Ensuring RECs are appropriately accessible to their respective workforces and supply chains and provide business and worker amenities and services conducive to attracting global talent.
- Ensuring the role of each REC is recognised in city-wide strategies within which RECs might play a significant role.
- Formulating a strategy in partnership with local governments for the ongoing sustainability and growth of RECs, particularly where they extend across administrative boundaries.
- Planning for the integrated delivery of infrastructure to support the RECs ongoing development and growth by different levels of government and service delivery providers.
- Advocating and promoting RECs as locations of regionally and, in some cases, nationally significant economic activity, invocation and employment.

This is not an exhaustive list but provides a guide for future detailed investigations as part of Priority Action 3.

Regional activity centres network

The RACN is intended to play a key role in the delivery of SEQ's desired growth pattern and development outcomes. Appendix B lists the centres historically identified in SEQ.

The current RACN largely reflects local government planning schemes at the time when the 2005 regional plan was prepared. The centres policy in the 2005, 2009 and 2017 regional plans mandates that centres be mixed use and multi-functional to meet the broader needs of the community. Out-of-centre development was discouraged, and employment opportunities were to be concentrated in centres. Stronger focus was placed on raising in-centre residential population to achieve compact, self-contained communities. However, business needs and consideration of business-to-business interactions were given less focus.

The majority of centres are predominantly focused on supporting retail and commercial activities or population-serving uses. These sectors have traditionally been strong economic performers. However, moving towards 2046, other sectors and industries will emerge to outperform these traditional sectors. The current centres network will need to adapt to support the transitioning economy and facilitate growth of emerging industries.

A detailed review of the RACN was not in scope for this review of ShapingSEQ 2017. However, a high-level review of the RACN was undertaken. The initial scope of the RACN review was limited to the Capital City Centre and Principal Regional Activity Centres (PRACs), with a view to identifying any centres that might have ascended or declined within the RACN. However, the review scope extended to consider the Capital City Centre and all PRACs and Major Regional Activity Centres (MRACs) in recognition of the possibility of a new PRAC emerging in the form of an ascendant MRAC subsequent to Shaping SEQ 2017.

Centres have faced a range of emerging trends since the preparation of Shaping SEQ 2017. These trends have had a material impact on how centres function and their outlook. In considering these trends it is important to note that economies are always evolving, with the one economic constant being change and innovation. The most successful regional economies tend to embrace evolution and disruption, with a view to driving innovation. This section provides an analysis of local, regional, national, and international trends in the planning and development of centres as a result of disruption, evolution and/or innovation.

Key trends impacting centres, include but are not limited to:

- » The increasing market share of online retailing – over the past two decades, online retail's share of retail trade increased significantly. Online retail fulfilment is expanding across a range of product items and has led to significant innovation in how retailing occurs, with notable innovations being the emergence of 'Dark Stores' and 'Dark Kitchens'. Growing online retail market share represents a direct challenge to the standard business models of traditional retail centres, resulting in major centre owners looking to reposition their centres from retail centres to lifestyle and entertainment centres.
- » Tele-health and virtual services – the rise in tele-health and virtual services means that providers can reach a broader and more diverse catchment area, which might mean the success of a centre might be driven more so by the quality of work place it can provide service professionals, than the size of the residential catchment. This means service providers with large virtual service portfolios might consider clustering in more lifestyle-oriented locations to attract the best talent, or alternatively might avoid those locations that do not offer good worker amenity.
- » Changes in how we work – between 2016 and 2021, the proportion of persons working from home increased significantly. This increase can be largely attributed to the COVID-19 pandemic. The increase in the incidence of persons working from home in turn has placed downward pressure on demand for commercial office floorspace. While there has been a strong push from major employers to encourage workers back to office environments, it is anticipated that a significant portion of the workforce will continue to have some form of hybrid working arrangement where they work from home regularly or on an as-needed basis. This has resulted in a rethinking of how office environments are laid out with more emphasis being given to activity-based office layouts that are flexible and include fewer permanent office seating positions.
- » Rising knowledge intensity – as the economy transitions towards greater knowledge intensity the demand for knowledge workers will only increase. Centres are major employment locations and need to be responsive to the needs and expectations of knowledge workers.

- » Robotics, automation and smart technology – increasing automation and adoption of smart technology might result in the emergence of low impact, but high value industrial activities gravitating towards centralised locations where businesses can maximise the size of their workforce catchment. This is of direct relevance to centres, particularly higher order centres, which could supplement their existing ‘white collar’ workforces with new ‘white coat’ employment.

Like all economic land uses, centres are facing significant disruption and evolution. In response to disruption, innovation has changed how centres are used and operate. Recent trends point paradoxically towards a rising incidence of working from home, but also a resurgent Capital City Centre. There is no evidence available to indicate that PRACs and MRACs are declining in their business-to-business functions however, PRACs and MRACs are the most likely to sustain adverse retail impacts from the growth in online retail and changing consumer expectations. This highlights the need for PRACs and MRACs to pivot away from their traditional retail centric approach, and towards more mixed-use activity centres. This has long been a goal of centres planning, however this goal was predicated on increasing non-retail floor space as opposed to a decline in retailing. While it is not anticipated that there will be significant reductions in retail floor space, a slowing of historical growth in retail floor space provision and a reconfiguration of floor space from ‘selling floor’ to ‘experience centre’ is expected. Health and community services have and will continue to become more important to the success of activity centres over time, both in response to the needs of an aging population but also the need for centres to diversify their offer⁷.

RACs, particularly those with central locations and good connectivity, can also expect to experience interest from land uses that are not the typical market for centres. As automation and smart technology result in increased knowledge intensity in sectors more traditionally associated with industrial land, there could be some high value low impact industrial uses that might consider high quality centre environments as a potential enterprise location. The presence of disruption and evolution points to the opportunity of having flexible planning controls that focus more on impact rather than use to create new tenant demand for some centres.

The review of the RACN confirmed that generally the RACN remained relevant to SEQ, however the review identified the potential to elevate a centre as well as identify some centres for which their role and function might need to be reviewed in the future.

The review identified the need to elevate North Lakes within the RACN from an MRAC to a PRAC. Employment and floor space provision within the North Lakes activity centre is well above that in some smaller PRACs within the SEQ RACN (most notably Springwood and Beenleigh) and remains larger than Carindale PRAC, Indooroopilly PRAC and is of a similar scale to Upper Mount Gravatt PRAC. The North Lakes activity centre is now located with access to mass transit (Moreton Bay Rail Line) and direct access to the Bruce Highway. The North Lakes activity centre also has one of the largest primary trade areas of any of the PRACs and MRACs identified within the SEQ RACN. Growth prospects for the North Lakes MRACs primary trade area are also among the strongest of any centre within the RACN. The North Lakes activity centre hosts a diverse range of retail, commercial office, health, community and education floor space within a comparatively compact activity centre footprint and has been successful in attracting major government service centres. This highlights the need to elevate North Lakes activity centre from MRAC to PRAC.

Table 6 - Regional Activity Centres Network

Sub-region	LGA	Centre	Centre Level
Metro	Brisbane	Brisbane City Centre	Primary
		Indooroopilly	Principal Regional
		Carindale	Principal Regional
		Upper Mount Gravatt	Principal Regional
		Chermside	Principal Regional
		Mitchelton	Major Regional
		Toowong	Major Regional

⁷ Bull and Bear Economics (2023), ShapingSEQ Review: Regional Activity Centres Network Review

Sub-region	LGA	Centre	Centre Level	
		Toombul/Nundah	Major Regional	
		Wynnum Central	Major Regional	
	Logan	Springwood	Principal Regional	
		Beenleigh	Principal Regional	
		Browns Plains	Major Regional	
		Flagstone	Major Regional	
		Logan Central	Major Regional	
		Logan Hyperdome	Major Regional	
		Yarrabilba	Major Regional	
		Jimboomba (Major)	Rural	
	Moreton Bay	Caboolture/Morayfield	Principal Regional	
		North Lakes	Principal Regional	
		Redcliffe	Major Regional	
		Strathpine	Major Regional	
	Redland	Capalaba	Principal Regional	
		Cleveland	Principal Regional	
	Northern	Noosa	Noosa	Major Regional
		Sunshine Coast	Maroochydore	Principal Regional
Beerwah			Major Regional	
Caloundra			Major Regional	
Caloundra South			Major Regional	
Kawana			Major Regional	
Nambour			Major Regional	
Sippy Downs			Major Regional	
Southern	Gold Coast	Robina	Principal Regional	
		Southport	Principal Regional	
		Broadbeach	Major Regional	
		Bundall	Major Regional	

Sub-region	LGA	Centre	Centre Level
		Coomera	Major Regional
		Coolangatta	Major Regional
		Helensvale	Major Regional
		Nerang	Major Regional
		Surfers Paradise	Major Regional
Western	Ipswich	Ipswich	Principal Regional
		Springfield	Principal Regional
		Goodna	Major Regional
		Ripley	Major Regional
	Lockyer Valley	Gatton (Principal)	Rural
		Laidley (Major)	Rural
	Scenic Rim	Beaudesert (Principal)	Rural
		Boonah (Major)	Rural
	Somerset	Fernvale (Major)	Rural
		Esk (Major)	Rural
		Kilcoy (Major)	Rural
	Toowoomba	Toowoomba	Principal Regional

The RACN strategy has been carried forward through the respective SEQ regional plans since 2005. The strategy has evolved over time but remains largely the same as its inception, when it largely reflected local government planning schemes at the time when the 2005 regional plan was prepared.

There is an opportunity for a future review of the RACN to consider whether this strategy remains fit-for-purpose to achieving the economic, sustainability and liveability and connectivity outcomes sought for SEQ. This detailed review will require an agreed method to monitor and evaluate RACs. The review informing ShapingSEQ 2023 identified a number of centres as underperforming with reference to their role identified within the RACN, and this highlights the need for a better understanding of RACs generally (and regionally) and in turn ongoing monitoring of RACs.

Priority Action 5: Regional activity centres

Priority Action 5 – Regional Activity Centres	
Stakeholders: State and local governments	2024 – 2025
The Queensland Government will work with local governments to develop agreed principles and boundaries for what constitutes the area of a regional activity centre. This will inform an update to regional activity centres, including geographic boundaries as necessary.	

Using the agreed boundaries, key measures for centres will be identified, and used for the ongoing monitoring of regional activity centres. This information will be used as an evidence base to inform future policy decisions and put in place actions to address where centres are underperforming or alternately actions to facilitate more floor space, mixed uses, jobs and residential development where capacity exists in these areas.

A key challenge in the assessment and monitoring of RACs is the divergent views as to what constitutes an 'activity centre'. Shaping SEQ 2017 (and its predecessor statutory plans) adopted a broad definition of an activity centre to include land uses within the 'centre zone' and other immediately adjacent or proximate employment generating uses. Activity centres were not spatially defined as part of ShapingSEQ 2017. A key consideration is what area each local government considers as constituting the centre, and how this is applied across the region. Some local governments only consider land within 'centre zones' as constituting a centre, while other adopt a broader definition.

The priority action in relation to RACs is the development of agreed principles and boundaries for what constitutes a regional activity centre. It is expected that this would be broader than simply the centre zone within planning schemes. The significant use of the mixed-use zoning to frame centres highlights a recognition that centres are likely to be larger than simply the centre zone in a lot of cases.

Once boundaries are agreed (recognising that this would take time to achieve), key measures for centres such as employment and floor space by use type and potentially in-centre residential population can be assessed regularly to allow for more transparent monitoring and assessment of RACs.

The Queensland Government will work with local governments to identify regional activity centres and develop a suite of principles and measures to assist in their ongoing monitoring and evaluation.

The additional work on the RACN will provide an important evidence base to inform key policy decisions at the state and local levels of government.

Knowledge and technology precincts

Within SEQ, employment growth in health, education, and scientific and technical services sectors is expected to serve the growing and changing community. Research and innovation are key aspects of these sectors. These high value sectors are important to supporting a more outward-focused regional economy. ShapingSEQ identified KTPs as areas where co-location of mutually supportive activities is encouraged.

Within SEQ, there are 19 KTPs that have a role and function as part of the REC in which they are located (see Table 4). In addition, there are 6 KTPs that are not located within RECs and have their own role and function within the region. These include:

- » Chermside K20 (health and education)
- » Pinjarra Hills K21 (technology and mining)
- » Gatton K23 (animal sciences)
- » Sippy Downs K24 (education and technology)
- » Cleveland (Health and research) K25
- » Caboolture (Health) K26

Queensland has a number of purpose-built world-class research facilities that are helping to position the State and SEQ as a centre of excellence in the life sciences industry, and the health and medical, agricultural, environment, and industrial sectors. KTPs leverage from individual health or education facilities to develop or emerge into dynamic hubs. These hubs occur when two or more organisations are working together using world-class equipment and facilities that bridge the gap between research and industry. In these locations, physical infrastructure combined with highly skilled researchers and a culture of commercialisation and development is generating economic activity and securing SEQ's competitive advantage into the future.

While each precinct is different in terms of the specialisation, scale and intensity of uses, these precincts are generally characterised by:

- » core high-level health, education, research or similar facility that provides opportunities for complementary and supporting activities
- » a high level of accessibility including proximity to regional transport infrastructure

- » the ability to accommodate a mix of uses and activities, and for development to intensify over time
- » the opportunity for public and private sector investment and cooperation.

ShapingSEQ 2023 aims to protect and foster the attributes that characterise these precincts by encouraging local governments to recognise these areas and the potential for complementary and supporting activities surrounding core uses, rather than treating them in isolation from a land use perspective.

Nationally and internationally, there is significant competition for KTP workers and entrepreneurs. The significant synergies between KTPs and other employment areas, such as centres and major industrial areas, are maintained in the context of RECs. However, land use planning within KTPs should also reflect the level of amenity and access to services that knowledge and technology workers seek within close proximity to their place of work. Supporting and enabling land uses to, or within, KTPs should be diverse. These uses should range from providing land for private sector funded knowledge or creative enterprises, to the provision of high-quality public open space or recreational facilities.

Planning for industrial land

Ensuring adequate supply of future industrial land is important for the regional economy. Given the specific locational needs for industrial uses, finding appropriate suitable land can be challenging.

Supply of sufficient industrial land across SEQ is a key priority to service the growing population and to ensure SEQ can make the most of the opportunities presented by innovation in sectors such as manufacturing, waste and energy.

The nature of industry is changing. With SEQ having established its industrial competitive advantage in a range of industries, the next industrial evolution of the region will involve the integration of new technologies which will again reduce the level of unskilled labour required throughout industrial sectors. As the SEQ regional economy grows and diversifies it will also become more integrated. This means that industrial supply chains often cross over local government boundaries and even state boundaries. SEQ's industrial areas, anchored by MEIAs, represent an industrial ecosystem connected by physical and virtual infrastructure to transport freight and knowledge across a diverse regional supply chain. The presence of this industrial ecosystem that operates across SEQ highlights the importance of a regional approach to industrial land planning.

There are a range of trends anticipated to impact on how industry operates within SEQ, including:

- » Rising knowledge intensity – this trend indicates an increasing number of workers will be required to have more knowledge and higher skillsets than previously required. Within industrial businesses, this arises from a reduced reliance on mass physical labour and instead taking advantage of new technologies that allow for more efficient production. The impact for workers is that labour-intensive services, of which a significant portion work in industrial estates, transition to a more technical knowledge, problem solving and critical thinking capabilities.
- » Sustainability – sustainable energy is a key new industry opportunity for Queensland. The Queensland Government has established several Renewable Energy Zones (REZs), including a Southern Queensland REZ which includes SEQ. One of the focuses for this zone will be integrating storage (batteries and pumped hydro) with renewable energy sources.
- » Industry 4.0 – the emergence of recent technological advancements whereby big data and automated analytics combine with robotics to support industrial businesses to improve costs has given rise to the concept of Industry 4.0.
- » Agriculture 4.0 – this refers to the process of disrupting the current food processing and manufacturing systems through using innovative technologies designed to increase efficiency and yield, whilst decreasing waste. This can be achieved by producing differently using new technologies; adoption of new technologies to bring food to markets; and the incorporation of cross-industry technologies and applications.
- » E-commerce – the increasing market share of online retailing and e-commerce has contributed to an increasing demand for warehouse and distribution facilities and the emergence of 'Dark Stores' and 'Dark Kitchens'.
- » Climate change – industries such as agriculture, conventional energy, heavy industry and manufacturing, transport and construction will be most vulnerable to changes brought about by climate change and a shift to net zero. Decarbonisation of the SEQ regional economy will drive innovation in these industries (and others) to create new opportunities for the future.

- » Entrepreneurism – to attract industrial entrepreneurs to SEQ, industrial spaces must be structured in a way that allows for flexible and low risk options for workspaces. For industrial activity this means building more mixed-use precincts with varied sizes of industrial land (warehouses and hardstand) to suit varying sizes and types of businesses. These precincts should also have a focus on collaboration between entrepreneurs and industrial activity.
- » The future of construction – construction is anticipated to become increasing design oriented with construction anticipated to adopt new technologies in terms of visualisation for design; new materials and new methods of construction. Modular construction reduces waste and time of site. As capability in SEQ’s modular construction sector grows so too will demand for modular construction manufacturing facilities in industrial areas ⁸.

Common to these trends are that highly skilled workers are required at every stage of the process, from those in the manufacturing plants through to design and business development. SEQ is well placed to take advantage of these trends and emerging industries, however the impacts on workers and businesses required to constantly upskill and remain knowledgeable on new technologies and research must be considered.

This highlights how industry can and will change over time and the need for regional plans to be responsive to industrial changes. The ongoing innovation and disruption across the SEQ regional economy highlights the strategic importance of delivering well located, flexible and adaptable industrial areas to meet the needs of existing and emerging industries as well as new industries not yet imagined.

Industrial land supply and demand

The Land Supply and Development Monitoring Report 2021 (LSDM 2021), prepared as part of the Growth Monitoring Program (GMP), reports on the realistic availability and historic take up of planned industrial land for each local government area as well as the planned industrial employment supply for each local government area.

To inform ShapingSEQ 2023, GMP 2022 data was used to estimate the remaining quantum of vacant and developable land across SEQ. Note that this data was sought from the best available point-in-time as at 2022.

Table 8 summarises the remaining vacant and developable industrial land within SEQ by LGA based on GMP 2022 data.

Table 8 - Remaining vacant and developable industrial land in SEQ by LGA (2022)

Local Government Area	Vacant Developable Area (ha)
Brisbane	404
Logan	206
Redland	31
Ipswich	3,489
Moreton Bay	888
Gold Coast	438
Somerset	97
Lockyer Valley	153
Noosa	12
Sunshine Coast	221
Toowoomba City (SEQ)	984

⁸ Bull & Bear Economics (2023), ShapingSEQ Review: Major Enterprise and Industrial Areas Technical Paper.

Local Government Area	Vacant Developable Area (ha)
Scenic Rim	1,273
SEQ	8,194

Source: Department of State Development, Infrastructure, Local Government and Planning - GMP (2022)

However, GMP and the LSDM 2021 do not include demand modelling for industrial land. The remit for the review of ShapingSEQ included reviewing adequacy and future need for industrial land to ensure sufficient industrial land is located where it is needed. To meet this requirement a high-level analysis of the balance between supply and demand for industrial land across SEQ was undertaken sufficient to provide a general indication of the industrial land supply and demand trends for SEQ. This high-level analysis was undertaken acknowledging that a more detailed and collaborative Regional Industrial Land Framework was required and should be developed in the near future.

The high-level analysis relating to industrial land for the review of ShapingSEQ was undertaken in April and May 2023. The demand projections formulated as part of ShapingSEQ 2023 are based on high-level interpretations of data from two alternative approaches:

- » historic land take-up rates sourced from the Queensland Government’s GMP; or
- » Queensland Treasury Regional Employment Projections⁹.

While a more detailed and finer grain demand assessment would generate more robust industrial land demand projections, this high-level approach was fit for purpose to inform this review. The high-level analysis was sufficient to identify broad industrial land supply trends being:

- » a pressing industrial land supply issue in Brisbane with industrial land supply anticipated to be exhausted within 5-10 years;
- » challenges with sufficient supply within Redlands, Sunshine Coast, Gold Coast, Noosa and Logan.

Subsequent to the preparation of background analysis to support ShapingSEQ 2023 new Queensland Government Regional Employment Projections were prepared. A comparison of the Queensland Treasury Regional Employment Projections from ShapingSEQ 2017 and the Queensland Treasury Regional Employment Projections released in 2023 was carried out to understand any implications for ShapingSEQ 2023 policy.

The more recent 2023 Queensland Government employment projections generally reflect the challenges identified using the ShapingSEQ 2017 figures, including continuing to identify the industrial land supply challenges to be faced by Brisbane, which will see excess demand needing to be accommodated elsewhere.

While the high-level demand review undertaken was sufficient to identify the broader industrial land supply trends for SEQ it highlighted the need for a Regional Industrial Land Framework. A key challenge for the strategic planning of the MEIAs in SEQ is the impending exhaustion of industrial land within Brisbane LGA. The Brisbane City Plan 2014 (City Plan) sets out the spatial and regulatory framework for the city’s Major Industrial Areas (MIAs), Strategic Inner City Industrial Areas (SICIAs) and other areas of industrial zoned land. Through its zoning framework and code requirements, City Plan protects industrial areas from encroachment by other uses and applies impact-based standards to corral uses into specific zones, with site-based standards that apply regardless of geographic location. Over time, the City Plan has been amended to deal with the historic evolution of changing land use demands across the city. When the current City Plan was adopted in 2014, it introduced MIAs and SICIAs within the Strategic Framework, clarifying the higher order function of these core areas of industrial activity. The City Plan recognised that these industrial areas are unlikely to expand spatially, but rather have activities intensify consequently increasing their economic productivity. Despite intensification of use of industrial areas being a key objective of industrial land planning within Brisbane LGA, there remains only a finite supply of industrial land in Brisbane. Over time as Brisbane’s industrial land is taken up, industrial land prices will rise which will cause an incremental redistribution of lower value (although important) industrial activities outside of Brisbane. This will also naturally occur for freight and logistics operators who typically aim to be on the urban fringe to facilitate breaking of bulk freight prior to areas of urban congestion.

⁹ Queensland Treasury Regional Employment Projections 2010-11 to 2040-41 as published in ShapingSEQ 2017.

The projected exhaustion of vacant and developable industrial land in Brisbane within the life of ShapingSEQ 2023 highlights the need for a regional strategy for industrial land planning where different MEIAs and industrial areas fulfill different roles and functions depending on the markets they serve and strategic location within the broader freight network.

The likely exhaustion of industrial land within Brisbane represents the principal industrial land planning challenge for SEQ. Estimates of the excess demand by 2046 could range from 546 hectares to 1,824 hectares. This represents a wide range, which is an outcome of this being a high-level assessment. However, it is clear that excess demand from Brisbane will be significant. Gold Coast, Logan and Ipswich LGAs represent logical areas to accommodate a large amount of this excess demand. How this excess demand is accommodated will depend on both market and infrastructure factors. Some enterprises will prefer to locate in a particular area due to locational factors such as supply chain and workforce origin or other factors such as branding. On the other hand, infrastructure servicing has the potential to be a universally limiting factor. Even in the absence of overflow demand from Brisbane, the industrial land supply and demand balance in Logan and Gold Coast anticipates industrial land shortages in these areas.

The Northern sub-region (Sunshine Coast and Noosa) and Redland LGA were also identified as having a shortfall of industrial land within the life of the plan.

Major Enterprise and Industrial Areas

MEIAs are located throughout SEQ and while they all represent major regional employment areas they fulfill different roles and functions depending on their location and accessibility. The role and function of individual MEIAs have and will continue to evolve as SEQ develops. MEIAs represent major anchors for SEQ's industrial ecosystem, an ecosystem and ecology that does not recognise LGA boundaries. The presence of this industrial ecosystem that operates across SEQ highlights the importance of a regional approach to industrial land planning. A full list of MEIAs in SEQ can be found at Appendix C.

High level profiles of each MEIA in SEQ were prepared outlining estimated employment, most significant employment sectors and key freight assets. A summary of each profile is provided in Appendix D.

ShapingSEQ 2023 includes strategies aimed at strengthening planning and protection for MEIAs across SEQ. Identifying new locations for industrial land is challenging, as there are specific requirements for the location of these uses including access to freight and supply chain networks, and co-location with other supporting uses. ShapingSEQ 2023 acknowledges the importance of these areas to the future strategic needs of a sustainable regional economy with strategies to:

- » Retain existing MEIAs as the region's most important industrial areas.
- » Protect existing MEIAs from incompatible uses (both in and near the area).
- » Plan for new MEIAs, and support the growth of, MEIAs so they can fulfill the respective roles and functions depend on their location and accessibility. For example:
 - Expansion of Yatala/Stapylton MEIA.
 - Expanding Park Ridge MEIA through prioritised infrastructure investment to improve freight accessibility to Park Ridge.
 - Expanding Coolool MEIA with EDQ to prioritise the expansion of Coolool Eco Industrial Park.
 - Expanding the Caloundra MEIA.
 - Catalysing development at Ebenezer MEIA with EDQ to prioritise the delivery of State 1 of the Willowbank Industrial Area.

Recycling Enterprise Precincts

The Queensland Waste Management and Resource Recovery Strategy (the Waste Strategy) seeks to transition Queensland to the principles of a circular economy. The framework assists in delivery of coordinated, long-term and sustained growth for the recycling and resource recovery sector while reducing the amount of waste produced and ultimately disposed of, by promoting more sustainable waste management practices for business, industry and households.

To achieve the objectives of the Waste Strategy, several Recycling Enterprise Precincts will be required across SEQ. Recycling Enterprise Precincts are places that transform and remanufacture recovered materials into new products with a commercial value. When established, these precincts aim to generate new jobs, increase investment in research and development, encourage positive environmental outcomes, support a transition to a low carbon future, and support the creation of sustainable markets for remanufactured end products.

ShapingSEQ 2023 acknowledges that industrial land will play an important role in Queensland's waste, resource recovery and recycling task.

Recycling Enterprise Precincts will be major consolidation locations for the recycling industry. These precincts will need to be well-buffered and separated from urban uses.

The Queensland Recycling Enterprise Precinct Location Strategy (2022) identifies two types of precincts, namely:

- » Prepare precincts – consolidation locations for waste material that can be recycled or transformed. These precincts can leverage off existing waste and resource recovery centres.
- » Transform precincts – large scale locations where waste material is recycled or transformed. These would need to be specialised locations with adequate buffering from other urban uses.¹⁰

The Queensland Recycling Enterprise Precinct Location Strategy identifies the Port of Brisbane, Bromelton, Toowoomba and Willowbank as potential locations for "transform precincts," and identifies Caloundra and North Gold Coast as locations for potential "prepare precincts."

The infrastructure requirements to support these precincts, particularly the transform precincts will be significant, highlighting the importance of delivering trunk urban infrastructure and freight transport infrastructure to MEIAs located in the abovementioned areas.

Industrial land supply responses

Key responses to the industrial land supply and demand analysis in ShapingSEQ 2023 include:

- » Priority Action 4 which establishes a regional industrial land framework as a mechanism to carry out more in-depth analysis of the demand and supply scenario in SEQ, and establish a detailed strategy to respond in the medium-long term.
- » Contributing to a short-term response to industrial land supply by including more land in the Urban Footprint for industrial purposes in Gold Coast LGA (Stapylton), which is a priority area for the regional industrial land framework. This area has been identified as a SEQ Development Area to ensure that out-of-sequence development does not occur until detailed land use and infrastructure planning is complete.
- » Responding to identified industrial land shortfalls in the Northern sub-region (Yandina East and Cooroy), and the Redlands LGA (Southern Thornlands and Redland Bay) by including more land in the Urban Footprint for mixed industry and business purposes.
- » Including more land in the Urban Footprint for industrial purposes at other locations to support other place-based or industry-specific needs including West Toowoomba and the identification of Charlton/Wellcamp MEIA (West Toowoomba which has also been identified as a SEQ Development Area to ensure that out-of-sequence development does not occur until detailed land use and infrastructure planning is complete).
- » Identifying Priority Future Growth Areas (PFGAs) that are prioritised for investigation for industrial use at Stapylton, South Logan and Wellcamp. These areas are identified to protect their future potential for use for industrial uses, as they may be required to accommodate long-term urban growth.

ShapingSEQ 2023 focuses on regionally-significant industrial land for SEQ (MEIAs), and ensuring that these areas are protected and enhanced into the future. Local planning for industrial land remains crucial to the economic future of SEQ. Local governments must plan for a local supply of suitable land for industrial uses that considers anticipated demand within the LGA.

There is significant demand for industrial land uses other than the large distribution centres typically located in, or as close as possible to, Brisbane. There is also demand for industrial land in locations other than along established road freight corridors from Brisbane into southern states. Recycling Enterprise Precincts are examples of these overlapping place-based or industry specific needs.

¹⁰ E3 Advisory (2022). Recycling Enterprise Precinct Location Strategy.

Priority Action 4: Establish a regional industrial land framework

Priority action 4 is to establish a regional industrial land framework as a mechanism to carry out more in-depth analysis of the demand and supply for industrial land in SEQ, and establish a detailed strategy to respond in the medium-long term.

Priority Action 4 – Establish a regional industrial land framework	
Stakeholders: State and local governments	2024 – 2025
In partnership with local government, the Queensland Government will establish a regional industrial land framework to monitor industrial land supply, project industrial land demand and respond to projected regional industrial land demand in SEQ. This framework will consider industrial land at a regional scale which will complement local industrial land planning.	

This framework will consider industrial land at a regional scale, which will compliment local industrial land planning.

Given that the impacts of the exhaustion of industrial land supply in Brisbane are expected to be felt within 5-10 years, a targeted response must be prioritised. Gold Coast, Logan and Ipswich LGAs are the key focus areas for this issue given the location of the existing and planned freight and logistics networks that are located in the south and south-western corridors.

Through the regional industrial land framework, state and local government will undertake a more detailed assessment of the industrial land supply and demand outlook in Brisbane, Gold Coast, Logan and Ipswich. This will include an investigation of the ability of land already designated to be appropriately serviced and made accessible to meet future demand pressures.

The following actions are prioritised through ShapingSEQ 2023 to ensure the timely provision of regional industrial land:

- » Identification of additional industrial land within northern Gold Coast.
- » Infrastructure investment within Logan to provide improved freight accessibility to Park Ridge MEIA and Crestmead/Berrinba MEIA.
- » Investigation of potential additional industrial land within Logan within the South Logan PFGA.
- » Infrastructure investment within Ipswich LGA to service industrial land located at Ebenezer.

The regional industrial land framework will also consider the longer-term role and function of MEIAs across SEQ, in recognition of their place in regional, national and international supply chains.

This priority action is closely related to Priority Action 3 Strengthening RECs. Many of the region's MEIAs are located within RECs, and benefit from synergies with core components of RECs.

Additionally, the SEQ Infrastructure Plan (SEQIP) planned for 2025 will support the identification of priority infrastructure required to achieve the outcomes of the regional industrial land framework. The SEQIP will include, but is not limited to, the regional freight network(s) and enabling trunk infrastructure. The industrial land framework will consider:

- » new and emerging industrial precincts including but not limited to the Ebenezer Regional Industrial Area and Wellcamp Business Park.
- » existing and mature industrial precincts to consider if they are supported with the infrastructure required to enable the take up of transformation opportunities by industry.

Tourism

Tourism remains a strength for the SEQ economy. Measuring the impact of tourism on the economy remains challenging as there is limited data that accurately reflect the industry as a whole. Tourism transects multiple industries such as accommodation, retail trade, food and beverages, and transport.

Tourism in SEQ is diverse and varied with each sub-region offering unique tourism opportunities and experiences for a visitor. Tourism can also involve natural places, rural production areas, towns or townships, suburban or

urban neighbourhood areas to more dense cities. Collectively, the vast array of tourist options and experiences contribute significantly to the overall attractiveness and appeal of SEQ. SEQ has a number of key attributes that differentiate itself from other tourist destinations which gives the region a strong comparative advantage.

ShapingSEQ 2023 continues to promote SEQ as a world-class tourism and events destination, providing strategies that support the provision of diverse and sophisticated tourism experiences for domestic and international visitors. RECs, centres and rural precincts will continue to support and facilitate tourism opportunities that enhance economic, environmental, social and cultural benefits and improve SEQ's role as a premier domestic and international tourism destination.

Special uses

Throughout SEQ there are a number of major economic and/or industrial facilities that are not located within the urban areas of the region. These uses typically have locational specific requirements and/or fulfil a special purpose. Frequently, these facilities need to be located away from sensitive land uses, or a more naturally suited to being located within the rural zone.

These land uses are highly specialised and service a particular need that if sourced interstate, could compromise business operations through increased costs or reduced productivity. These are identified as 'special uses' in ShapingSEQ 2023 and examples uses include, but are not limited to the following facilities:

- » Helidon Explosives Reserve (Lockyer Valley) – the Helidon Hazardous Industry Precinct contains the Helidon Explosives Reserve, which is one of only two explosives reserves within Queensland. This highly specialised land use has very significant buffering requirements and is integral to supporting the extractive and construction industries. Opportunities to grow the capacity of the Helidon Hazardous Industry Precinct for regionally significant special industry operations will be investigated in the longer term.
- » Defence facilities – a number of Australia Defence Force facilities are located in SEQ and are critical to operational and training requirements of the defence forces. Examples include the Greenbank Training Area, The Gallipoli Barracks, RAAF Base Amberley and Kokoda Barracks.
- » Raceways – including Ipswich Motorsport Precinct located at Willowbank and Lakeside Park located at Lake Kurwongbah.
- » Ace Waste Facility – Queensland's only commercial medical incinerator is located at Willawong in Brisbane's south and represents a regional and state significant facility that ensures the efficient management of medical waste. Queensland's hospitals and health facilities would need to transport their medical waste interstate without these facilities.
- » Correctional facilities – a number of correctional facilities located in SEQ include the Borallon Training and Correctional Centre, Southern Queensland Correctional Centre, Arthur Gorrie Correctional Centre, Brisbane Correctional Centre, Brisbane Women's Correctional Centre, Wolston Correctional Centre, Woodford Correctional Centre and the Locker Valley Correctional Centre (currently under construction).

The scale of these special uses can vary significantly. These facilities can be large and service a broad area. Because of their specialised nature, these land uses can be difficult to plan for in advance. In some instances, these facilities have had sympathetic land use zonings applied under local government planning schemes, while in other cases these facilities are located in the rural zone.

Many of these uses make a significant contribution to the regional economy and are at risk or under threat from land use competition or encroachment, warranting their identification and protection in ShapingSEQ 2023.

It is not possible to identify all uses that may fall into special uses that are regionally significant however, the above examples provides local governments direction on the uniqueness of some uses that should be protected. Other uses could include marine industry, defence land, extractive resources, airport land or difficult to locate industry.

Rural prosperity

Agricultural development is not simply a 'default' land use in rural areas but is a significant and deliberate undertaking that is not easily moved and requires detailed planning. ShapingSEQ 2023 sets key strategies to conserve and manage the environmental and economic values inherent in rural areas. ShapingSEQ 2023 aims to assist rural businesses and industries to adapt innovatively to changing technology, business operations, and a growing domestic and global demand for high quality produce.

The Prosper theme of ShapingSEQ supports rural areas leveraging traditional primary industry strengths to expand, diversify and introduce value-adding activities that enhance productivity, resilience and competitiveness in domestic and global markets. The Prosper theme also promotes the intensification or diversification of agricultural activities on farms, and the introduction of new rural value-adding activities (e.g. biotechnology), as well as supporting rural communities to adapt and build on their strategic advantages in existing rural industry and activities.

ShapingSEQ 2023 also provides for local government-led rural precinct planning to support sustainability and economic diversification of rural areas.

A rural precinct is a spatially defined and actively planned area within SEQ's RLRPA that supports the sustainability and economic diversification of rural areas. Rural precincts are used to advance the rural prosperity and natural economic resource strategies of ShapingSEQ.

A rural precinct is established through a rural planning exercise led by local government, in consultation with the department. In addition to being endorsed and gazetted by the Planning Minister, these precincts are to be reflected in local government planning schemes to facilitate the desired planning outcomes.

Rural precincts are to be applied to discrete areas and will not be appropriate in every situation, or across the entirety of an LGA.

There are two types of rural precincts provided for under ShapingSEQ 2023 and the SEQ Regulatory Provisions (refer to the Planning Regulation 2017):

- » 'Rural subdivision precincts' are used to promote the diversification of agricultural activities.
- » 'Rural enterprise precincts' are used to promote the diversification of rural activities.

The ShapingSEQ Rural Precincts Guideline provides further information.

Further information

To download a copy of ShapingSEQ 2023, or to access further information, go to the department's website at www.qld.gov.au/shapingseq

The website includes a range of supporting materials including:

- » A summary of the plan
- » Interactive mapping
- » PDF maps
- » ShapingSEQ 2023 Consultation Report
- » Indicator Dictionary.

Appendix A: Employment projections by LGA

South East Queensland Employment Projections Data Tables - 2020-21 to 2045-46

These data tables provide a spatial and temporal overview of SEQ’s projected employment at LGA levels, including an analysis of future employment by place of work and industry.

These employment planning baselines have been aggregated into land use type to better align with planning schemes and infrastructure planning. Schemes and transport modelling generally allocate employment into use types rather than ANZSIC categories. While it is acknowledged there are multiple ways the employment baselines can be aggregated, it is decided that the aggregation shown below is the most appropriate for ShapingSEQ 2023 based on similar trips and land requirements generated by common uses.

It is important to note that aggregating the employment into land use categories has not interfered with the overall figures. These figures are still as per the Queensland Government 2023 regional employment projections.

Table 7 - Aggregated employment projections by land use

Construction	Industry	Offices	Retail and Leisure	Natural Resources	Health and Education
Construction	Manufacturing Wholesale trade Transport, postal and warehousing	Information, media and telecommunications Administrative and support services Public administration and safety Financial and insurance services Other services Professional, scientific and technical services	Rental, hiring and real estate services Retail trade Accommodation and food services Arts and recreation services	Agriculture, forestry and fishing Electricity, gas, water and waste services Mining	Education and training Health care and social assistance

Source: Queensland Treasury

Table 8 – Regional Employment Projections by LGA and land use type

	2020-21	2025-26	2030-31	2035-36	2040-41	2045-46
Brisbane LGA						
Construction	63,520	59,840	67,670	77,810	88,070	97,800
Industry	126,360	157,940	177,140	184,760	190,920	198,220
Office	273,240	301,070	327,630	354,890	381,100	408,110
Retail and leisure	151,680	174,530	189,500	201,030	210,160	217,660

Natural resources	23,780	31,590	35,760	35,910	37,310	39,320
Health and Education	203,620	231,630	248,300	264,500	283,140	302,490
Total persons employed	842,200	956,600	1,046,000	1,118,900	1,190,700	1,263,600
Gold Coast LGA						
Construction	36,290	35,040	37,880	44,970	53,150	61,440
Industry	35,250	42,840	47,760	49,640	51,370	53,490
Office	66,080	71,910	77,990	85,480	92,820	100,350
Retail and leisure	78,900	93,110	102,800	110,970	117,620	123,570
Natural resources	4,370	5,600	6,090	6,320	6,710	7,300
Health and Education	72,610	84,900	93,880	102,420	111,630	121,150
Total persons employed	293,500	333,400	366,400	399,800	433,300	467,300
Ipswich LGA						
Construction	6,300	6,330	7,150	8,460	9,920	11,390
Industry	14,310	18,150	19,910	20,410	21,130	22,100
Office	18,700	22,680	25,360	27,270	28,960	30,640
Retail and leisure	15,820	18,210	20,340	22,510	24,480	26,200
Natural resources	2,200	3,000	3,710	3,840	4,040	4,320
Health and Education	23,470	29,030	34,030	41,410	50,270	59,250
Total persons employed	80,800	97,400	110,500	123,900	138,800	153,900
Lockyer Valley LGA						
Construction	1,180	1,180	1,230	1,420	1,650	1,890
Industry	2,260	2,850	3,080	3,130	3,260	3,430
Office	2,180	2,430	2,620	2,820	3,020	3,220
Retail and leisure	2,470	2,830	3,070	3,260	3,410	3,540
Natural resources	3,330	3,980	4,020	3,870	4,020	4,410
Health and Education	2,980	3,530	3,780	4,000	4,240	4,510
Total persons employed	14,400	16,800	17,800	18,500	19,600	21,000
Logan LGA						
Construction	16,780	16,560	17,480	20,640	24,310	28,010

Industry	17,630	21,220	23,520	24,470	25,370	26,400
Office	21,610	23,720	25,530	27,610	29,650	31,730
Retail and leisure	24,560	27,740	30,560	32,890	34,520	35,660
Natural resources	2,160	2,740	3,010	3,090	3,270	3,550
Health and Education	30,160	35,620	39,300	42,200	44,480	46,650
Total persons employed	112,900	127,600	139,400	150,900	161,600	172,000
Moreton Bay LGA						
Construction	18,990	18,770	20,210	23,660	27,670	31,790
Industry	17,760	21,760	24,300	25,350	26,220	27,220
Office	28,380	31,190	33,580	36,320	38,980	41,700
Retail and leisure	35,480	40,640	44,790	48,070	50,740	53,110
Natural resources	5,180	6,450	6,780	6,780	7,140	7,810
Health and Education	43,510	52,890	59,740	64,120	68,650	73,070
Total persons employed	149,300	171,700	189,400	204,300	219,400	234,700
Noosa LGA						
Construction	2,830	2,740	2,730	3,240	3,890	4,560
Industry	1,890	2,230	2,490	2,590	2,670	2,770
Office	5,770	6,200	6,640	7,260	7,890	8,530
Retail and leisure	8,550	10,230	11,020	11,730	12,320	12,890
Natural resources	640	770	830	850	890	960
Health and Education	5,520	6,230	6,590	6,830	7,240	7,590
Total persons employed	25,200	28,400	30,300	32,500	34,900	37,300
Redland LGA						
Construction	6,600	6,480	6,670	7,770	9,100	10,440
Industry	5,390	6,860	7,560	7,770	8,040	8,400
Office	10,350	11,340	12,200	13,210	14,200	15,210
Retail and leisure	12,060	13,560	14,610	15,380	15,950	16,370
Natural resources	1,310	1,640	1,780	1,820	1,930	2,110
Health and Education	14,490	16,420	17,380	17,950	18,680	19,370

Total persons employed	50,200	56,300	60,200	63,900	67,900	71,900
Scenic Rim LGA						
Construction	1,690	1,690	1,740	2,040	2,400	2,760
Industry	1,800	2,180	2,420	2,500	2,590	2,690
Office	3,120	3,580	3,910	4,180	4,420	4,670
Retail and leisure	3,440	4,240	4,640	4,920	5,130	5,330
Natural resources	2,160	2,560	2,720	2,730	2,840	3,050
Health and Education	3,590	3,950	4,270	4,430	4,620	4,800
Total persons employed	15,800	18,200	19,700	20,800	22,000	23,300
Somerset LGA						
Construction	650	700	710	830	1,000	1,160
Industry	2,350	3,230	3,360	3,280	3,460	3,740
Office	1,050	1,160	1,250	1,350	1,450	1,540
Retail and leisure	1,220	1,420	1,560	1,650	1,730	1,800
Natural resources	1,280	1,580	1,900	1,920	1,990	2,120
Health and Education	1,650	2,010	2,120	2,270	2,370	2,440
Total persons employed	8,200	10,100	10,900	11,300	12,000	12,800
Sunshine Coast LGA						
Construction	19,210	18,710	19,650	23,300	27,680	32,140
Industry	14,690	17,500	19,440	20,230	20,960	21,830
Office	31,360	33,940	36,480	39,770	43,070	46,420
Retail and leisure	34,740	40,560	44,280	47,700	50,610	53,190
Natural resources	4,850	5,890	6,220	6,260	6,570	7,140
Health and Education	42,750	50,200	55,430	60,540	66,110	71,480
Total persons employed	147,600	166,800	181,500	197,800	215,000	232,200
Toowoomba (urban extent)						
Construction	7,070	6,670	7,000	7,860	8,780	9,620
Industry	8,590	10,480	11,640	12,050	12,380	12,740

Office	15,510	16,930	17,760	18,550	19,270	19,980
Retail and leisure	13,660	15,290	16,110	16,630	16,930	17,110
Natural resources	4,040	5,080	5,430	5,380	5,500	5,770
Health and Education	23,830	26,550	27,860	29,030	30,340	31,380
Total persons employed	72,700	81,000	85,800	89,500	93,200	96,600

Appendix B: Historical regional activity centres network

Designation	1995	1998	2000	Designation	2005	2009	2017	2023
Dominant	Brisbane CBD and its frame	Brisbane CBD and its frame	Brisbane CBD and its frame	Primary / Capital City Centre	Brisbane CBD	Brisbane CBD	Brisbane CBD and frame	Brisbane CBD and surrounding frame
Key metropolitan centres	Ipswich Caboolture/ Morayfield Beenleigh	Ipswich Caboolture/ Morayfield Beenleigh	Ipswich Caboolture Beenleigh	Principal	Toowoomba Maroochydore Southport Robina Caboolture/ Morayfield Chermside Ipswich Springfield Indooroopilly Carindale Upper Mount Gravatt Capalaba Cleveland Springwood Beenleigh	Toowoomba Maroochydore Southport Robina Caboolture/ Morayfield Chermside Ipswich Springfield Indooroopilly Carindale Upper Mount Gravatt Capalaba Cleveland Springwood Beenleigh	Toowoomba Maroochydore Southport Robina Caboolture/ Morayfield Chermside Ipswich Springfield Indooroopilly Carindale Upper Mount Gravatt Capalaba Cleveland Springwood Beenleigh	Toowoomba Maroochydore Southport Robina Caboolture/ Morayfield Chermside Ipswich Springfield Indooroopilly Carindale Upper Mount Gravatt Capalaba Cleveland Springwood Beenleigh North Lakes

Designation	1995	1998	2000	Designation	2005	2009	2017	2023
Key regional activity centres	Toowoomba	Toowoomba	Toowoomba	Major	Noosa	Noosa	Noosa	Noosa
	Maroochydore	Maroochydore	Maroochydore		Nambour	Nambour	Nambour	Nambour
	Robina	Robina	Robina		Kawana Waters	Kawana	Kawana	Kawana
	Southport	Southport	Southport		Caloundra	Caloundra	Caloundra	Caloundra
					Caloundra South	Caloundra South	Caloundra South	Caloundra South
					Sippy Downs	Sippy Downs	Sippy Downs	Sippy Downs
					Beerwah	Beerwah	Beerwah	Beerwah
					Redcliffe	Redcliffe	Redcliffe	Redcliffe
					North Lakes	North Lakes	North Lakes	Strathpine
					Strathpine	Strathpine	Strathpine	Mitchelton
					Mitchelton	Mitchelton	Mitchelton	Toombul/ Nundah
					Toombul	Toombul/ Nundah	Toombul/ Nundah	Wynnum Central
					Wynnum Central	Wynnum Central	Wynnum Central	Toowong
					Toowong	Toowong	Toowong	Goodna
					Goodna	Goodna	Goodna	Ripley
					Ripley	Ripley	Ripley	Logan Central
					Logan Central	Logan Central	Logan Central	Browns Plains
					Browns Plains	Browns Plains	Browns Plains	Logan Hyperdome
					Logan Hyperdome	Logan Hyperdome	Logan Hyperdome	Flagstone
					Coomera	Coomera	Coomera	Yarrabilba
			Nerang	Nerang	Nerang	Coomera		
			Surfers Paradise	Surfers Paradise	Surfers Paradise	Helensvale		
			Broadbeach	Broadbeach	Broadbeach	Nerang		
			Bundall	Bundall	Bundall	Surfers Paradise		
						Surfers Paradise	Broadbeach	
						Broadbeach	Bundall	

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Designation	1995	1998	2000	Designation	2005	2009	2017	2023
					Coolangatta/ Tweed	Surfers Paradise Broadbeach Bundall Coolangatta/ Tweed	Bundall Coolangatta	Coolangatta
				Principal Rural	Gatton	Gatton	Gatton Beaudesert	Gatton Beaudesert
				Major Rural	Kilcoy Esk Fernvale Boonah Laidley	Kilcoy Esk Fernvale Boonah Laidley Jimboomba	Kilcoy Esk Fernvale Boonah Laidley Jimboomba	Kilcoy Esk Fernvale Boonah Laidley Jimboomba
Total	8	8	8		47	51	52	52

Appendix C: Major Enterprise and Industrial Areas in SEQ

Sub-Region	LGA	MEIA
Metro	Brisbane	Eagle Farm
		Geebung
		Hemmant
		Lytton
		Murarie/Colmslie
		Nudgee/Banyo
		Pinkenba/Bulwer Island
		Virginia/Northgate
		Archerfield
		Acacia Ridge
		Rocklea/Brisbane Markets
		Richlands
		Salisbury
		Sumner/Darra
		Wacol
		Willawong
	Heathwood/Larapinta	
	Logan	Crestmead/Berrinba
		Park Ridge
		North Maclean
	Moreton Bay	Brendale
		Narangba
		Morayfield/Burpengary
		Elimbah East

Sub-Region	LGA	MEIA
Northern	Sunshine Coast	Kunda Park
		Caloundra
		Coolum
		Yandina East
Southern	Gold Coast	Yatala/Stapylton
Western	Ipswich	Bundamba/Riverview
		Carole Park
		New Chum
		Redbank
		Swanbank
		Amberley
		Wulkuraka/Karrabin
		Ebenezer
	Lockyer Valley	Gatton
	Scenic Rim	Bromelton State Development Area
Toowoomba	Charlton/Wellcamp	

Appendix D: Summary profile for each MEIA

LGA/MEIA	Most Significant Sectors (2021)		Key Freight Assets
Brisbane			
Eagle Farm (21,271 workers)	Air and Space Transport	20.1%	Brisbane Airport
	Transport Support Services	12.6%	Port of Brisbane
	Road Transport	8.9%	Southern Cross Way
	Construction Services	6.3%	Gateway Motorway
	Transport Equipment Manufacturing	6.1%	Brisbane Airport
Geebung (11,229 workers)	Construction Services	12.6%	Sandgate Road
	Electricity Supply	11.3%	Brisbane Airport
	Food Product Manufacturing	8.9%	Gateway Motorway
	Road Transport	5.6%	
	Repair and Maintenance	5.5%	
Hemmant (3,601 workers)	Road Transport	12.1%	Brisbane Airport
	Construction Services	11.2%	Port of Brisbane
	Food Product Manufacturing	9.3%	Brisbane Multimodal Terminal
	Warehousing and Storage Services	7.7%	Gateway Motorway
	Repair and Maintenance	4.6%	Port of Brisbane Motorway
Lytton (5,053 workers)	Road Transport	26.2%	Port of Brisbane
	Transport Support Services	20.1%	Brisbane Multimodal Terminal
	Warehousing and Storage Services	6.5%	Port of Brisbane Motorway
	Grocery, Liquor and Tobacco Product Wholesaling	4.6%	
	Construction Services	4.2%	
Murarrie/Colmslie (10,551 workers)	Food Product Manufacturing	24.1%	Brisbane Airport
	Construction Services	11.5%	Port of Brisbane

LGA/MEIA	Most Significant Sectors (2021)		Key Freight Assets
	Machinery and Equipment Wholesaling	7.2%	Brisbane Multimodal Terminal
	Warehousing and Storage Services	4.9%	Gateway Motorway
	Grocery, Liquor and Tobacco Product Wholesaling	4.6%	Port of Brisbane Motorway
Nudgee/Banyo (4,324 workers)	Postal and Courier Pick-up and Delivery Services	13.4%	Sandgate Road
	Construction Services	11.9%	Brisbane Airport
	Waste Collection, Treatment and Disposal Services	8.7%	Gateway Motorway
	Food Product Manufacturing	8.4%	Southern Cross Way
	Basic Material Wholesaling	5.8%	
Pinkenba/Bulwer Island (21,271 workers)	Air and Space Transport	20.1%	Brisbane Airport
	Transport Support Services	12.6%	Southern Cross Way
	Road Transport	8.9%	Gateway Motorway
	Construction Services	6.3%	
	Transport Equipment Manufacturing	6.1%	
Virginia/Northgate (4,324 workers)	Postal and Courier Pick-up and Delivery Services	13.4%	Sandgate Road
	Construction Services	11.9%	Brisbane Airport
	Waste Collection, Treatment and Disposal Services	8.7%	Gateway Motorway
	Food Product Manufacturing	8.4%	
	Basic Material Wholesaling	5.8%	
Archerfield (16,692 workers)	Road Transport	11.4%	
	Machinery and Equipment Wholesaling	8.0%	Archerfield Airport
	Repair and Maintenance	7.8%	Ipswich Motorway
	Construction Services	7.8%	Beaudesert Road

LGA/MEIA	Most Significant Sectors (2021)		Key Freight Assets
	Grocery, Liquor and Tobacco Product Wholesaling	7.6%	
Acacia Ridge (16,692 workers)	Road Transport	11.4%	Pacific National Intermodal Terminal
	Machinery and Equipment Wholesaling	8.0%	Archerfield Airport
	Repair and Maintenance	7.8%	Beaudesert Road
	Construction Services	7.8%	
	Grocery, Liquor and Tobacco Product Wholesaling	7.6%	
Coopers Plains (2,775 workers)	Construction Services	14.2%	Archerfield Airport
	Repair and Maintenance	12.0%	Pacific National Intermodal Terminal
	Road Transport	9.0%	Beaudesert Road
	Transport Equipment Manufacturing	5.7%	
	Primary Metal and Metal Product Manufacturing	4.5%	
Rocklea/Brisbane Markets (17,605 workers)	Road Transport	11.0%	Ipswich Motorway
	Repair and Maintenance	8.8%	Sherwood Road
	Construction Services	8.3%	Ipswich Road
	Machinery and Equipment Wholesaling	7.7%	
	Grocery, Liquor and Tobacco Product Wholesaling	7.3%	
Richlands (2,940 workers)	Beverage and Tobacco Product Manufacturing	13.6%	Ipswich Motorway
	Food Product Manufacturing	8.8%	Centenary Highway
	Road Transport	8.2%	Logan Motorway
	Construction Services	8.0%	
	Warehousing and Storage Services	5.6%	

LGA/MEIA	Most Significant Sectors (2021)		Key Freight Assets
Salisbury (2,957 workers)	Construction Services	19.6%	Beaudesert Road
	Basic Chemical and Chemical Product Manufacturing	11.3%	Ipswich Motorway
	Postal and Courier Pick-up and Delivery Services	9.3%	
	Repair and Maintenance	6.9%	
	Primary Metal and Metal Product Manufacturing	6.7%	
Sumner/Darra (6,515 workers)	Construction Services	18.4%	Centenary Highway
	Road Transport	10.3%	Ipswich Motorway
	Repair and Maintenance	7.6%	
	Food Product Manufacturing	6.1%	
	Fabricated Metal Product Manufacturing	4.4%	
Wacol (7,329 workers)	Food Product Manufacturing	20.8%	Centenary Highway
	Transport Equipment Manufacturing	16.1%	Ipswich Motorway
	Construction Services	8.6%	Logan Motorway
	Machinery and Equipment Wholesaling	8.4%	
	Road Transport	6.1%	
Willawong (5,709 workers)	Road Transport	25.9%	Learoyd Road
	Food Product Manufacturing	10.2%	Archerfield Airport
	Warehousing and Storage Services	9.9%	Beaudesert Road
	Postal and Courier Pick-up and Delivery Services	7.4%	Logan Motorway
	Construction Services	5.1%	
Heathwood/Larapinta (5,709 worker)	Road Transport	25.9%	Logan Motorway
	Food Product Manufacturing	10.2%	Mount Lindesay Highway

LGA/MEIA	Most Significant Sectors (2021)		Key Freight Assets
	Warehousing and Storage Services	9.9%	Centenary Highway
	Postal and Courier Pick-up and Delivery Services	7.4%	
	Construction Services	5.1%	
Logan			
Crestmead/Berrinba (4,448 workers)	Construction Services	13.3%	Browns Plains Road
	Grocery, Liquor and Tobacco Product Wholesaling	13.1%	Mount Lindesay Highway
	Road Transport	6.8%	Logan Motorway
	Transport Support Services	5.9%	
	Fabricated Metal Product Manufacturing	5.9%	
Park Ridge (775 workers)	Road Transport	33.8%	Mount Lindesay Highway
	Construction Services	27.4%	Chambers Flat Road
	Building Cleaning, Pest Control and Other Support Services	7.2%	Logan Motorway
	Food Product Manufacturing	4.4%	
	Repair and Maintenance	4.4%	
North Maclean (454 workers)	Construction Services	51.5%	Mount Lindesay Highway
	Road Transport	13.0%	
	Building Cleaning, Pest Control and Other Support Services	6.2%	
	Repair and Maintenance	4.6%	
	Construction, nfd	3.5%	
Moreton Bay			
Brendale (6,859 workers)	Construction Services	18.4%	Gympie Arterial Road
	Repair and Maintenance	10.7%	Gateway Motorway
	Manufacturing, nfd	5.6%	Bruce Highway

LGA/MEIA	Most Significant Sectors (2021)		Key Freight Assets
	Polymer Product and Rubber Product Manufacturing	5.5%	
	Basic Material Wholesaling	5.4%	
Narangba (4,951 workers)	Construction Services	24.4%	Bruce Highway
	Building Cleaning, Pest Control and Other Support Services	6.2%	Deception Bay Road
	Road Transport	5.4%	
	Fabricated Metal Product Manufacturing	5.3%	
	Repair and Maintenance	4.9%	
Morayfield/Burpengary (330 workers)	Construction Services	51.8%	Bruce Highway
	Road Transport	8.2%	Morayfield Road
	Building Cleaning, Pest Control and Other Support Services	7.3%	
	Repair and Maintenance	5.8%	
	Transport Equipment Manufacturing	5.2%	
Elimbah East (2,520 workers)	Construction Services	22.6%	Bruce Highway
	Road Transport	17.8%	Beerburum Road
	Repair and Maintenance	9.4%	Steve Irwin Way
	Transport Equipment Manufacturing	4.4%	
	Building Cleaning, Pest Control and Other Support Services	4.1%	
Sunshine Coast			
Kunda Park (7,668 workers)	Construction Services	25.1%	Sunshine Coast Airport
	Repair and Maintenance	10.2%	Sunshine Motorway
	Building Cleaning, Pest Control and Other Support Services	6.7%	Bruce Highway
	Food Product Manufacturing	5.7%	

LGA/MEIA	Most Significant Sectors (2021)		Key Freight Assets
	Water Supply, Sewerage and Drainage Services	5.1%	
Caloundra (1,699 workers)	Construction Services	31.0%	Nicklin Way
	Transport Equipment Manufacturing	8.2%	Caloundra Road
	Road Transport	6.8%	Bruce Highway
	Wood Product Manufacturing	6.1%	
	Building Cleaning, Pest Control and Other Support Services	5.9%	
Coolum (3,407 workers)	Construction Services	19.3%	Sunshine Motorway
	Food Product Manufacturing	7.2%	Sunshine Coast Airport
	Road Transport	7.2%	Yandina Coolum Road
	Transport Equipment Manufacturing	5.2%	
	Basic Material Wholesaling	4.8%	
Yandina East (3,407 workers)	Construction Services	19.3%	Bruce Highway
	Food Product Manufacturing	7.2%	Yandina Coolum Road
	Road Transport	7.2%	
	Transport Equipment Manufacturing	5.2%	
	Basic Material Wholesaling	4.8%	
Gold Coast			
Yatala / Stapylton (13,846 workers)	Construction Services	18.7%	Pacific Motorway
	Road Transport	7.5%	
	Fabricated Metal Product Manufacturing	6.7%	
	Food Product Manufacturing	5.9%	
	Basic Material Wholesaling	4.9%	

Ipswich			
Bundamba/Riverview (3,397 workers)	Food Product Manufacturing	40.3%	Warrego Highway
	Road Transport	7.4%	Cunningham Highway
	Primary Metal and Metal Product Manufacturing	6.7%	Ipswich Motorway
	Construction Services	6.1%	
	Transport Equipment Manufacturing	5.2%	
Carole Park (4,653 workers)	Food Product Manufacturing	9.2%	Logan Motorway
	Fabricated Metal Product Manufacturing	8.4%	Centenary Highway
	Machinery and Equipment Manufacturing	8.2%	Ipswich Motorway
	Pulp, Paper and Converted Paper Product Manufacturing	7.1%	
	Basic Chemical and Chemical Product Manufacturing	6.9%	
New Chum (64 workers)	Waste Collection, Treatment and Disposal Services	45.3%	Cunningham Highway
	Other Goods Wholesaling	15.6%	Warrego Highway
	Basic Chemical and Chemical Product Manufacturing	7.8%	Ipswich Motorway
	Other Transport	7.8%	
	Mining, nfd	6.3%	
Redbank (2,676 workers)	Postal and Courier Pick-up and Delivery Services	32.2%	Cunningham Highway
	Road Transport	12.4%	Warrego Highway
	Transport Equipment Manufacturing	9.0%	Ipswich Motorway
	Air and Space Transport	8.9%	
	Transport Support Services	5.4%	
Swanbank (534 workers)	Construction Services	32.8%	Cunningham Highway

	Non-Metallic Mineral Product Manufacturing	15.7%	Warrego Highway
	Waste Collection, Treatment and Disposal Services	12.2%	Ipswich Motorway
	Road Transport	10.1%	
	Building Cleaning, Pest Control and Other Support Services	6.4%	
Amberley (1,005 workers)	Transport Equipment Manufacturing	25.3%	RAAF Base Amberley
	Construction Services	21.1%	Cunningham Highway
	Road Transport	14.2%	Warrego Highway
	Building Cleaning, Pest Control and Other Support Services	5.9%	
	Repair and Maintenance	4.6%	
Wulkuraka/Karrabin (793 workers)	Food Product Manufacturing	15.1%	Cunningham Highway
	Beverage and Tobacco Product Manufacturing	11.2%	Warrego Highway
	Construction Services	9.2%	RAAF Base Amberley
	Transport Equipment Manufacturing	8.8%	
	Grocery, Liquor and Tobacco Product Wholesaling	6.8%	
Ebenezer (1,005 workers)	Transport Equipment Manufacturing	25.3%	Cunningham Highway
	Construction Services	21.1%	Proposed Ebenezer Intermodal Terminal
	Road Transport	14.2%	
	Building Cleaning, Pest Control and Other Support Services	5.9%	
	Repair and Maintenance	4.6%	
Lockyer Valley			
Gatton (961 workers)	Road Transport	30.4%	Warrego Highway
	Construction Services	13.9%	
	Repair and Maintenance	10.4%	

	Building Cleaning, Pest Control and Other Support Services	7.7%	
	Machinery and Equipment Wholesaling	7.2%	
Scenic Rim			
Bromelton State Development Area (1,334 workers)	Construction Services	19.3%	Beaudesert Boonah Road
	Food Product Manufacturing	13.6%	Mount Lindesay Highway
	Repair and Maintenance	9.1%	SCT Intermodal Terminal
	Road Transport	8.1%	
	Rail Transport	4.3%	
Toowoomba			
Charlton/Wellcamp (3,726 workers)	Road Transport	17.8%	Toowoomba Wellcamp Airport
	Construction Services	15.2%	Gore Highway
	Repair and Maintenance	8.5%	Warrego Highway
	Machinery and Equipment Manufacturing	7.9%	Toowoomba Bypass
	Machinery and Equipment Wholesaling	7.7%	New England Highway
			InterlinkSQ Intermodal Terminal
			Pacific National Intermodal Terminal (planned)



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