CONNOR HOLMES

PORT PIRIE

EMPLOYMENT LANDS STUDY

PREPARED FOR PORT PIRIE REGIONAL COUNCIL
JUNE 2012

DOCUMENT CONTROL

REVISION	DESCRIPTION	AUTHOR	DATE
V1	Employment Lands Study	HD	2.7.12
V2	Employment Lands Study	HD	10.7.12

DISCLAIMER

The opinions, estimates and information given herein or otherwise in relation hereto are made by Connor Holmes in their best judgement, in good faith and as far as possible based on data or sources which are believed to be reliable. With the exception of the party to whom this document is specifically addressed, Connor Holmes, its directors, employees and agents expressly disclaim any liability and responsibility to any person whether a reader of this document or not in respect of anything and of the consequences of anything done or omitted to be done by any such person in reliance whether wholly or partially upon the whole or any part of the contents of this document. All information contained within this document is confidential. Unauthorised reproduction of this document without consent may warrant legal action.

CONTENT

1. INTRODUCTION **1**

2. POLICY CONTEXT **2**

2.1 South Australia's Strategic Plan 2
2.2 Mid-North Region Plan, Government of South Australia, 2011 5
2.3 Mid North and Yorke Regional Road Map, Regional Development Australia, 2011 6
2.4 Port Pirie Strategic Plan, Port Pirie Regional Council 7
2.5 Development Plan 8

3. STRATEGIC CONTEXT **10**

3.1 Employment Trends 10
3.2 Business Location Drivers 10
3.3 Employment Locations 11

4. CONSTRAINTS AND OPPORTUNITIES **13**

4.1 Global Trends 13
4.2 State Trends 13
4.3 Local Factors 14
4.4 Other 14
4.5 Infrastructure 17

5. EXISTING INDUSTRIES **21**

5.1 Retail 21
5.2 Health and Community Services 21
5.3 Education 21
5.4 Construction 22
5.5 General Commercial and Administration 22
5.6 General and Special Industry 22
5.7 Transport 23
5.8 Personal Services 23
5.9 Agriculture, Forestry and Fishing 24
5.10 Tourism and leisure 24
5.11 Port Activities 25
5.12 Mining 26

6. CURRENT EMPLOYMENT PROFILE **27**

6.1 Workforce Profile 27
6.2 Jobs Profile 28

7. EXISTING ZONE CAPACITY **30**

7.1 Centre and Retail Zone 30
7.2 Industry Zone 30
7.3 Commercial Zone 32
7.4 Tourist Accommodation Zone 33
7.5 Development Approvals 33

8. OPPORTUNITIES FOR INDUSTRY EXPANSION AND GROWTH **38**

8.1 Mining 38
8.2 Tourism 38
8.3 Primary Production Value Adding 39
8.4 Transport and Logistics 39
8.5 Retail 40
8.6 Government Expenditure in Services and Infrastructure 40

9. PROSPECTIVE WORKFORCE **41**

9.1 Prospective Workforce 41
9.2 Prospective Industries of Employment 43

10. FUTURE EMPLOYMENT LAND REQUIREMENTS **44**

11. DEVELOPMENT PLAN IMPLICATIONS **47**

12. BIBLIOGRAPHY **48**

Appendix 1 Industry Zones

Appendix 2 Relative levels across key areas of the City

Appendix 3 Vacant land analysis

Appendix 4 Vacant land by street address

Appendix 5 Future employment land identification

1. INTRODUCTION

Connor Holmes has been engaged by the Port Pirie Regional Council to undertake a review of the supply of employment land, with a particular focus on industrial land supply, both currently and into the future. This study will underpin the development of other strategic planning and policy initiatives.

Port Pirie is located 219 km to the north of Adelaide and can be reached by car in around 2- 2.5 hours.

Port Pirie is the largest City in the State's mid North Region, which in addition to the Port Pirie Regional Council, takes in the local government areas of Clare and Gilbert Valleys, the District Council of Mount Remarkable, the District Council of Orroroo Carrieton, the Northern Areas Council, and the Regional Council of Goyder.

Within this Region, Port Pirie is the major commercial and service centre, providing the bulk of services and facilities including health, aged care, education, emergency, retail and commercial facilities.

Port Pirie had a population of 17,142 at the 2006 census. This grew to 17,333 at the 2011 census. State Government projections are for this population to increase to 18,404 by 2026.

It is easily accessible to the north, south and east in particular by road and to the west by rail providing locational advantages for logistics, the port and potentially the airport.

The area is home to the world's largest integrated lead and zinc smelter. Primary production in the form of cropping, viticulture, and livestock, is also important to the local economy along with industries and businesses supporting the smelting activities. The other key area of employment is service industries.

Providing employment opportunities will be essential to underpin the desired population growth. This will require growing current industry sectors, value adding to current industry sectors and identifying and taking advantage of new industry sectors such as mining.

2. POLICY CONTEXT

2.1 South Australia's Strategic Plan, 2011

South Australia's Strategic Plan was first published in 2004 and has been updated regularly since that time. The most recent update is September 2011.

The Plan outlines a medium to long-term vision for the whole of South Australia and is designed to drive the State's prosperity, assist in achieving sustainability, fostered creativity and innovation and to share these State successes with all South Australians to improve wellbeing, expand opportunities and develop stronger communities.

The Plan has two important and complementary roles. Firstly, it provides a framework for the activities of the South Australian Government, business and the entire South Australian community. Secondly, it is a means for tracking progress state-wide, with the targets acting as points of reference that can be assessed periodically.

The Plan is based on three foundations of a sustainable society: Our Community, Our Prosperity and Our Environment. These are the three drivers of the *South Australia Strategic Plan*. These are supported by six theme areas, as are set out below:

> *"Our Community*
>
> *We come from all walks of life but we all walk together. Inspiring one another by our diversity. Strengthening each other in adversity. Leaving the tapestry of South Australia with the threads of all our cultures. Giving the next generation a solid foundation from which to launch. This is who we are. This is Our Community.*
>
> *Our Prosperity*
>
> *A strong and diverse economy. Attractive employment opportunities. Jobs for our kids. The ability to retain the best talent. This is what our state needs. Balancing our growth in harmony with our natural environment. This is what will transform South Australia into an economic powerhouse. These are the keys to Our Prosperity.*
>
> *Our Environment*
>
> *If we want a cleaner Earth, it's no surprise where the effort begins. We're wiping away our carbon footprint – harvesting the power of wind, sun and waves. We've learned to reuse and recycle, to carry our shopping without wasteful plastic and to grow our own greens. This is the legacy we're creating for our children and our children's children. After all, this is Our Environment.*
>
> *Our Health*
>
> *Good health is everything. Ensuring that our bodies are well-nourished, well-exercised and well-prepared to deal with any situation. At any age we want to be well enough to live our lives to the fullest. This is how we invest in our own health and the health of our families. This is Our Health.*
>
> *Our Education*
>
> *Let's grow our knowledge and encourage kids to love learning. In fact, let's all learn a bit more than we ought to. Whether it's a new trade, a new skill, or a new way of doing things, growing our knowledge will benefit us in the long run. Our kids will be smarter. Our workers will be more productive. Our industries will be more competitive. This is the future that awaits each one of us. This is what we can achieve with Our Education.*

Our Ideas

Living at the frontiers of our imaginations. Upturning conventions instead of being led by them. Challenging the present so that the future is more refreshing than we ever thought it could be. Always seeking to improve. Never ceasing to innovate. Not pursuing change merely for its own sake, but to revolutionise the way we work and play and live. This is the essence of South Australian creativity. These are Our Ideas."

The following are Targets from the Plan that are relevant to Port Pirie and its employment and industry.

Target 4: Tourism industry
Increase visitor expenditure in South Australia's total tourism industry to $8 billion and on Kangaroo Island to $180 million by 2020 *(baseline: 2002 for South Australia, 2008 for Kangaroo Island) Milestone of $6.3 billion total industry by 2014.*

Target 7: Affordable housing
South Australia leads the nation over the period to 2020 in the proportion of homes sold or built that are affordable by low and moderate income households *(baseline: 2010)*

Target 8: Housing stress
South Australia leads the nation over the period to 2020 in the proportion of low income households not experiencing housing stress *(baseline: 2010)*

Target 13: Work-life balance
Improve the quality of life of all South Australians through maintenance of a healthy work-life balance *(baseline: 2007)*

Target 16: Economic disadvantage
By 2020, increase by 2 percentage points the share of total household income earned by low income South Australians *(baseline: 2007-08)*

Target 21: Greater safety at work
Achieve a 40% reduction in injury by 2012 and a further 50% reduction by 2022 *(baseline: 2001-02)*

Target 35: Economic growth
Exceed the national economic growth rate over the period to 2020 *(baseline: 2002-03)*

Target 36: Labour productivity
Exceed Australia's average labour productivity growth rate through to 2020 *(baseline: 2002-03)*

Target 37: Total exports
Increase the value of South Australia's export income to $25 billion by 2020 *(baseline: 2002-03)*

Target 38: Business investment
Exceed Australia's ratio of business investment as a percentage of the economy by 2014 and maintain thereafter *(baseline: 2002-03)*

Target 40: Food industry
Grow the contribution made by the South Australian food industry to $20 billion by 2020 *(baseline:*
2001-02)

Target 41: Minerals exploration
Exploration expenditure in South Australia to be maintained in excess of $200 million per annum until 2015 *(baseline: 2003)*

Target 42: Minerals production and processing
Increase the value of minerals production and processing to $10 billion by 2020 *(baseline: 2002-03)*

Target 43: Defence industry
Increase defence and defence industry annual contribution to our economy to $2.5 billion and employment to 37 000 people by 2020 *(baseline: 2003) Milestone of $2 billion and 28 000 people by 2013*

Target 46: Regional population levels
Increase regional populations, outside of Greater Adelaide, by 20 000 to 320 000 or more by 2020 *(baseline: 2010)*

Target 47: Jobs
Increase employment by 2% each year from 2010 to 2016 *(baseline: 2010)*

Target 48: Ageing workforce participation
Increase the proportion of older South Australians who are engaged in the workforce percentage points by 2020 *(baseline: 2010)*

Target 49: Unemployment
Maintain equal or lower than the Australian average through to 2020 *(baseline: 2004)*

Target 50: People with disability
Increase by 10% the number of people with a disability employed in South Australia by 2020 *(baseline: 2009)*

Target 51: Aboriginal unemployment
Halve the gap between Aboriginal and non-Aboriginal unemployment rates by 2018 *(baseline: 2008)*

Target 52: Women
Have women comprising half of the public sector employees in the executive levels (including Chief Executives) by 2014 and maintain thereafter *(baseline: 2003)*

Target 53: Aboriginal employees
Increase the participation of Aboriginal people in the South Australian public sector, spread across all classifications and agencies, to 2% by 2014 and maintain or better those levels through to 2020 *(baseline: 2003)*

Target 54: Learning or earning
Increase the proportion of 15-24 year olds engaged full-time in school, post-school education, training or employment (or combination thereof) to 85% by 2020 *(baseline: 2003)*

Target 55: Apprentices
Increase the number of apprentice completions in trade occupations by 20% by 2020 *(baseline:2009)*

Target 56: Strategic infrastructure
Ensure the provision of key economic and social infrastructure accommodates population growth *(baseline: 2010-11)*

Target 57: Broadband access
The proportion of South Australian premises with access to broadband services delivered by fibre technology meets the national average by 2020 *(baseline: 2011)*

Target 58: Online business
Increase the proportion of businesses that receive orders online from 24% to 40% by 2014 and continue growth each year to 2020 *(baseline: 2007-08)*

Target 64: Renewable energy
Support the development of renewable energy so that it comprises 33% of the state's electricity production by 2020 *(baseline: 2004-05) Milestone of 20% by 2014.*

The Government has been actively seeking to ensure population and employment targets are met and the Department of Further Education, Employment, Science and Technology is working with industry to development workforce action plans in a number of sectors including mining[1].

Port Pirie is being positioned by the RDAYMN and the Port Pirie regional Council to assist in the attainment of all of the above targets.

The RDAYMN and Council are seeking to position the district to diversify its economy. These bodies are promoting and as far as is practicable facilitating population growth, the provision of key infrastructure, managing regulation and identifying new employment opportunities and value adding.

Port Pirie has key facilities to assist with Regional employment diversification. and has access to a broad range of infrastructure, notwithstanding that upgrades would be required to sustain major new industries. Port Pirie is also well located with respect to mining activities and renewable energy projects.

2.2 Mid-North Region Plan, Government of South Australia, 2011

The Mid-North region Plan is a volume of the Planning Strategy and as such is a statutory plan. This plan is designed to set the directions and framework for the future of the region with implementation occurring at the local level largely via Local Government and its strategic and statutory plans.

The Mid-North Region Plan seeks to encourage population growth of 13787 by 2036. The South Australia Strategic Plan (SASP) Target 46 to grow regional populations to 320,000 or more by 2020. Seeking population growth is generally in line with this target which has been refined over time.

Employment opportunities will be a key to facilitating this growth.

The vision for the Mid-North identifies the need to increase industrial investment focussing on the Port Pirie to Peterborough Corridor. The Plan indicates the benefits for strategically planning for industry in this corridor.

Other key opportunities identified in the Plan include development of wind farms, protecting agricultural land, reinforcing the region as a preferred tourism destination, providing well serviced and sited industrial land to meet future demand and ensuring that commercial development is sited to support towns.

The Plan sets out key goals for the region a number of these relate to economic development and infrastructure and service provision as are set out below:

- Attract and retain a highly skilled and flexible workforce to ensure a stronger economic base;
- Develop an integrated plan to guide the expansion of tourism, building on the regions character and natural assets;
- Encourage the development of wind farms in appropriate locations and the training of people in the region to undertake their operation and maintenance;
- Attract industry to the region, particularly where there is infrastructure capacity for growth (eg: electricity, gas, roads, rail and shipping infrastructure);

[1] Department of Planning and Local Government, Mid North Region Plan, Government of South Australia

- Continue to foster the development and diversification of primary industries, including viticulture;
- Support the sustainable adaption of primary industries' to climate change;
- Position the region to capitalise on the opportunities arising from the expansion of mining activities across the state;
- Improve the capacity of water and sewer infrastructure to support population growth and the expansion of the tourism industry;
- Expand local electricity generation through renewable energy sources such as wind farms, and gas fired peak demand plants, which will provide greater capacity for economic activity. This will require expansion of the transmission infrastructure to service this growth;
- Improve the information and communication technology networks, particularly broadband, to: foster education, training and professional development opportunities, enhance health delivery and support industry development;
- Plan for the expansion of the transmission infrastructure required to meet increased electricity generation;
- Maximise economic benefits by making the best use of existing and planning infrastructure;
- Extend and upgrade access to broadband and mobile phone services across the entire region to support industry and expand distance education opportunities;
- Implement a waste management strategy including a central solid waste disposal site;
- Consider opportunities for establishing community sporting hubs, including shared use of school facilities;
- Supporting the development and maintenance of social and community facilities, including sporting, education, health and other facilities to serve the local population.

2.3 Mid North and Yorke Regional Road Map, Regional Development Australia, 2011

Regional Development Australia Yorke and Mid North (RDAYMN) was formed on 1 February 2010 and is a partnership between the Australian Government, the South Australian Government and the following Local Governments:

- District Council of Barunga West;
- Clare and Gilbert Valleys Council;
- District Council of the Copper Coast;
- Regional Council of Goyder;
- District Council of Mount Remarkable;
- Northern Areas Council;
- District Council of Orroroo Carrieton;
- District Council of Peterborough;
- Port Pirie Regional Council;
- Wakefield Regional Council;
- District Council of Yorke Peninsula.

This road map identifies the challenges and opportunities facing the region and establishes a set of priorities for its future development.

Priorities established for the region include:

- Strengthening Regional Partnerships and Leadership;
- Targeted population growth (notionally growth of 25,000 by 2036).

The RDAYMN has identified four key market segments likely to be attracted to the Region including Tree and Sea Changers, Returning Locals, Opportunity Seekers and Following Partners.

The lifestyle advantages offered by Port Pirie in this regard include a broad range of services and facilities, good proximity to Adelaide, and affordable housing. Increasing employment opportunities in the region will be an important attraction for the returning locals, opportunity seekers and the following partners segments in particular.

- Business and Industry expansion Opportunities for business and industry expansion identified in the plan applicable to Port Pirie include:
  - Value adding to agriculture
  - Intensive livestock
  - Aquaculture
  - Service industries particularly in support of new mining activities
  - Building and construction
  - Mining and mineral processing
  - Manufacturing
  - Renewal energy and alterative water sources; and
  - Knowledge intensive industries.
- Improving Infrastructure, including specifically upgrading the Port Pirie Wharf facilities, upgrading the airport to handle passengers.

2.4 Port Pirie Strategic Plan, Port Pirie Regional Council

The Rural City of Port Pirie Strategic Plan 2010 – 2019 is consistent with the plans of these other spheres of government.

This Plan identifies attracting businesses and new residents as an opportunity, as well as the potential to further exploit the area as the gateway to the Southern Flinders Ranges.

To assist to realise these opportunities the plan includes a number of key outcomes. In addition to outcomes supporting the Quality Lifestyle Goad, such as strengthen the community and establishing the City as providing a quality lifestyle choice, there are specific outcomes pertaining to economic prosperity. These include:

- Grow the regional economy by attracting new businesses and diversified base;
- Develop and support tourism and promotional initiatives;
- Ensure Council's regulatory framework supports sustainable economic growth;
- Ensure that regional population grows.

Council plans to achieve these outcomes, by taking advantage of the mining boom, improving the attractiveness of the City as a place to live, assisting businesses to find appropriate sites, develop appropriate community infrastructure, facilitate the development of Port Pirie as a regional centre for health, education and services and retail.

Through this Plan the Council will also actively seek to pursue support from other spheres of Government for strategic transport opportunities, and infrastructure development projects.

2.5 Development Plan

The Development Plan for Port Pirie provides a relatively traditional policy framework for development within the City. Within the Development Plan there are a number of single focus types of zones and/or specific policy areas contained within zones.

The Development Plan for Port Pirie generally envisages industrial development to occur within the industry zone. These are located primarily along the Warnertown Road, a smaller area in the vicinity of Esmond Road and Grey Terrace and the Nyrstar Smelter to the northern end of Ellen Street. See Figure 1 below and Appendix 1 for A3.

Figure 1 – Industry Zones

Some industrial land uses (in some forms), whilst not necessarily specifically encouraged, are allowed on merit in a range of other zones including the centre zones, commercial zones, and the public purpose zone (some specific forms of industry are non-complying within these zones).

The former SAMAG site was considered for industrial development and an amendment to the Development Plan has resulted in industry in the industry buffer policy areas 19 and 20 being not non-complying the General Farming and Rural Coastal Zones respectively. Beyond this however, the policy does not encourage industrial development within this locality.

The General Farming zone provides specifically for agricultural land uses and associated employment.

Development providing for a range of employment opportunities such as professional services, retail, community services, teaching etc is provided primarily within the Regional and other Centre zones, the commercial zones and public purpose zones.

3. STRATEGIC CONTEXT

3.1 Employment Trends

In reviewing employment and industrial land supply it is important to consider recent and likely future changes in the nature and industry of work.

In terms of industry sectors, a shift away from agriculture and manufacturing has been occurring over many years as a result of globalisation and technological change. The relative decline in these sectors can be expected to continue into the future.

The majority of job creation in recent times has been in the services sector, including retail, education, health, financial and business services.

Global demand for resources, is continuing to drive demand and growth in the mineral exploration sector. Growth in this sector generates demand for professional skills particularly in areas such as environmental management, engineering, geology, human resources, and building management fields. Mining and exploration also generates demand for a variety of semi-professionals, trades and unskilled labour and logistics.

The mining sector also provides demand for processing and refining ore.

The Defence Sector has also been growing recent times and South Australia has benefitted from a major share in this industry. Investment in the Defence Sector has flow on benefits for manufacturing and services sectors in particular.[2]

Moves to address carbon outputs provide opportunities for growth in areas of water security and renewable energy.

3.2 Business Location Drivers

There are a range of factors that impact on business location decisions, these vary by industry sector. In general key factors in business location decisions are the cost of buying/leasing premises, proximity to labour, proximity to markets and availability of supporting infrastructure. The relative importance of each of these, and other factors, varies by industrial sector and individual business circumstances.

Industrial businesses (eg manufacturing/processing, transport and warehousing) have specific location requirements including affordable suitably sized and serviced land and access to transport infrastructure including airports, ports, rail and road networks. Industrial land also needs to be relatively flat in order to accommodate large floor plates and compaction may be an issues for sites serviced by heavy vehicles. Industrial businesses need to be in close proximity to complementary businesses (eg suppliers need to be close to their customers). Additionally planning policies generally restrict the location choices of industry to specific zones and/or require buffers to more sensitive land uses.

The services sector, comprising retail, education, health and other services have varying location requirements but customer catchments, access and exposure are often key location factors. Generally planning policy seek to encourage service-based businesses to locate in Activity Centres, Commercial Zones, Business Zones, Mixed Use Zones and in limited instances Residential zones (eg Schools).

---

[2] Economic Development Board, Economic Statement – South Australia's Prospects for Growth, March 2009.

Other industry sectors have location requirements that generally restrict them to rural locations. These include Agriculture, forestry and mining.

In addition Agriculture is dependent upon climate and soil conditions.

Tourism as an industry sector is often most successful in locations where there are attractions and activities for tourists. This can include natural areas, such as beaches, and conservation parks, farms, museums, theatres, heritage buildings and tours, culinary experiences, and sporting and recreation activities both formal (competition for participants and spectators) and informal such as walking trails, boating, and fishing.

3.3 Employment Locations

When workers are employed close to their place of residence, a range of benefits can be generated including:

- Improved quality of life for workers through reduced travel time;
- Economic benefits for workers including reduced travel expenses; and
- Reducing environmental impacts through a reduction in the number or length of trips.

In seeking to encourage sustainable development, policy makers are focussed on maximising local employment. Two terms used to describe local employment are employment sufficiency and employment containment. Employment sufficiency is the number of jobs available in an area as a proportion of the employed people residing in the area. Employment containment is the number of jobs available in an area held by residents of that area as a proportion of the number of employed people residing in the area.

In regional locations employment containment is generally higher than in metropolitan areas given the reduced employment opportunities and distances between centres. Employment self-sufficiency is therefore very important.

At the 2006[3] Census there were 5,997 jobs available within Port Pirie LGA and 6,312 employed people residing in the area. These figures represent an employment self-sufficiency rate of 95%.

At the 2006 Census 5,397 employed Port Pirie LGA residents also worked within the area, representing an employment containment rate of 74.6%.

Of those employed residents who travelled outside of the Port Pirie LGA to access work opportunities, the majority of residents were employed within Metropolitan Adelaide, Northern Areas LGA and Unincorporated Far North regions, as shown in Table 1.

[3] The 2011 employment figures have not yet been released. This data is expected in October 2012

Table 1: Port Pire LGA Residents' Place of Work 2006

LGA	Jobs	%
Port Adelaide Enfield	30	0.5%
Salisbury	3	0.0%
Charles Sturt	9	0.1%
West Torrens	15	0.2%
Adelaide	11	0.2%
Adelaide Hills	6	0.1%
Light Regional	5	0.1%
Norwood, Payneham & St Peters	6	0.1%
Barunga West	25	0.4%
Copper Coast	9	0.1%
Yorke Peninsula	3	0.0%
Clare and Gilbert Valleys	17	0.3%
Goyder	8	0.1%
Wakefield	26	0.4%
Loxton Waikerie	7	0.1%
Ceduna	5	0.1%
Whyalla	6	0.1%
Northern Areas	59	0.9%
Orroroo/Carrieton	3	0.0%
Peterborough	9	0.1%
Port Pirie	5,397	85.5%
Mount Remarkable	22	0.3%
Port Augusta	55	0.9%
Unincorporated Flinders Ranges	17	0.3%
Roxby Downs	9	0.1%
Unincorporated Far North	73	1.2%
SA undefined	63	1.0%
No fixed address	141	2.2%
Not stated	236	3.7%
Rest of Australia	37	0.6%
Total	**6,312**	**100.0%**

Source: ABS/Connor Holmes Customised Data

An employment land strategy aimed at maximising in the number of people who work within the local area needs to provide actions to encourage employment containment, including diversifying the employment base and matching employment lands, business location needs and the local workforce.

4. CONSTRAINTS AND OPPORTUNITIES

4.1 Global Trends

Since October 2008, when the GFC took hold, there has been a general tightening of finance and caution within markets.

Whilst to date Australia has escaped recession, it has nevertheless been impacted through a tightening of global finance making it more expensive and difficult for Australian Banks to gain finance, and reduced investment by international and multinational corporations in major projects.

Further, Australian's stopped spending and begun saving, effectively removing more money from the economy and impacting sectors such as property, housing and retail.

Lower levels of growth in Asia and in particular China have also impacted demand for Australia's natural resources.

The higher Australian dollar has also reduced the competitiveness of Australian labour and exports and, whilst the Australian dollar has eased slightly, it is still high relative to its usual trading levels.

Going forward, there is continued uncertainty globally with continued fear in the USA and Europe.

This has flow on effects of reduced spending on imports and lowered confidence and reduced spending generally globally.

In short, it is likely that there will be a protracted period where economic growth is slow.

On 1 July 2012, Australia's Carbon Tax came into effect. Commentary on the impact of the tax is prevalent and mixed and, the full effect is at this stage somewhat uncertain.

4.2 State Trends

According to the South Australian centre for Economic Studies[4], the South Australian Economy grew weakly over the past 12 months estimated at approximately 1.5% and the immediate outlook is for continued weak growth (expected to be 0.5%) in 2012 – 2013.

Unemployment levels remain relatively low at only 5.1% although growth in employment also remains low.

The last 12 months has seen an increase in exports from South Australia. By price this increase is 11.5%. This is largely due to two back to back good agricultural seasons and higher mining outputs and mineral prices. The strong Australian dollar is not helpful in this regard.

Mining exploration has been increasing in South Australia. Mining now accounts for 4.0% of the State's GDP. This will increase substantially if the planned expansion of

[4] South Australian centre for Economic Studies, Latest Appraisal of the South Australian Economy, 15 June 2012.

Olympic Dam by BHP progresses. A decision by the Board in this respect is expected later this year.

New investment spending in South Australia will be boosted by the construction of the new RAH and the Adelaide Oval redevelopment projects.

Overall however, general confidence is weak and in particular there are lower levels of investment in new business.

4.3 Local factors

4.3.1 Local Market Perceptions

In order to gain a fuller appreciation of the local situation interviews were undertaken with four major Real Estate Agents in Port Pirie[5].

The perceptions of these agents were generally aligned. The key issues were identified as:

- The market is very slow, very few enquiries;
- Confidence is very low – lots of projects that have come to nothing;
- Investment is low pending anticipation of the impact of mining in the Region and to the north or other key industry that has not materialised;
- The Industry land near Centro is the best located particularly for those operations that have a shop front, ie hardware supplies, small equipment hire, trades with a domestic aspect ie plumbers and/or self storage;
- The industry land on the eastern approach to the town is seen to be a long way out of town;
- The Industry land on the eastern approach to town is well located for industries that need good road access;
- The sizes of allotments most popular (although difficult to judge given the slowness of the market) appear to be between 1,500 m² and 2,000 m² with a need for up to 4,000 m² for those operations that require B- Double access and storage;
- Market could be a little over priced;
- Likely price range $80,000 to $120,000 for industrial lots up to 2000m²;
- Probably sufficient land for some time to come;
- Lead is seen to be an issue in Port Pirie and whilst the “Ten for Them” campaign is supported it is considered less advertising of the “lead issue” would be beneficial to the town.

4.4 Other

The Port Pirie CBD supports not only the urban residential population of the City but acts as a service centre for the populations in the outlying towns and areas. It is the major regional centre within the Mid North and provides a wide range of health, education, community, government, recreational, arts and retail services.

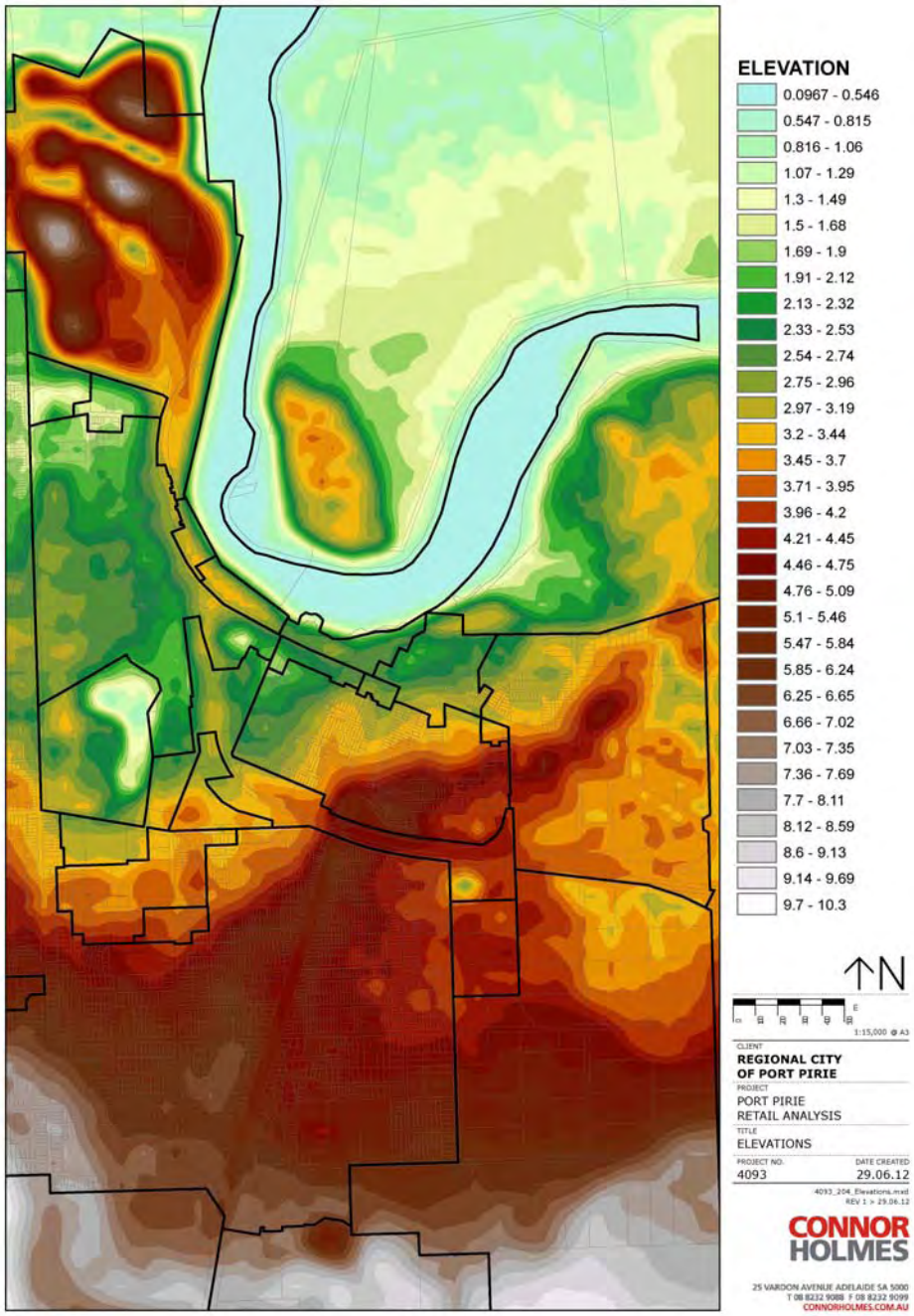
[5] Agents included: Elders, Professionals, LJ Hooker, and Wardell and Co.

Port Pirie is relatively well serviced with a broad range of infrastructure albeit it improvements in the airport, port facilities, and rail along with increased supplies of natural gas and water would improve prospects for industrial growth.

Port Pirie is relatively low lying and some areas are subject to inundation and flooding which provides some limitations on the suitability of some sites for industrial land uses.

Figure 2 below (and Appendix 2 for A3) shows relative levels across key areas of the city.

Figure 2



In general terms the economic base within Port Pirie is quite narrow and changes in one of the key industry sectors could have a major negative impact on the town.

Based on 2006 Journey to Work data, the key fields of employment within Port Pirie LGA are retail trade, manufacturing, and health and community services. These three industries account for half of all jobs located within Port Pirie LGA. Although agriculture is a key sector in terms of economic contribution it accounts only for a small proportion of jobs. It is also reliant upon the prevailing weather conditions.

Port Pirie's employment base is heavily reliant on Nyrstar both directly through employment with the company and indirectly through employment in complementary businesses and service industries established to support these residents.

This reliance can be seen in the number of people employed as machinery operators/drivers, technicians and trade workers, and labourers.

Regional and local Plans have identified the need to broaden the economic base of Port Pirie and this is considered imperative to the long term success and sustainability of the town.

Port Pirie is being impacted by Global, national and State trends and the market is slow and growth is slow.

During the last intercensal period the population of Port Pirie grew by 1.1% to 17,333. This is an average annual growth of 0.22%. Whilst low, this is consistent with generally lower growth rates in Regional areas. In some areas there has been a decline in population. Growth is most prevalent in centres and coastal locations. However, it is not achieving the growth sought by State Government plans for Regional Centres that seek growth in population of 1% per annum.

Population growth in Port Pirie is likely to be inter-twined with the provision of employment opportunities in that many people will be attracted to Port Pirie for employment. This is consistent with the regional plans that see opportunities for Port Pirie in partners following workers, returning locals and opportunities seekers. The majority of these categories of persons will require employment.

Major Government investment in the town in facilities and services such as the hospital and health sector, community sectors and education is also likely to attract population growth.

Opportunities identified as potential stimulants of population growth by the RDA, Council and the State Government include the following:

- Port Pirie as a domicile for miners and related personnel;
- Growth in services to support the mining population;
- Growth in industries supporting mining activities;
- Expansion / introduction of major industries;
- Tree change / sea change migration to the area; and
- Affordable lifestyle attractions.

Tourism and mining do provide key opportunities for the local region to respond and diversify its economic base, as do expansions in the community services sectors.

Tourism has been identified as a growth opportunity and, over the period 2001 – 2006 employment in tourism industry related jobs increased.

Growth in the community services sector will be in part reliant upon an increased population base both from within Port Pirie and the surrounding catchment areas. Major investment and service upgrades and or expansions are likely also to provide increased employment opportunities in this sector.

The City is relatively well positioned with respect to many areas where mining or exploration is occurring. Port Pirie will however need to compete with other favourably located centres such as Port Augusta and Whyalla that also have good locational characteristics, good services and infrastructure (including a deep port at Whyalla) and State Government commitment.

Notwithstanding, Port Pirie is particularly well located for mining exploration to the east. The industry base within the City to date has resulted in the workforce having numerous skills and resources that are directly transferrable to the mining industry during exploration work, construction and operation phases. In particular Port Pirie has a strong base in engineering and fabrication businesses, construction businesses and associated trades. It also has a ready workforce.

4.5 Infrastructure

Physical or hard infrastructure such as roads, rail, airports and ports and supplies of power, water, gas and telecommunications capacities are critical factors underpinning industry location.

As would be expected with a major smelting facility, the City of Port Pirie is serviced with a broad range of infrastructure. The issue for Port Pirie however is that much of this infrastructure is near or at capacity and/or has operational issues that need to be addressed.

Port

Port Pirie has an open access general cargo Port operated by Flinders Ports. The Port facilitates vessels to Handimax class of up to 185m in length.

The Port is however limited by the fact that it is accessed via a relatively shallow channel and swinging basin dredged to 6.4m. Depths at most berths are 8.2m. This restricts the size of vessels that can access the Port. Loading of larger vessels can only occur via barging material and loading vessels in the gulf; this is a costly exercise. It is suggested (Aurecon 2012)[6] the broad-brush capacity of the Port Pirie Port is 20 million tonnes per annum.

In addition there are road/rail conflicts at the entry to the Port.

The study by Aurecon further identifies a potential demand for Port facilities to accommodate up to 100 million tonnes as a result of existing and proposed mining operations in the north of South Australia.

To accommodate this much cargo would require not only a major upgrade to the Port and wharf facility (including storage and equipment) but also to the infrastructure leading to the Port.

[6] Aurecon, Regional development Australia Yorke and Mid-North Infrastructure Audit, 2012 (Draft)

Identified alternatives include slurry pipes and a barge facility on the eastern side of the Port Pirie River. This option could include a requirement for overpasses to alleviate road/rail conflicts.

Further investigations into options for upgrading the wharf, port and access arrangements form part of two studies identified by the RDAYMN as High and Medium priorities.

Airport

Port Pirie is serviced by an airfield located on the edge of the City. The airfield has three runways one of which is an all-weather (sealed) strip 1047m in length. This airport also provides hangar facilities and refuelling. Twenty four hour access can be accommodated for twin engine planes.[7]

The airfield is of particular importance for the Royal Flying Doctor Service.

The airfield however, has no passenger handling facilities and the length of the airstrip limits the size of planes able to use the facility.

Fly in fly out for mining workers has been identified as a possible future for Port Pirie[8]. This would require lengthening the airstrip to 1600m to accommodate planes of up to 50 seats. There would also need to be an upgrade to provide passenger handling facilities. To upgrade for passenger handling is likely to have significant cost implications not only for the construction of a terminal but also for the provision of appropriate security treatments. In addition there would be ongoing staffing implications.

There may be opportunities to use the airstrip as an air logistics maintenance hub using the skill of workers within Port Pirie.

Road

For the most part road infrastructure within Port Pirie is appropriate with good accessibility to surrounding areas via Highway 1, the national highway with links around the country.

The key road infrastructure issues are located within the City CBD. The rail to the Port and the main road intersect just before the entrance to the Port. This causes major congestion with trains blocking the road for minutes at a time.

Rail

Port Pirie is serviced by standard gauge rail and is well connected to the north and south as well as the east to Broken Hill in New South Wales.

The rail line traverses the CBD to the Port and supports the operation of the Port and the smelter. The operation of the trains through the part of the CBD results in congestion. Furthermore because the trains need to enter the CBD they can be a maximum length of only 600m whereas for the balance of the journey freight trains typically are 1.8 kilometres long. Reducing the trains to 600m in length results in delays of 5 minutes at the rail crossings, at 1.8 km this delay rises to 15 minutes[9].

An overpass or loop route could alleviate this issue to varying degrees.

---

[7] Upper Spencer Gulf Common Purpose Group, Port Pirie – City of Opportunity.
[8] RDAYMN, Yorke and Mid North Regional Road Map, April 2011
[9] Aurecon, Regional development Australia Yorke and Mid-North Infrastructure Audit, 2012 (Draft)

This conflict between road and rail traffic is an impediment to the capacities of both the rail network and the port facilities.

Natural Gas

Natural Gas is supplied to Port Pirie via a lateral from the Adelaide Moomba Pipeline. This links runs through Port Pirie and then across the Gulf to provide gas services to Whyalla.

The major users of this gas are One Steel in Whyalla, Nyrstar in Port Pirie and SANTOS at Port Bonython combined with smaller industrial users in Port Pirie and Whyalla.

The lateral from the Adelaide Moomba pipeline to Port Pirie is 150mm in diameter. This increases to 200mm through to Whyalla. The whole system however is constrained by the 150mm lateral into Port Pirie which is near capacity at 7.7PJpa. This lateral could be upgraded by 40% to 11PJpa via the addition of compression at Whyte Yarcowie. This would have a capital cost of some $5.9 Million[10].

The current capacity limits opportunities for industry. Increasing the capacity of gas by 10PJpa would require some duplication of the pipeline at a cost of in the order of $40 Million[11].

The duplication would however benefit not only Port Pirie and Whyalla but would provide an opportunity to supply Port Augusta with gas.

As an aside recent studies (GPA Engineering)[12] conclude in relation to the price of gas that South Australia is likely to increasingly be at a gas price disadvantage due to the increasing need to transport gas from distant reserves.

Water

Water is provided to Port Pirie from the Morgan to Whyalla pipeline. The major user of this water is Nyrstar which uses some 1.4 Gl per annum.

SA Water has been unable to provide specific advice in relation to water supply, other than with a demand of 1.6GL per annum water would be unable to be supplied in January and only half of the required supply could be provided in February.

Alternative water supplies such as recycled water therefore are important for Port Pirie. Nyrstar and the Council are currently working to recycle 300 ML per annum[13].

Energy

The Mid North is supplied with electricity from the Main Grid 275kV system via 275/132kV network transformers at Para (near Elizabeth), Robertstown, Brinkworth and Bungama (near Port Pirie.)

The Bungama substation was recently upgraded and supplies 33 MW to Nyrstar.

[10] GPA Engineering, Upper Spencer Gulf Common Purpose Group, Increased Gas Supply to the Upper Spencer Gulf, April 2011
[11] Aurecon, Regional development Australia Yorke and Mid-North Infrastructure Audit, 2012 (Draft)
[12] GPA Engineering, Upper Spencer Gulf Common Purpose Group, Increased Gas Supply to the Upper Spencer Gulf, April 2011
[13] Aurecon, Regional development Australia Yorke and Mid-North Infrastructure Audit, 2012 (Draft)

The mid north 132 kV system has limited capacity to accommodate significant electrical demand or generation without augmentation.

Telecommunications

Access to broadband is a key priority for the region.

As at 2011, 53% of households across the region had no internet connection. Approximately 42.4% of people in Port Pirie had internet almost 50:50 dial up : broadband.

A high speed fibre loop has been installed around the Port Pirie CBD to deliver commercial broadband services for State Government Agencies in the City. This loop includes public facilities including the library and cultural centre.

ADSL2+ is available in Port Pirie however coverage is not universal with some areas experiencing slow access.

WiMax is available in Port Pirie and surrounding areas and provides long range fixed and mobile access.

Port Pirie is listed to receive NBN Co high-speed fibre optic service in the next three years.

5. EXISTING INDUSTRIES

5.1 Retail

Port Pirie is the retail hub for the mid-north area of the State. Within Port Pirie there is some 44, 130 m² of retail floor space. This is made up of the CBD proper extending into Solomontown, the Pirie Plaza shopping centre on Grey Terrace as well as smaller local centres in Risdon Park and Risdon Park South.

Port Pirie has a large number of national brands, including Coles and Woolworths as well as K-Mart and Country Target.

The retail sector employed some 1043 people at the 2006 census and was the largest industry sector in Port Pirie accounting for 17.4% of jobs.

5.2 Health and Community Services

Port Pirie is a regional centre for health. Port Pirie Hospital is home to both an acute hospital and Regional Health Service providing 95 beds for people with an acute medical condition, adults and children, surgical, obstetric, palliative care and care for people over 75 years of age. The hospital has a high dependency unit as well as some private rooms.

It also has a 24 hour accident and emergency section.

There are also myrid allied health services including seventeen GP clinics and practices, ten dental practitioners/clinics, two physiotherapists, two chiropractors and two aged care facilities, along with optometrists and hearing clinics.

As at the 2006 census a total of 925 people were employed in the health care and social assistance industries. The heath and community services sector is the third largest employment sector in Port Pirie.

Increased public sector investment and/or population growth will underpin a growth in this sector.

5.3 Education

Port Pirie has one of the strongest education sectors within the region.

Within Port Pirie there are four kindergartens, three government primary schools, and one government high school. There are also two private colleges offering primary and secondary education as well as one government special school.

<u>Kindergartens</u>
Ellendale Kindergarten
Port Pirie Community Kindergarten
Risdon Park South Kindergarten
Solomontown Kindergarten

<u>Primary Schools</u>
Airdale Primary School
Port Pirie Primary
Risdon Park Primary
Solomontown Primary

Secondary Schools
John Pirie Secondary School

Non-Government Schools
Mid-North Christian College R-12 (Interdenominational)
St Marks College (Catholic R-12)

There is also a trade school for the future providing the opportunity for school based apprenticeships.

Post-secondary education is available at the TAFE College.

At the 2006 census there were 535 education related jobs in Port Pirie. This was the fourth largest employment sector at this time.

5.4 Construction

At the 2006 Census Port Pirie recorded 308 construction jobs.

Within Port Pirie there are a number of business involved in aspects of domestic and commercial construction including building companies, and suppliers such as landscaping and paving, materials, and equipment (e.g crane hire).

The construction industry is one of the industries that are likely to be well placed to service the mining industry should exploration lead to mines and associated mining settlements.

5.5 General Commercial and Administration

There are a variety of employment opportunities in the fields of general commercial and administration.

This includes jobs in areas such as property and business services, finance and insurance, government administration, professional services and the like.

At the 2006 census 640 jobs within Port Pirie were provided in these fields. Whilst a few of these jobs would be provided within other centres within the Council area, most notably Crystal Brook, the vast majority will be within Port Pirie given that it is the major service centre within the Region.

5.6 General and Special Industry

Manufacturing still remains a key employment industry in Port Pirie employing 991 people at the 2006 census. Manufacturing is the second largest employment sector in Port Pirie behind the retail sector.

The Nyrstar Smelter is an integrated multi-material recovery plant.

Nyrstar Port Pirie is one of the world's largest primary lead smelting facilities and is the third largest silver producer.

The operation includes a lead smelter and refinery, a precious metals refinery, a copper plant and a zinc plant. Goods produced include commodity grade lead, zinc, silver, copper cathode, gold and sulphuric acid.

This smelter also has the ability to treat a variety of by-products and is strategically linked to the Hobart smelter.

In 2011 Nyrstar Port Pirie produced the following:

Product	Quantity in tonnes
Lead metal	195,000
Zinc Metal	30,000
Copper Cathode	4,000
	Quantity in troy ounces
Silver	18,563,000
Gold	36,000

As part of this operation Nyrstar leases and operates a committed Port facility. The Port facility is used to receive concentrates and feeds. The refined commodities are dispatched by road and rail. The rail is therefore also of particular importance to Nyrstar.

Nyrstar has provided employment for generations of Port Pirie residents both directly and indirectly. Directly the Nyrstar smelter provides employment for 726 employees.[14] Compared to the 2006 jobs level this facility provides for approximately 73% of total number of industry jobs in Port Pirie. In addition there are generally 130 contractors employed on a full time basis. During plant shutdowns the contractors swell to between 300 and 400 in number. Nyrstar employs a range of personnel from professionals through to unskilled workers and also trains a number of apprentices that often move to other businesses once the apprenticeship is completed.

Much of the workforce is sourced locally, intrastate or interstate and the majority of employees live in Port Pirie, although some defined term staff will rent.

Supporting this key industry, numerous small engineering and fabrication companies have established in Port Pirie.

5.7 Transport

Transport and storage accounted for 171 jobs at the 2006 census or nearly 3% of all jobs. Port Pirie is well located for transport and logistics and much product is dispatched and/or received by road.

Kalara has a major transport depot located within the industrial area off Warnertown Road and Viterra has a major site on the corner of Warnertown Road and Boundary Road.

5.8 Personal Services

Personal services such as hairdressers, beauty salons and the like comprised some 246 jobs throughout the Council area. Much of this is concentrated within Port Pirie.

Increases in population will create demand for these types of services.

[14] Nyrstar website 27.6.12

5.9 Agriculture, Forestry and Fishing

Agricultural production in the Port Pirie Council had a gross value of $46.8 Million in 2006. This comprised $36.1 million in crops, and $10.7million in livestock and livestock products[15].

By area, key crops include grain, non-cereal broad acre crops with a small amount of vegetables for human consumption. Overall some 95,100 ha are under crops.

The majority of livestock is sheep followed by meat cattle and then pigs.

Agriculture in particular is dependent upon the prevailing weather conditions. The last two seasons have resulted in high production levels and increased export.

In recent times value adding of agricultural products has been increasing and diversifying.

Viterra has a major bulk handling facility at Port Pirie. It also has a dedicated berth from which grain can be loaded via booms. The Flinders Port website indicates that grain is a commodity currently handled at the Port.

At the 2006 census 368 jobs were provided in this sector in Port Pirie.

5.10 Tourism and Leisure

Port Pirie is located within the Flinders Ranges and Outback Region for the purposes of tourism marketing and monitoring. In 2009 tourism within this region was worth $176 Million ($128M domestic and $48M international)[16].

The majority of domestic visitors are from either Adelaide or elsewhere in the State with the largest interstate markets being Victoria followed by NSW/ACT. This region has the highest proportion of interstate visitors of all regions (including Adelaide).

The international market is largely made up from Europeans with almost as many Germans visiting the region as other Europeans combined.

Over 50% of all visitors to the Flinders and Outback Region do so for the purposes of a holiday and this makes up over half of the visitor nights. A further 18% of visitors visit friends and relative within the region and 29% visit for the purpose of business, education or some other purpose. The average length of stay of visitors in the Flinders Ranges is 3.2 nights and 36% of visitors remain in the region for seven nights or more.

Most visitors arrive by private vehicle (86%).

The top five activities undertaken by domestic visitors to the Flinders Ranges include:

- Visiting with friends and relatives (38%)
- Sightseeing; (37%) and Eating out at restaurants; (37%)
- Bushwalking (25%);
- Pubs and clubs (23%); and
- Visiting national and State parks (21%).

[15] ABS – economic data
[16] SATC – Regional Tourism Profile 2011

Industrial tourism attractions appear to be the least appealing at 3%.

Excluding those people visiting friends and relatives and thus staying in a private dwelling, the main forms of accommodation sought in the region are commercial caravan parks/camping grounds (21%) and Hotel, Motel or resort (21%). Backpacker and hostel accommodation accounts for 3% of nights.

On the basis that most people arrive in the region by private vehicle, the accommodation preferences and the identified activities of choice which are readily available in Port Pirie, it should have an equal footing with other localities in the region. Furthermore Port Pirie has the added attraction of being the gateway to the region.

Port Pirie has a number of events that could potentially be used to attract visitors to the City. These include:

- State Masters Games – March/April;
- Laura Folk Fair – April;
- Pt Pirie Senior Motocross – April;
- North Western Agricultural Show (Crystal Brook) – August;
- Blessing of the Fleet – September;
- Port Pirie Art Prize – August/September;
- Port Pirie Festival of Country Music – October;
- Smelter Picnic – October;
- Baroota Rodeo – October;
- NyrStar Pt Pirie Tennis Classic (International Event) – October;
- Christmas Pageant – December;
- Candlelight Carols – December;
- Producer's Market - 2nd Sunday of month.

A total of 369 jobs in Port Pirie were in the tourism and leisure industries at the 2006 Census.

Development of the Tourism industry appears to be a significant opportunity for Port Pirie.

5.11 Port Activities

Major commodities handled at the Port include mineral concentrates, refined lead and zinc, coal, grain and seeds and general cargo. General Cargo in recent times has included wind turbine components and mining equipment. Major exports include large quantities of zinc concentrates and lead. Imports include minerals, coal and ores. This Port also has capacity to handle grain and some limited capacity to handle containers.

The port has 10 berths of varying lengths and depths dedicated as follows:

Berth Number	Length (m)	Depth (m)	Use
1	152	5.3	Fishing / recreation vessels
2	190	8.2	Grain
4	107	4.9	Tug Boats
5	198	8.2	General
6	183	8.2	Ore Exports
7	145	8.2	General Container
8	180	8.2	Lead Export
9	180	8.2	Lead Export/ Coal Import
10	158	8.2	Bulk Imports

Source: Adapted from Flinders Ports website

The Flinders Ports website records 549,000 tonnes of cargo was handled though the Port Pirie Port for 2010/2011. This is down slightly from 652,000 tonnes in 2009/2010.

It is suggested (Aurecon 2012)[17] the broad-brush capacity of the Port of Port Pirie is 20 million tonnes per annum. The study by Aurecon further identifies a potential demand for Port facilities to accommodate up to100 million tonnes as a result of existing and proposed mining operations in the north of South Australia.

5.12 Mining

Whilst mining remains largely in an exploration phase within the northern and mid-northern regions, a total of 52 jobs were attributed to mining in Port Pirie at the 2006 census.

[17] Aurecon, Regional development Australia Yorke and Mid-North Infrastructure Audit, 2012 (Draft)

6. CURRENT EMPLOYMENT PROFILE

6.1 Workforce Profile

This section provides information on the employed residents of Port Pirie LGA.

At the 2006 Census there were 6,844 persons in the workforce residing within the Pt Pirie LGA. Of these, 678 were looking for work, which represents an unemployment rate of 9.9%. The most recent unemployment rate for Port Pirie (2010) is 5.2%[18]. Details of actual figures from the 2011 census will be released in October 2012. However rate of 5.2% is quite similar to the State's current unemployment rate of 5.1%.

The 2006 Census shows that workforce participation in Port Pirie LGA represents 51.4% of the over 15 year old population and 40.4% of the overall population. This is substantially lower than the metropolitan rate of 59% of the over 15 year old population and 48% of the overall population.

Table 6.1 identifies the industries in which residents of Port Pirie LGA are employed. It is apparent that key employment industries for residents of this area are:

- retail trade;
- manufacturing; and
- health care and social assistance.

Table 2 also shows that between 1996 and 2006 the percentages of Port Pirie LGA residents employed in different industries has changed, with the percentage of people employed in manufacturing, agriculture, information media and telecommunications, declining and, those in health care and social assistance, mining, education, accommodation and food services, administrative and support services, and professional, scientific and technical services increasing.

Table 2: Industry of Employment Port Pirie LGA Residents

Industry	Jobs			%		
	1996	2001	2006	1996	2001	2006
Agriculture, forestry & fishing	386	344	308	6.3%	5.7%	5.0%
Mining	32	48	102	0.5%	0.8%	1.7%
Manufacturing	1,088	1,043	994	17.8%	17.4%	16.1%
Electricity, gas, water & waste services	92	69	112	1.5%	1.2%	1.8%
Construction	296	335	333	4.8%	5.6%	5.4%
Wholesale trade	203	263	151	3.3%	4.4%	2.4%
Retail trade	823	845	826	13.4%	14.1%	13.4%
Accommodation & food services	374	373	414	6.1%	6.2%	6.7%
Transport, postal & warehousing	283	281	244	4.6%	4.7%	4.0%
Information media & telecommunications	186	88	70	3.0%	1.5%	1.1%
Financial & insurance services	135	89	104	2.2%	1.5%	1.7%
Rental, hiring & real estate services	74	64	83	1.2%	1.1%	1.3%
Professional, scientific & technical services	105	109	123	1.7%	1.8%	2.0%

[18] ABS, National Regional Profile 2006-20101: Port Pirie and Districts (M)(Local Government Area)

Industry	Jobs			%		
	1996	2001	2006	1996	2001	2006
Administrative & support services	156	200	195	2.5%	3.3%	3.2%
Public administration & safety	267	270	313	4.4%	4.5%	5.1%
Education & training	457	444	497	7.5%	7.4%	8.1%
Health care & social assistance	687	740	890	11.2%	12.3%	14.4%
Arts & recreation services	54	54	38	0.9%	0.9%	0.6%
Other services	219	223	221	3.6%	3.7%	3.6%
Inadequately described/Not stated	210	114	151	3.4%	1.9%	2.4%
Total	**6,127**	**5,996**	**6,169**	**100.0%**	**100.0%**	**100.0%**

Source: ABS 2006 Census Data

6.2 Jobs Profile

This section provides information about the jobs available within the Port Pirie LGA.

6.2.1 Number of Jobs

At the 2006 Census there were 5,997 jobs available within Port Pirie LGA and 6,312 employed people residing in the area. These figures represent an employment self-sufficiency rate of 95%.

6.2.2 Industry Sectors

Table 3 below identifies the numbers of jobs available in Port Pirie by Industry sector.

Table 3: Jobs Within Port Pirie LGA by Industry

Industry	Jobs	%
Agriculture, Forestry and Fishing	368	6.1%
Mining	52	0.9%
Manufacturing	991	16.5%
Electricity, Gas and Water Supply	74	1.2%
Construction	308	5.1%
Wholesale Trade	187	3.1%
Retail Trade	1043	17.4%
Accommodation, Cafes and Restaurants	281	4.7%
Transport and Storage	171	2.9%
Communication Services	44	0.7%
Finance and Insurance	103	1.7%
Property and Business Services	312	5.2%
Government Administration and Defence	225	3.8%
Education	535	8.9%
Health and Community Services	925	15.4%
Cultural and Recreational Services	88	1.5%
Personal and Other Services	246	4.1%
Non-Classifiable Economic Units	41	0.7%
& Not stated	3	0.1%
Total	**5997**	**100.0%**

Source: ABS/ Connor Holmes Customised Data (2006 data)

The majority of the jobs are within the Centre zones and Industry zones at Port Pirie. Some retail in particular will be located within the Town Centre Zone in Crystal Brook. There will also be a handful of these jobs in the Country Townships zones in the smaller towns within the Council area.

6.2.3 Summary

Table 4 compares the Port Pirie workforce and job market. This shows a high level of sufficiency and containment as is expected in a regional location.

Table 4: Employment Self Sufficiency and Containment by Industry Port Pirie LGA

Industry of Employment	Employed People Residing in Pt Pirie	Jobs Available In Port Pirie	People Who Live In and Work In Port Pirie	Self Sufficiency	Containment
Agriculture, Forestry and Fishing	417	368	298	88.2%	71.5%
Mining	142	52	45	36.6%	31.7%
Manufacturing	1001	991	925	99.0%	92.4%
Electricity, Gas and Water Supply	71	74	65	104.2%	91.5%
Construction	356	308	266	86.5%	74.7%
Wholesale Trade	199	187	167	94.0%	83.9%
Retail Trade	1045	1043	989	99.8%	94.6%
Accommodation, Cafes and Restaurants	287	281	256	97.9%	89.2%
Transport and Storage	216	171	157	79.2%	72.7%
Communication Services	47	44	44	93.6%	93.6%
Finance and Insurance	107	103	89	96.3%	83.2%
Property and Business Services	339	312	277	92.0%	81.7%
Government Administration and Defence	220	225	196	102.3%	89.1%
Education	505	535	461	105.9%	91.3%
Health and Community Services	894	925	830	103.5%	92.8%
Cultural and Recreational Services	71	88	68	123.9%	95.8%
Personal and Other Services	247	246	225	99.6%	91.1%
Non-Classifiable Economic Units	58	41	36	N/A	N/A
& Not stated	90	3	3	N/A	N/A
Total	6312	5997	5397	95.0%	85.5%

Source ABS (Journey to work) Customised data for Connor Holmes and Connor Holmes

This illustrates the need to provide local employment opportunities to underpin population growth.

7. EXISTING ZONE CAPACITY

The main opportunities for employment within Port Pirie are within the Centre Zones, Industry, Commercial, and Tourist Accommodation.

7.1 Centre and Retail Zone

A dedicated Retail Analysis (Connor Holmes, 2012) reviewed land uses within the Regional, Neighbourhood and Local Centres and identified a vacancy rate of approximately 9%. Much of this was vacant retail space at ground level. It was also noted as part of this study that there is much under utilised space at first floor level, particularly in the Regional Centre (CBD) area.

The retail study concludes that policy development should encourage a wide range of uses that complement the commercial activities in the precinct and encourage more people into the area, including opportunities for short term tourism accommodation, especially the use of first floor accommodation.

7.2 Industry Zone

There are four main areas zoned industrial within Port Pirie these are:

- The Industry area east of town along the Warnertown Road including Flinders Estate;
- The Industrial area around Esmond Road south and east of Centro;
- The Nyrstar Smelter; and
- The land on the north western corner of Warnertown and Pirie Blocks Roads.

These areas are shown in Appendix 1.

<u>Nyrstar Smelter Site</u>

The Nyrstar Smelter site is in a zone encompassing some 152 hectares. Nyrstar has undertaken some development on this site in recent times. However, given this site is under the control of Nyrstar it is not considered to be available for other general development.

<u>Warnertown and Pirie Blocks Road</u>

The zoned land on the north western corner of Warnertown and Pirie Blocks Road is largely developed at this time with the Electricity Sub Station. There is also some truck storage and dwellings. Within this Zone there is no evidence of take up of land in the last 11 years. The site has good levels of accessibility Approximately 19ha of land remains available in this zone.

<u>Industry Area (1) East of CBD along Warnertown Road</u>

This zone includes 289.87ha of land including Flinders Estate.

It abuts land zoned residential, tourist accommodation, and commercial to the west, Rural Living to the south, General Farming to the east and rural Coastal to the north.

There are sites of varying sizes within this area and a mix of land uses including construction and earthmoving, cements works, transport depots, the Council depot, storage, engineering and fabrication.

A review of take up between 1999 and 2010 indicates that the take up rate in this area is an average of 0.4ha per annum.

Total Zoned (ha)	Take up per annum (ha)	Vacant (ha)	Vacant (contaminated) (ha)	Total Land available ha
82	0.4ha	28.2	7.8	20.4

The former Mobil tank farm is located within the area. This is a significant site of 7.8 hectares. However given the likelihood of contamination this site has been excluded from the total available land calculations on the basis of the need for remediation and the cost implications that this would have compared with other zoned sites.

Interface issues between this zone and the neighbouring residential zone in particular will need to be addressed and may result in lower impact industries locating on sites along this boundary.

This land is considered to be well located for industrial developments with a reliance on large vehicles and also those for which a public interface is not a necessity. In this respect it is considered to be located on the "right" side of town.

Some of this land is however low lying. Relative to the Pirie River this land grades from approximately 2.1m to 4.0m, with the majority lying around 3.4m to 4.4m. Some of this area has already been given over to drainage and stormwater management in the form of swales. More land may be required for these purposes.

Given the low lying nature of the land some sites may require filling and compaction to enable access by heavy vehicles in particular.

Many of the land uses in this area would require three phase power.

The size of the lots within the area are considered to be generally appropriate with the major take up of lots being around the 1,500 m² to 2,000 m². Larger allotments eg 4000 m² are required for specific uses that have high level of equipment storage or required B-Double truck access.

This area is generally attractive to fabrication and engineering type businesses, storage yards and an assortment of operations, including the Council depot.

Industry Area 2 – Esmond Road

The Esmond Road Industrial Area is considered to be well located for industrial businesses that require a shop front, such as hardware and timber outlets, plumbers and the like. In addition the levels of services provided to this area are seen to be superior by prospective purchasers and it is considered to be closer to the centre of town resulting in lower travel times.

There is evidence of new developments in this area.

This zone abuts the Commercial Zone and the Residential Zone and interface issues need to be managed to the surrounding residential development.

This area is relatively elevated at between approximately 3.0m and 4.5m.

This zone includes 20.3 hectares of land. The take up between 1999 and 2010 was an average 0.1 ha per annum.

Total Zoned (ha)	Take up per annum (ha)	Vacant (ha)	Vacant (contaminated) (ha)	Total Land available ha
20.3	0.1ha	3.4	n/a	3.4

Other

In addition to these Industry Zones, the former site proposed for magnesium processing near Weeroona Island (whilst zoned General Farming and Rural Coastal) also has policy that loosely enables industrial development. The two Industry Buffer Policy areas total 1887 hectares. Notwithstanding this site is at present not serviced with infrastructure, although gas, water, rail and road are in close proximity. It is suited to large mining related, processing and value adding industries of a sufficient scale that require a large site and can afford, as part of the project, to bring appropriate services to the site.

If this land was to be specifically considered for industrial purposes dedicated policy is recommended.

At this stage its availability is noted but it is not considered to be "available" for development at this time.

Total Industry land

Total Zoned (ha)	Take up per annum (ha)	Vacant (ha)	Vacant (contaminated) (ha)	Total Land available ha
287.9	0.5	50.6	7.8	42.8[19]

This provides for a reasonable supply of land into the future based on the current average take up rates. However, in the event that a major industrial land use was to locate at Port Pirie, however there is limited opportunity given the fragmentation of the vacant land, and the difficultly in amassing a suitably zoned, located, serviced and sized site.

7.3 Commercial Zone

An assessment of land use changes over the period 1999 to 2010 indicates very low take up rates, with some of the most recent development being the Council's waterfront park project to the north west of the Viterra silos.

There is a total of 47.9 hectares zoned for commercial (excluding specific commercial zones such as the commercial (bulk handling) zone).

Viterra's operations are located within the Commercial (Bulk Handling) Zone and, whilst this may be underused, is not considered to be available for general commercial use and is excluded from the "available land".

Within the Commercial zones there is approximately 3.5 hectares of vacant land.

[19] This excludes the land that was formerly associated with the SAMAG site and assume all land associated with Nyrstar is required for Nyrstar and therefore not generally available.

7.4 Tourist Accommodation Zone

The Tourist Accommodation zone covers an area of some 10.8 hectares. Over the period 1999 to 2010 some 1685m² of land was taken up. This leaves a total of 0.7 hectares of vacant land within this zone. Based on current take-up rates this would be sufficient for approximately 6 years.

It is considered however that not all tourist accommodation needs to be nor necessarily should be located within a specific tourist accommodation zone and indeed there may well be benefits from enabling accommodation to locate in a variety of areas in proximity to key attractions and the coast.

7.5 Development Approvals

The low take up rates for industrial land and commercial land are borne out by a review of the Council's development approvals over the last 5 years (2007 – 2011.)

For the most part approval numbers have declined over the period 2007 – 2011. Furthermore the vast majority of applications have been for redevelopments, alterations and additions, fit outs and the like or additional developments on existing sites as opposed to the developments on new sites.

Table 5 below indicates approval number and values.

Table 5: Development applications approved[20]

Year	Number of Applications			Value
	New[21]	m²[22] (new)	Existing[23]	
2007	6	702[24]	15	15.9m[25]
2008	3	901	17	$4.0m
2009	1	414	9	$3.0m
2010	4	934	10	$2.4m[26]
2011[27]	6	4379	4[28]	$8.9m

Source: Connor Holmes from Council's Development Assessment Register.

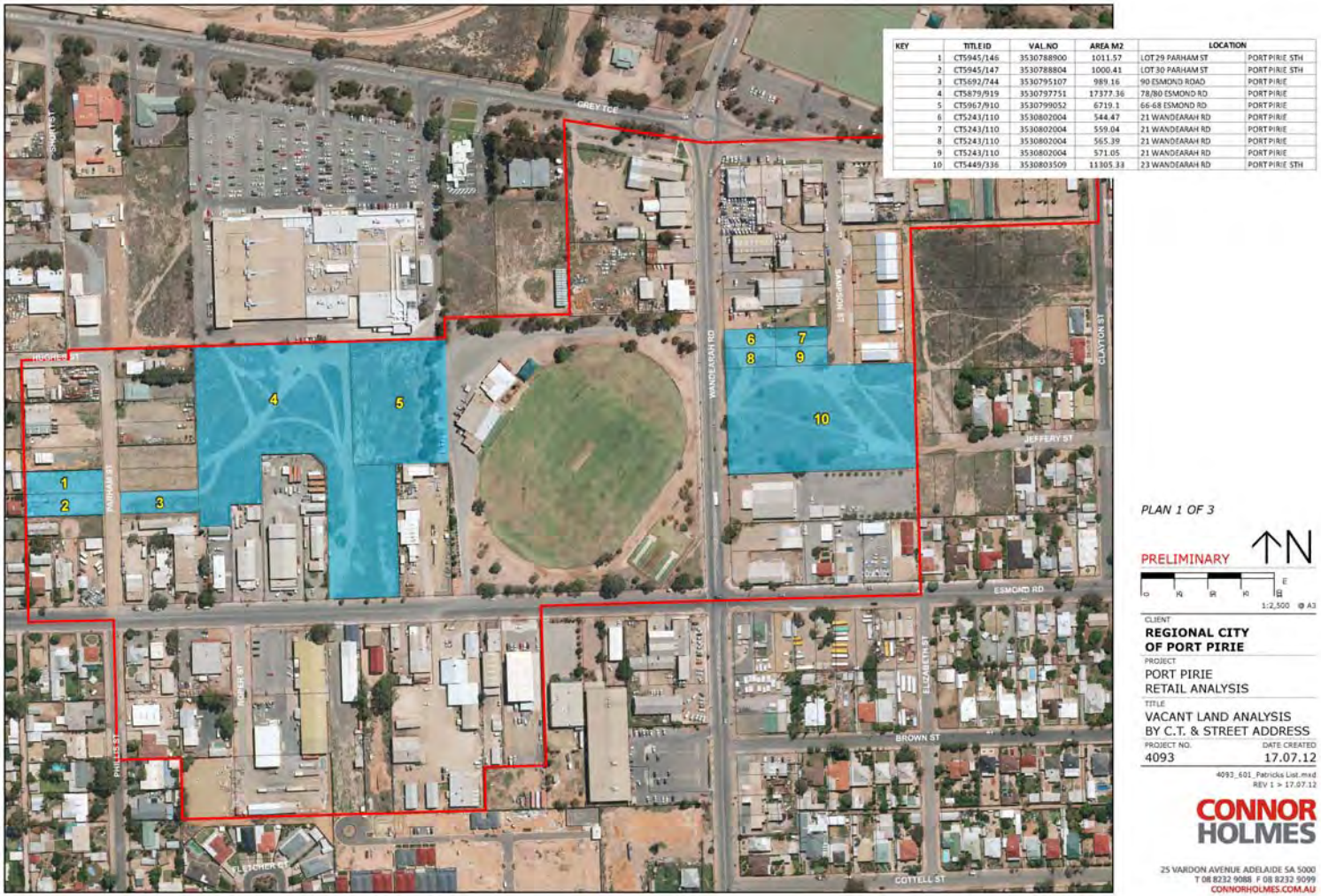
The first three months of 2012 saw seven approvals totalling $1 m. This excludes the value of an application by the Minister for Health for consulting rooms/offices and parking.) Of these approvals some 1800 m² is likely to be new land take up.

Figure 3 (See Appendix 3 for A3) included below shows the land currently zoned, vacant land and potentially contaminated land.

[20] Assessment has been based on building classification, descriptions and value.
[21] New is judged to be most likely the take up on a new site.
[22] This can be a guide only as not all areas were stipulated in each year
[23] Existing is judged to be development on an existing site, eg alterations and additions, new classrooms, signs etc.
[24] Not all area data of new development was available.
[25] This includes a church, the two major retail redevelopments and a school redevelopment totalling 12.1m
[26] Includes 1.2m for St Marks parish but excludes Nation Building for Risdon Pk PS, Airodale PS and Pirie West PS
[27] This includes all areas and the high value largely arises from a major development by Nyrstar and the Caltex Petrol Filling station that together totalled $8.4 m
[28] Excludes an amendment to the McDonalds approval as this is counted in 2010.

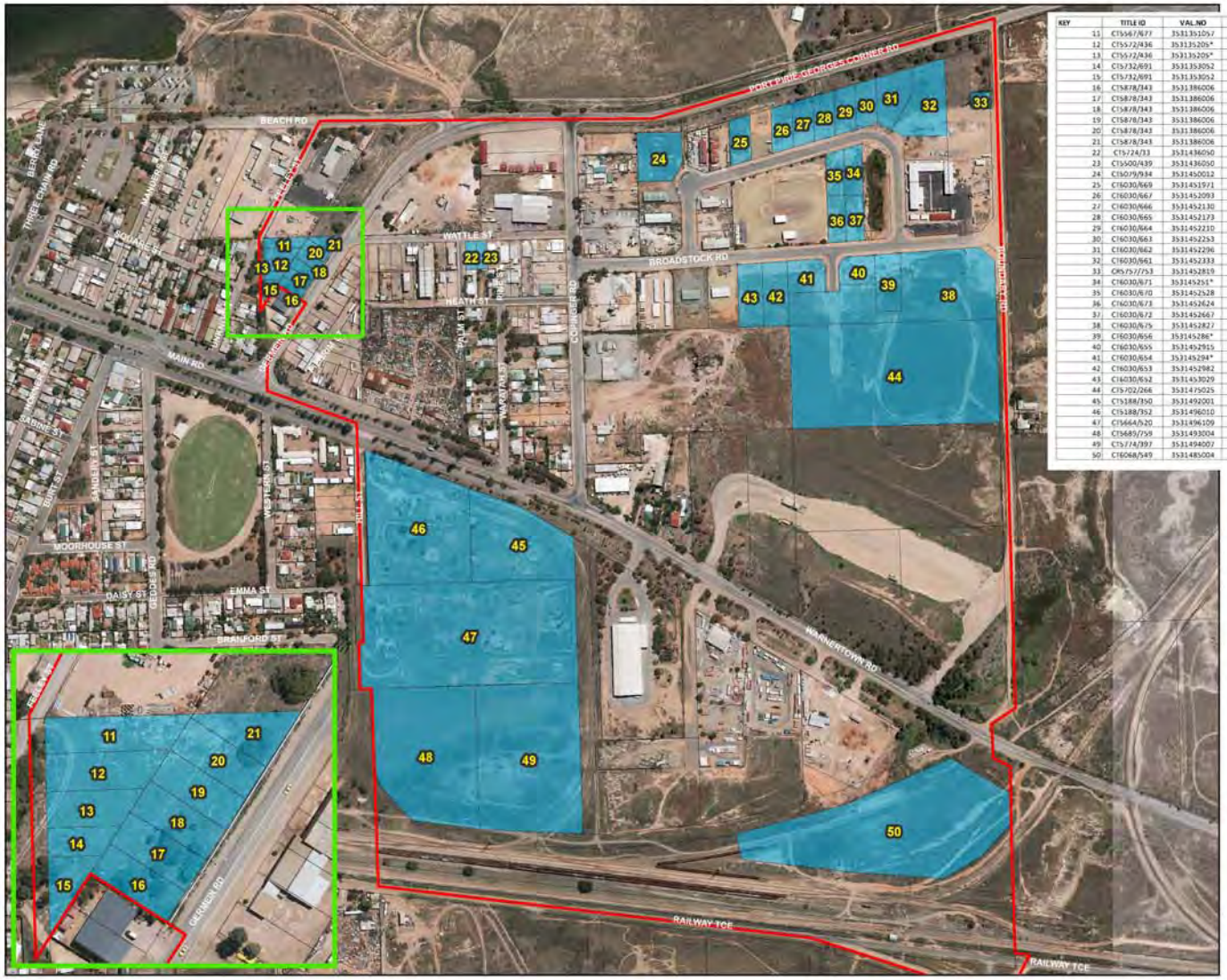
Figures 4, 4a, 4b (see Appendix 4 for A3) show vacant land by address.

Figure 4



KEY	TITLE ID	VAL NO	AREA M2	LOCATION	
1	CT5945/146	3530788900	1011.57	LOT 29 PARHAM ST	PORT PIRIE STH
2	CT5945/147	3530788804	1000.41	LOT 30 PARHAM ST	PORT PIRIE STH
3	CT5692/744	3530795107	989.16	90 ESMOND ROAD	PORT PIRIE
4	CT5879/919	3530797751	17377.36	78/80 ESMOND RD	PORT PIRIE
5	CT5967/910	3530799052	6719.1	66-68 ESMOND RD	PORT PIRIE
6	CT5243/110	3530802004	544.47	21 WANDEARAH RD	PORT PIRIE
7	CT5243/110	3530802004	559.04	21 WANDEARAH RD	PORT PIRIE
8	CT5243/110	3530802004	565.39	21 WANDEARAH RD	PORT PIRIE
9	CT5243/110	3530802004	571.05	21 WANDEARAH RD	PORT PIRIE
10	CT5449/336	3530803509	11305.33	23 WANDEARAH RD	PORT PIRIE STH

Figure 4a



KEY	TITLE ID	VAL NO	AREA M2	LOCATION	
11	CT5567/677	3531351057	830.38	LOT 1 FELLEY ST	PORT PIRIE
12	CT5572/436	3531335205*	724.94	LOT 2 FELLEY ST	PORT PIRIE
13	CT5572/436	3531335205*	537.47	LOT 2 FELLEY ST	PORT PIRIE
14	CT5732/691	3531353052	316.27	LOT 4 FELLEY ST	PORT PIRIE
15	CT5732/691	3531353052	369.45	LOT 4 FELLEY ST	PORT PIRIE
16	CT5878/343	3531386006	554.09	LOT 10 GERMAIN RD	PORT PIRIE
17	CT5878/343	3531386006	572.44	LOT 10 GERMAIN RD	PORT PIRIE
18	CT5878/343	3531386006	560.34	LOT 10 GERMAIN RD	PORT PIRIE
19	CT5878/343	3531386006	558.38	LOT 10 GERMAIN RD	PORT PIRIE
20	CT5878/343	3531386006	578.23	LOT 10 GERMAIN RD	PORT PIRIE
21	CT5878/343	3531386006	541.95	LOT 10 GERMAIN RD	PORT PIRIE
22	CT5724/13	3531436050	603.18	22 WATTLE ST	PORT PIRIE
23	CT5900/439	3531436050	580.25	22 WATTLE ST	PORT PIRIE
24	CT6079/934	3531450012	3949.43	LOT 28 BARTSCH DR	PORT PIRIE
25	CT6030/669	3531451971	1807.84	LOT 68 BARTSCH DRV	PORT PIRIE
26	CT6030/667	3531452093	1808.22	LOT 66 BARTSCH DRV	PORT PIRIE
27	CT6030/666	3531452130	1808.34	LOT 65 BARTSCH DRV	PORT PIRIE
28	CT6030/665	3531452173	1807.76	LOT 64 BARTSCH DRV	PORT PIRIE
29	CT6030/664	3531452210	1807.58	LOT 63 BARTSCH DRV	PORT PIRIE
30	CT6030/663	3531452253	1807.65	LOT 62 BARTSCH DRV	PORT PIRIE
31	CT6030/662	3531452296	3052.27	LOT 61 BARTSCH DRV	PORT PIRIE
32	CT6030/661	3531452333	5580.94	LOT 60 BARTSCH DRV	PORT PIRIE
33	CR5757/753	3531452819	594.45	SEC 1267 BOUNDARY RD	SOLOMONTOWN
34	CT6030/671	3531452561*	1673.98	LOT 83 BARTSCH DRV	PORT PIRIE
35	CT6030/670	3531452528	1517.04	LOT 82 BARTSCH DRV	PORT PIRIE
36	CT6030/673	3531452624	1611.04	LOT 87 BROADSTOCK RD	PORT PIRIE
37	CT6030/672	3531452667	1580.96	LOT 86 BROADSTOCK RD	PORT PIRIE
38	CT6030/675	3531452827	18954.38	LOT 205 BROADSTOCK RD	PORT PIRIE
39	CT6030/656	3531452886*	2761.99	LOT 45 BROADSTOCK RD	PORT PIRIE
40	CT6030/655	3531452915	1906.32	LOT 44 BROADSTOCK RD	PORT PIRIE
41	CT6030/654	3531452994*	2297.61	LOT 26 BROADSTOCK RD	PORT PIRIE
42	CT6030/653	3531452982	3083.43	LOT 25 BROADSTOCK RD	PORT PIRIE
43	CT6030/652	3531453029	2959.92	LOT 24 BROADSTOCK RD	PORT PIRIE
44	CT5702/266	3531475025	40468.86	BOUNDARY RD	SOLOMONTOWN
45	CT5188/350	3531492001	13837.3	FCL 108 WARNERTOWN RD	COONAMBA
46	CT5188/352	3531496010	22394.56	SEC 231 WARNERTOWN RD	COONAMBA
47	CT5664/520	3531496109	42225.54	SEC 93 HILL ST	PORT PIRIE
48	CT5689/759	3531493004	25187.81	PT.5228 HASLAM RD	PORT PIRIE
49	CT5774/397	3531494007	28855.46	PT.5 227 HASLAM RD	PORT PIRIE
50	CT6068/549	3531485004	36847.92	200 WARNERTOWN RD	COONAMBA

PLAN 2 OF 3

PRELIMINARY

N

0 50 100 150 200 E

1:5,000 @ A3

CLIENT
REGIONAL CITY OF PORT PIRIE

PROJECT
PORT PIRIE
RETAIL ANALYSIS

TITLE
VACANT LAND ANALYSIS
BY C.T. & STREET ADDRESS

PROJECT NO. 4093
DATE CREATED 17.07.12

4093_601_Patricks List.mxd
REV 1 > 17.07.12

CONNOR HOLMES

25 VARDON AVENUE ADELAIDE SA 5000
T 08 8232 9088 F 08 8232 9099
CONNORHOLMES.COM.AU

Figure 4b

KEY	TITLE ID	VAL.NO	AREA M2	LOCATION	
51	CT5978/764	3541424651	95298.07	LOT 53 PIRIE BLOCKS RD	PORT PIRIE
52	CT5978/765	3541424707	94925.94	LOT 54 WARNERTOWN RD	COONAMIA
53	CT5978/766	3541424758	100865.49	LOT 55 WARNERTOWN RD	COONAMIA

PLAN 3 OF 3

PRELIMINARY

N

0 50 100 150 200 E

1:5,000 @ A3

CLIENT
REGIONAL CITY OF PORT PIRIE

PROJECT
PORT PIRIE
RETAIL ANALYSIS

TITLE
VACANT LAND ANALYSIS
BY C.T. & STREET ADDRESS

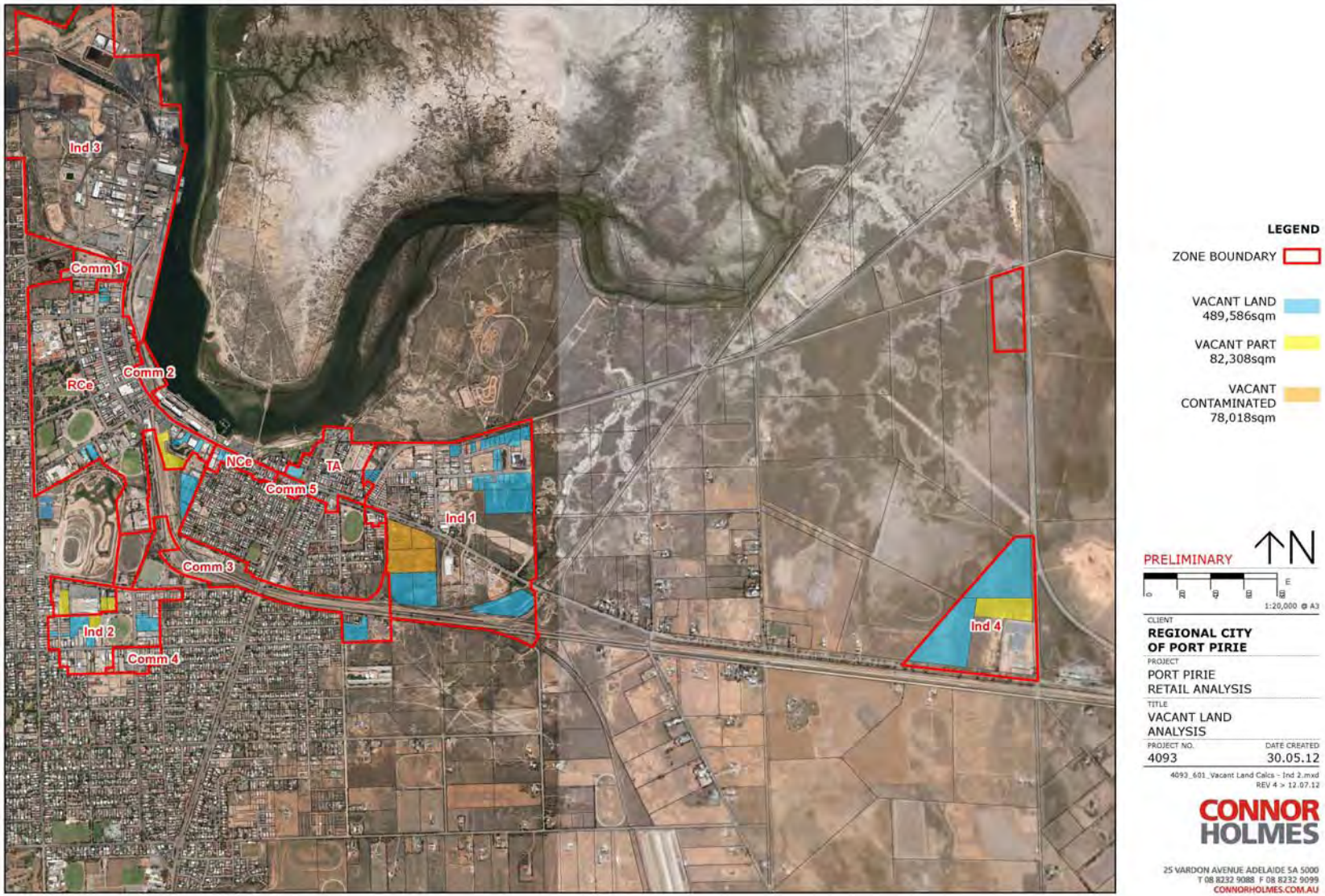
PROJECT NO. 4093
DATE CREATED 17.07.12

4093_601_Patricks List.mxd
REV 1 > 17.07.12

CONNOR HOLMES

25 VARDON AVENUE ADELAIDE SA 5000
T 08 8232 9088 F 08 8232 9099
CONNORHOLMES.COM.AU

Figure 5


Ind 3
Comm 1
Comm 2
RCe
NCe
TA
Comm 5
Ind 1
Comm 3
Ind 2
Comm 4
Ind 4
LEGEND
ZONE BOUNDARY
VACANT LAND
489,586sqm
VACANT PART
82,308sqm
VACANT
CONTAMINATED
78,018sqm
PRELIMINARY
N
1:20,000 @ A3
CLIENT
REGIONAL CITY
OF PORT PIRIE
PROJECT
PORT PIRIE
RETAIL ANALYSIS
TITLE
VACANT LAND
ANALYSIS
PROJECT NO.
4093
DATE CREATED
30.05.12
4093_601_Vacant Land Calcs - Ind 2.mxd
REV 4 > 12.07.12
CONNOR
HOLMES
25 VARDON AVENUE ADELAIDE SA 5000
T 08 8232 9088 F 08 8232 9099
CONNORHOLMES.COM.AU

8. OPPORTUNITIES FOR INDUSTRY GROWTH AND EXPANSION

As has been outlined above there are a number of industry sectors that provide opportunities for growth within Port Pirie.

8.1 Mining

Mining exploration is occurring to the north and east. This is considered to provide opportunities for Port Pirie as follows:

- **Domicile for workers.** Port Pirie is well serviced with health, community, education, retail and recreation opportunities and is also well located with respect to the exploration and proposed mines. Port Pirie also provides relatively good housing affordability and therefore provides an opportunity as a base for families of mine workers. To realise this potential will require marketing to prospective mine employees and mining companies. An upgrade of the airport to enable passenger handling would also be beneficial to attract these workers as the fly in fly out provides greater scope to service more mines than a pure road based commute;
- **Construction for mines.** Port Pirie has a well located and resourced construction industry that would be well positioned to assist with mining town construction, shells, material and equipment supply;
- **Engineering and fabrication.** The manufacturing focus of Port Pirie has resulted in a cluster of expert fabrication and engineering companies that would be well positioned to fabricate components for the mining companies;
- **Service personnel.** Port Pirie's employment base provides for trades and skills in machinery maintenance. Opportunities may exist for Port Pirie based companies to provide maintenance support to mining companies and transport equipment such as trucks and aeroplanes;
- **Skilled staff.** The TAFE at Port Pirie could extend courses to focus on skills and training relevant to the full range of jobs within the mining industry, such as food handling, preparation and management, health and community care, engineering fabrication, HR, IR etc;
- **Receiving and dispatch for goods.** Opportunities exist for direct transport of input and output Materials. This could occur via road transport or sea transport. The depth of the channel at the Port could be an impediment to this;
- **Processing of product.** Given the inherent attributes of Port Pirie for material production including the existing smelter, good transport, and access to water, power and gas (albeit that some upgrade to some of these services would be required) opportunities exist for processing and dispatch of materials;
- **Off-mine facilities.** Land values may make Port Pirie an attractive base for mining companies to locate activities non-dependent upon the mine site, such as recruitment facilities.

8.2 Tourism

Tourism would appear to provide opportunities for jobs growth in the area.

The vast majority of intrastate visitors to the region are visiting friends and relatives. Port Pirie should attract its commensurate share of these visitors.

In order of priority the following are the next five most popular activities undertaken by visitors to the region:

- Sightseeing; (37%) and Eating out at restaurants; (37%);
- Bushwalking (25%);
- Pubs and clubs (23%); and
- Visiting national and State parks (21%).

Port Pirie is located in the Southern Flinders ranges close to numerous Parks including Mambray Creek, Mount Remarkable and Telowie Gorge. It is also close to the Wirrabara Forest and the Bundaleer Forest. These provide opportunities for day excursions for bush walking with a return to Pirie for dining experiences and accommodation in the evening.

To realise these opportunities may require marketing, tour packaging, a variety of accommodation and additional dining opportunities.

8.3 Primary Production Value Adding

Primary production is a key attribute of the Port Pirie Region. Opportunities exist for valuing adding to the product via promotion and local use of fresh product and local processing.

To this end boutique food industries related to, grain processing such as pasta manufacture which is already occurring, may be extended. Alternatively cereal processing may be an option. This could lead to other local food related experiences.

In addition new crops such as Quandongs and other native plants and associated products could be pursued.

Aquaculture may also provide additional produce opportunities and would reinforce the coastal location.

The fresh produce market is also a way of value adding primary production as well as tourism.

Industry zones should be suitable for these user, although Council may wish to designate food production areas to minimise potential land use conflicts associated with food contaminants such as chemicals and dust.

8.4 Transport and Logistics

Port Pirie already has a developed transport industry with many goods transported to and from the City by Road.

The position of the City close to National Highway 1 provides opportunities for transport companies to connect into the national network.

The railway provides a good link interstate and to Adelaide.

The airport could also form part of a freight network however this may require an upgrade to the runway to handle larger planes.

8.5 Retail

Connor Holmes has reviewed the retail sector in Port Pirie and suggests that with the likely anticipated growth in population of 0.5% to 2031, that this could increase by an approximately 5,600 m^2 of additional floorspace. In the event a major employer was to locate in Port Pirie the population growth could increase (say 2.5% over five years reverting back to 0.5% to 2031) and add an additional approximate 8,500 m^2 of additional floorspace.

While the amounts may seem modest, they are significant in the context of the scale of existing floorspace provision within the township and would be very significant under a scenario where population growth, increased catchment penetration and real increases in retail spending are occurring.

A combination of these factors, notwithstanding a modest shift towards online sales, could result in an ultimate need for a further 15,000 m^2 – 20,000 m^2 of retail floorspace. Alternatively a scenario involving no population growth and no real increases in retail expenditure would be likely to result in little or no need for additional retail floorspace.

Allowing 3 jobs per 100m^2 of retail floor space this could provide between 168 – 600 additional jobs.

8.6 Government expenditure in services and infrastructure

Port Pirie could seek to work with the Government to position itself as an even more important Mid-North and Yorke Peninsular service centre.

Government investment in the level of service provision would increase the attractiveness of Port Pirie as a place to live, would create employment opportunities and would enhance its reputation as a major service centre.

Investment could occur in the following:

- centralisation of government agencies;
- education such as expanded TAFE opportunities or some University accredited course delivery;
- major research/testing facility;
- increased health and community facilities.

Government investment of this nature would be likely to have a flow on effect for the construction industry.

9. PROSPECTIVE WORKFORCE

9.1 Prospective Workforce

This section examines the prospective future workforce. The prospective workforce will be dependent upon either natural population increases or will follow employment opportunities.

Population growth and employment are most likely to be inextricably linked in Port Pirie given the high level of employment self-sufficiency due to the relative isolation from alternative job markets, Port Pirie will grow largely based on job opportunities.

This section looks at some alternate population scenarios and the implications for employment and jobs.

Over the 2006 – 2011 census period Port Pirie grew by 1.1% or 0.22% per annum.

It is significant that Port Pirie LGA has grown over the intercensal period, but not nearly as rapidly as predicted by the ABS. On the other hand, some other LGAs in the region have experienced substantial population decline during this same period.

The Mid North Region Plan acknowledges the need for each region to achieve an annual average growth rate of just over 1% per annum in order to meet the State's target of maintaining each region's share of overall population.

The draft Structure Plan for Port Pirie (not published) identifies a series of growth rates as a basis for testing additional population and dwelling requirements. These growth rates vary from 0.5% per annum to 2.5% per annum.

Recent trends in population change in the region reveal the following:

- Very low growth rates and, in some areas, absolute population decline; and
- A stronger propensity for growth in larger urban centres and coastal locations.

Opportunities identified as potential stimulants of population growth include the following:

- Port Pirie as a domicile for miners and related personnel;
- Growth in services to support the mining population;
- Growth in industries supporting mining activities;
- Expansion / introduction of major industries;
- Tree change / sea change migration to the area;
- Tourism;
- Affordable lifestyle attractions; and
- Strategic Government investment in services and / or infrastructure.

Having regard to the foregoing the following are identified as possible growth scenarios:

- Scenario 1 - modest growth in mining based activities and associated multiplier effects offsetting a decline in the permanent workforce at the Nyrstar smelter, resulting in population growth in the order of 0-1% per annum (assume 0.5% pa) (this is considered most likely); and
- Scenario 2 introduction of a major new industry with a short-medium term population stimulus, reverting to the modest growth scenario thereafter. (Assume 2.5% pa growth over 5 years in primary catchment and 0.5% pa growth thereafter; 0.5% pa growth in secondary catchment);
- Scenario 3 involving a continuation of the population changes experienced over the period 2006 to 2011, ie average annual growth of 0.2%.

Table 6 shows the population under these scenarios

Table 6: Port Pirie Population Growth Scenarios

Port Pirie Growth Scenarios			
Year	Scenario 1 (medium growth)	Scenario 2[29] (high growth)	Scenario 3 (low growth)
2011	17,333	17,333	17,333
2016	17,771	19,611	17,525
2021	18,219	20,106	17,720
2026	18,679	20,614	17,917
2031	19,151	21,134	18,115

Scenario 1 (medium growth) is considered to be the most likely scenario. This is based on the assumptions that the RDA, Council and the State Government will continue to actively seek and stimulate population growth within Port Pirie through regulation and investment that will target employment growth, combined with the realisation of some of the opportunities for industry sector growth and expansion being realised.

Based on the most likely population growth scenario and assuming the current age cohort proportion and workforce participation rates, the predicted workforce population in Port Pirie will be 7,737 in 2031. This is an increase in 893 prospective employees.

Port Pirie Workforce Population Scenarios			
Year	Scenario 1	Scenario 2	Scenario 3
2011	7,003	7,003	7,003
2016	7,179	7,923	7,080
2021	7,361	8,123	7,159
2026	7,547	8,328	7,238
2031	7,737	8,538	7,319

[29] Note, this assumes growth of 2.5% in first five years and reverting to 0.5 % thereafter. This is for convenience only and the 2.5% growth could occur anywhere in the period and this will alter the time series numbers.

9.2 Prospective Industries of Employment

Based on the most likely scenario for population growth, and likely areas of job expansion and contraction, Table 7 shows a predicted industry profile. This predicted profile assumes stability in the manufacturing industry and job growth in certain industries, particularly mining, health and community services and education.

Table 7: Projected Industry Profile Port Pirie Residents 2031

Industry of Employment	Total Jobs	%	Net Additional Jobs
Agriculture, Forestry and Fishing	271	3.5%	-146
Mining	294	3.8%	152
Manufacturing	1,215	15.7%	214
Electricity, Gas and Water Supply	77	1.0%	6
Construction	418	5.4%	62
Wholesale Trade	240	3.1%	41
Retail Trade	1,284	16.6%	239
Accommodation, Cafes and Restaurants	464	6.0%	177
Transport and Storage	193	2.5%	-23
Communication Services	31	0.4%	-16
Finance and Insurance	124	1.6%	17
Property and Business Services	402	5.2%	63
Government Administration and Defence	309	4.0%	89
Education	712	9.2%	207
Health and Community Services	1,222	15.8%	328
Cultural and Recreational Services	54	0.7%	-17
Personal and Other Services	279	3.6%	32
Non-Classifiable Economic Units	54	0.7%	-4
& Not stated	93	1.2%	3
Total	7,737	100.0%	1,425

From this table it can be seen that manufacturing, retail, health and community services and education will be important employment sections, sufficient zoned land needs to be available to accommodate these uses.

10. FUTURE EMPLOYMENT LAND REQUIREMENTS AND OPTIONS

As highlighted previously the amount and type of additional employment land required within Port Pirie will be a function of take up of the remaining capacity within existing zones and the types of businesses that will be attracted to Port Pirie.

This vacant industrially zoned land can accommodate a theoretical 1275 jobs[30].

The vacant commercially zoned land can accommodate a theoretical 420 jobs.[31]

Based upon take up rates and amounts of vacant land alone there would appear to be sufficient land zoned for commercial and industrial uses for the foreseeable future.

Notwithstanding, not all the vacant land is really available for development due to:

- Land being in private ownership and not on the market;
- Some land being subject to inundation, salinity and/or compaction/fill issues;
- Some land being subject to contamination;
- Accessibility or infrastructure constraints to some sites;
- Some land being located within specified clearance distances of power lines, the gas meter station and the like (this could restrict some land uses within these clearances);
- Interface management for particular land uses; and
- Fragmentation of holdings that may limit opportunities to amass sufficient size sites for larger land uses.

Accordingly it is considered necessary that additional land is zoned for employment purposes to ensure that allowance is made for that zoned land that is not actually available for development.

Land for industrial purposes will need to be identified having regard to business drivers such as proximity to labour, proximity to markets and availability of supporting infrastructure, as well as physical attributes such as being largely flat, well compacted, high levels of accessibility, low cost and proximity to other facilities such as ports, and suppliers.

Areas to the east of the City (see Appendix 5 Item 1) are well located with respect to transport generally and obviate the need for large vehicles to travel through the City other than to access the Port. In addition, the location of the existing industrial area provides locality synergies in the form of service provision, economies of scale and close location of complementary businesses.

Within this area however, land to the immediate east of the existing zone around Warnertown Road is low lying and subject to inundation. This land is also traversed by the high voltage power lines. This land was identified in the Draft Port Pirie Structure Plan as possible industrial areas. Use of this land for industrial land uses, however would require significant expenditure and is not considered to be viable (discounted).

[30] Based on a gross floor space yield of 20% and employment density of 1.5 jobs per 100m²
[31] Based on a gross floor space yield of 40% and employment density of 3 jobs per 100m²

The current Rural Living Zone adjacent the western boundary of the Bungama Industrial land (Appendix 5 item 6) is higher than the adjoining land to the east and could form a logical extension of the Bungama zone. It is the side of the City where services enter and has good access to the highway and reasonable access to the rail and port facilities.

Land to the immediate north, (see Appendix 5 Item 2) across Port Germein Road, abuts the Pirie River and is considered to have environmental attributes worthy of retention. In addition this land is also traversed by the high voltage power lines and as such some of this land will require clearances for specific land uses. Mineral storage and/or rail loop activities may be appropriate for this site.

This leaves land to the south (see Appendix 5 Item 3) of the existing industry zone. Bound by Steamtrain Road, Railway Tce and Afford Road this land is currently zoned Rural Residential. This land is relatively flat and elevated. The site is well located with respect to the railway line and is on the side of town from where major infrastructure services including gas, water and electricity are accessed. The site has good access to the main highway

This land is relatively large parcels and provides the opportunity to amass a large development site should a land use present. A zone expansion of some 66 hectares would be possible in this location. This land is however well positioned for expansion of the residential area and may be more valuable for this use long term.

Land to the west (see figure 4 (see Appendix 5 Item 4) of the town is not considered feasible for industrial development purposes given much of it is subject to inundation, the fact that services would need to be brought in across the city, and access with heavy vehicles would be via the town creating heavy vehicle interfaces on two sides of the CBD. Alternatively a bypass road would need to be constructed. (discount).

Additional commercial land uses can occur within the Regional Centre Zone. In particular, there would appear to be significant levels of underused land at first floor level.

The Draft Port Pirie Structure Plan identified land zoned Industry forming part of the current Edmond Road Industrial Zone as potentially suitable for rezoning to commercial. Given the relative attributes of this site for industry and recent activity in this area this is not considered to be feasible (discounted).

Notwithstanding there may be opportunities for additional commercial type land uses along the Warnertown Road in the current industrial zone, particularly if additional land was zoned for industry elsewhere.

Subject to further investigations commercial zoning to accommodate low scale commercial development e.g warehouses, and uses with a customer interface, similar to those establishing behind Centro, may be appropriate for some of the land currently in the Public Purposes zone directly north of the cemetery (Appendix 5 item A). This land is relatively well located within respect to the CBD via Goode Road and Memorial Drive and Moppett Road the Terrace and Mary Elie Street. It is envisaged that service vehicles would be small, such as vans and small fixed trucks. It is one of the only sites readily identifiable in proximity to the CBD; a criteria the real estate agents identify as important. This site may provide a longer term option.

Subject to further investigations, item 5 shown on Appendix 5, along Abattoir Rd currently zoned General Farming provides an opportunity for a large industrial use as an alternative to the SAMAG site. Additional infrastructure will be required, however it is located on the side of town from where services enter.

It is well located with respect to access to the airport and road network and has a relatively direct route to the Port. An extension of the rail system may be possible to further improve the connectivity of this site. On the whole it is well separated from other incompatible land uses. The site is in large land holdings currently.

Some height restrictions may apply in some areas due to its position relative to the sealed runway.

Within this area sites in excess of a hundred hectares could potentially be brought online.

The Mid North Region Plan recommends to increase industrial investment, focussing on the corridor between Port Pirie and Peterborough. This is clarified by the priority that indicates Council should plan for expansion of industrial land in towns along the corridor between Port Pirie and Peterborough. This is largely Gladstone and Jamestown.

Jamestown is also noted in this Plan to be earmarked as a service centre to support the RM Williams Highway.

For these reasons industry expansion should be compatible with tourism. Primary production and agriculture and associated value adding i.e food production/ manufacture and processing would be considered to be appropriate both in terms of industrial development and the tourism focus.

The zone currently allows for value adding activities but greater emphasis in the policy suite could be placed on this identifying opportunities to value add to all primary production.

11. DEVELOPMENT PLAN IMPLICATIONS

This study identifies a need to rezone some additional land for industrial and commercial purposes to safeguard supply for the future and ensure opportunities exist for land uses that create employment opportunities.

It is recommended that the following changes be made to the Development Plan:

- Consider rezoning land to the west of the current Bungama Industry Zone that is currently zoned for Rural Living for Industry/commercial type land uses;
- Consider rezoning land around Abattoir Rd currently zoned General Farming for industrial uses. Zoning could specifically contemplate large and major industries and/or processing activities;
- Consider reviewing the potential for the Public Purpose Zone located north of the cemetery for commercial land uses;
- Consider reviewing the potential for commercial land uses along the Warnertown Road within the existing Industry Zone;
- Consider adding some more specific policies to guide industrial development on the former SAMAG site in the General Farming and Rural Coastal Zones if it is intended to continue to contemplate the redevelopment of this site for industrial purposes into the future;
- Review policies pertaining to tourist accommodation to enable tourist accommodation to occur more widely across the City and in particular in proximity to areas of scenic appeal and other tourist attractions; and
- Review the policies pertaining to commercial and centre zones to ensure that they allow for an appropriate mix of uses to support Port Pirie as the ultimate service centre within the wider region.

12. BIBLIOGRAPHY

ABS, Census Data 2001, 2006 and 2011

ABS Journey to Work data

ABS customised data

Aurecon, Regional development Australia Yorke and Mid-North Infrastructure Audit, 2012 (Draft)

Department of Planning and Local Government, Mid North Region Plan, Government of South Australia, May 2011

Development Plan Port Pirie (RC), Consolidated 12 January 2012

Economic Development Board, Economic Statement – South Australia's Prospects for Growth, March 2009.

Government of South Australia, South Australia's Strategic Plan, 2011

Government of South Australia, Draft Port Pirie Structure Plan (Confidential), 2009

GPA Engineering, Upper Spencer Gulf Common Purpose Group, Increased Gas Supply to the Upper Spencer Gulf, April 2011

Personal Communications, Professionals Real Estate Port Pirie

Personal Communications, Wardell and Co, Real Estate port Pirie

Personal Communications, Elders Real Estate Port Pirie

Personal Communications, LJ Hooker Port Pirie

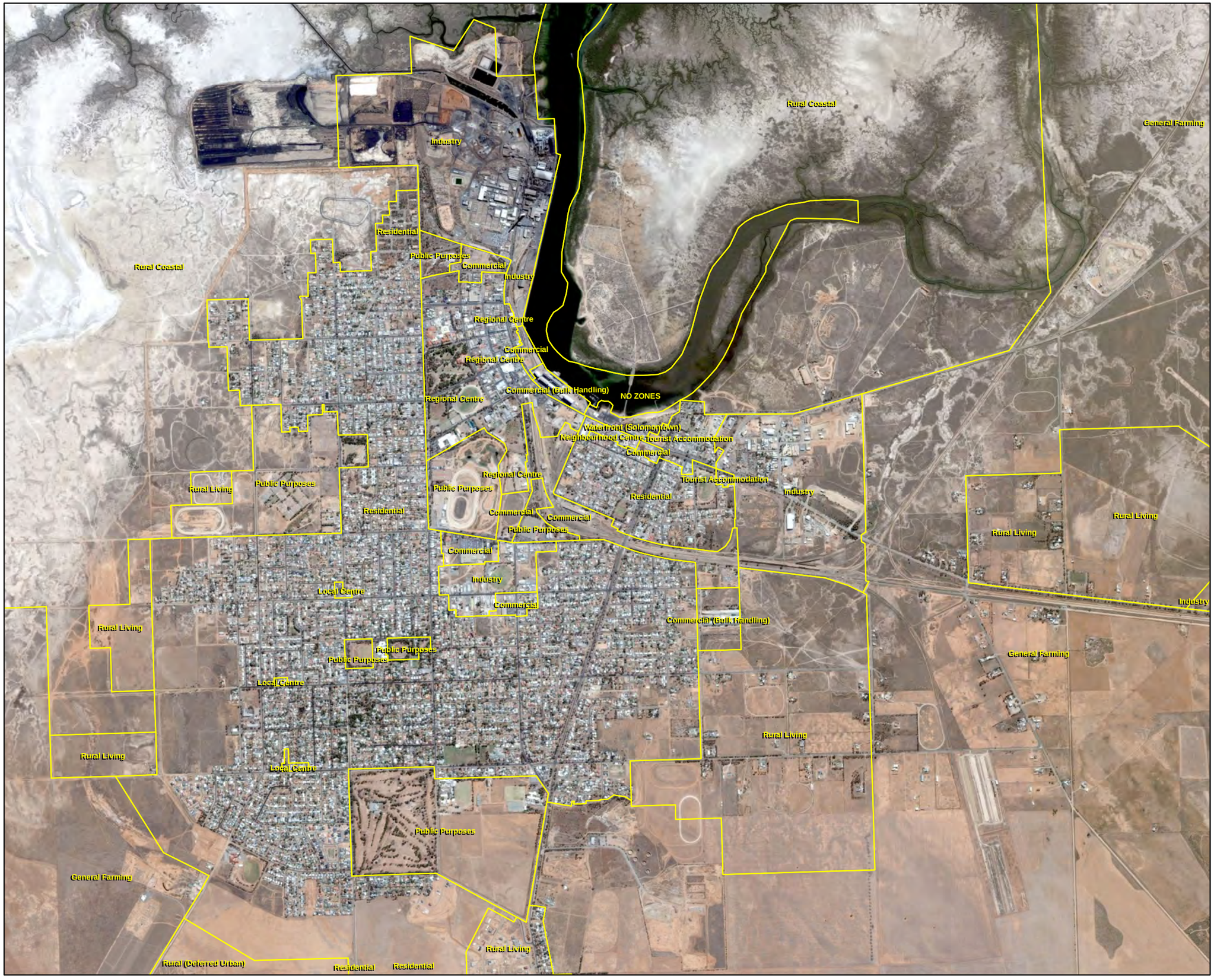
Port Pirie Regional Council, Port Pirie Strategic Plan 2010 - 2019

Regional Development Australia Yorke and Mid North, Mid North and Yorke Regional Road Map, Regional Development Australia, 2011

South Australian Centre for Economic Studies, Latest Appraisal of the South Australian Economy, June 2012

APPENDIX 1

INDUSTRY ZONES



PRELIMINARY

N

0 300 600 900 1,200 m

1:25,000 @ A3

CLIENT
REGIONAL CITY
OF PORT PIRIE

PROJECT
PORT PIRIE
RETAIL ANALYSIS

TITLE
TOWNSHIP
ZONING

PROJECT NO.	DATE CREATED
4093	11.05.12

4093_202_Zoning.mxd REV 1 > 11.05.12

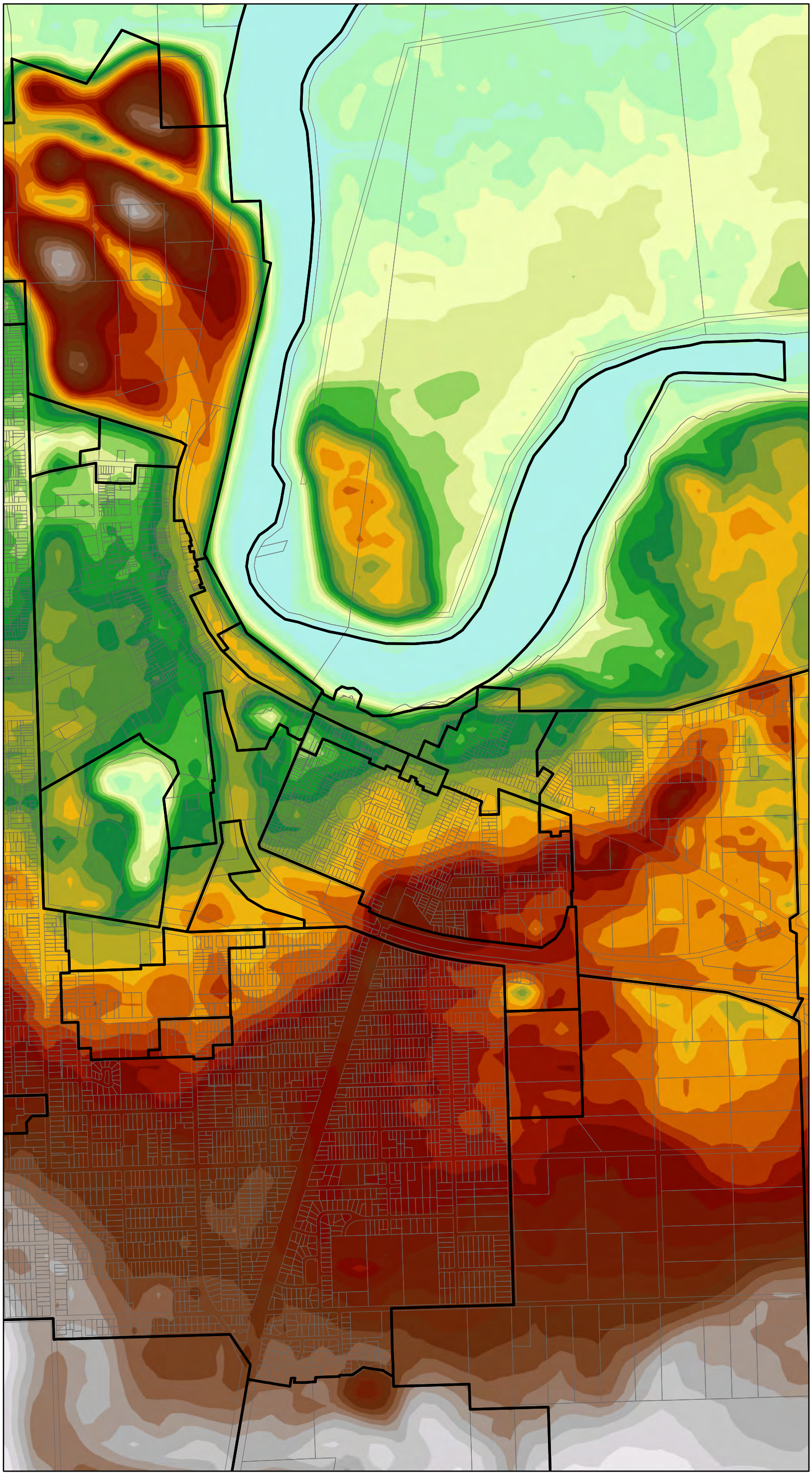
CONNOR HOLMES

25 VARDON AVENUE ADELAIDE SA 5000
T 08 8232 9088 F 08 8232 9099
CONNORHOLMES.COM.AU

CONNOR HOLMES

APPENDIX 2

RELATIVE LEVELS ACROSS KEY AREAS OF THE CITY



ELEVATION

- 0.0967 - 0.546
- 0.547 - 0.815
- 0.816 - 1.06
- 1.07 - 1.29
- 1.3 - 1.49
- 1.5 - 1.68
- 1.69 - 1.9
- 1.91 - 2.12
- 2.13 - 2.32
- 2.33 - 2.53
- 2.54 - 2.74
- 2.75 - 2.96
- 2.97 - 3.19
- 3.2 - 3.44
- 3.45 - 3.7
- 3.71 - 3.95
- 3.96 - 4.2
- 4.21 - 4.45
- 4.46 - 4.75
- 4.76 - 5.09
- 5.1 - 5.46
- 5.47 - 5.84
- 5.85 - 6.24
- 6.25 - 6.65
- 6.66 - 7.02
- 7.03 - 7.35
- 7.36 - 7.69
- 7.7 - 8.11
- 8.12 - 8.59
- 8.6 - 9.13
- 9.14 - 9.69
- 9.7 - 10.3

N

0 100 200 300 400 500 m

1:15,000 @ A3

CLIENT
REGIONAL CITY OF PORT PIRIE

PROJECT
PORT PIRIE RETAIL ANALYSIS

TITLE
ELEVATIONS

PROJECT NO. 4093

DATE CREATED 29.06.12

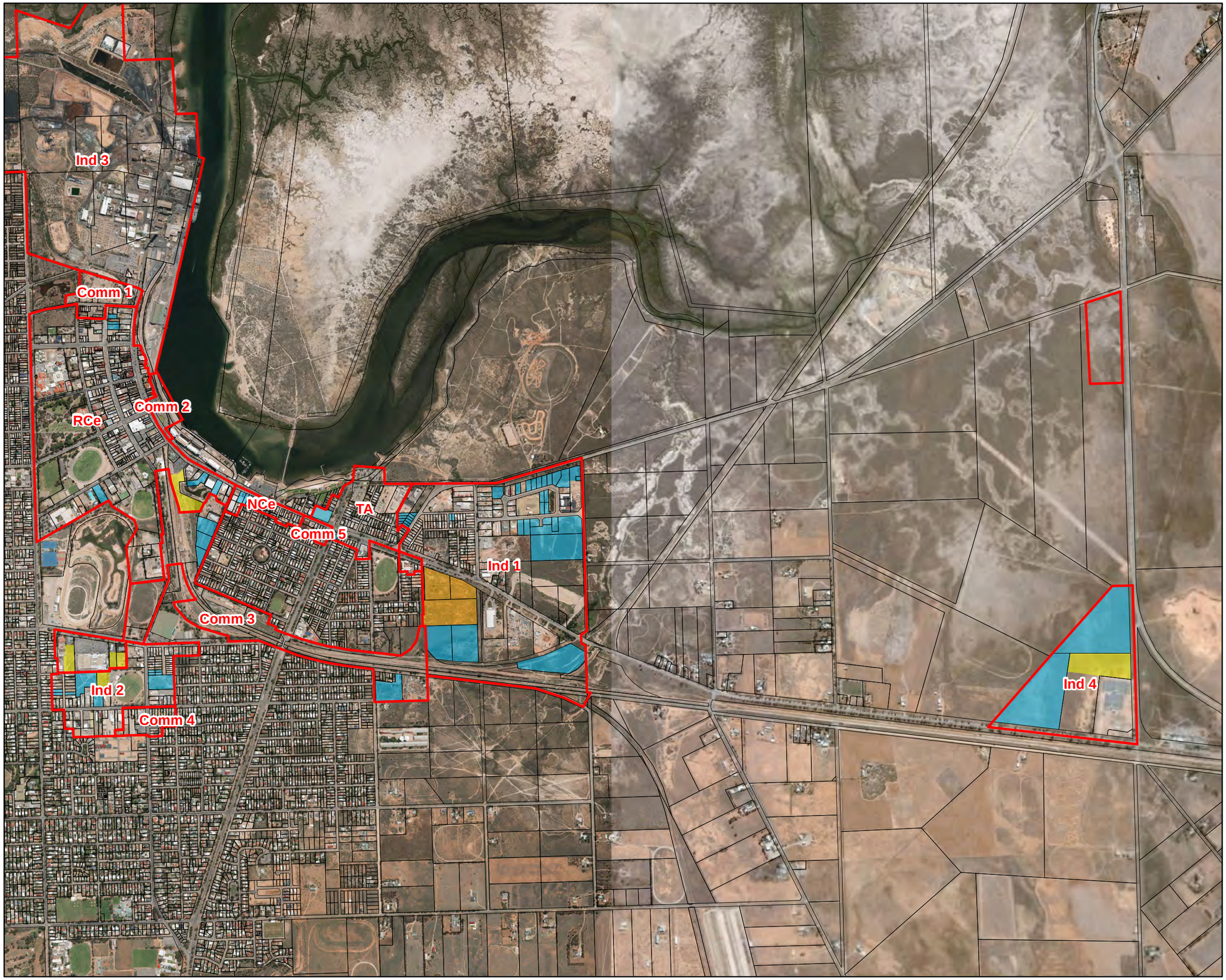
4093_204_Elevations.mxd
REV 1 > 29.06.12

CONNOR HOLMES
25 VARDON AVENUE ADELAIDE SA 5000
T 08 8232 9088 F 08 8232 9099
CONNORHOLMES.COM.AU

CONNOR HOLMES

APPENDIX 3

VACANT LAND ANALYSIS



LEGEND

ZONE BOUNDARY

VACANT LAND
489,586sqm

VACANT PART
82,308sqm

VACANT CONTAMINATED
78,018sqm

PRELIMINARY

N

0 200 400 600 800 m

1:20,000 @ A3

CLIENT
REGIONAL CITY OF PORT PIRIE

PROJECT
PORT PIRIE RETAIL ANALYSIS

TITLE
VACANT LAND ANALYSIS

PROJECT NO.	DATE CREATED
4093	30.05.12

4093_601_Vacant Land Calcs - Ind 2.mxd
REV 4 > 12.07.12

CONNOR HOLMES

25 VARDON AVENUE ADELAIDE SA 5000
T 08 8232 9088 F 08 8232 9099
CONNORHOLMES.COM.AU

APPENDIX 4

VACANT LAND BY STREET ADDRESS

KEY	TITLE ID	VAL.NO	AREA M2	LOCATION	
1	CT5945/146	3530788900	1011.57	LOT 29 PARHAM ST	PORT PIRIE STH
2	CT5945/147	3530788804	1000.41	LOT 30 PARHAM ST	PORT PIRIE STH
3	CT5692/744	3530795107	989.16	90 ESMOND ROAD	PORT PIRIE
4	CT5879/919	3530797751	17377.36	78/80 ESMOND RD	PORT PIRIE
5	CT5967/910	3530799052	6719.1	66-68 ESMOND RD	PORT PIRIE
6	CT5243/110	3530802004	544.47	21 WANDEARAH RD	PORT PIRIE
7	CT5243/110	3530802004	559.04	21 WANDEARAH RD	PORT PIRIE
8	CT5243/110	3530802004	565.39	21 WANDEARAH RD	PORT PIRIE
9	CT5243/110	3530802004	571.05	21 WANDEARAH RD	PORT PIRIE
10	CT5449/336	3530803509	11305.33	23 WANDEARAH RD	PORT PIRIE STH

PLAN 1 OF 3

PRELIMINARY

N

0 25 50 75 100 m

1:2,500 @ A3

CLIENT
REGIONAL CITY
OF PORT PIRIE

PROJECT
PORT PIRIE
RETAIL ANALYSIS

TITLE
VACANT LAND ANALYSIS
BY C.T. & STREET ADDRESS

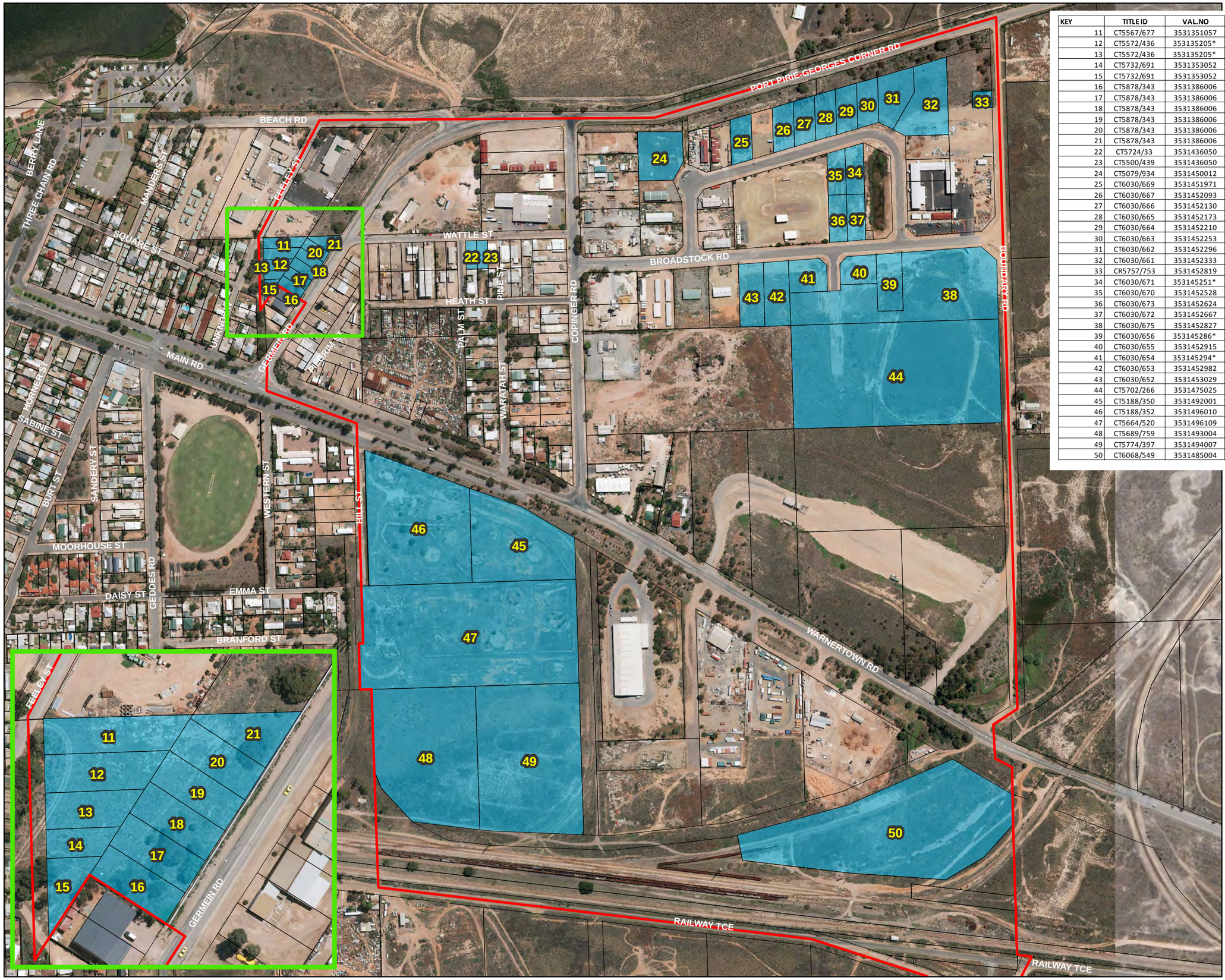
PROJECT NO. 4093

DATE CREATED 17.07.12

4093_601_Patricks List.mxd
REV 1 > 17.07.12

CONNOR HOLMES

25 VARDON AVENUE ADELAIDE SA 5000
T 08 8232 9088 F 08 8232 9099
CONNORHOLMES.COM.AU



KEY	TITLE ID	VAL.NO	AREA M2	LOCATION	
11	CT5567/677	3531351057	830.38	LOT 1 FEELEY ST	PORT PIRIE
12	CT5572/436	353135205*	724.94	LOT 2 FEELEY ST	PORT PIRIE
13	CT5572/436	353135205*	537.47	LOT 2 FEELEY ST	PORT PIRIE
14	CT5732/691	3531353052	316.27	LOT 4 FEELEY ST	PORT PIRIE
15	CT5732/691	3531353052	369.45	LOT 4 FEELEY ST	PORT PIRIE
16	CT5878/343	3531386006	554.09	LOT 10 GERMEIN RD	PORT PIRIE
17	CT5878/343	3531386006	572.44	LOT 10 GERMEIN RD	PORT PIRIE
18	CT5878/343	3531386006	560.34	LOT 10 GERMEIN RD	PORT PIRIE
19	CT5878/343	3531386006	558.38	LOT 10 GERMEIN RD	PORT PIRIE
20	CT5878/343	3531386006	578.23	LOT 10 GERMEIN RD	PORT PIRIE
21	CT5878/343	3531386006	541.95	LOT 10 GERMEIN RD	PORT PIRIE
22	CT5724/33	3531436050	603.18	22 WATTLE ST	PORT PIRIE
23	CT5500/439	3531436050	580.25	22 WATTLE ST	PORT PIRIE
24	CT5079/934	3531450012	3949.43	LOT 28 BARTSCH DR	PORT PIRIE
25	CT6030/669	3531451971	1807.84	LOT 68 BARTSCH DRV	PORT PIRIE
26	CT6030/667	3531452093	1808.22	LOT 66 BARTSCH DRV	PORT PIRIE
27	CT6030/666	3531452130	1808.54	LOT 65 BARTSCH DRV	PORT PIRIE
28	CT6030/665	3531452173	1807.76	LOT 64 BARTSCH DRV	PORT PIRIE
29	CT6030/664	3531452210	1807.58	LOT 63 BARTSCH DRV	PORT PIRIE
30	CT6030/663	3531452253	1807.65	LOT 62 BARTSCH DRV	PORT PIRIE
31	CT6030/662	3531452296	3052.27	LOT 61 BARTSCH DRV	PORT PIRIE
32	CT6030/661	3531452333	5580.94	LOT 60 BARTSCH DRV	PORT PIRIE
33	CR5757/753	3531452819	594.45	SEC 1267 BOUNDARY RD	SOLOMONTOWN
34	CT6030/671	353145251*	1673.98	LOT 83 BARTSCH DRV	PORT PIRIE
35	CT6030/670	3531452528	1517.04	LOT 82 BARTSCH DRV	PORT PIRIE
36	CT6030/673	3531452624	1611.04	LOT 87 BROADSTOCK RD	PORT PIRIE
37	CT6030/672	3531452667	1580.96	LOT 86 BROADSTOCK RD	PORT PIRIE
38	CT6030/675	3531452827	18954.38	LOT 205 BROADSTOCK RD	PORT PIRIE
39	CT6030/656	353145286*	2761.99	LOT 45 BROADSTOCK RD	PORT PIRIE
40	CT6030/655	3531452915	1906.32	LOT 44 BROADSTOCK RD	PORT PIRIE
41	CT6030/654	353145294*	2297.61	LOT 26 BROADSTOCK RD	PORT PIRIE
42	CT6030/653	3531452982	3083.43	LOT 25 BROADSTOCK RD	PORT PIRIE
43	CT6030/652	3531453029	2959.92	LOT 24 BROADSTOCK RD	PORT PIRIE
44	CT5702/266	3531475025	40468.86	BOUNDARY RD	SOLOMONTOWN
45	CT5188/350	3531492001	13837.3	PCE 108 WARNERTOWN RD	COONAMIA
46	CT5188/352	3531496010	22394.56	SEC 231 WARNERTOWN RD	COONAMIA
47	CT5664/520	3531496109	42225.54	SEC 93 HILL ST	PORT PIRIE
48	CT5689/759	3531493004	25187.81	PT.S228 HASLAM RD	PORT PIRIE
49	CT5774/397	3531494007	28855.46	PT.S.227 HASLAM RD	PORT PIRIE
50	CT6068/549	3531485004	36847.92	200 WARNERTOWN RD	COONAMIA

PLAN 2 OF 3

PRELIMINARY

N

0 50 100 150 200 m

1:5,000 @ A3

CLIENT
REGIONAL CITY
OF PORT PIRIE

PROJECT
PORT PIRIE
RETAIL ANALYSIS

TITLE
VACANT LAND ANALYSIS
BY C.T. & STREET ADDRESS

PROJECT NO. 4093

DATE CREATED 17.07.12

4093_601_Patricks List.mxd
REV 1 > 17.07.12

CONNOR HOLMES

25 VARDON AVENUE ADELAIDE SA 5000
T 08 8232 9088 F 08 8232 9099
CONNORHOLMES.COM.AU

KEY	TITLE ID	VAL.NO	AREA M2	LOCATION	
51	CT5978/764	3541424651	95298.07	LOT 53 PIRIE BLOCKS RD	PORT PIRIE
52	CT5978/765	3541424707	94925.94	LOT 54 WARNERTOWN RD	COONAMIA
53	CT5978/766	3541424758	100865.49	LOT 55 WARNERTOWN RD	COONAMIA

PLAN 3 OF 3

PRELIMINARY

N

0 50 100 150 200 m

1:5,000 @ A3

CLIENT
REGIONAL CITY
OF PORT PIRIE

PROJECT
PORT PIRIE
RETAIL ANALYSIS

TITLE
VACANT LAND ANALYSIS
BY C.T. & STREET ADDRESS

PROJECT NO. 4093

DATE CREATED 17.07.12

4093_601_Patricks List.mxd
REV 1 > 17.07.12

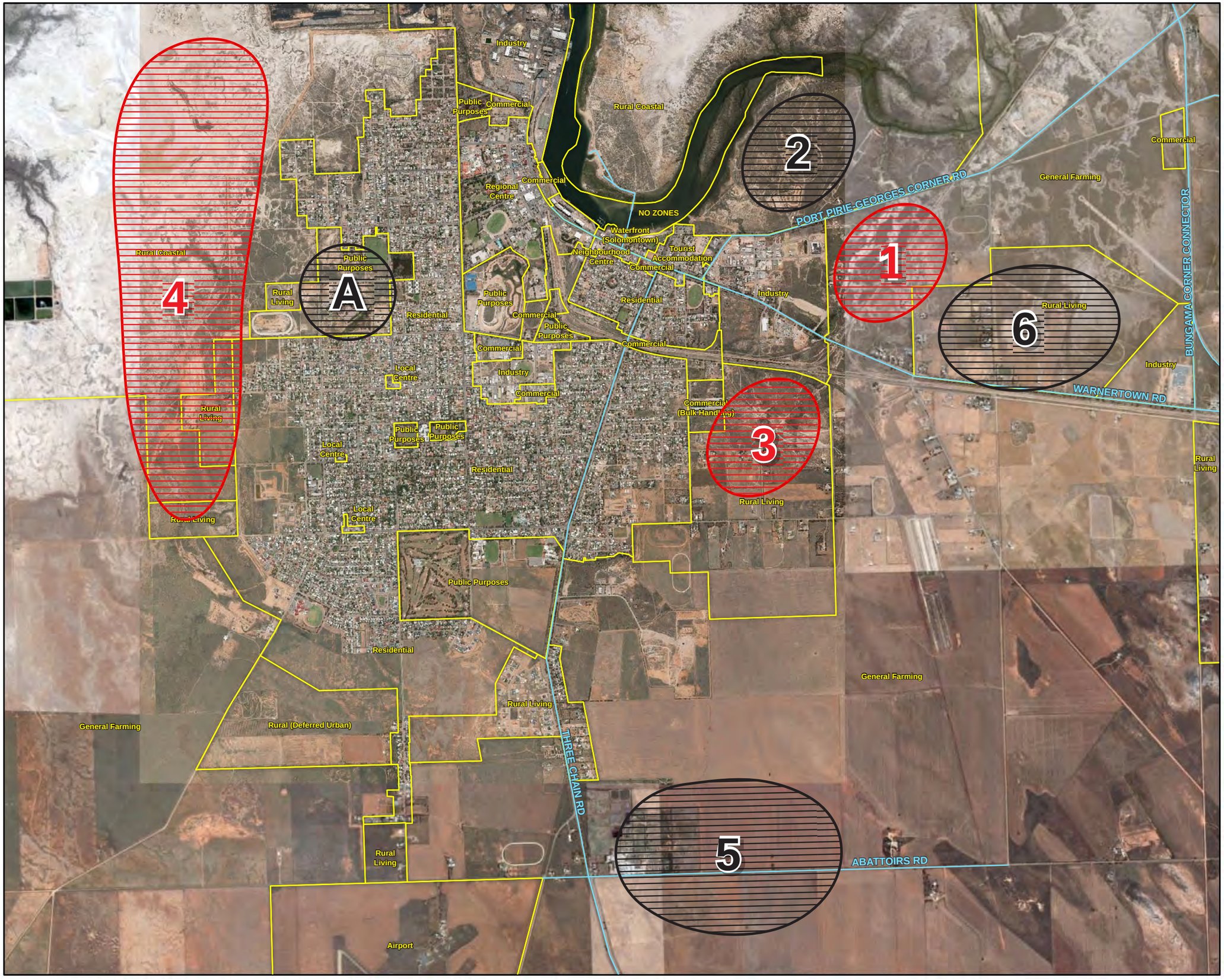
CONNOR HOLMES

25 VARDON AVENUE ADELAIDE SA 5000
T 08 8232 9088 F 08 8232 9099
CONNORHOLMES.COM.AU

CONNOR HOLMES

APPENDIX 5

FUTURE EMPLOYMENT LAND IDENTIFICATION



LEGEND

POTENTIAL FUTURE EXPANSION AREA

DISCOUNTED FUTURE EXPANSION AREA

PRELIMINARY

N

0 200 400 600 800m

1:30,000 @ A3

CLIENT
REGIONAL CITY OF PORT PIRIE

PROJECT
PORT PIRIE RETAIL ANALYSIS

TITLE
APPENDIX 4: INDUSTRY OPTIONS

PROJECT NO.	DATE CREATED
4093	10.07.12

4093_203_Industry Options.ai
REV 1 > 10.07.12

CONNOR HOLMES

25 VARDON AVENUE ADELAIDE SA 5000
T 08 8232 9088 F 08 8232 9099
CONNORHOLMES.COM.AU