



# **Ballina Shire Commercial & Industrial Land Demand Assessment**

Prepared for Ballina Shire Council

December 2014

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# INTRODUCTION

Lawrence Consulting was commissioned by Ballina Shire Council to undertake an assessment of future demand for commercial and industrial land in the Ballina Shire over a twenty-year timeframe (i.e. through to 2031), with the potential to provide interim targets (i.e. by 2021). The demand modelling forms part of a broader review of industrial and commercial land use in the shire being conducted by Council. This report is an update of a previous analysis completed in 2008 by Lawrence Consulting in conjunction with GeoLink Environmental Management and Design.

In order to assess the future demand for commercial and industrial land in Ballina Shire, Lawrence Consulting has employed an employment land forecasting model that uses inputs from the working population data set supplemented with population and employment growth projections and assumptions on floor space and development floor space ratio (FSR) averages.

The steps in the floor space/land demand modelling are as follows:

1. Establish the current employment profile for Ballina Shire, i.e. identify the number of employees by industry group (ANZSIC 2006), along with the three major sub-regions within the Shire, specifically the following statistical area 2 (SA2):
  - Ballina;
  - Lennox Head and Skennars Head; and
  - Ballina Region (or Balance of Shire, including the localities of Alstonville, Wollongbar and Wardell).
2. Undertake employment modelling using various inputs – including historical employment changes, population, gross regional product, State and National employment forecasts – to estimate growth in employed persons by industry to 2021 and 2031 for Ballina Shire and three sub-regions.
3. Multiply the forecast growth in employed persons by industry category by the floor space and land area standards per employee to estimate the demand for additional land.

The details of the employment land demand modelling are summarised in the following sections of this report.

# EMPLOYMENT FORECASTS

## Workforce Profile

The working population of Ballina Shire – i.e. the number of persons employed in the Shire (as distinct from the number of employed persons resident in the Shire) – was 13,742 as per the 2011 Census, representing an increase of 1,041 persons, or average annual growth of 1.6% since 2006. The following table contains an estimate of the number of employees in each industry represented in Ballina Shire in 2011, along with the respective industry shares of employment for each of the three sub-regions within Ballina Shire.

(Note: All employment and subsequent land demand modelling has been undertaken based on the 2006 ANZSIC industry classification.)

**Table 1: Employment by Industry (Working Population), Ballina Shire, 2011**

Industry	Ballina		Lennox Head – Skennars Head		Balance of Shire		Ballina Shire	
	Level	% of total	Level	% of total	Level	% of total	Level	% of total
Agriculture, forestry & fishing	42	0.5	12	0.9	644	15.0	698	5.1
Mining	17	0.2	0	0.0	23	0.5	40	0.3
Manufacturing	439	5.4	39	3.0	337	7.8	815	5.9
Electricity, gas, water & waste services	110	1.3	0	0.0	10	0.2	120	0.9
Construction	564	6.9	133	10.4	388	9.0	1,085	7.9
Wholesale trade	166	2.0	12	0.9	210	4.9	388	2.8
Retail trade	1,562	19.1	160	12.5	313	7.3	2,035	14.8
Accommodation & food services	875	10.7	208	16.2	256	6.0	1,339	9.7
Transport, postal & warehousing	238	2.9	9	0.7	156	3.6	403	2.9
Information media & telecommunications	106	1.3	23	1.8	29	0.7	158	1.1
Financial & insurance services	217	2.7	36	2.8	61	1.4	314	2.3
Rental, hiring & real estate services	165	2.0	46	3.6	61	1.4	272	2.0
Professional, scientific & technical services	387	4.7	137	10.7	218	5.1	742	5.4
Administrative & support services	191	2.3	37	2.9	80	1.9	308	2.2
Public administration & safety	579	7.1	20	1.6	174	4.0	773	5.6
Education & training	650	8.0	209	16.3	494	11.5	1,353	9.8
Health care & social assistance	1,365	16.7	113	8.8	606	14.1	2,084	15.2
Arts & recreation services	85	1.0	30	2.3	78	1.8	193	1.4
Other services	352	4.3	39	3.0	123	2.9	514	3.7
Unclassified	50	0.6	20	1.6	38	0.9	108	0.8
<b>Total</b>	<b>8,160</b>	<b>100.0</b>	<b>1,283</b>	<b>100.0</b>	<b>4,299</b>	<b>100.0</b>	<b>13,742</b>	<b>100.0</b>

Source: ABS 2011 Census

## Employment Forecasts

The table below provides the employment forecasts by industry for Ballina Shire for 2021 and 2031, whilst the tables on the following pages contain similar data for each sub-region within Ballina Shire. As previously noted, the growth projections are based on various inputs including historical employment changes, population, gross regional product, State and National employment forecasts. Table 2 shows that there is an expected increase in employment in Ballina Shire of 2,260 persons by 2021 and 4,591 persons by 2031.

**Table 2: Employment Forecasts by Industry, Ballina Shire, 2011-31**

Industry	Employed persons (no.)			Employment growth (no.)		Employment growth (%)	
	2011	2021	2031	2011-21	2011-31	2011-21	2011-31
Agriculture, forestry & fishing	698	598	447	-100	-251	-14.4%	-35.9%
Mining	40	36	43	-4	3	-8.9%	8.3%
Manufacturing	815	851	831	36	16	4.4%	2.0%
Electricity, gas, water & waste services	120	150	195	30	75	25.2%	62.7%
Construction	1,085	1,327	1,573	242	488	22.3%	45.0%
Wholesale trade	388	452	404	64	16	16.4%	4.1%
Retail trade	2,035	2,351	2,427	316	392	15.5%	19.2%
Accommodation & food services	1,339	1,636	1,985	297	646	22.2%	48.2%
Transport, postal & warehousing	403	414	454	11	51	2.7%	12.6%
Information media & telecommunications	158	155	172	-3	14	-1.7%	9.1%
Financial & insurance services	314	318	315	4	1	1.1%	0.2%
Rental, hiring & real estate services	272	328	329	56	57	20.6%	20.8%
Professional, scientific & technical services	742	880	1,000	138	258	18.7%	34.8%
Administrative & support services	308	396	471	88	163	28.7%	53.1%
Public administration & safety	773	835	885	62	112	8.0%	14.4%
Education & training	1,353	1,756	2,182	403	829	29.8%	61.3%
Health care & social assistance	2,084	2,766	3,850	682	1,766	32.7%	84.8%
Arts & recreation services	193	217	224	24	31	12.5%	16.0%
Other services	514	535	545	21	31	4.0%	6.0%
<b>Total</b>	<b>13,742</b>	<b>16,002</b>	<b>18,333</b>	<b>2,260</b>	<b>4,591</b>	<b>16.4%</b>	<b>33.4%</b>

Source: Lawrence Consulting

**Table 3: Employment Forecasts by Industry, Ballina, 2011-31**

Industry	Employed persons (no.)			Employment growth (no.)		Employment growth (%)	
	2011	2021	2031	2011-21	2011-31	2011-21	2011-31
Agriculture, forestry & fishing	42	28	17	-14	-25	-32.3%	-60.1%
Mining	17	10	8	-7	-9	-38.3%	-53.8%
Manufacturing	439	438	407	-1	-32	-0.3%	-7.2%
Electricity, gas, water & waste services	110	139	182	29	72	26.4%	65.5%
Construction	564	685	803	121	239	21.4%	42.4%
Wholesale trade	166	148	97	-18	-69	-10.9%	-41.5%
Retail trade	1,562	1,740	1,715	178	153	11.4%	9.8%
Accommodation & food services	875	996	1,113	121	238	13.8%	27.2%
Transport, postal & warehousing	238	242	262	4	24	1.7%	10.3%
Information media & telecommunications	106	95	93	-11	-13	-10.6%	-11.9%
Financial & insurance services	217	210	199	-7	-18	-3.0%	-8.2%
Rental, hiring & real estate services	165	171	142	6	-23	3.7%	-13.7%
Professional, scientific & technical services	387	423	425	36	38	9.4%	9.9%
Administrative & support services	191	255	307	64	116	33.4%	60.5%
Public administration & safety	579	567	530	-12	-49	-2.1%	-8.5%
Education & training	650	836	1,017	186	367	28.6%	56.4%
Health care & social assistance	1,365	1,754	2,355	389	990	28.5%	72.6%
Arts & recreation services	85	78	62	-7	-23	-8.6%	-27.2%
Other services	352	380	399	28	47	7.8%	13.4%
<b>Total</b>	<b>8,160</b>	<b>9,196</b>	<b>10,134</b>	<b>1,036</b>	<b>1,974</b>	<b>12.7%</b>	<b>24.2%</b>

Source: Lawrence Consulting

**Table 4: Employment Forecasts by Industry, Lennox Head-Skennars Head, 2011-31**

Industry	Employed persons (no.)			Employment growth (no.)		Employment growth (%)	
	2011	2021	2031	2011-21	2011-31	2011-21	2011-31
Agriculture, forestry & fishing	12	12	10	0	-2	-0.7%	-14.1%
Mining	0	0	0	0	0	n.a.	n.a.
Manufacturing	39	48	55	9	16	22.5%	40.0%
Electricity, gas, water & waste services	0	0	0	0	0	n.a.	n.a.
Construction	133	190	262	57	129	42.9%	97.3%
Wholesale trade	12	13	11	1	-1	9.7%	-11.3%
Retail trade	160	250	344	90	184	56.0%	115.2%
Accommodation & food services	208	309	449	101	241	48.3%	116.1%
Transport, postal & warehousing	9	11	14	2	5	21.5%	57.3%
Information media & telecommunications	23	31	46	8	23	34.1%	98.1%
Financial & insurance services	36	42	48	6	12	16.4%	32.2%
Rental, hiring & real estate services	46	75	97	29	51	62.4%	111.5%
Professional, scientific & technical services	137	233	363	96	226	69.9%	164.9%
Administrative & support services	37	62	93	25	56	67.4%	152.6%
Public administration & safety	20	23	25	3	5	13.9%	23.9%
Education & training	209	336	510	127	301	60.6%	144.0%
Health care & social assistance	113	184	312	71	199	62.5%	176.0%
Arts & recreation services	30	50	73	20	43	66.7%	142.1%
Other services	39	43	46	4	7	9.8%	17.6%
<b>Total</b>	<b>1,283</b>	<b>1,909</b>	<b>2,758</b>	<b>626</b>	<b>1,475</b>	<b>48.8%</b>	<b>115.0%</b>

Source: Lawrence Consulting

**Table 5: Employment Forecasts by Industry, Balance of Shire, 2011-31**

Industry	Employed persons (no.)			Employment growth (no.)		Employment growth (%)	
	2011	2021	2031	2011-21	2011-31	2011-21	2011-31
Agriculture, forestry & fishing	644	557	420	-87	-224	-13.5%	-34.8%
Mining	23	26	35	3	12	12.8%	54.3%
Manufacturing	337	365	369	28	32	8.4%	9.6%
Electricity, gas, water & waste services	10	11	13	1	3	12.7%	31.7%
Construction	388	452	508	64	120	16.4%	30.9%
Wholesale trade	210	290	296	80	86	38.3%	41.0%
Retail trade	313	361	367	48	54	15.2%	17.4%
Accommodation & food services	256	332	422	76	166	29.6%	65.0%
Transport, postal & warehousing	156	161	177	5	21	3.2%	13.5%
Information media & telecommunications	29	30	34	1	5	2.4%	15.5%
Financial & insurance services	61	65	68	4	7	6.8%	11.4%
Rental, hiring & real estate services	61	82	89	21	28	34.7%	45.5%
Professional, scientific & technical services	218	224	212	6	-6	2.9%	-2.7%
Administrative & support services	80	80	71	0	-9	-0.5%	-10.7%
Public administration & safety	174	245	330	71	156	41.0%	89.7%
Education & training	494	585	655	91	161	18.4%	32.6%
Health care & social assistance	606	828	1,183	222	577	36.7%	95.2%
Arts & recreation services	78	89	89	11	11	14.7%	14.6%
Other services	123	112	100	-11	-23	-8.7%	-18.7%
<b>Total</b>	<b>4,299</b>	<b>4,897</b>	<b>5,440</b>	<b>598</b>	<b>1,141</b>	<b>13.9%</b>	<b>26.6%</b>

Source: Lawrence Consulting



# COMMERCIAL & INDUSTRIAL LAND PROJECTIONS

## Employee Floor Space and Land Ratios

In order to derive gross floor space estimates for each commercial and industrial land use category and sector, indicative employment to floor space ratios are applied. The floor space figures are then converted into site area needs based on floor space to site area or land ratios. These ratios are from databases established by Lawrence Consulting based on previous floorspace survey results and other benchmarks for commercial and industrial areas across Australia. These ratios are adjusted for the local Ballina context based on research on the commercial and industrial market in regional New South Wales, as opposed to using metropolitan, statewide and national averages.

The following table shows the floor space and site area standards adopted for this analysis, grouped by various industry groups that have similar floor space requirements.

**Table 6: Employee Floor Space & Site Area Ratios**

Industry	Gross floor area per employee (sq m)	Gross land area per employee (sq m)	Assumed avg floor space ratio (FSR)	No. of employees per hectare
Agriculture, Forestry & Fishing	110	275	40%	36
Mining	110	275	40%	36
Manufacturing	120	400	30%	25
Electricity, gas, water & waste services	110	275	40%	36
Construction	110	275	40%	36
Wholesale trade	120	240	50%	42
Retail trade	50	100	50%	100
Accommodation & food services	60	120	50%	83
Transport, postal & warehousing	160	533	30%	19
Information media & telecommunications	110	275	40%	36
Financial & insurance services	30	60	50%	167
Rental, hiring & real estate services	30	60	50%	167
Professional, scientific & technical services	30	60	50%	167
Administrative & support services	30	60	50%	167
Public administration & safety	30	60	50%	167
Education & training	110	275	40%	36
Health care & social assistance	40	80	50%	125
Arts & recreation services	60	120	50%	83
Other services	50	100	50%	100

Source: Lawrence Consulting



## Floor Space Estimates

The employment to floor space ratios outlined in the previous section have been used to provide an estimate of gross floor space that may be added to Ballina Shire over the period 2011 to 2031, with interim figures provided for 2021, as shown in the following table.

**Table 7: Estimated Floor Space Growth (sq m), Ballina Shire, 2011-31**

Industry	Ballina Shire		Ballina		Lennox Head – Skennars Head		Balance of Shire	
	2011-21	2011-31	2011-21	2011-31	2011-21	2011-31	2011-21	2011-31
Agriculture, forestry & fishing	-11,044	-27,600	-1,493	-2,777	-9	-186	-9,542	-24,638
Mining	-392	367	-716	-1,007	0	0	324	1,374
Manufacturing	4,319	1,959	-137	-3,802	1,053	1,870	3,402	3,890
Electricity, gas, water & waste services	3,333	8,274	3,193	7,926	0	0	140	348
Construction	26,584	53,724	13,286	26,285	6,281	14,235	7,017	13,205
Wholesale trade	7,620	1,911	-2,171	-8,260	140	-163	9,651	10,334
Retail trade	15,781	19,575	8,920	7,637	4,481	9,218	2,381	2,720
Accommodation & food services	17,845	38,762	7,262	14,297	6,033	14,486	4,549	9,979
Transport, postal & warehousing	1,748	8,106	646	3,910	309	825	793	3,370
Information media & telecommunications	-293	1,585	-1,234	-1,393	864	2,482	77	495
Financial & insurance services	105	19	-197	-536	177	348	125	208
Rental, hiring & real estate services	1,681	1,696	185	-676	861	1,539	635	833
Professional, scientific & technical services	4,153	7,752	1,090	1,148	2,871	6,779	192	-175
Administrative & support services	2,652	4,902	1,916	3,466	748	1,693	-11	-257
Public administration & safety	1,860	3,346	-364	-1,481	84	143	2,140	4,684
Education & training	44,355	91,201	20,427	40,342	13,930	33,117	9,997	17,742
Health care & social assistance	27,300	70,650	15,577	39,620	2,827	7,955	8,895	23,075
Arts & recreation services	1,449	1,855	-438	-1,386	1,200	2,558	687	683
Other services	1,035	1,552	1,379	2,361	191	343	-536	-1,152
<b>Total</b>	<b>150,091</b>	<b>289,637</b>	<b>67,133</b>	<b>125,674</b>	<b>42,041</b>	<b>97,245</b>	<b>40,918</b>	<b>66,718</b>

Source: Lawrence Consulting

## Land Area Demand

Using the floor space estimate and site area benchmarks previously outlined, land area demand for each industry category has been calculated in terms of both square metres and hectares, the results of which are shown in the following tables.

**Table 8: Land Demand, Ballina Shire, 2011-31**

Industry	Land area increase (sq m)		Land area increase (ha)	
	2011-21	2011-31	2011-21	2011-31
Agriculture, forestry & fishing	-27,610	-69,001	-2.8	-6.9
Mining	-981	918	-0.1	0.1
Manufacturing	14,397	6,529	1.4	0.7
Electricity, gas, water & waste services	8,332	20,686	0.8	2.1
Construction	66,460	134,310	6.6	13.4
Wholesale trade	15,240	3,822	1.5	0.4
Retail trade	31,562	39,150	3.2	3.9
Accommodation & food services	35,690	77,524	3.6	7.8
Transport, postal & warehousing	5,828	27,019	0.6	2.7
Information media & telecommunications	-731	3,962	-0.1	0.4
Financial & insurance services	211	38	0.0	0.0
Rental, hiring & real estate services	3,362	3,392	0.3	0.3
Professional, scientific & technical services	8,306	15,505	0.8	1.6
Administrative & support services	5,305	9,805	0.5	1.0
Public administration & safety	3,719	6,693	0.4	0.7
Education & training	110,886	228,002	11.1	22.8
Health care & social assistance	54,600	141,299	5.5	14.1
Arts & recreation services	2,898	3,710	0.3	0.4
Other services	2,070	3,105	0.2	0.3
<b>Total</b>	<b>339,544</b>	<b>656,469</b>	<b>34.0</b>	<b>65.6</b>

Source: Lawrence Consulting

**Table 9: Land Demand, Ballina, 2011-31**

<b>Industry</b>	<b>Land area increase (sq m)</b>		<b>Land area increase (ha)</b>	
	<b>2011-21</b>	<b>2011-31</b>	<b>2011-21</b>	<b>2011-31</b>
Agriculture, forestry & fishing	-3,733	-6,942	-0.4	-0.7
Mining	-1,790	-2,517	-0.2	-0.3
Manufacturing	-455	-12,673	0.0	-1.3
Electricity, gas, water & waste services	7,982	19,816	0.8	2.0
Construction	33,215	65,712	3.3	6.6
Wholesale trade	-4,341	-16,521	-0.4	-1.7
Retail trade	17,839	15,274	1.8	1.5
Accommodation & food services	14,524	28,594	1.5	2.9
Transport, postal & warehousing	2,154	13,034	0.2	1.3
Information media & telecommunications	-3,084	-3,482	-0.3	-0.3
Financial & insurance services	-393	-1,073	0.0	-0.1
Rental, hiring & real estate services	371	-1,352	0.0	-0.1
Professional, scientific & technical services	2,180	2,296	0.2	0.2
Administrative & support services	3,831	6,932	0.4	0.7
Public administration & safety	-729	-2,963	-0.1	-0.3
Education & training	51,068	100,856	5.1	10.1
Health care & social assistance	31,155	79,240	3.1	7.9
Arts & recreation services	-876	-2,772	-0.1	-0.3
Other services	2,758	4,721	0.3	0.5
<b>Total</b>	<b>151,676</b>	<b>286,180</b>	<b>15.2</b>	<b>28.6</b>

Source: Lawrence Consulting

**Table 10: Land Demand, Lennox Head-Skennars Head, 2011-31**

<b>Industry</b>	<b>Land area increase (sq m)</b>		<b>Land area increase (ha)</b>	
	<b>2011-21</b>	<b>2011-31</b>	<b>2011-21</b>	<b>2011-31</b>
Agriculture, forestry & fishing	-22	-464	0.0	0.0
Mining	0	0	0.0	0.0
Manufacturing	3,510	6,234	0.4	0.6
Electricity, gas, water & waste services	0	0	0.0	0.0
Construction	15,702	35,586	1.6	3.6
Wholesale trade	279	-325	0.0	0.0
Retail trade	8,962	18,437	0.9	1.8
Accommodation & food services	12,067	28,973	1.2	2.9
Transport, postal & warehousing	1,030	2,750	0.1	0.3
Information media & telecommunications	2,159	6,206	0.2	0.6
Financial & insurance services	354	695	0.0	0.1
Rental, hiring & real estate services	1,722	3,078	0.2	0.3
Professional, scientific & technical services	5,742	13,559	0.6	1.4
Administrative & support services	1,496	3,387	0.1	0.3
Public administration & safety	167	287	0.0	0.0
Education & training	34,826	82,792	3.5	8.3
Health care & social assistance	5,654	15,911	0.6	1.6
Arts & recreation services	2,400	5,115	0.2	0.5
Other services	383	687	0.0	0.1
<b>Total</b>	<b>96,432</b>	<b>222,908</b>	<b>9.6</b>	<b>22.3</b>

Source: Lawrence Consulting

**Table 11: Land Demand, Balance of Shire, 2011-31**

<b>Industry</b>	<b>Land area increase (sq m)</b>		<b>Land area increase (ha)</b>	
	<b>2011-21</b>	<b>2011-31</b>	<b>2011-21</b>	<b>2011-31</b>
Agriculture, forestry & fishing	-23,855	-61,595	-2.4	-6.2
Mining	810	3,434	0.1	0.3
Manufacturing	11,342	12,968	1.1	1.3
Electricity, gas, water & waste services	350	871	0.0	0.1
Construction	17,542	33,012	1.8	3.3
Wholesale trade	19,303	20,668	1.9	2.1
Retail trade	4,762	5,439	0.5	0.5
Accommodation & food services	9,099	19,957	0.9	2.0
Transport, postal & warehousing	2,644	11,235	0.3	1.1
Information media & telecommunications	194	1,238	0.0	0.1
Financial & insurance services	250	416	0.0	0.0
Rental, hiring & real estate services	1,270	1,667	0.1	0.2
Professional, scientific & technical services	385	-350	0.0	0.0
Administrative & support services	-22	-514	0.0	-0.1
Public administration & safety	4,281	9,369	0.4	0.9
Education & training	24,992	44,354	2.5	4.4
Health care & social assistance	17,791	46,149	1.8	4.6
Arts & recreation services	1,373	1,366	0.1	0.1
Other services	-1,072	-2,303	-0.1	-0.2
<b>Total</b>	<b>91,436</b>	<b>147,381</b>	<b>9.1</b>	<b>14.7</b>

Source: Lawrence Consulting

## SUMMARY

The employment and land demand modelling conducted in this analysis considers changes to market conditions, social patterns, technology and infrastructure that will define the growth of Ballina Shire and the Northern Rivers region over the period to 2031. The land demands for employment uses over this period will be affected by a number of variables beyond population growth including:

- Dependency rate;
- Participation rate;
- Employment growth;
- Containment rate (i.e. proportions of the workforce not commuting);
- Market attraction of the region – through marketing of the region;
- Internal growth of local employers;
- Changes in size distribution of enterprises; and
- Shifts in distribution of business sector employment.

The projected demand for commercial and industrial land was based on the expected expansion of specific industry sectors that would be likely to locate within Ballina Shire. The projections define the four key employment sectors that will be the key determinant for land demands.

These include:

- Industrial land, which includes manufacturing; construction; wholesale trade; electricity, gas, water and waste services; and transport and storage;
- Commercial land, which includes retail, communications, restaurants, entertainment and personal services;
- Special use land for schools and other education institutions; and
- Other employment land, which includes Government use of commercial premises, health care and defence.

The likely increase in employment land that would be required for Ballina Shire to both 2021 and 2031 is identified by major land use type in the following table.

**Table 12: Employment Land Demand by Land Use Type, Ballina Shire, 2011-31**

Land use type	Additional employment area (ha)							
	Ballina Shire		Ballina		Lennox Head – Skennars Head		Balance of Shire	
	2011-21	2011-31	2011-21	2011-31	2011-21	2011-31	2011-21	2011-31
Industrial	10.9	19.3	3.7	6.7	2.1	4.4	5.2	8.2
Commercial	5.8	8.3	3.4	4.5	3.3	7.5	-0.9	-3.6
Special use – schools	11.1	22.8	5.1	10.1	3.5	8.3	2.5	4.4
Special use – other	6.1	15.2	3.0	7.4	0.8	2.1	2.3	5.7
<b>Total</b>	<b>34.0</b>	<b>65.6</b>	<b>15.2</b>	<b>28.6</b>	<b>9.6</b>	<b>22.3</b>	<b>9.1</b>	<b>14.7</b>

Source: Lawrence Consulting

This modelling is based on growth in employment numbers as a result of project population growth. There are numerous other external factors, such as major infrastructure upgrades, marketing strategies or the attraction of a major industry, which could also increase the demand for employment and industrial land in Ballina Shire.