Frankston City Industrial Precincts: Planning for Prosperity and Change

Discussion Paper

Prepared for
Frankston City Council

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Instructions.

Instructing Party	Frankston City Council	
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Our Reference	Charter Contact	Simon Micmacher
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Acknowledgement of Country	Frankston City Council, Charter Keck Cramer and Tract respectfully acknowledges that Frankston City Council is situated on the traditional land of the Boon Wurrung and Bunurong in this special place now known by its European name, Frankston. We recognise the contribution of all Aboriginal and Torres Strait Islander people to our community in the past, present and into the future.	
Front Cover	Source	Frankston City Council

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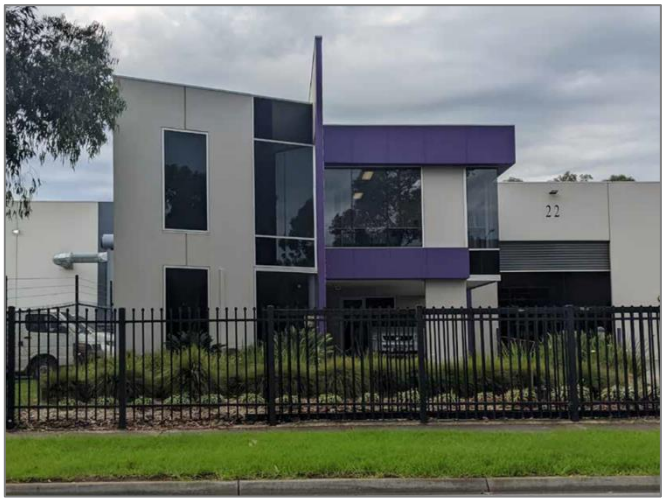
1. Frankston City Industrial Precincts - The Next Stage of Change and Prosperity

From its earliest days supporting local fishing industries to its post war plastic manufacturing, automotive and fabrication industries through to its current role in complex manufacturing, wholesaling and service enterprises, Frankston LGA has seen continued waves of change in its industrial uses and built form.

The next era of Frankston City's industrial evolution has commenced. Following the development of the municipality's final and last remaining industrial expansion area in Carrum Downs the municipality must now explore new and creative pathways to secure local employment growth while supporting the needs of a 21st century sustainable economy.

The future entails challenges and opportunities. New energy systems, climate change, the circular economy, the digitisation of the economy, Melbourne's population growth and the onshoring opportunities resulting from supply change disruption present an array of transformative opportunities and challenges for Melbourne's south. Industry policy and land use planning settings need to establish the conditions that help industry prepare for and respond to change.



Building on the Community Vision

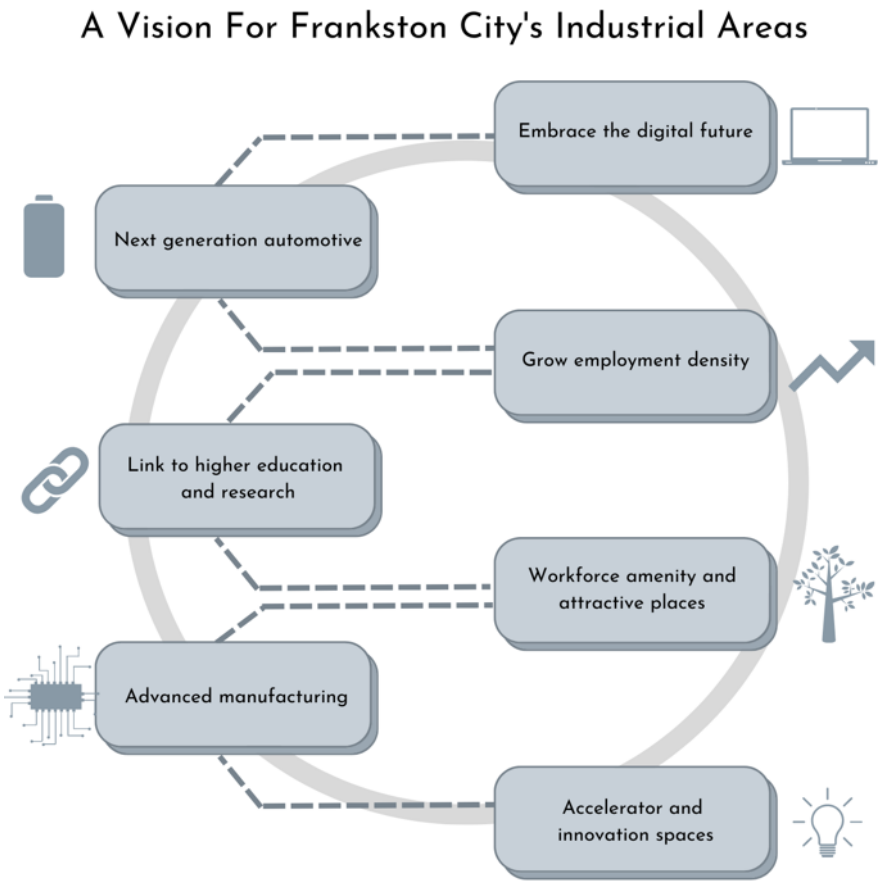
This discussion paper is one component in the delivery of Council's *Community Vision 2040*:

> *Frankston City 2040 is the place on the bay to learn, live, work and play in a vibrant, safe and culturally inclusive community. Our City is clean, green and environmentally responsible.*

In particular, the paper articulates industry and urban design initiatives that aim to deliver on Council's employment and education aspirations as detailed in theme 5 of *Community Vision 2040*:

> *Frankston City nurtures and attracts innovation and investment and is known for its education and business opportunities, including renewable energy, technology, hospitality, health and tourism.*

Drawing on the themes and aspirations of the *Community Vision 2040* the following sets out a draft vision for Frankston City's Industrial Precincts:



1.2. Where have we been? Previous Industrial work in Frankston City Council

This discussion paper represents the next stage in the ongoing planning of Frankston City's industrial areas guided by the ultimate aim of updating the *Frankston Industrial Strategy 2009 (SGS Economics and Planning*) to reflect the changing planning and economic conditions of the municipality's industrial precincts.

The 2009 strategy focused on supporting the delivery of Carrum Downs as the municipality's premier greenfield industrial area. The Strategy helped deliver a high amenity precinct in Carrum Downs that now supports substantial economic activity and employment.

More recently, the *Frankston City Council Industrial Land Strategy Review – Industrial Precincts Report 2019* confirmed that by 2019 the development of Carrum Downs was nearing completion and that the municipality now needed to focus on the presentation, physical form, connectivity and amenity of the municipality's older industrial areas.

This 2019 report complemented the *Frankston City Council Industrial Precincts Needs Analysis Report* (2018) in which Council surveyed businesses within its industrial precincts and identified high levels of industry commitment to Frankston City Council as a preferred location for business, with numerous businesses planning to expand and grow.

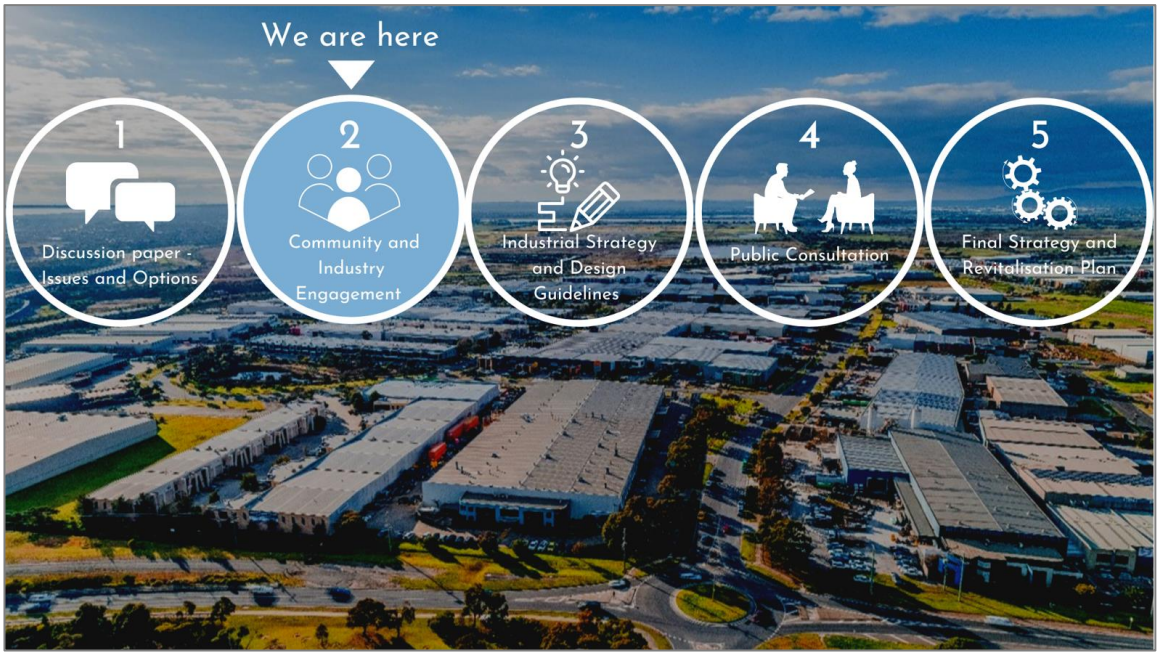
1.3. Where are we today? Frankston City Industrial Strategy 2022

This *Frankston City Industrial Precincts: Planning for Prosperity and Change Discussion Paper* forms a key stage along the journey towards developing the *Frankston City Council Industrial Strategy 2022*, *Urban Design Guidelines*, and *Frankston Revitalisation Plan* for Frankston City's industrial precincts.

Information gathered and documented in this *Discussion Paper* and associated consultation sets the scene for the development of the *Frankston City Industrial Strategy 2022* which will set out key commitments and initiatives that help Frankston City's industrial areas respond to changing economic conditions and opportunities. The development of the strategy will be supported by extensive community, Councillor and industry engagement.

One of the key goals of this paper is to canvass ideas, initiatives and areas of focus, and catalyse a forum for feedback and consultation with key stakeholders and the broader Frankston City community.

The development of the strategy will follow the steps outlined below. We are now at step 2.



1.4. Frankston LGA Economic Context

Given its land area and population, Frankston LGA makes an outsized contribution to employment and economic activity in Melbourne's southern region as follows:

- In FY 2020-21 the Frankston LGA economy generated an estimated $14.24 billion in economic output. For this period, Frankston LGA's output constituted 10.4% of economic output in Melbourne's Southern Region ($137.33 billion) and 1.8% of output generated in Metropolitan Melbourne ($795.47 billion).
- Manufacturing is the single greatest contributor to Frankston LGA's economic output 19.4% ($2,768 million) followed by construction 18.2% ($2,584 million). Each of these sectors contributes significantly to the economy of Melbourne's Southern Region.
- Health Care and Social Assistance (9,180 jobs) is Frankston LGA's leading sector of employment constituting 20.4% of local jobs. This is followed by retail (5,894 jobs) with 13.1% of local jobs and construction employment (5,483 jobs), 12.2% of local jobs.
- Health Care and Social Assistance leads the municipality in employment growth adding 3,520 jobs between 2006 and 2021. Construction is also a leading growth area adding 3,000 jobs over the same period. In contrast, Manufacturing and Wholesale Trade employment is in decline. Manufacturing employment declined by 688 jobs between 2006 and 2021. As will be discussed, manufacturing has become increasingly reliant on technology and skills rather than high volumes of labour.

More broadly:

- In FY2020-21, there were an estimated 44,930 jobs in Frankston LGA. This constituted 12.3% of jobs in Melbourne's Southern Region (estimated at 363,941 jobs), and 2.1% of the jobs in Metropolitan Melbourne (estimated at 2,134,014 jobs).
- In FY2020-21 Frankston LGA recorded a Gross Regional Product (GRP) per worker of $159,657, which was approximately 2.9% lower than Melbourne's Southern Region (of $164,455) and approximately 9.4% lower than Metropolitan Melbourne (of $176,295).

Figure 1: Frankston LGA - Key Economic Performance Indicators (FY 2020-21)

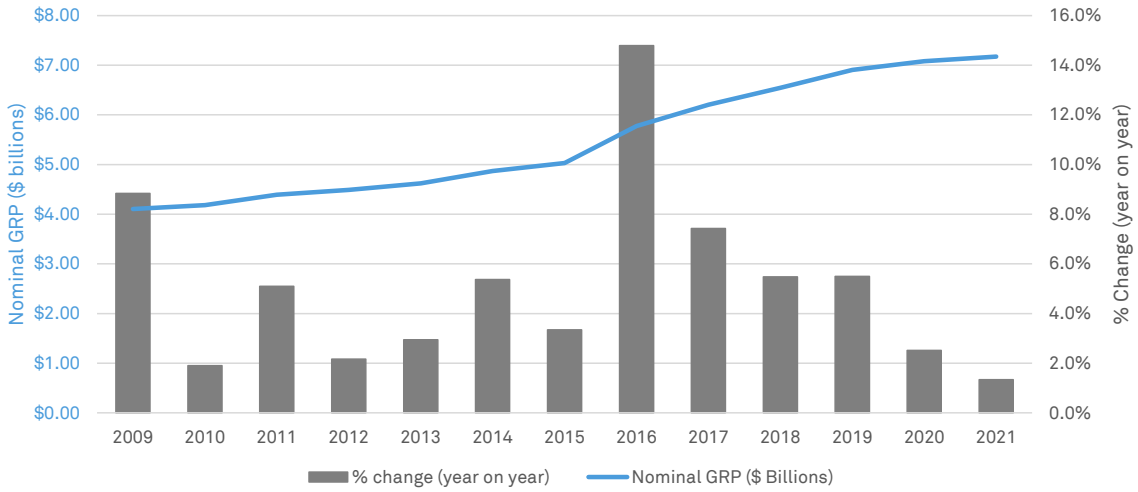
	Frankston LGA	Southern Region	Metropolitan Melbourne	Frankston LGA as % of Southern Region	Frankston LGA as % of Metropolitan Melbourne
Output ($ billions)	$14.24	$137.33	$795.47	10.4%	1.8%
GRP ($ billions)	$7.17	$59.85	$376.22	12.0%	1.9%
No. Jobs	44,934	363,941	2,134,014	12.3%	2.1%
GRP per worker ($)	$159,657	$164,455	$176,295	-	-
GRP per capita ($)	$53,480	$60,701	$83,879	-	-

Source: ABS; Remplan; Charter Keck Cramer

Frankston City Council has demonstrated continued economic growth over a sustained period, with nominal GRP growing at an average annual rate of 5.1% p.a. over the FY2009-FY2021 period.

The Covid-19 pandemic, however, resulted in slower local economic growth. The FY2020-FY2021 period resulted in lower than average economic growth of 2.5% in 2020 and 1.3% in 2021. Social distancing and lockdowns adversely impacted on the growth of the local economy over the past two years.

Figure 2: Frankston LGA - Economic Performance – Nominal GRP [FY2009 – FY2021]



Source: ABS; Remplan; Charter Keck Cramer

Frankston LGA's households and individuals have seen growth in median incomes while education levels and the number of professionals living in the municipality has also been growing. The forthcoming Census is likely to highlight further beneficial change in Frankston LGA's socio-economic characteristics.

Figure 3: Frankston LGA - Socio-Economic Change

Frankston LGA	2006	2011	2016
Median total personal income ($/weekly)	$459	$568	$660
Median total family income ($/weekly)	$1,124	$1,396	$1,649
Median total household income ($/weekly)	$956	$1,140	$1,331
Total Residents with Bachelor Degree or Higher Qualification	8,787	12,181	15,857
Bachelor Degree of Higher Qualification as a proportion of residents aged over 15	9.4%	11.9%	14.5%
Total Residents employed as Managers or Professionals	13,068	15,633	17,331
Managers & Professionals as proportion of total workforce	24.6%	26.4%	27.8%

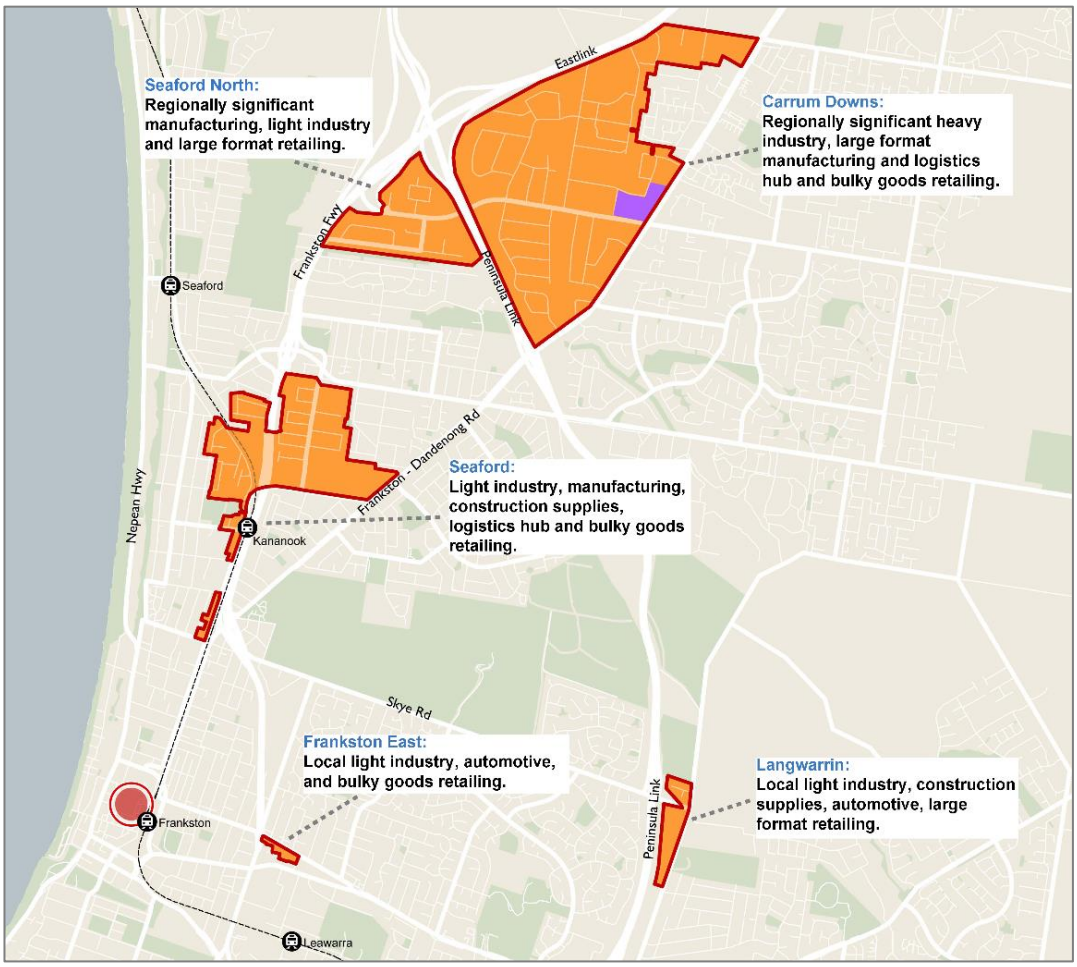
Source: ABS; Charter Keck Cramer

1.5. Frankston City's Industrial Precincts – Overview

The municipality's industrial precincts are a leading source of local and regional employment, private investment and economic activity. The municipality's industrial areas are thriving in terms of employment growth, land use demand and investment and are well positioned to harness the benefits of a changing economy.

The economic function and role of each of the municipality's industrial precinct differs in focus, format and breadth of uses. In the municipality's north east, the convergence of EastLink and the Peninsula Link Freeway has fostered the growth of a regionally significant specialised manufacturing and supplies sector, while closer to the coast, industrial precincts are nestled in amongst residential areas for whom they increasingly provide a range of hospitality, household and automotive services.

Figure 4: Frankston LGA – Industrial Precincts



Source: Charter Keck Cramer

The municipality's industrial precincts are a critical source of economic activity. Over the previous financial year (FY2020-21), the municipality's industrial precincts contributed $6.23 billion in economic output representing 43.8% of Frankston LGA's economic output.

The Carrum Downs Industrial Precinct constitutes approximately 28.1% of Frankston LGA's economic output, with $4.00 billion in output in the FY2020-21 while the Seaford Industrial Precinct constitutes approximately 9.5% of the municipality's economic output, with $1.36 billion (during the FY2020-21 period).

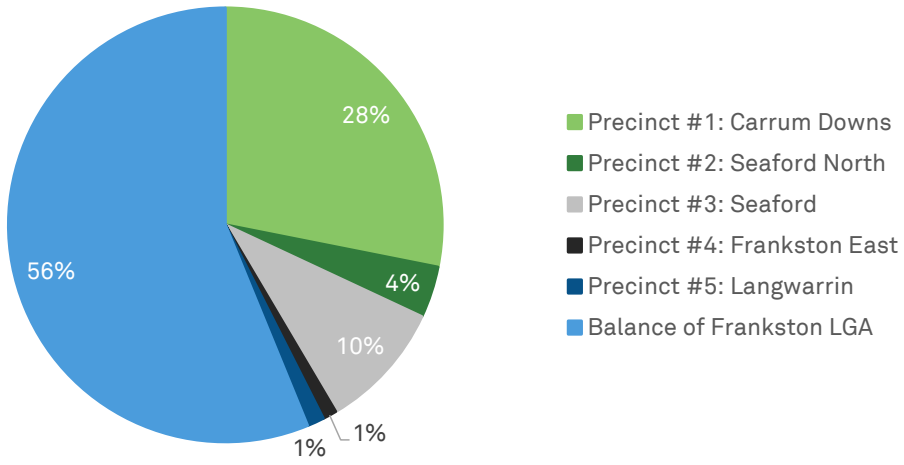
Figure 5: Output - Contribution of 5 Industrial Precincts to Frankston LGA (FY2020-21)

Precinct	Output ($ million; 2021)	Precinct Proportion (%) of Frankston LGA
Precinct #1: Carrum Downs	$4,003.59	28.1%
Precinct #2: Seaford North	$545.22	3.8%
Precinct #3: Seaford	$1,359.63	9.5%
Precinct #4: Frankston East	$148.05	1.0%
Precinct #5: Langwarrin	$180.47	1.3%
Sub-total (5 Precincts combined)	**$6,236.96**	**43.8%**
Balance of Frankston LGA	$8,000.46	56.2%
Frankston LGA	**14,237.424**	**100.0%**

Source: ABS; Remplan; Charter Keck Cramer

The economic contribution of each of the five Industrial Precinct's to Frankston LGA's output appears below. As can be seen below, both Langwarrin and Frankston East represent relatively small precinct's in economic output.

Figure 6: Output - Contribution of 5 Industrial Precincts to Frankston LGA (FY2020-21)



Source: ABS; Remplan; Charter Keck Cramer

Industrial precincts are also an important source of employment and employment growth. At FY2020-21, the five industrial precincts supported a combined total of 13,680 jobs, constituting 30.5% of Frankston LGA's total jobs. Employment is growing. During the 2011 – 2021 period, the net additional jobs created in industrial areas (2,646 jobs) accounted for 33.5% of the total jobs created in the Frankston LGA.

The Carrum Downs Industrial Precinct constitutes approximately 16.7% of Frankston LGA's jobs (with 7,500 jobs) while the Seaford Industrial Precinct constitutes approximately 7.9% of Frankston LGA's jobs, with 3,558 jobs (in 2021).

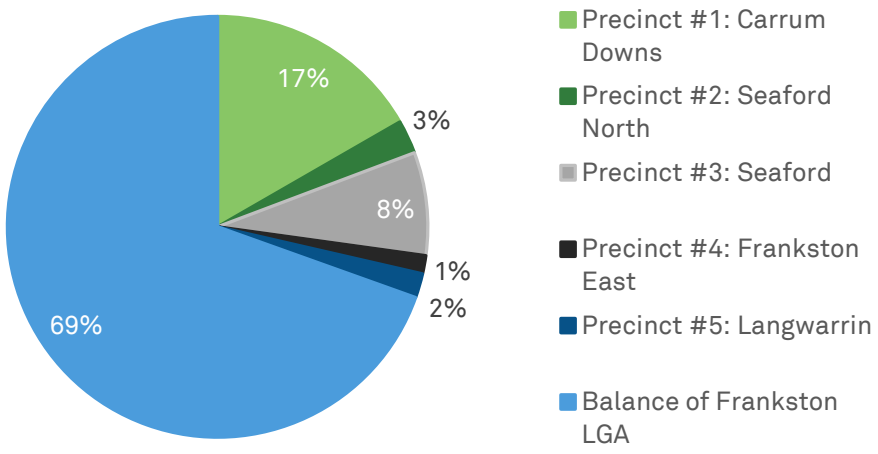
Figure 7: Jobs – Employment Precincts and Frankston LGA (2011 – 2021)

Precinct	2011	2016	2021	Net Change (2011-2021)	Precinct Jobs, as % of Precinct's Total Jobs (2021)
Precinct #1: Carrum Downs	4,695	6,920	7,500	2,805	16.7%
Precinct #2: Seaford North	1,116	1,144	1,160	44	2.6%
Precinct #3: Seaford	3,171	3,388	3,558	387	7.9%
Precinct #4: Frankston East	1,368	637	628	-740	1.4%
Precinct #5: Langwarrin	690	839	840	150	1.9%
Sub-total (5 Precincts combined)	**11,040**	**12,928**	**13,686**	**2,646**	**30.5%**
Balance of Frankston LGA	25,991	29,987	31,248	5,257	69.5%
Frankston LGA	**37,031**	**42,915**	**44,934**	**7,903**	**100.0%**

Source: ABS; Remplan; Charter Keck Cramer

The contribution of each of the five Industrial Precinct's to the total number of jobs in Frankston LGA appears below.

Figure 8: Share (%) of Jobs – Employment Precincts and Frankston LGA (2021)



Source: ABS; Remplan; Charter Keck Cramer

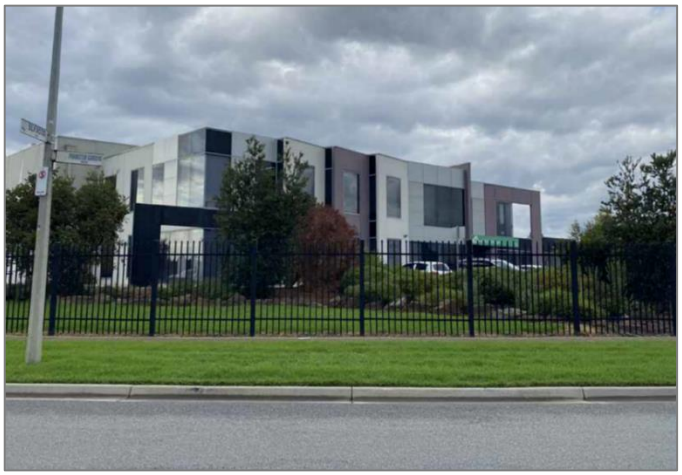
1.6. Summary of Key Issues and Initiatives

Section 3 of this discussion paper canvasses an array of issues and initiatives to help Frankston City respond to long term economic challenges and opportunities whilst also enhancing the amenity and sustainability of industrial areas. A summary of key trends and associated initiatives is provided as follows.

Global Trends

Major technological and environmental trends will compel change throughout Frankston LGA, with specific impacts on industrial uses as follows:

- Sustainable growth: The drive toward a low emissions sustainable future is set to transform economic systems. The last 3 years have seen the Victorian government progress a range of policy, funding and investment initiatives to transform energy, waste and recycling systems. The next phase of sustainable development will require the broader transformation of production, distribution and consumption systems through behavioural, infrastructure and process change at household, precinct and regional scales. As a major manufacturing and logistics centre in Melbourne, Frankston LGA will need to be a part of this change.
- Digitisation: Covid-19 accelerated the digitisation of the economy. Digital infrastructure and interaction is rapidly transforming consumption, transport and distribution systems whilst also transforming education and work practices. Digitisation is transforming industrial areas propelled by insatiable demand for eCommerce, warehousing and logistics space.
- Demand for skills: Economic activity increasingly relies on specialised skills and knowledge. The municipality's numerous manufacturers, construction, logistics and automotive sectors increasingly compete on the basis of unique skills and technological capability. Into the future, the municipality's substantive automotive sector, for instance, will require skills that are closer to those of an IT professional or software engineer than a traditional mechanic.
- Supply chain security: Global insecurities have highlighted national supply chain vulnerabilities. The Federal government is committed to identifying and addressing issues of national supply chain security. Moreover, there is increasing demand for reliable high quality locally manufacturing as well as businesses seeking augmented warehousing capacity as a way to smooth out up-stream supply chain disruptions and assist with local stock availability.



Local Trends

Local trends present both opportunities and potential constraints on industrial change and growth. These include:

- Industrial land market analysis shows Frankston LGA has reached nearly full capacity of industrial zoned land – there is now only 9.6 hectares of industrial zoned land (being 2.8% of total industrial land) available for future industrial development within the municipality.
- There is a shortage of vacant industrial land throughout Melbourne's Southern Region that is driving price increases and prompting new industrial development to move to the region's outer suburbs.
- There are significant opportunities to harness, encourage and leverage the rise of key 'future industry', including advanced manufacturing, digital economy and population serving sectors (including health, recreation, hospitality, education, arts, government, and social assistance sectors).
- The local automotive sector is set to undergo significant change as Australia's electric car fleet grows to 1.7 million vehicles by 2030.[1]
- The future of industrial growth will entail the redevelopment and renewal of aging sites and industrial precincts. In Seaford and Seaford North the process of renewal has commenced with a number of aged sites currently undergoing transformation.

Each of the above trends are further explored in Section 3 of this discussion paper.

[1] Federal Government, Future Fuels and Vehicles Strategy, 2021

Summary of Initiatives

This paper sets out a range of potential renewal, industry and place based initiatives to both help propel and guide the next decade of the municipality's industrial change. These initiatives are explored in depth in Section 3 of this paper.

Future Land Use

- **Initiative 1** – Facilitate Industrial Renewal
- **Initiative 2** – Explore Multi Storey Renewal
- **Initiative 3** – Logical Expansion

- **Initiative 4** – Adopt a Precinct Planning Approach

Future Industry

- **Initiative 5** – A Bold Vision for Kananook
- **Initiative 6** – Building Industry Networks and Connections

- **Initiative 7** – Supporting the Evolution of Seaford as Community Centre

Place Making

- **Initiative 8** – Enhance Streetscapes and Open Spaces

- **Initiative 9** – Provide safe and integrated active transport connections
- **Initiative 10** – Respond to Local Site Qualities
- **Initiative 11** – Encourage High Quality Built Form Outcomes
- **Initiative 12** – Support the delivery of ESD and Sustainable Initiatives
- **Initiative 13** – Improve the organisation of front setbacks
- **Initiative 14** – Improve safety and security
- **Initiative 15** – Improve the appearance of industrial sites

- **Initiative 16** – Provide a sensitive interface to residential uses.
- **Initiative 17** – Enhance worker amenity

2. Precinct Profiles

This section profiles the municipality's Industrial Precincts according to their socio-demographic, economic and urban design characteristics.

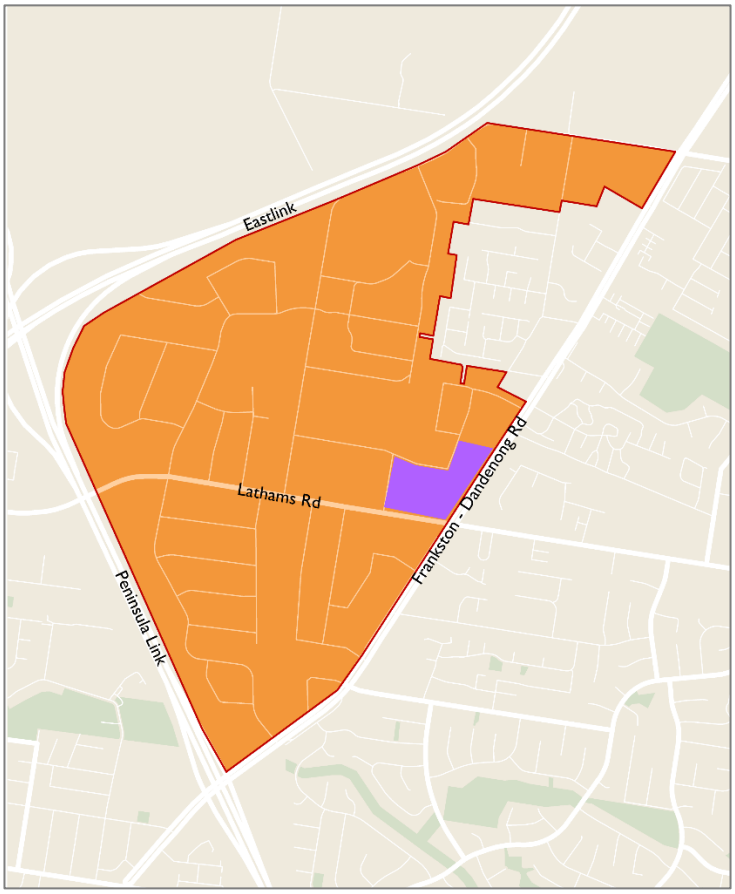
2.1. Carrum Downs

Carrum Downs is the municipality's most significant Industrial Precinct with its $4 billion in economic output (2021) constituting 28% of Frankston LGA's economic output (and nearly 3% of Melbourne's Southern Region's economic output). The 7,500 jobs in Carrum Downs constitute 17% of all jobs within Frankston LGA in 2021 (up from 13% in 2011).

Carrum Downs is a major manufacturing heartland with its $1.9 billion in economic output constituting 70% of Frankston LGA's manufacturing sector (and being more than 4% of Melbourne's Southern Region's manufacturing sector). The 2,089 construction industry workers located in Carrum Downs constitute 38% of all construction jobs in Frankston LGA. Meanwhile, Carrum Downs also includes a significant concentration of wholesale trade entities with its $222 million in economic output constituting 51% of Frankston LGA's wholesale trade sector (and being nearly 3% of Melbourne's Southern Region's wholesale trade sector).

Carrum Downs is located approximately 8km south west of the Greater Dandenong State Significant Industrial Precinct and benefits from major transportation linkages including Eastlink, Peninsula Link Freeway and Frankston-Dandenong Road.

Figure 9: Carrum Downs Industrial Precinct

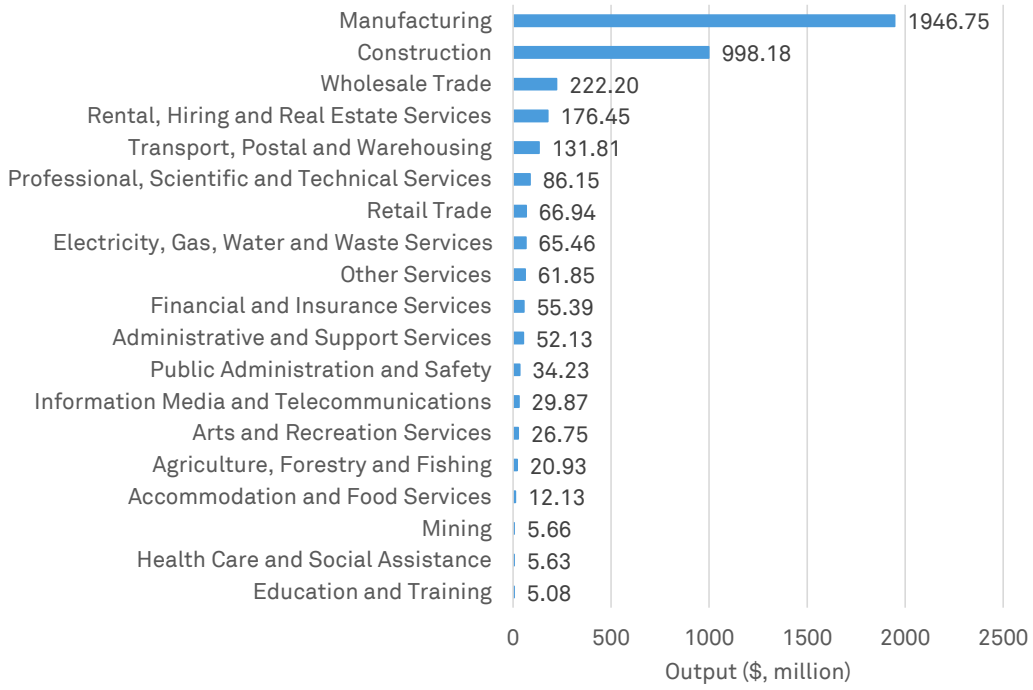


Source: Charter Keck Cramer

2.1.1. Carrum Downs Industrial Precinct – Output by Industry

The Carrum Downs Industrial Precinct generated $4.00 billion in economic output during the FY2020-21 period, constituting 28.1% of the total Frankston LGA economic output during this period. As demonstrated below, manufacturing constituted nearly half of the Precinct's economic output underlying the importance of this sector to Frankston LGA and its potential to grow and agglomerate new uses. As is also evident, construction is also a major economic component of this Precinct which benefits from the precinct's multi-directional accessibility and, in turn, the capacity to shuttle inputs across the metropolis.

Figure 10: Carrum Downs Industrial Precinct - Output [$ million, FY 2020-21]



Source: ABS; Remplan; Charter Keck Cramer

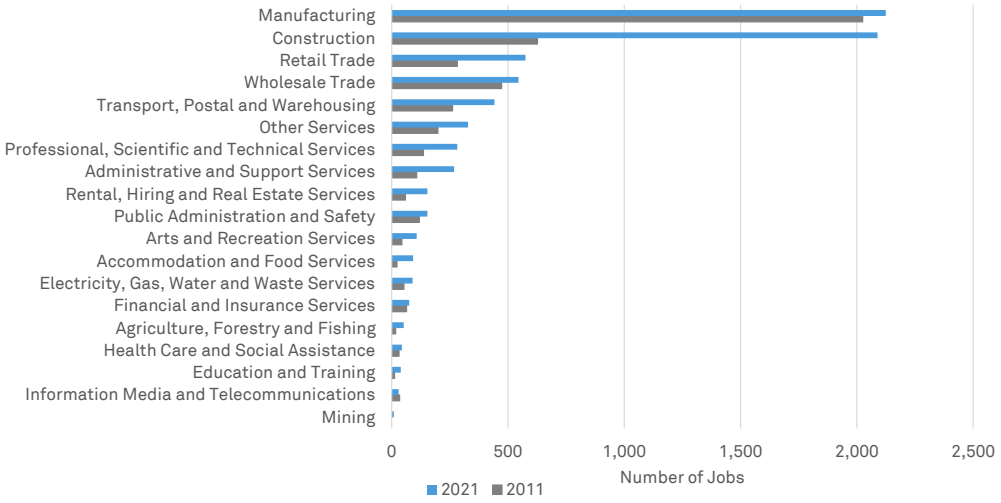
2.1.2. Employment Profile – By Industry

At 2021, Carrum Downs Industrial Precinct supported 7,500 jobs including:

- Manufacturing 2,124 jobs, 28.3% of total jobs
- Construction 2,089 jobs, 27.9% of total jobs
- Retail Trade 575 jobs, with 7.7% of total jobs

While manufacturing leads the precinct in output this is not the case when employment is considered. As manufacturing has become more specialised and technical its economic output increasingly relies on skilled labour rather than high volumes of labour.

Figure 11: Carrum Downs Industrial Precinct - Number of Jobs (2011, 2021)



Source: ABS; Remplan; Charter Keck Cramer

2.1.3. Economic Opportunities and Constraints

Economic Opportunities and Constraints:

- The Carrum Downs Industrial Precinct has experienced strong economic growth along with associated demand for and consumption of industrial land – this Precinct is now experiencing a severe lack of available industrial land, with the precinct approaching near full capacity.
- This Precinct supports a number of large and sophisticated manufacturing and logistics entities – many of which are operating in growth industries and are likely seeking to expand and grow. In the 2018 survey, 60% of Carrum Downs respondents planned to grow their operations. Given the lack of land availability, a number of enterprises may look to re-locate to alternative industrial precincts in Melbourne's south in order to expand their operations.
- In the long term, there is a need for Frankston LGA to encourage and/or facilitate 'in-fill' development, for example via multi-storey industrial development and the renewal of adjoining industrial precincts to standard that matches that of Carrum Downs.

Figure 12: Multi-Storey Industrial and Warehouse Development may become more common

Source: Charter Keck Cramer

2.1.4. Urban Design Opportunities and Constraints

Carrum Downs sets a benchmark for industrial development across Frankston LGA. It has a consistent character established by high quality, well maintained and contemporary architecture, and landscaping. The retention of trees, generous front setbacks and permeable front fencing also contribute to a sense of openness and helps to unify the streetscape and the broader precinct.

The key urban design opportunities for Carrum Downs focus on providing connected pedestrian and shared path connections, enhancing key streetscapes, major road and residential interfaces and improving the environmental qualities of creek corridors and the amenity of service and utility reserves.

Opportunities and Constraints

The following should be read in conjunction with the map on the adjoining page.

1. Opportunity to incorporate and enhance the service and utility reserve as an open space corridor. This could expand the treatment provided in the northern section, including the provision of a shared user path, seating and tree planting, with the potential to embellish key nodes.

2. Opportunity to enhance the character and amenity of Frankston-Dandenong Road by providing more substantial planting that responds to the scale of the road, that softens car parking areas and enhanced the amenity for pedestrian along the street edge. This should be complemented by a shared footpath that provides continuous access along the frontage and connects to nearby existing and planned trail networks.

3. Opportunity to create a shared path network that provides new connections along the service and utility reserve, Bobby Creek and the Eastlink interface, and links to other shared users' paths including Peninsula Link Trail and the proposed shared path along Lathams Road. This should include pedestrian crossings at key road intersections.

4. Opportunity to screen development that is visible from EastLink / Peninsula Link through roadside planting or landscaping within the road reserve. Built form visible from this interface will need to be high quality and represent the desired qualities of Carrum Downs.

5. Opportunity to provide landscaping treatments, where these have not been provided for along residential interfaces, to screen industrial built form.

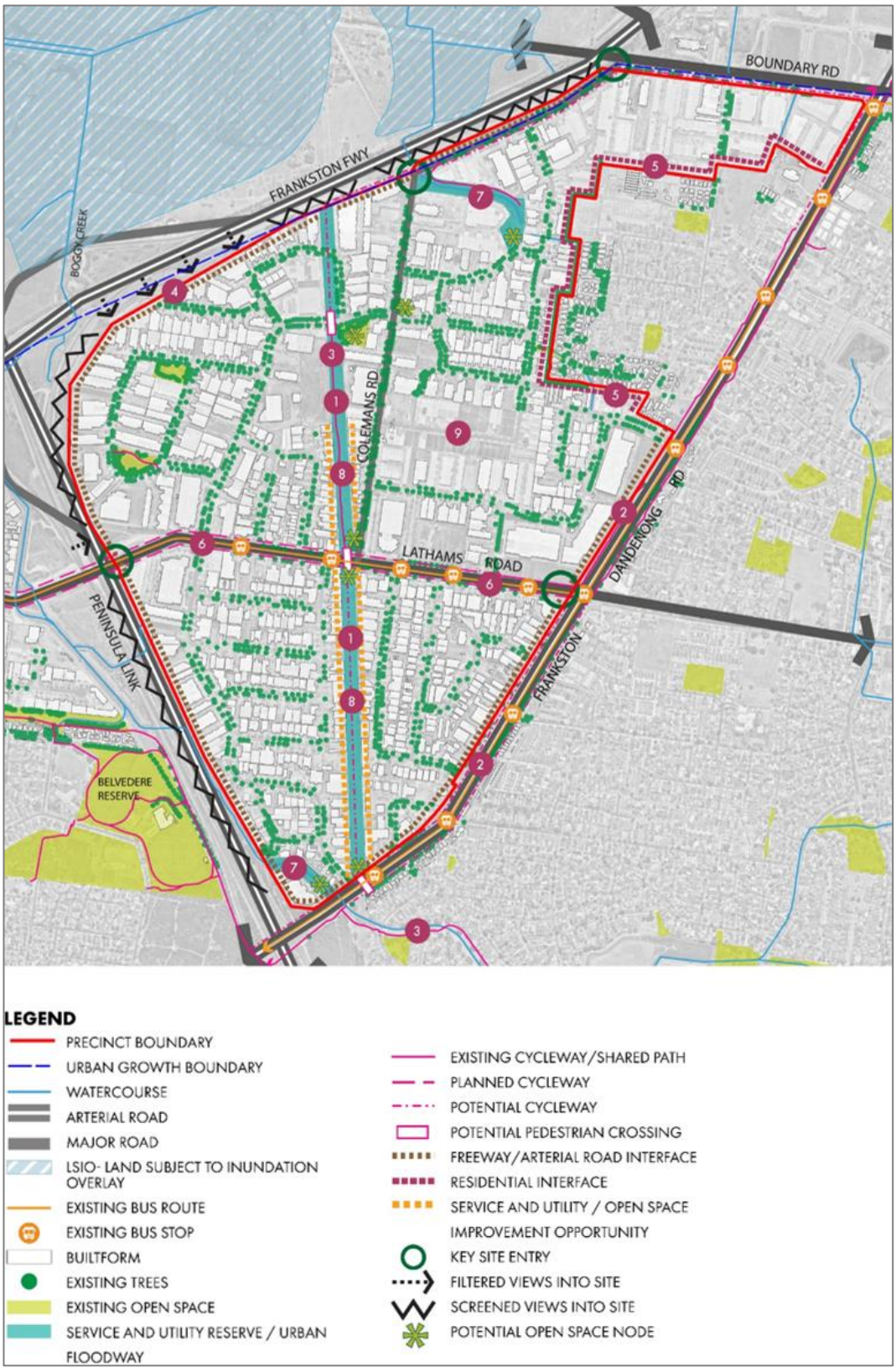
6. Opportunity to complement the upgrades along Lathams Road with additional street tree planting to improve pedestrian amenity, wayfinding and the appearance of this street.

7. Opportunity to enhance the environmental and biodiversity qualities of Bobby Creek and other drainage reserves within the precinct.

8. Investigate the opportunity to improve the interfaces between industrial lots and open spaces, including opportunities to enhance passive surveillance and additional connections.

9. Opportunity to complete local footpath connections to provide a continuous footpath network throughout the precinct.

Figure 13: Carrum Downs – Opportunities and Constraints



Source: Tract

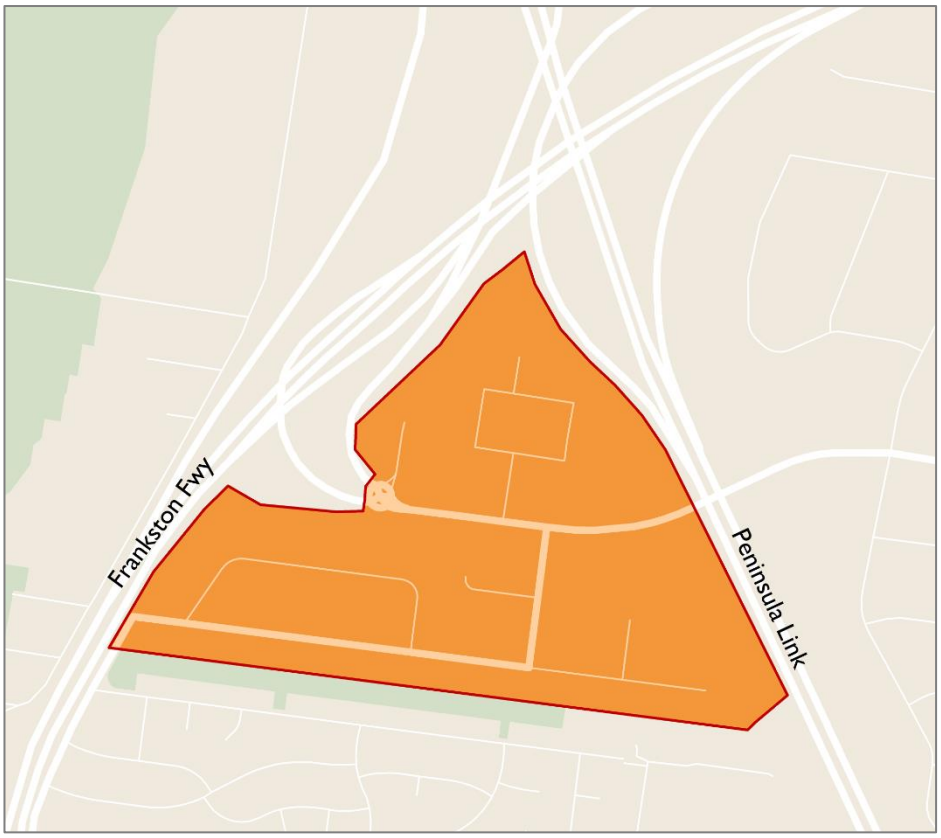
2.2. Seaford North

Seaford North is a large industrial precinct that in 2021 generated $545 million in economic output. This constituted nearly 4% of Frankston LGA's economic output and approximately 0.4% of Melbourne's Southern Region's economic output.

Seaford North is located approximately 9km south west of the Greater Dandenong State Significant Industrial Precinct and benefits from major transportation linkages including Eastlink, Peninsula Link Freeway and Frankston-Dandenong Road, as well as close proximity to passenger rail services. The precinct supports a wide range of industrial lot sizes especially large lot sizes which support large format operations.

The precinct supports 1,160 jobs which constituted 3% of all jobs within Frankston LGA in 2021 (holding a steady share, with 3% in 2011). Key industries include manufacturing, construction and rental, hiring and real estate services.

Figure 14: Seaford North Industrial Precinct



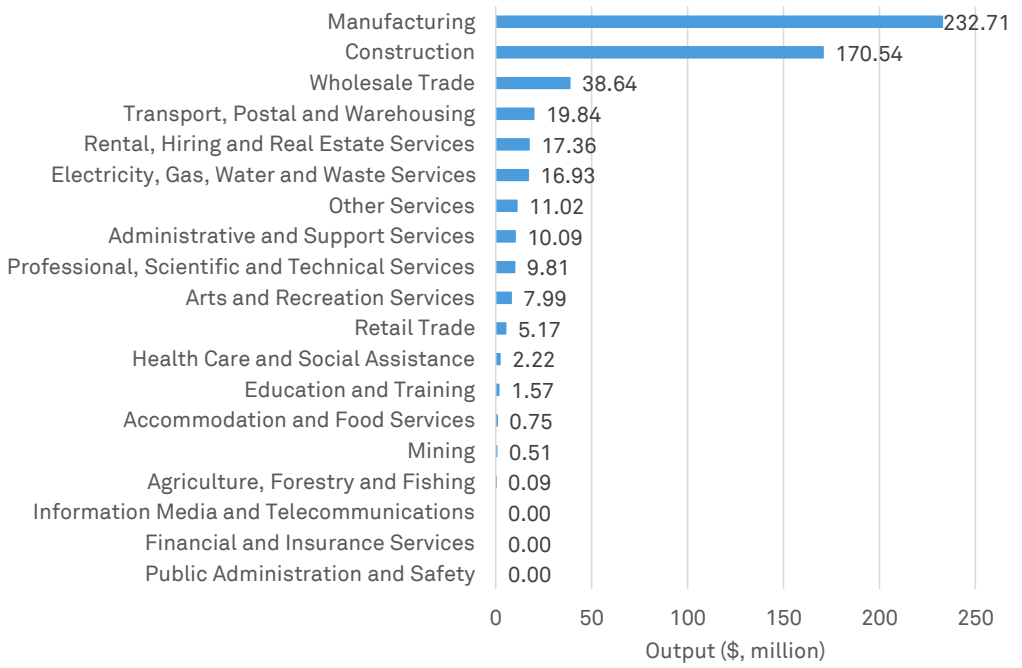
Source: Charter Keck Cramer

2.2.1. Seaford North Industrial Precinct – Output by Industry

The Seaford North Industrial Precinct generated $545.22 million in economic output during the FY2020-21 period, constituting 3.8% of the total Frankston LGA's economic output during that period.

Seaford North has a significant manufacturing base with its $232 million in economic output constituting more than 8% of Frankston LGA's manufacturing sector (and 0.5% of Melbourne's Southern Region's manufacturing sector). There are also numerous construction focused firms in the precinct which generated $170.5 million in economic output in 2021. As is evident below, service based industries steadily represent a growing share of economic activity in the precinct.

Figure 15: Seaford North Industrial Precinct - Output [$ million, FY 2020-21]



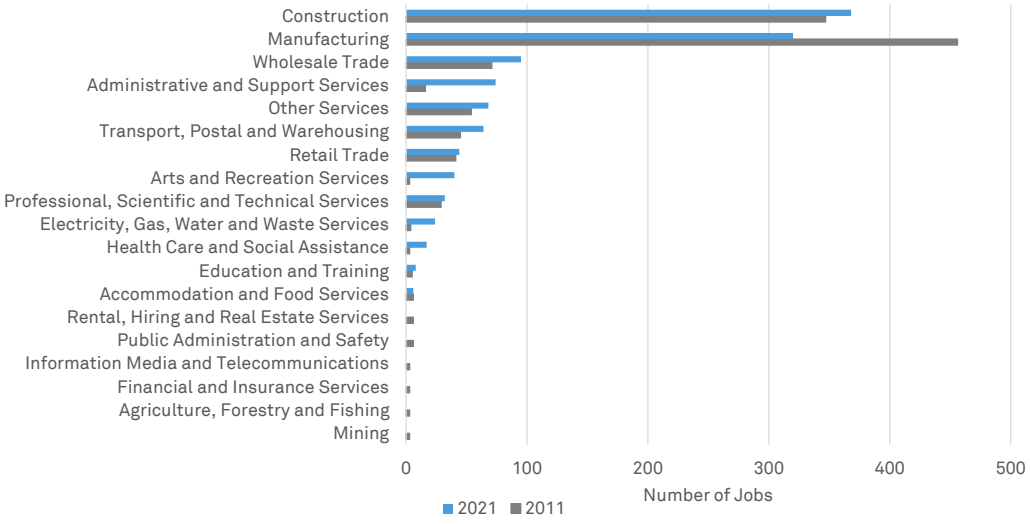
Source: ABS; Remplan; Charter Keck Cramer

2.2.2. Employment Profile – By Industry

The precinct supported 1,160 in 2021 which included:

- Construction 368 jobs, 31.7% of total jobs
- Manufacturing 320 jobs, 27.6% of total jobs
- Wholesale Trade 95 jobs, with 8.2% of total jobs

Figure 16: Seaford North Industrial Precinct - Number of Jobs [2011, 2021]



Source: ABS; Remplan; Charter Keck Cramer

2.2.3. Economic Opportunities and Constraints

Economic Opportunities and Constraints:

- The Seaford North Industrial Precinct has experienced strong economic growth along with associated demand for industrial land – this Precinct is currently close to capacity and is considered to be land-constrained (in terms of available industrial land).
- A number of larger manufacturing, packaging, building supplies and manufacturing entities are located within this precinct – some of which are likely seeking to grow and expand. To do so, some may seek to make more efficient use of their existing site while others may explore opportunities outside of the municipality.
- The precinct incorporates a range of built form from different eras including contemporary built form and aged older stock.
- The precinct is beginning to see renewal and a change of use.
- An opportunity exists for Frankston City Council to encourage and/or facilitate 'in-fill' development in Seaford North while also improving its amenity. The precinct benefits from substantive multi-directional accessibility and needs to be supported in its renewal and next phase of development.

2.2.4. Urban Design Opportunities and Constraints

Seaford North is an established industrial precinct that has a mixed and disjointed character that is influenced by its variety of setbacks, architectural styles and materials and finishes, as well as poor storage and waste management, and limited landscaping treatments throughout the precinct. Despite this, it's generally wide streetscapes and permeable front fencing contribute to sense of openness.

The key urban opportunities for Seaford North should focus on streetscapes enhancements to unify and improve the appearance of the precinct, improving amenities for pedestrians and cyclists, providing connected trail networks, in particular links to the Peninsula Link Trail, enhancing major road interfaces and improving the environmental qualities of creek corridors and the amenity of the urban floodway.

Opportunities and Constraints

The following should be read in conjunction with the map on the adjoining page.

1. Opportunity for a loop trail network that connects existing trails including the Peninsula Link Trail and planned Lathams Road shared path with new paths along Boggy Creek and the urban floodway. This should include pedestrian crossings at key road intersections.

2. Opportunity to improve the character and environmental qualities of the urban floodway.

3. Investigate the opportunity improve the interfaces between industrial lots and the urban floodway, including opportunities to enhance passive surveillance.

4. Opportunity to enhance the environmental and biodiversity qualities of Bobby Creek.

5. Investigate opportunities to provide additional connections between the industrial area and the Peninsula Link Trail and open space to the south.

6. Opportunity to complement the upgrades along Lathams Road with additional street tree planting to improve pedestrian amenity, wayfinding and the appearance of this street.

7. Opportunity to screen development that is visible from East Link / Peninsula Link through roadside planting or landscaping within the road reserve. Built form visible from this interface will need to be high quality and represent the desired qualities of Seaford.

8. Opportunity to provide landscaping treatments to screen industrial built form from residential streets.

9. Opportunity to increase canopy street tree planting along all internal streets to improve appearance of streetscapes and pedestrian amenity.

10. Opportunity to provide enhanced landscape treatments within the road reserve at key entries into the site, to improve the arrival experience and enhance wayfinding.

11. Opportunity to improve built form, overtime, as new development occurs, particularly along key entry roads.

Figure 17: Seaford North Opportunities and Constraints

Source: Tract

2.3. Seaford

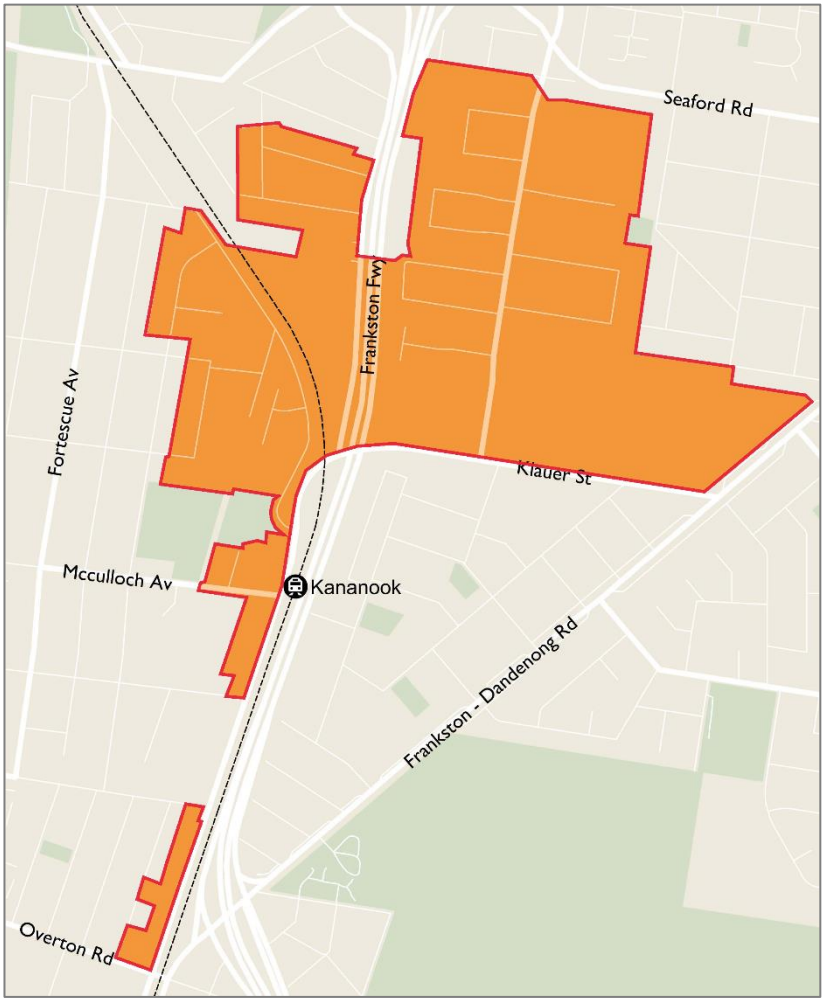
Seaford is an industrial precinct located to the north of Frankston Metropolitan Activity Centre. Its $1.4 billion in economic output (2021) constitutes nearly 10% of Frankston LGA's economic output (and approximately 1% of Melbourne's Southern Region's economic output). The 3,558 jobs in Seaford constitute 8% of all jobs within Frankston LGA in 2021 (down slightly from 9% in 2011), with key industries are Manufacturing, Construction and Rental, Hiring and Real Estate Services.

Seaford has a significant manufacturing base with its $385 million in economic output constituting 14% of Frankston LGA's manufacturing sector (and 1% of Melbourne's Southern Region's manufacturing sector). The 713 Construction industry workers located in Seaford constitute 13% of all Construction jobs in Frankston LGA.

Seaford is located approximately 10km south west of the State Significant Industrial Precinct in Dandenong and Dandenong South, and benefits from major transportation linkages including Eastlink, Peninsula Link Freeway and Frankston-Dandenong Road, as well as close proximity to passenger rail services. Lot sizes are smaller than in the nearby Carrum Downs and Seaford North precincts, with a clear transition during recent years towards urban services, bulky goods and automotive showroom uses emerging alongside traditional industrial uses.

The Seaford Industrial Precinct is set out in the figure below.

Figure 18: Seaford Industrial Precinct



Source: Charter Keck Cramer

2.3.1. Seaford Industrial Precinct – Output by Industry

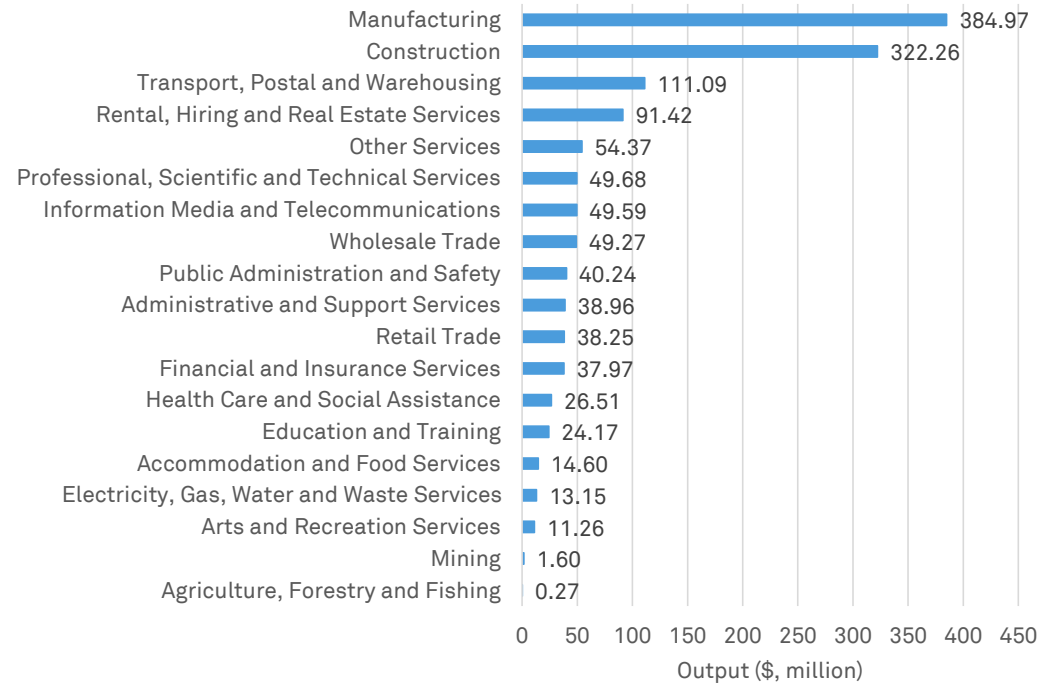
Seaford Industrial Precinct generated $1,359.63 million in economic output during the FY2020-21 period, constituting 9.5% of the total Frankston LGA's economic output during that period.

Key observations are as follows:

- The Seaford Industrial Precinct's Manufacturing sector generated $384.97 million in economic output, which constituted 28.3% of the Seaford Industrial Precinct's total economic output, and contributed 13.9% to the economic output generated by Frankston LGA's Manufacturing industry.
- The Seaford Industrial Precinct's Construction sector generated $322.26 million in economic output, which constituted 23.7% of the Seaford Industrial Precinct's total economic output, and contributed 12.5% of the economic output generated by Frankston LGA's Construction industry.
- The Seaford Industrial Precinct's Transport, Postal and Warehousing sector generated $111.09 million in economic output, which constituted 8.2% of the Seaford Industrial Precinct's total economic output, and contributed 28.6% of the economic output generated by Frankston LGA's Transport, Postal and Warehousing industry.

The constituent components and profile are set out below.

Figure 19: Seaford Industrial Precinct - Output ($ million, FY 2020-21)



Source: ABS; Remplan; Charter Keck Cramer

2.3.2. Employment Profile – by Industry

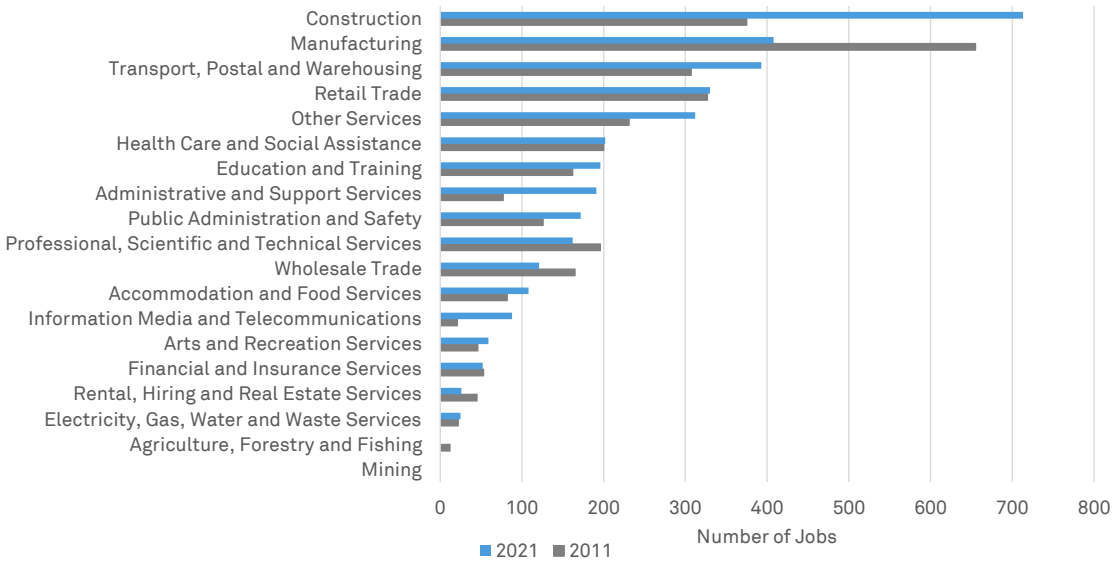
The employment profile demonstrating the number of jobs across industries for the Seaford Industrial Precinct is set out below.

Total jobs in Seaford Industrial Precinct shown for industry of employment for 2006 and 2021 appears below. As of 2021, the highest proportion of the total 3,558 jobs, were constituted by:

- Construction (713 jobs), with 20.0% of total jobs
- Manufacturing (408 jobs), with 11.5% of total jobs
- Transport, Postal and Warehousing (393 jobs), with 11.0% of total jobs

The figure below illustrates each industry, ranked by greatest number of jobs (in 2021).

Figure 20: Seaford Industrial Precinct - Number of Jobs (2011, 2021)



Source: ABS; Remplan; Charter Keck Cramer

2.3.3. Economic Opportunities and Constraints

Economic Opportunities and Constraints:

- The Seaford Industrial Precinct has experienced both healthy economic activity for traditional industrial uses as well as increasing economic activity for urban services (such as fitness gyms) and bulky goods retail (such as plumbing supplies).
- The Seaford Industrial Precinct has experienced significant growth in key industries such as Construction and Transport, Postal & Warehousing, while simultaneously experiencing a significant decline in manufacturing, further reinforcing the notion that this Precinct is experiencing a significant transition in its economic composition.
- There has been increasing interest from property developers seeking to develop retail and bulky goods retail uses in key sites throughout the Seaford Industrial Precinct, highlighting interest in these areas being in reasonably close proximity to the Frankston Metropolitan Activity Centre, as well as benefiting from linkages with passenger rail services (Kananook Station) and major highways. Notwithstanding this development pressure, current planning and zoning conditions may be considered in light of these economic trends.

2.3.4. Urban Design Opportunities and Constraints

Seaford is an established industrial precinct that is fragmented by major roads and a railway corridor, as well as residential uses, forming a number of sub-precincts.

Areas to the east of Wells Road typically incorporate higher quality built form, larger setbacks and landscaping that provides a sense of openness and legibility to the sub precinct.

Areas to the west of Wells Road include some of the oldest industrial developments in the precinct. It demonstrates a number of issues including inconsistent setbacks, a lack of windows on to streets, poor storage and waste management practices, poorly maintained buildings and sites, and unsuitable industrial and residential interfaces throughout that compromise the appearance and amenity of this precinct. As such, it appears disorderly and presents poorly.

Figure 21: Seaford Industrial Precinct – West of Wells Road

Source: Charter Keck Cramer

The key opportunities for Seaford should focus on streetscapes enhancements to unify and improve the appearance of the precinct, improving amenities for pedestrian and cyclists, enhancing major road interfaces and interfaces with residential and open spaces and investigating opportunities for renewal.

Opportunities and Constraints

The following should be read in conjunction with the map on the adjoining page.

1. Significant renewal opportunity for the industrial properties around Kananook Station as identified in the 2013 Housing Strategy. These properties are optimally located in close proximity to the station, surrounding open space and primary school. There is potential for this area to provide increased commercial and retail activity and housing. The Council depot site would play a key role in future renewal.

2. The former Nylex site along Frankston–Dandenong Road is currently vacant and provides an opportunity for significant redevelopment. Redevelopment should consider interface management, the arrangement and organisation of front setbacks, the size and location of signage, landscaping and fencing treatments and the provision of high-quality building forms.

3. Opportunity to enhance the interface with sports reserve and other sporting facilities at Kananook. This might be as part of a broader masterplan for the reserve.

4. Opportunity to enhance Harnett Drive as a key service business and retail corridor for the precinct. Improvements could include continuous and wide pedestrian paths, additional landscaping and canopy tree planting, and provision of pedestrian crossings to support safe east-west movement.

5. Opportunity to enhance Wells Road to improve the arrival experience into Kananook via both rail and road. Improvements could include continuous and wide pedestrian paths and additional landscaping and canopy tree planting.

6. Opportunity to screen development that is visible from key roads including Frankston Freeway and Wells Road through roadside planting or landscaping within the road reserve. Built form visible from this interface will need to be high quality and represent the desired qualities of Seaford.

7. Opportunity to enhance the interface and access to existing wetlands adjacent to the Frankston Freeway. This could be achieved through redevelopment of adjoining properties.

8. Opportunity to provide new path connections including along the drainage corridor to the west of Wells Road.

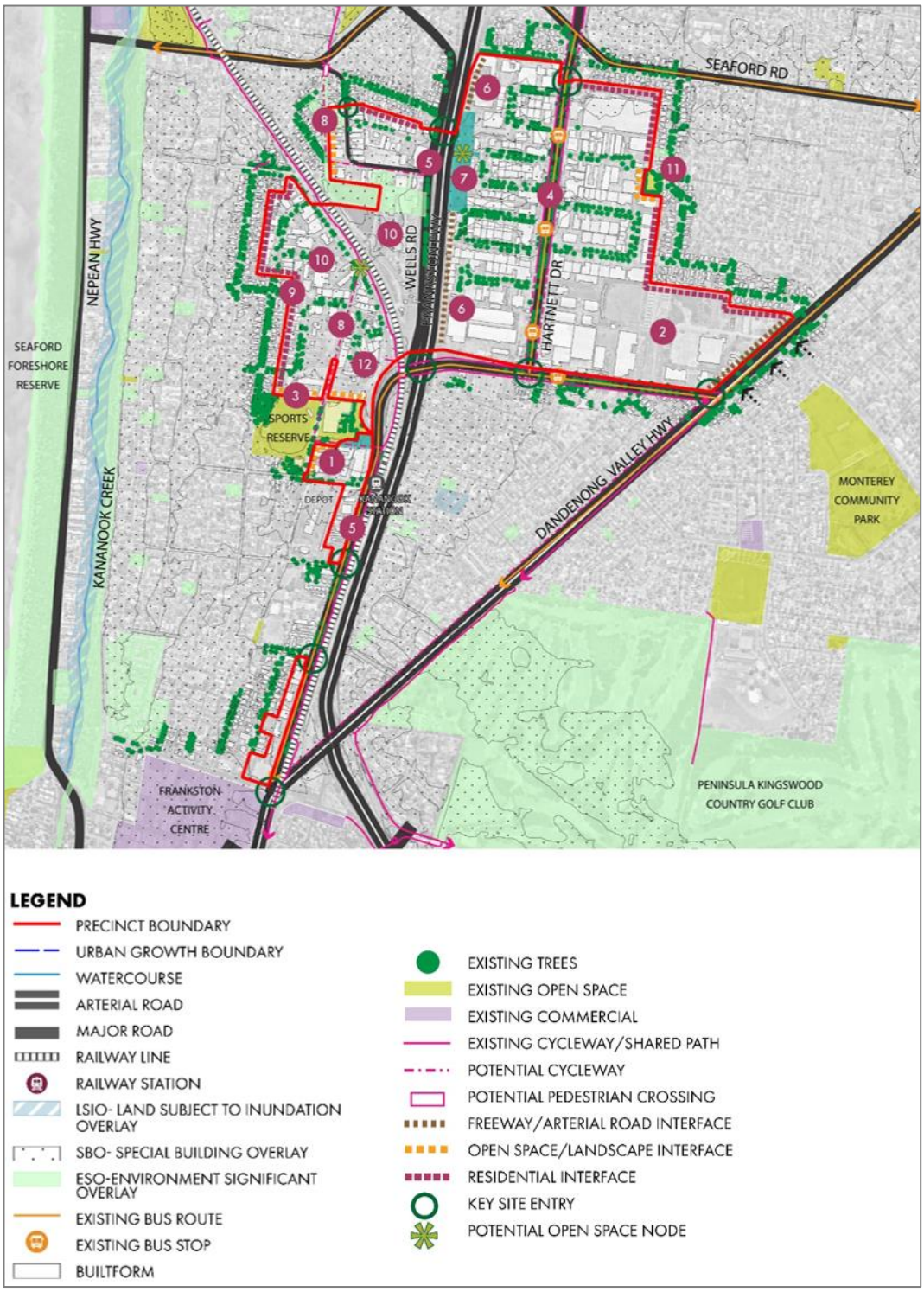
9. Opportunity to provide landscaping treatments to screen industrial built form from residential properties.

10. Opportunity to increase canopy street tree planting, particularly to the west of Wells Road, to improve appearance of streetscapes and pedestrian amenity.

11. Investigate opportunities to provide access to adjacent open space areas.

12. Opportunity to improve built form overtime as new development occurs.

Figure 22: Seaford Opportunities and Constraints



Source: Tract

2.4. Frankston East

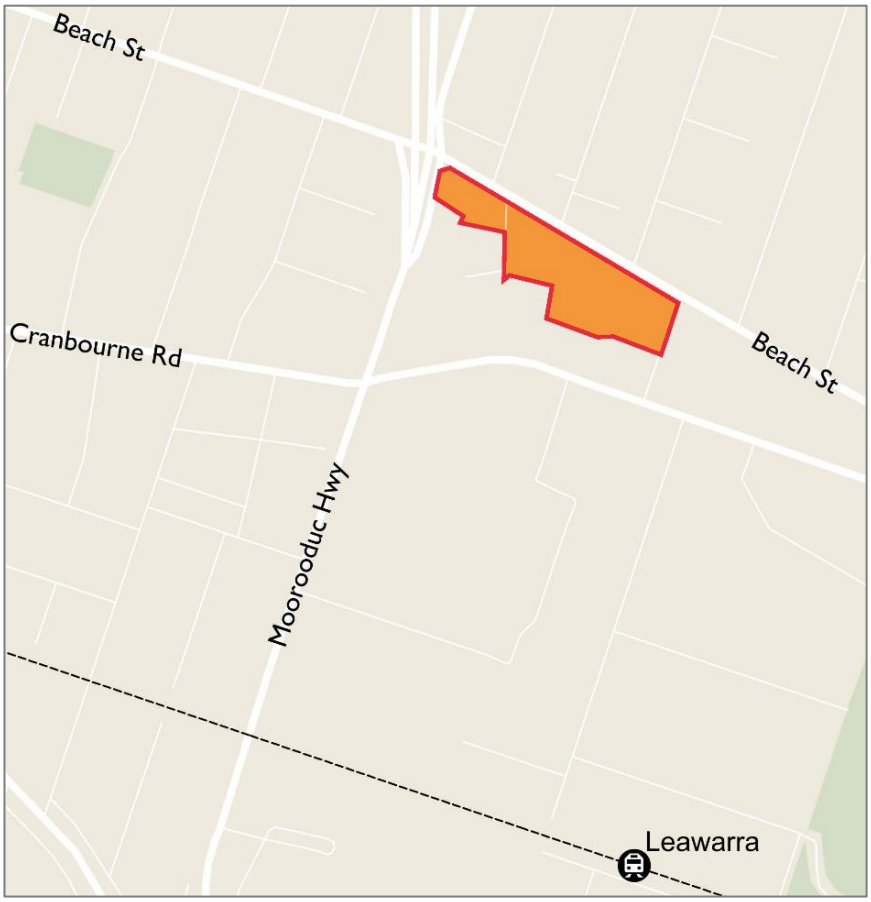
Frankston East precinct is a small industrial precinct located on Beach Street to the east of the Frankston Metropolitan Activity Centre. Its $148 million in economic output (2021) constitutes 1% of Frankston LGA's economic output. The 628 jobs in Frankston East constitute 1% of all jobs within Frankston LGA in 2021 (down from 4% in 2011), with key industries being Rental, Hiring & Real Estate Services, Education & Training, and Health Care & Social Assistance.

Frankston East has a significant Education & Training sector with its $26 million in economic output constituting nearly 5% of Frankston LGA's Education & Training sector. The 217 Health Care & Social Assistance industry workers located in Frankston constitute 35% of all Health Care & Social Assistance jobs in Frankston LGA.

Frankston East is located approximately 1km east of the Frankston Metropolitan Activity Centre, and benefits from major transportation linkages including Frankston Freeway and highway exposure along Beach Street, as well as close proximity to passenger rail services at Frankston Station. Lot sizes are smaller than in the nearby Carrum Downs and Seaford North precincts, with a clear transition during recent years towards urban services, bulky goods and automotive showroom uses.

The Frankston East Industrial Precinct is set out in the figure below.

Figure 23: Frankston East Industrial Precinct



Source: Charter Keck Cramer

2.4.1. Frankston East Industrial Precinct – Output by Industry

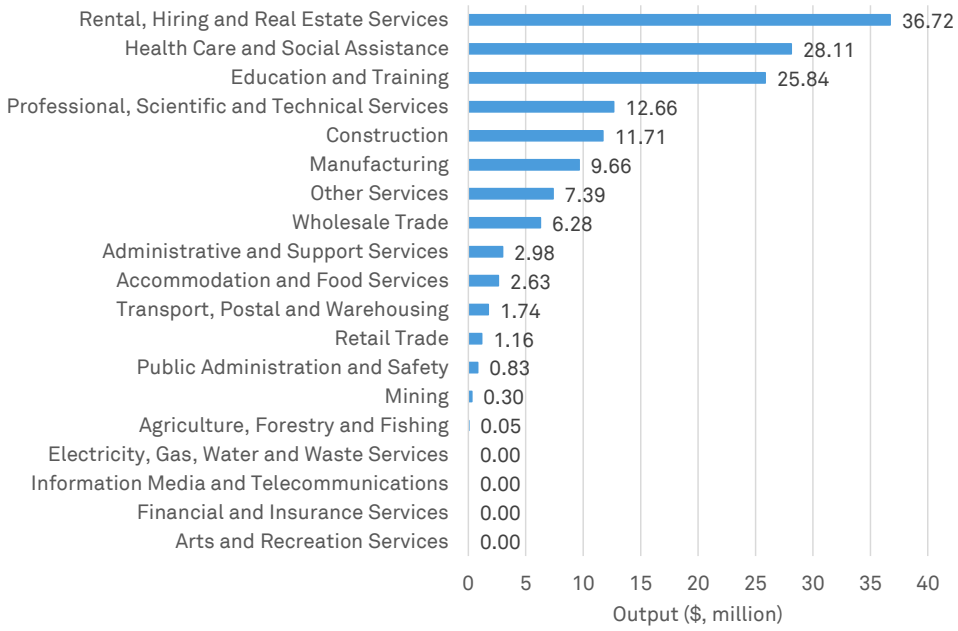
Frankston East Industrial Precinct generated in $148.05 million in economic output during the FY2020-21 period, constituting 1.0% of the total Frankston LGA economic output during that period.

Key observations are as follows:

- The Frankston East Industrial Precinct's Rental, Hiring and Real Estate Services sector generated $36.72 million in economic output, which constituted 24.8% of the Frankston East Industrial Precinct's total economic output, and contributed 2.1% to the economic output generated by Frankston LGA's Rental, Hiring and Real Estate Services industry.
- The Frankston East Industrial Precinct's Health Care and Social Assistance sector generated $28.11 million in economic output, which constituted 19.0% of the Frankston East Industrial Precinct's total economic output, and contributed 2.3% of the economic output generated by Frankston LGA's Health Care and Social Assistance industry.
- The Frankston East Industrial Precinct's Education and Training sector generated $25.84 million in economic output, which constituted 17.5% of the Frankston East Industrial Precinct's total economic output, and contributed 4.5% of the economic output generated by Frankston LGA's Education and Training industry.

The constituent components and profile are set out below.

Figure 24: Frankston East Industrial Precinct - Output ($ million, FY 2020-21)



Source: ABS; Remplan; Charter Keck Cramer

2.4.2. Employment Profile – by Industry

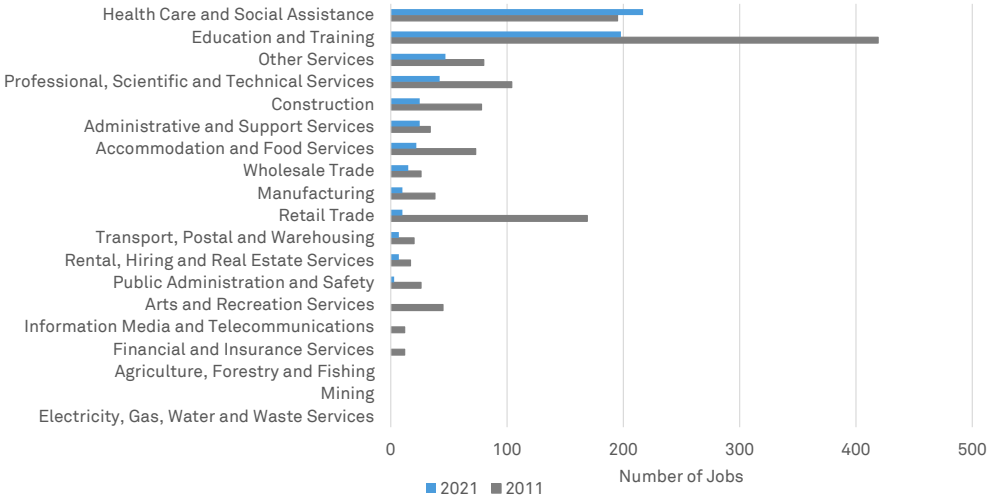
The employment profile demonstrating the number of jobs across industries for the Frankston East Industrial Precinct is set out below.

Total jobs in Frankston East Industrial Precinct shown for industry of employment for 2011 and 2021 appears below. As of 2021, the highest proportion of the total 628 jobs, were constituted by:

- Health Care and Social Assistance (217 jobs), with 34.6% of total jobs
- Education and Training (198 jobs), with 31.5% of total jobs
- Professional, Scientific and Technical Services (42 jobs), with 6.7% of total jobs

The chart below illustrates each industry, ranked by greatest number of jobs (in 2021).

Figure 25: Frankston East Industrial Precinct - Number of Jobs (2011, 2021)



Source: ABS; Remplan; Charter Keck Cramer

2.4.3. Economic Opportunities and Constraints

Economic Opportunities and Constraints:

- The Frankston East Industrial Precinct is a small industrial precinct as accordingly is constrained in its ability to accommodate larger businesses and entities.
- While the Precinct benefits from close proximity to major highways and access for large vehicle and trucks, the Precinct's small scale likely acts as a disincentive for those traditional industrial entities which may seek the benefits of agglomeration and co-location with similar entities, or close proximity to their suppliers, since this Precinct is likely to remain constrained in its potential to achieve significant 'scale'.
- While there is clearly strong demand for industrial land throughout the Frankston LGA and broader metropolitan Melbourne region, traditional industrial entities are likely to perceive other Industrial Precincts throughout Frankston LGA (for example, Carrum Downs and Seaford) as offering greater benefits, due to their larger scale and greater range of available land parcels.
- The presence of existing bulky goods retail and automotive uses indicates the attractiveness of this land for these uses, especially in light of the proximity to nearby commercial zoned land and significant bulky goods retail nodes (including among others the Harvey Norman centre) approximately 100 metres to the south of this Precinct.

2.4.4. Urban Design Opportunities and Constraints

Frankston East is a small industrial precinct located adjacent to retail uses along Beach Street, and abutting residential uses. While most industrial uses are predominately located along Beach Street, there are a few that are located along Franklin Court, which is primarily a residential street.

The precinct has a mixed and disjointed character, primarily due to its mix of architecture styles, setbacks and car parking arrangements, as well as the limited street tree planting along Beach Street.

The Frankston City Council Industrial Land Strategy Review (2019) suggests that the current land use zoning of this precinct should be reviewed both to reflect its current usage and its limited capacity to support industrial uses.

Should the site be investigated for other uses, the key opportunities for Frankston East should focus on enhancing the built form address and streetscape along Beach Street, improving residential interfaces and improving landscaping throughout the precinct.

Opportunities and Constraints

The following should be read in conjunction with the map on the adjoining page.

1. Opportunity to provide high quality-built form that responds to the highly prominent location and adjoining commercial and residential uses.

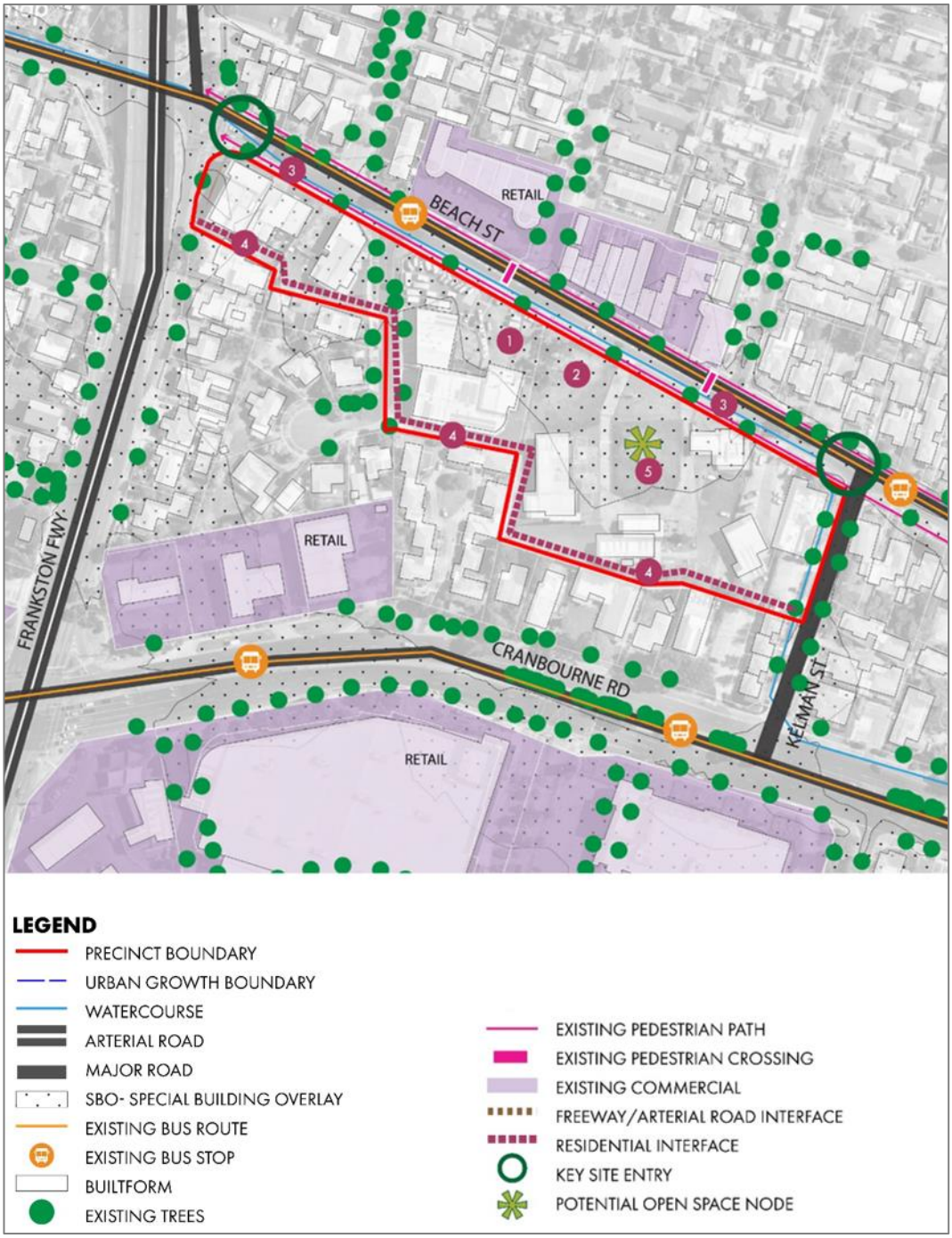
2. Opportunity to encourage future built form to address and provide a consistent street edge along Beach Street to unify the street, reinforce the character and enhance activity along both sides of the street.

3. Opportunity to enhance the landscape character and pedestrian amenity along Beach Street by reinforcing street tree planting within the road reserve.

4. Opportunity to provide a sensitive interface to residential uses. This should including consideration of overlooking and overshadowing.

5. Opportunity to provide open space that benefits future uses and adjoining commercial and residential uses.

Figure 26: Frankston East Opportunities and Constraints



Source: Tract

2.5. Langwarrin

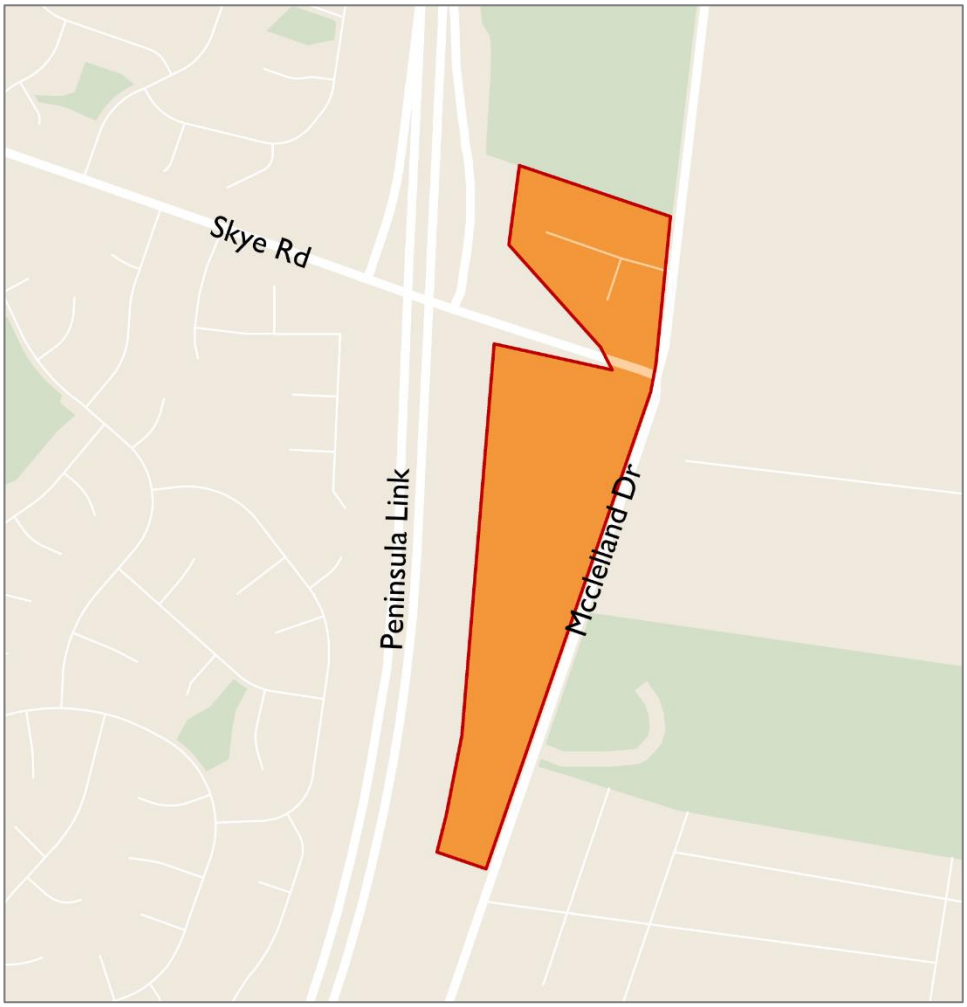
Langwarrin precinct is a medium sized industrial precinct located between McClelland Drive and the Peninsula Link. Its $180 million in economic output (2021) constitutes approximately 1% of Frankston LGA's economic output. The 840 jobs in Langwarrin constitute 2% of all jobs within Frankston LGA in 2021 (holding steady from 2% in 2011), with key industries being Construction and Health Care & Social Assistance.

Langwarrin has a healthy Construction sector with its $52 million in economic output constituting 2% of Frankston LGA's Construction sector. The 382 Health Care & Social Assistance industry workers located in Langwarrin constitute 4% of all Health Care & Social Assistance jobs in Frankston LGA.

The Langwarrin industrial precinct is located at the intersection of Peninsula Link and Skye Road, and benefits from major transportation linkages including Peninsula Freeway and Cranbourne-Frankston Road. Lot sizes are smaller than in the nearby Carrum Downs and Seaford North precincts, with some transition evident in recent years towards urban services (including dance studios and cafes) and automotive showroom uses alongside traditional industrial uses.

The Langwarrin Industrial Precinct is set out in the figure below.

Figure 27: Langwarrin Industrial Precinct



Source: Charter Keck Cramer

2.5.1. Langwarrin Industrial Precinct – Output by Industry

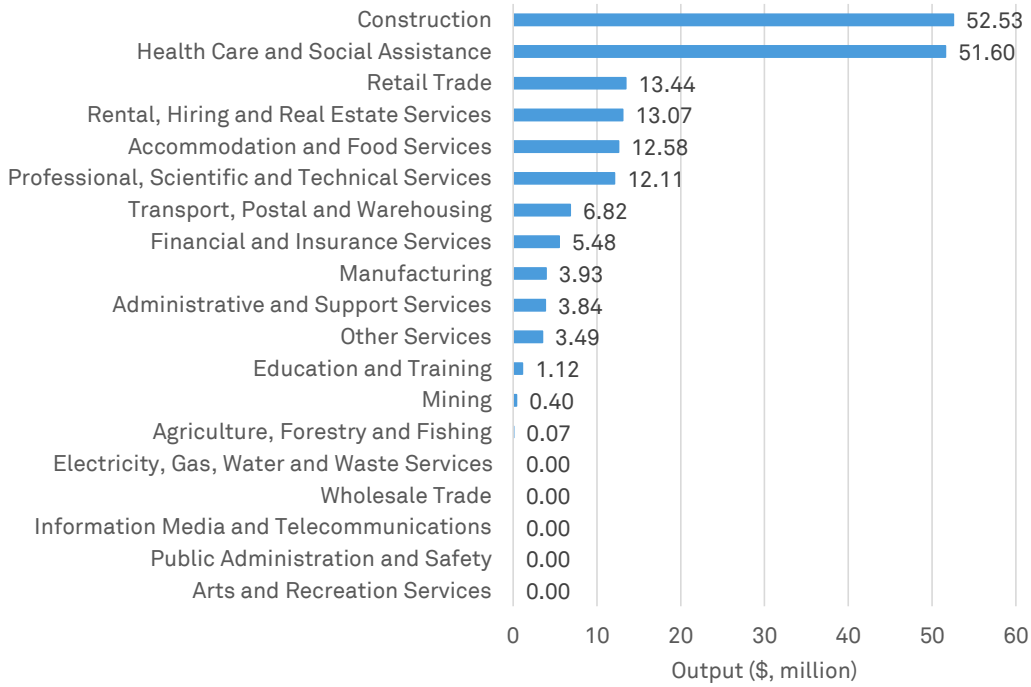
Langwarrin Industrial Precinct generated in $180.47 million in economic output during the FY2020-21 period, constituting 1.3% of the total Frankston LGA economic output during that period.

Key observations are as follows:

- The Langwarrin Industrial Precinct's Construction sector generated $52.53 million in economic output, which constituted 29.1% of the Langwarrin Industrial Precinct's total economic output, and contributed 2.0% to the economic output generated by Frankston LGA's Construction industry.
- The Langwarrin Industrial Precinct's Health Care and Social Assistance sector generated $51.60 million in economic output, which constituted 28.6% of the Langwarrin Industrial Precinct's total economic output, and contributed 4.2% of the economic output generated by Frankston LGA's Health Care and Social Assistance industry.
- The Langwarrin Industrial Precinct's Retail Trade sector generated $13.44 million in economic output, which constituted 7.4% of the Langwarrin Industrial Precinct's total economic output, and contributed 2.0% of the economic output generated by Frankston LGA's Retail Trade industry.

The constituent components and profile are set out below.

Figure 28: Langwarrin Industrial Precinct - Output [$ million, FY 2020-21]



Source: ABS; Remplan; Charter Keck Cramer

2.5.2. Employment Profile – by Industry

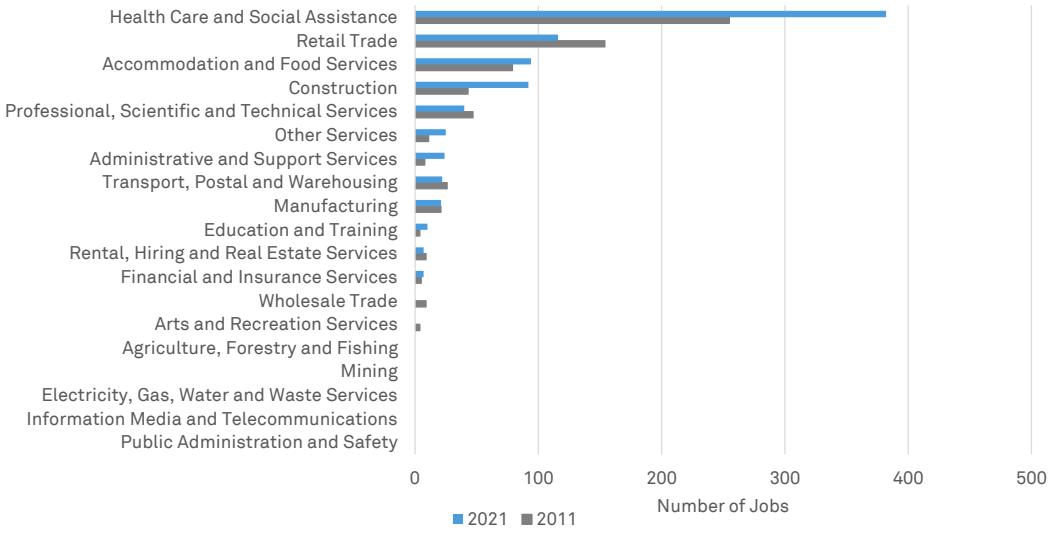
The employment profile demonstrating the number of jobs across industries for the Langwarrin Industrial Precinct is set out below.

Total jobs in Langwarrin Industrial Precinct shown for industry of employment for 2011 and 2021 appears below. As of 2021, the highest proportion of the total 840 jobs, were constituted by:

- Health Care and Social Assistance (382 jobs), with 45.5% of total jobs
- Retail Trade (116 jobs), with 13.8% of total jobs
- Accommodation and Food Services (94 jobs), with 11.2% of total jobs

The chart below illustrates each industry, ranked by greatest number of jobs (in 2021).

Figure 29: Langwarrin Industrial Precinct - Number of Jobs (2011, 2021)



Source: ABS; Remplan; Charter Keck Cramer

2.5.3. Economic Opportunities and Constraints

Economic Opportunities and Constraints:

- The Langwarrin Industrial Precinct presents an opportunity to enhance and increase industrial activity for Frankston LGA. The Langwarrin Industrial Precinct is under-utilised with regards to its industrial zoned land due to the presence of the "Log Cabin Caravan Park" (which currently occupies approximately 3.6 hectares of industrial zoned land). While this currently constrains potential industrial activity, this also represents an opportunity for future potential higher value use for this industrial zoned land.
- The Langwarrin Industrial Precinct is also surrounded by a number of future potential sites which may constitute logical inclusions for future potential industrial land (pending appropriate planning considerations).
- The presence of a range of wholesale, bulky goods retail and urban service orientated entities attests to the attractiveness of this location for entities and businesses seeking good highway access and exposure.

2.5.4. Urban Design Opportunities and Constraints

Langwarrin is a small industrial precinct located in proximity to several tourist attractions and facilities.

Comprising relatively contemporary built form, the precinct benefits from its landscape setting which includes the generous and tree lined road reserve of McClelland Drive and Peninsula Link and areas of open space including a sports reserve and green wedge zone to the north east. The provide the site with an informal and spacious landscaped character.

The key opportunities for Langwarrin should focus on enhancing major road interfaces, providing continuous footpath connections along McClelland Drive, improving the access and arrangement of car parking areas and enhancing landscaping throughout the precinct.

Opportunities and Constraints

The following should be read in conjunction with the map on the adjoining page.

1. Opportunity to strengthen and unify the informal streetscape character along McClelland Drive through additional street tree planting, WSUD treatments and understorey planting.

2. Opportunity to provide a continuous pedestrian footpath along the west side of McClelland Drive that connects to nearby existing trail networks, bus stops and residential areas.

3. Opportunity to provide a consolidated and provide a consistent approach to car parking and vehicle access along McClelland Drive to minimise the visual and pedestrian impacts.

4. Opportunity to maintain the spacious character of the precinct, by ensuring future fencing is transparent and visual unobtrusive, particularly along the McClelland Drive.

5. Opportunity to encourage future development to address McClelland Drive and avoid large expanse of black walls and solid fencing along this interface.

6. Opportunity to screen development that is visible from Peninsula Link through roadside planting or landscaping within the road reserve. Built form visible from this interface will need to be high quality and represent the desired qualities of Langwarrin.

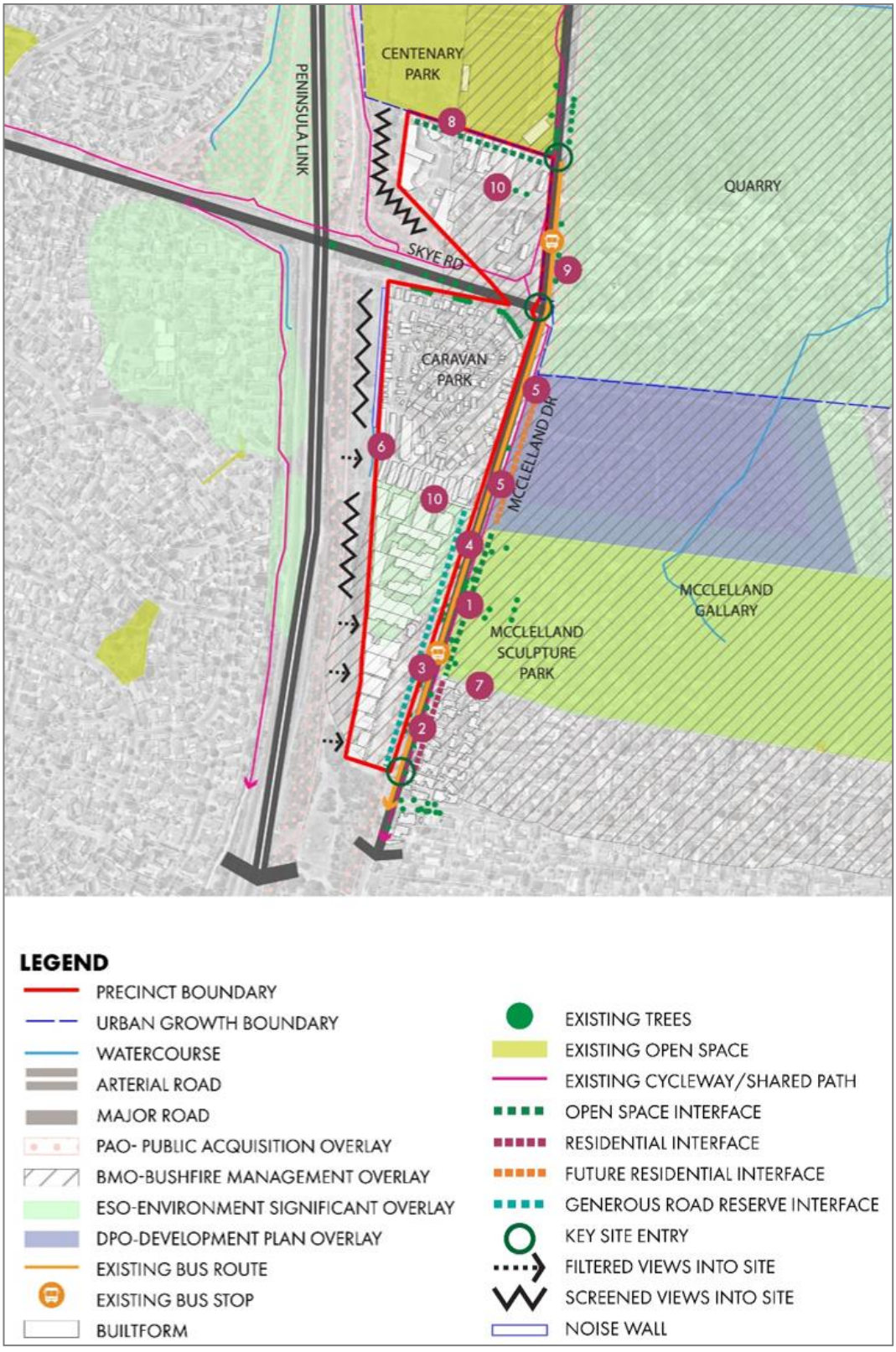
7. Advocate for improvements to bus stop connections and waiting facilities along McClelland Drive. This could include provision of a shelter and pedestrian refuges to support safe east-west movement.

8. Opportunity to enhance the interface between industrial uses and the sports reserve through additional planting or landscaping within the open space.

9. Opportunity to provide a consolidated approach to signage along McClelland Drive to minimise the visual clutter in the streetscape.

10. Opportunity to increase canopy street tree planting along all internal street and accessways to reinforce the landscape qualities of this setting, in particular along Duiker Court.

Figure 30: Langwarrin Opportunities and Constraints



Source: Tract

3. Future Focus Initiatives

Crisis eras are a time of structural change. The last two years has changed how Victoria's economy operates and how global systems of commerce function. Consumption, distribution and manufacturing systems are adjusting to new trends including the need for suppliers to carry greater inventories, a focus on the benefits of local sourcing and the instable growth of online retailing.

The end of the most severe stages of the pandemic will not entail an end of significant change. The next decade will see climate change, the transformation of energy systems and ongoing digitisation of the economy revolutionising transport and logistics systems and changes to the way we consume, work and interact.

The following explores how Frankston LGA might orient itself to respond to long term challenges and change. Initiatives focus on interventions and actions related to:

- Land Use: how the use and availability of land for in industrial purposes might be supported.
- Industry: how industry and targeted locations might be supported to change and grow in line with broader trends.
- Place Making: how to improve the experience, appeal, connectivity and sustainability of industrial areas.

Each of the 17 initiatives canvassed in this paper are detailed below. All initiatives are canvassed to promote community and industry discussion.

3.1. Land Use Initiatives

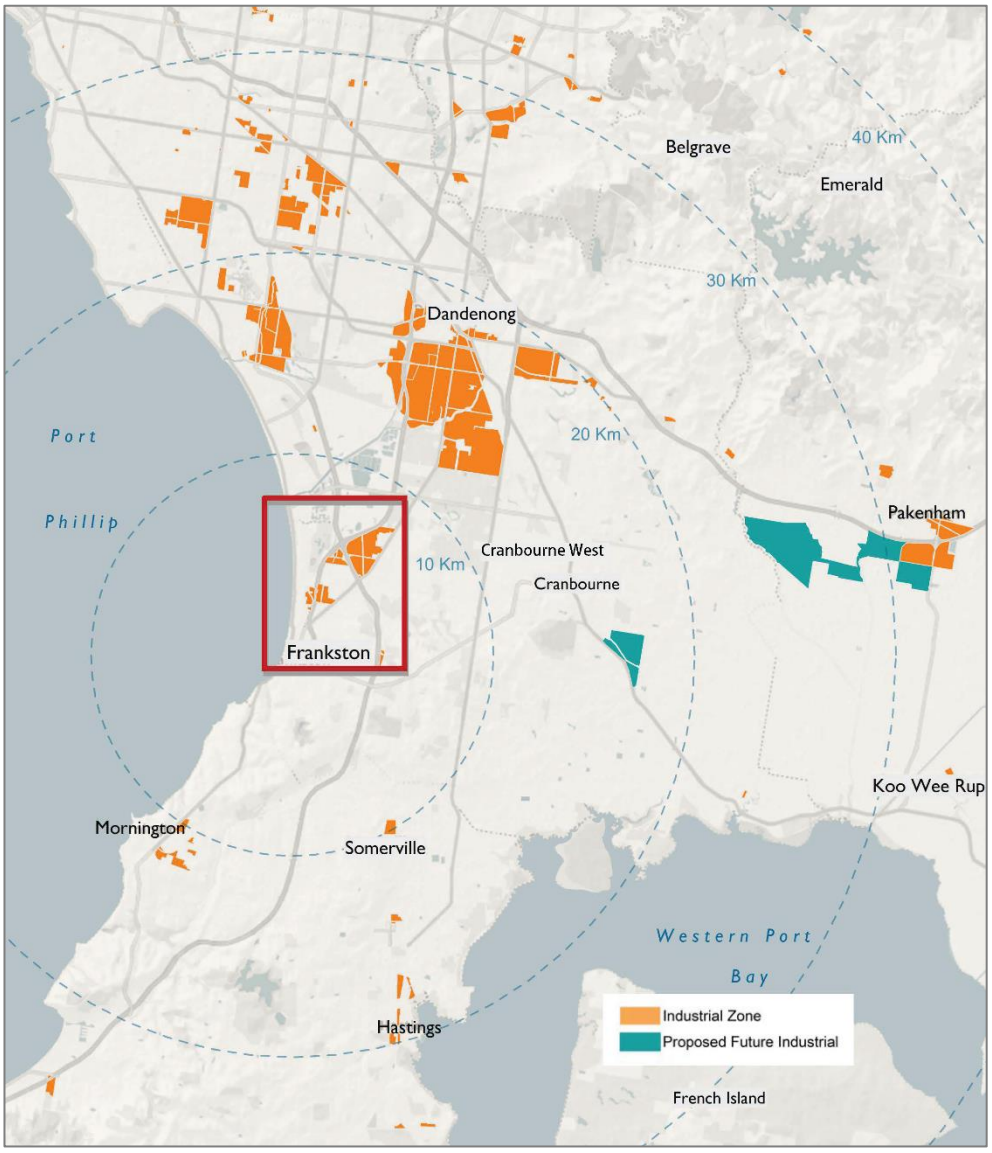
Growing the local economy will require addressing the pressures and challenges of industrial land supply and development whilst also preparing the conditions for innovation and precinct planning.

Frankston LGA's Industrial Role in Melbourne's Southern Region

Frankston City's Industrial Precincts function as both locally and regionally significant industrial areas in the context of Melbourne's southern region.

Beyond the municipality, industrial precincts in Dandenong, Moorabbin and the rapidly emerging Officer/Pakenham and Casey Fields precincts constitute the region's largest industrial areas by land area and economic output. Within the region there is approximately 7,270 hectares of zoned industrial land of which 34% of zoned land is in Greater Dandenong. Frankston LGA's industrial areas comprise 5% of the region's zoned industrial land.

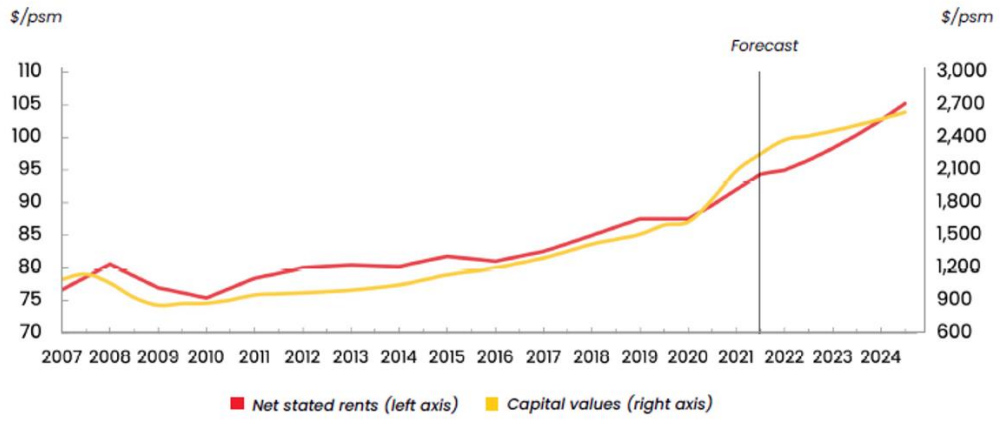
Figure 31: Frankston LGA Industrial in the context of Melbourne's Southern Region



Source: ABS; Charter Keck Cramer

Melbourne's Southern Region is experiencing a chronic shortage of vacant industrial land in established locations which is fuelling land price increases and shifting new industrial development to the region's outer suburbs. By 2027, for instance, the region's most significant industrial precinct in the municipality of Greater Dandenong is expected to run out of all meaningful industrial land supply.[2] At the same time, the boom in online retailing is fuelling insatiable industrial floor space demand in prime locations near both consumers and logistics routes – online retailing grew by 31% in financial year 2021 and is projected to grow by 22% in 2022. Accordingly, industrial rents and capital values are growing strongly and are projected to continue to grow. In January 2022 Melbourne's south eastern industrial markets recorded a vacancy rate of just 1% of industrial stock which is below market equilibrium.

Figure 32: Melbourne South-East Industrial Rents & Capital Values



Source: BIS Oxford Economics; Charter Keck Cramer

Demand for new industrial space has shifted to the region's outer areas including new industrial precincts in Officer, Pakenham and Casey Fields which are now the only locations in the region able to accommodate the needs of enterprises that require large format premises. Together Officer, Pakenham and Casey Fields incorporate over 1,900 hectares of either zoned or proposed industrial land supply. Closer to Frankston LGA, there is approximately 76 hectares of greenfield industrial land in Cranbourne West.

Figure 33: Melbourne Southern Region - Industrial Land [2021][3]

Council / Region	Zoned occupied (ha)	Zoned vacant (ha)	Future supply (ha)	Total available supply (ha)	Vacancy Rate
Cardinia	380.9	375.2	938.3	1,313.5	98.5%
Casey	670.7	367.5	245.2	612.7	54.8%
Frankston	368.4	21.6	0	21.6	5.9%
Greater Dandenong	2,448.2	469.6	0	469.6	19.2%
Kingston	1,217.3	75.9	0	75.9	6.2%
Mornington Peninsula	2,184.8	1,027.7	0	1,027.7	47.0%
Southern Region	**7,270.3**	**2,337.5**	**1,183.5**	**3,521**	**32.2%**

Source: DELWP; Charter Keck Cramer

[2] There is now minimal industrial land in Greater Dandenong which according to the State Government's Urban Development Program will effectively be exhausted by 2027.

[3] While there is technically over 1,000 hectares of industrial land in Mornington Peninsula, this land is reserved for uses that support the port and is therefore unavailable for general industrial purposes.

Where are We Today? Frankston City's Industrial Precincts

For the past two decades greenfield industrial land in Carrum Downs has been central to Frankston LGA's industry, employment and economic growth. Far sighted planning has facilitated the emergence of a highly contemporary manufacturing and logistics precinct in Carrum Downs that has enabled enterprise to leverage exceptional road connectivity to both service customers and shift goods across the metropolis– Carrum Downs sits in between Eastlink, the Mornington Peninsula Freeway and Frankston-Dandenong Road.

There is now, however, no substantive greenfield land in Carrum Downs to support its ongoing expansion and thereby industrial greenfield expansion in Frankston LGA. At 2021, there was 9.6 hectares of vacant industrial land in Frankston LGA, of which 8.6 hectares was within the Carrum Downs Industrial Precinct.

Figure 34: Development of Carrum Downs 2010 to 2022

Source: Charter Keck Cramer

Frankston LGA is perceived positively as a location by local industrial business. According to Council's 2018 industrial business survey results, 80% of surveyed enterprises rated their industrial precinct as either a 'good' or 'very good' location to operate from. In 2018, nearly half of the 308 industrial businesses surveyed indicated that they planned to expand over the next 5 years. Of these businesses, 95% of them stated that they would prefer to remain in Frankston LGA as they grew.[4]

Frankston LGA is perceived positively as a location to both operate and grow. To do so, Frankston City's Industrial Precincts will need to innovate and explore new opportunities and new forms of industrial expansion. The future will require support for infill development, multi-storey development and the potential identification of logical expansion opportunities within the Urban Growth Boundary.

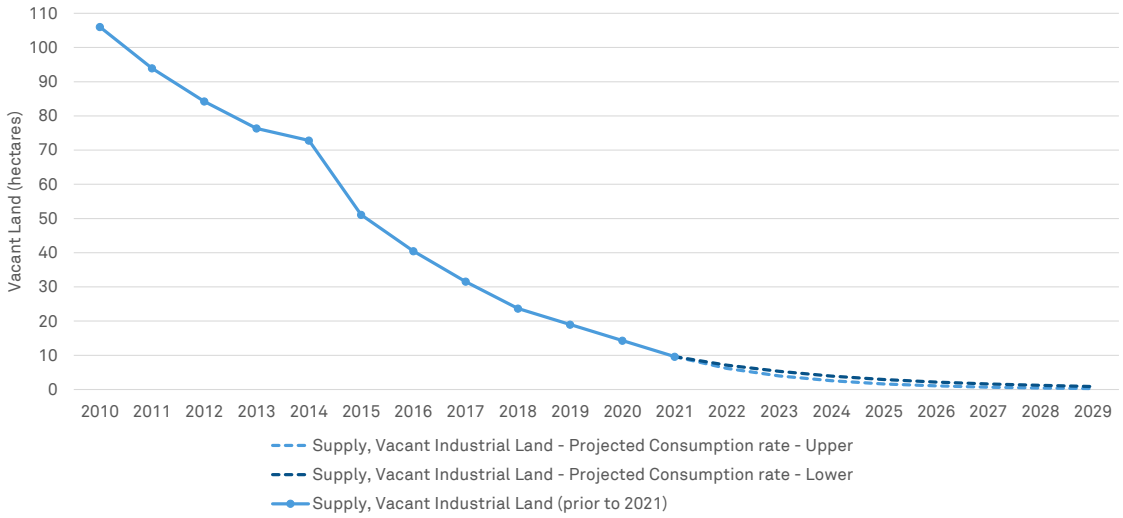
Any potential new industrial areas that might add to local industrial land supply would need to be identified within the Urban Growth Boundary, consistent with Frankston City Council's Green Wedge Management Plan.

[4] Notably, 60% of surveyed businesses in Carrum Downs stated that they planned to expand. *Industrial Precincts Needs Analysis Report September 2018*

Industrial Land Market Analysis

Within Frankston LGA there is now only 9.6 hectares of industrial zoned land available for future industrial development which represents a major limitation on industrial expansion in the municipality. Allowing for an upper consumption rate of approximately 35% of the remaining land each year (equivalent to approximately 5 hectares per year during 2022 to 2023), Frankston LGA now has less than 5-years of industrial land supply. If remaining land supply is consumed at a lower consumption rate of approximately 25% of the remaining stock each year, land supply might theoretically support 7 years of consumption.

Figure 35: Frankston LGA - Industrial Land Market Analysis



Source: Charter Keck Cramer

Initiative 1: Facilitate Industrial Renewal

Many of the municipality's industrial streets and precincts date back to development of the 1950's and 1970's and now include significant numbers of redundant and neglected industrial sites that are now ready for renewal.

As is evident in the image below, the process of industrial renewal has begun driven by increasing land values and unmet demand for high quality well located floor space.

Figure 36: The Renewal of 14 Milne Avenue, 2019 and 2022

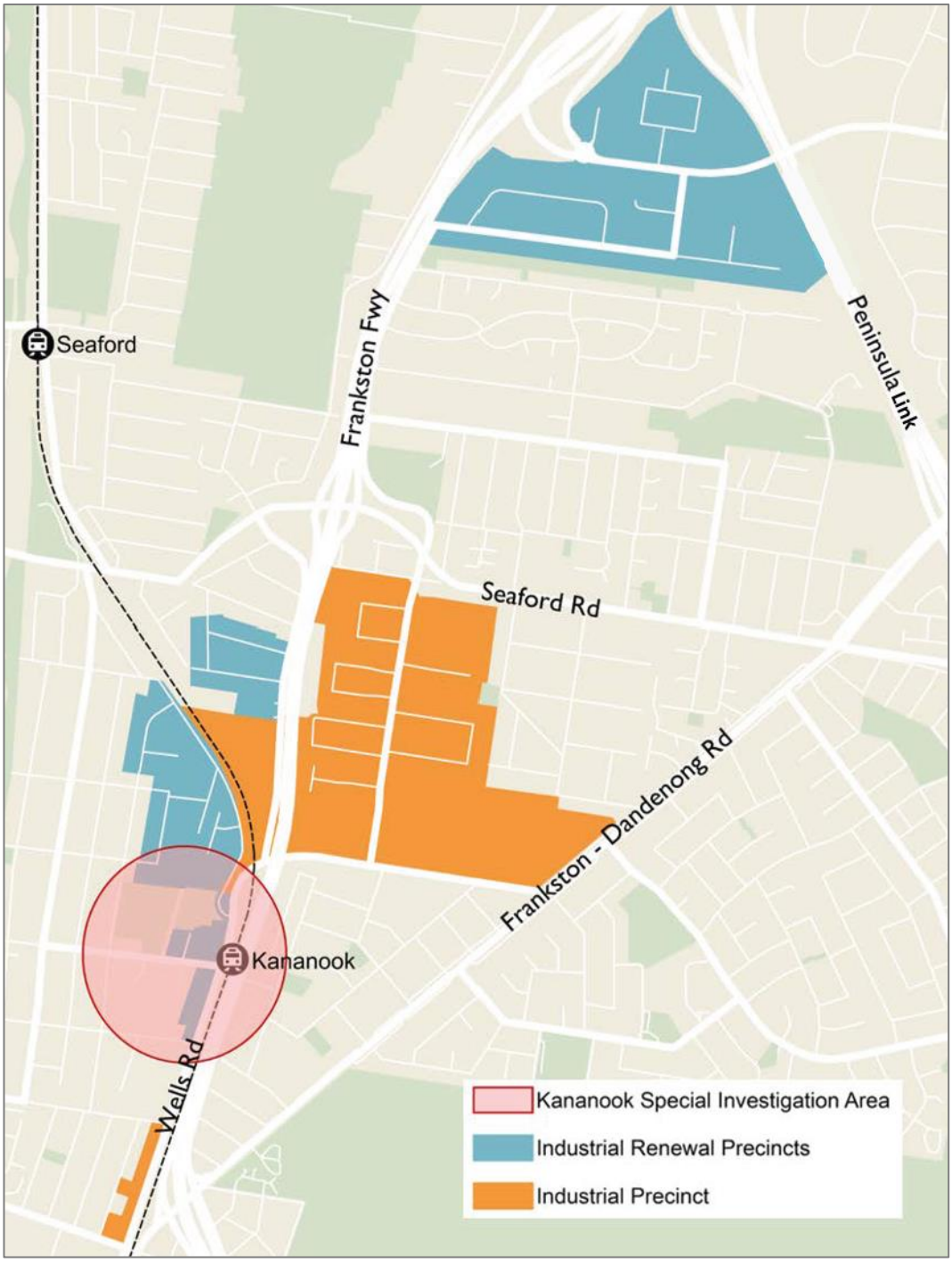
Source: Charter Keck Cramer

Planning policy can help support the process and scale of renewal. Redundant industrial sites detract from the visual and physical amenity of the municipality. These sites incorporate the potential to support both economic and physical renewal. In particular, the industrial precincts of Seaford and Seaford North incorporate large numbers of aged and blighted industrial sites that detract from perceptions of Frankston LGA within the community and by visitors. Supporting the renewal of aged sites can therefore assist in both economic reinvigoration and in shifting perceptions of place.

The renewal of older industrial areas can be supported by:

- Identifying Seaford and Seaford North as priority renewal precincts – the map below identifies priority renewal areas for policy support.
- Providing planning facilitation in priority renewal precincts.
- Identifying specific sites within priority precincts that require renewal and facilitation.
- Indicating to owners, investors and industrial land trusts that Frankston LGA is open to major renewal projects.

Figure 37: Seaford and Seaford North Proposed Priority Renewal Precincts



Source: Charter Keck Cramer

The new Seaford train stabling facility, which abuts the rail line on Wells Road, Seaford, is a 5.5 hectares site that now supports public transport uses rather than commercial activity in Seaford.

Initiative 2: Explore Multi Storey Renewal

For many industrial organisations transport costs represent one of their largest input costs providing a significant financial incentive to position operations as close as possible to population centres and major road infrastructure. It follows that highly accessible, high amenity industrial locations near population centres are now being considered for multi-storey development.

Multi-storey industrial buildings are highly expensive to construct – far more expensive than conventional industrial buildings. There are, however, 14 multi-storey industrial buildings either planned or under construction in New South Wales constituting 350,000 sq.m of new multi storey industrial floor space. As they encounter land constraints, Australian cities are predicted to follow Shanghai, Hong Kong and Tokyo in the development of multi-storey industrial buildings in high value, sought after locations.

In multi-storey buildings loading and unloading still occurs on the ground level with robots working vertically to transport goods between floors. Amazon's recently completed warehouse in Kemps Creek incorporates 14 kilometres of conveyancing infrastructure mostly for the use of robots.

Figure 38: Multi Storey Industrial Kemps Creek and Prestons (Proposed)

Source: Charter Keck Cramer

Within Frankston LGA, land values do not currently justify multi-storey development, however, as Melbourne's population continues to grow and prime industrial land becomes increasingly scarce, the viability of this form of development will inevitably increase.

For Frankston LGA multi-storey industrial development provides a logical opportunity to increase employment density and economic activity. Over the next two decades when major landholdings in Carrum Downs begin to commence renewal they are likely to consider multi-storey forms of development.

The question is whether a future Frankston Industrial Strategy should anticipate and potentially encourage multi-storey industrial growth in locations that are both remote from residential areas and in direct proximity to state significant road infrastructure.

Initiative 3: Logical Expansion of Industrial Areas

By changing the use of existing land to support industrial uses, Frankston LGA may be able to respond to enterprise demand for industrial floorspace. For instance, if a Council owned golf course was no longer required a portion of this land might then accommodate new industrial uses. Likewise, underutilised state government land such as surplus transport land might be repurposed to support industrial demand.

There are no greenfield land parcels within the municipality available to support further industrial expansion. Any future logical expansion will require a change of use of identified land. The land parcels listed below provide some examples of potential opportunities that might be investigated as strategic expansion opportunities.

As stated earlier, any potential logical inclusion sites would need to be identified within the Urban Growth Boundary, consistent with Frankston City Council's Green Wedge Management Plan.

Figure 39: Example Sites for Potential Logical Inclusion

Current Use	Address	Suburb	Area (ha)
Temporary car park	Cnr of Skye Road and Farrell Street	Frankston	9.1
Vegetation	350m Cranbourne Road	Langwarrin	11.3

Source: Charter Keck Cramer

A future Frankston Industrial Strategy might seek to facilitate industrial land expansion by:

- Liaising with private and government landholders as to their long term intentions.
- Engagement with State government in relation to potentially surplus transport land.
- Investigating the highest and best use of any identified expansion land.

Initiative 4: Adopt a Precinct Planning Approach

A precinct approach to economic development entails a coordinated and deliberate focus on supporting the planning and development process with the aim of achieving cohesive and responsive outcomes in individual locations.

Each of Frankston LGA's industrial precinct's represents a different era of economic activity and built form development. As described in the Precinct profiles above, the economic role of each Precinct is also now quite distinct – some Precincts serve local needs while others operate at a regional and metropolitan scale. Looking to the future, unlocking the full potential of each Precinct will require different interventions and support by location.

Adopting a precinct planning approach entails:

- Supporting the local and regional economic role and identity of each precinct in planning policy and economic development strategy.
- Identifying targeted renewal and redevelopment initiatives. The Seaford and Seaford North Precincts provide significant strategic renewal opportunities that require tailored support.
- Building precinct identity to promote clustering and investment and market recognition.
- Identifying urban design interventions that address the age and stage of development of each precinct.

Precinct planning also provides a framework to explore future energy and sustainability initiatives and platforms. Proximity to residential areas is typically a disadvantage for industrial areas. In the era of new energy platforms, however, Frankston LGA's industrial proximity to residential areas may provide opportunities to support major battery infrastructure and other localised energy infrastructure that supports the sustainability and resilience of local communities and industry alike. Notably, as industrial uses incorporate more robotics demand for power is expected to surge.

3.2. Industry Initiatives

The municipality's industries and skills base incorporate a number of advantages that establish the conditions for future prosperity and ongoing industry reinvention and adaptation.

3.2.1. Advanced Manufacturing

Advanced manufacturing is a form of manufacturing that relies on unique knowledge including specialised technologies, manufacturing inputs and production processes. In an advanced manufacturing context, competitive advantage arises from specialised knowledge and processes.

Where Are We today?

Frankston LGA retains a major manufacturing base that exemplifies the nimble and specialised nature of Australia's 2022 manufacturing base – small to medium sized firms, typically employing between 5 to 20 employees providing small batch, high value design intensive products.

While high volume low cost manufacturing in overseas countries has seen the decline of large format Australian manufacturing, as is demonstrated in Frankston LGA, some manufacturing industries continue to compete successfully, particularly in sectors where either perishability, shipping costs, niche outputs and local reliability and speed to market are important market determinants. These are industries that typically rely on knowledge rather than labour and are positioned to benefit from ongoing manufacturing innovation and trends in which local reliability is increasingly valued.

Frankston LGA is home to a number of specialist manufacturers including manufacturers providing tailored construction inputs, fabrication, specialist tools, moulding, prototyping and specialist automotive parts. There is also a sizeable food manufacturing sector. Manufacturing contributed $2.77 billion in economic output for in FY2020-21 with 3,318 manufacturing jobs throughout Frankston LGA.

Source: Freepik; Charter Keck Cramer

3.2.2. Digital Economy and Population Serving Industries

The digital age is transforming business models and breaking down the distinction between work and home along with the primacy of the central city as the centre of professional services and knowledge work – changes that have been accelerated under Covid-19. The spaces and format of uses demanded by digital enterprise is more fluid and less fixed than traditional businesses where the provision of service, delivery, marketing and networking activities can occur in a variety of dispersed locations.

In industrial areas across the world, aged historic industrial buildings are being transformed into digital economy enterprises as exemplified in the suburb of Cremorne in inner Melbourne or the Navy Yards in New York. In these locations aged factories now command premium rental rates in what are now hot spot economic areas for new economy activity.

In suburban locations, suburbs such as Spotswood demonstrate how the distinction between traditional industrial uses and the contemporary economy is blurred when design, marketing, food and population serving enterprises permeate traditional industrial uses in a truly mixed economy.

Where Are We Today?

Population servicing industries including health, recreation, hospitality, education, arts, government and social assistance sectors increasingly operate from the municipality's industrial areas which are activities that are generally permitted under the planning scheme.

The Carrum Downs industrial precinct, for instance, currently supports 15 fitness enterprises, while land in and around Hartnett Drive, Seaford is home to an array of health practitioners and food and hospitality enterprises. As the local community grows and changes, industrial areas across Melbourne increasingly service a wider variety of local needs beyond traditional industrial uses. This now includes new digital based enterprises including digital marketing, brand development, printing, audio visual and display businesses – both Carrum Downs and Seaford now incorporate an increasing number of these forms of businesses. Notably, new economy business tends to use industrial space very differently while also demanding higher standards of worker amenity.

Case Study: Burst

Burst is a branding agency located in the Seaford North Industrial Precinct. Burst provides branding services which includes graphic design, printing and signage. Signage is the most prominent service, encapsulating vehicle wraps, fabrication, large format printing and on-site installations.

Burst demonstrates the prevalence of economic linkages throughout Frankston City's industrial precincts which provide 'value added' services throughout supply chains, along with demonstrating the future growth of industrial businesses as those which embrace a 'holistic' approach to their business; whereas traditional supply chains have historically involved a product being sold in a retail environment (with a wholesaler providing the product), newer eCommerce businesses provide a more 'end-to-end' customer experience, which prompts a need for logistics and delivery businesses to communicate more directly with customers, thereby prompting a need for improved signage and branding.

The agency's premises in Seaford North demonstrates the creative re-use of industrial space. The space hosts community events and workshops, an early morning pop-up coffee bar as well as a variety of digital work spaces all within the framework of traditional industrial built form.

Source: Burst; Charter Keck Cramer

3.2.3. New Energy, Transport and Recycling

Energy systems, transport systems and systems of consumption are transforming in response to climate change and the need for more sustainable systems of production and consumption.

The ongoing growth and adoption of renewable energy systems will see more localised energy generation and storage, which in urban areas increasingly entails battery storage.

The transformation of energy systems will also see the transformation of transport platforms that support highly innovative logistics and delivery methods. The first electric trucking fleets are now being tested and provide the prospect of significantly reduced emissions. Electric trucks also reduce energy and maintenance costs (electric vehicles have significantly less moving parts resulting in reduced maintenance requirements). Drone delivery and driverless technology is also advancing which will further transform supply chains and logistics. Across the world, the re-platforming of transport systems to electric platforms is expected to propel the mass retirement of older automotive mechanics who will need to be replaced by younger digital technician whose skills and qualifications will resemble those of IT workers. Australia is largely unprepared for the transformation of its vehicle fleet to include 1.7 million electric cars which will require a new automotive workforce.

Consumption systems are also set to change guided by the need to extract maximum value from waste material. All levels of government are now seeking to establish, expand and accelerate advanced recycling systems according to the aspirations of the circular economy.

Where Are We Today?

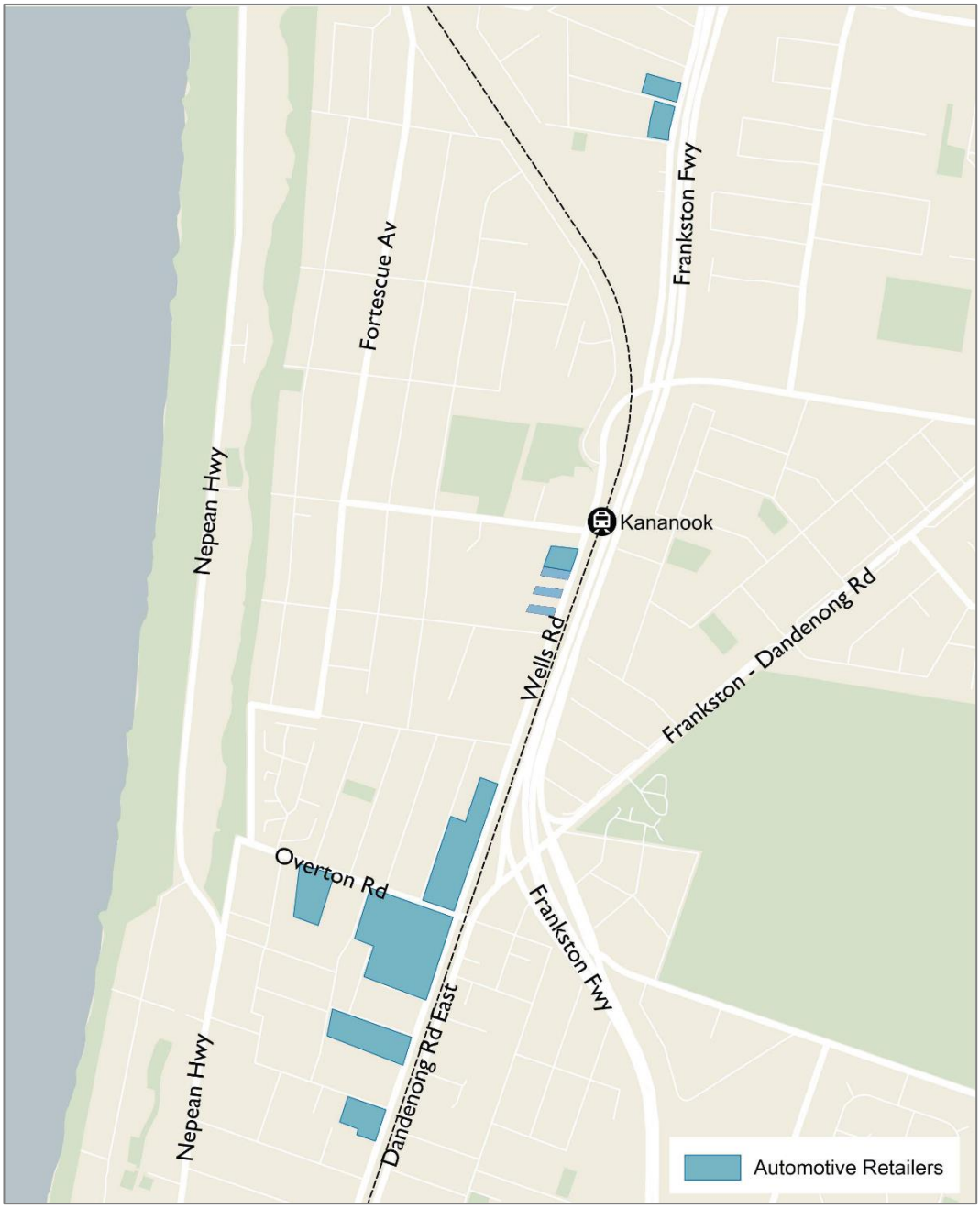
Frankston City's industrial areas incorporate a growing cluster recycling enterprises including a number of e-waste and metal recycling enterprises and number of specialist enterprises including a paint recycler, a gas bottle recycler and a multi-national recycler that recovers precious metals from car parts. Notably, Carrum Downs is home to one of Victoria's most innovative recycling companies (discussed below) that repurposes plastic waste into furniture products.

The municipality's industrial areas also support a significant cluster of solar energy and domestic battery providers and installers. The municipality is also home to a biogas specialist that designs and installs systems that converts biowaste into energy.

The municipality's recycling and energy enterprises provide a basis to respond to changes in the structure of the economy, particularly as the economy achieves net zero objectives.

Perhaps the greatest level of change should be expected in the municipality's substantial auto sector which faces significant transformation as car makers become fully electric enterprises. Over the next decade, Ford (2030), GMH (2035), Volvo (2030), Chrysler (2028) all plan to be fully electric enterprises. The 19 automotive retail outlets along Dandenong/Wells Road and the vast numbers of automotive electricians and mechanics that occupy the municipality's industrial space are likely to operate very differently as every major and minor global car marker transforms their platform. The municipality's regionally significant auto sector is set to change in both skills, service and format. Next-generation workshops will be cleaner, temperature-controlled and wider than existing work bays to incorporate a variety of electronic service equipment. New automotive specialisations will also emerge.

Figure 40: Auto Retailers – Wells / Dandenong Road



Source: Charter Keck Cramer

Within Victoria concepts such the circular economy and waste to energy opportunities are guiding planning and investment within both State and local government. The current linear economic model of take, make, and waste is not sustainable and needs to shift to a more circular footing in which waste becomes a reusable resource. The circular economy may present opportunities for the municipality particularly in high value resource recovery and in repurposing waste.

Case Study: Replas Australia (Repeat Plastics Australia)

Replas is a leading example of a recycling company that has grown to become one of Australia's leading plastic product manufacturers. Replas reprocesses a range of soft plastic, kerbside plastic waste and commercial plastic waste into approximately 200 recycled plastic products, primarily for outdoor use.

By diverting plastic waste from landfill Replas contributes to the Circular Economy. Input materials include:

- Post consumer material comes from the soft plastic collected at Coles and Woolworths through the "REDcycle" program,
- Post commercial materials from hospital waste,
- Post industrial mixed plastics from factory scraps,
- Mixed hygiene products from multiple polymer types and paper

Finished products include:

- Outdoor Furniture
- Garden Products
- Outdoor sheeting
- Traffic Control products
- Signage and plaques
- Bollards and bollard caps
- Decking
- Dog Agility
- Fencing
- Fitness Equipment

Replas deploys advanced automated technology in its production processes, for both sifting and sorting of raw materials and in its manufacturing process.

Figure 41: Replas - Products and Robotic Manufacturing Processes

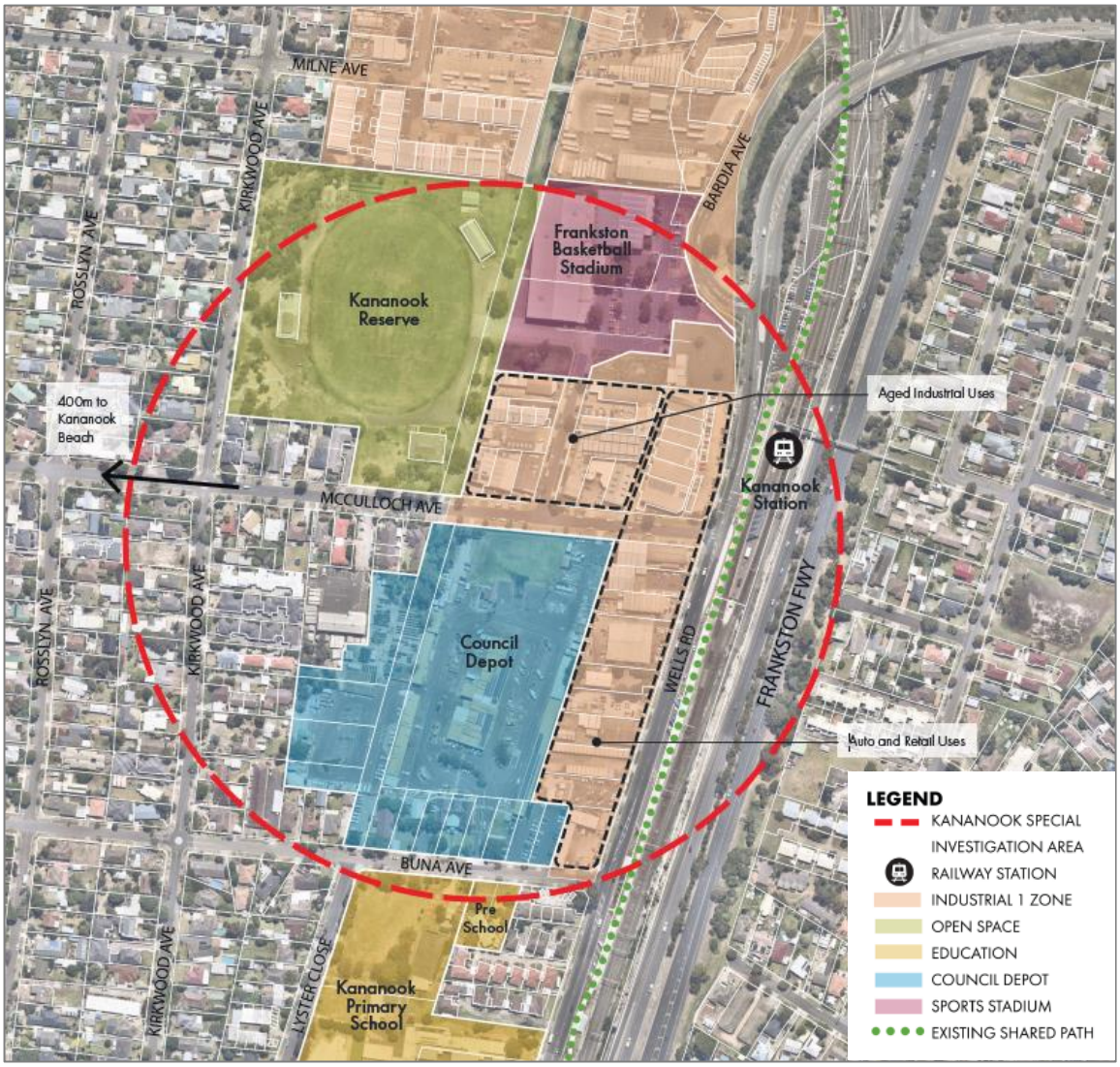
Source: Replas; Charter Keck Cramer

Initiative 5: A Bold Vision for Kananook

A key challenge for Frankston LGA and many of Melbourne's urban locations with negligible industrial land supply is how to renew industrial spaces while meeting increased demand for other forms of urban space including service, residential and office space. The answer may be a new form of industrial mixed-use, whereby typologies which have traditionally been kept apart are combined and co-located in new formats that support the needs of the contemporary economy and community.

> *Every city centre or outlying urban area has strategic sites which could be leveraged and repurposed to blend core uses. And not only would these new typologies provide a sustainable solution to spatial constraints and development imperatives, they would help generate value.*[5]

Figure 42: Kananook Special Investigation Area



Source: Charter Keck Cramer

[5] Jamie Webb, Head of Benoy, EMEA

Kananook enjoys significant locational advantages including proximity to the Bay (within 900 metres), direct access to public transport infrastructure and substantive community infrastructure and open space. While the area incorporates substantial industrial land, Kananook, is today, largely defined by its community and recreational uses. The area is a major sporting destination that includes the regionally significant Frankston Basketball Stadium as well as the Kananook Reserve which supports the activities of the Southern Football Netball League.

Kananook's 3.5 hectares of industrial land includes a variety of single storey buildings the majority of which do not currently support traditional industrial uses. Many buildings are also aged and highly degraded particularly those along Easton Avenue. While the area attracts numerous visitors, these buildings, as depicted below, clearly detract from perceptions of the area. Kananook's industrial land is also disconnected from Seaford's core industrial lands to the east along Hartnett Drive and to the North along Bardia Avenue.

Figure 43: Easton Avenue, Kananook

Kananook's many amenity, locational and infrastructure advantages provides a highly unique opportunity to renew its degraded building stock and uses into a 21st century mixed housing, service and recreation centre that links the new and old economies of Frankston LGA.

A new vision for Kananook:

- A renewed street environment that creates a re-invigorated and attractive street experience
- Multi-storey buildings that create space and amenity for new economy industries, population services and housing befitting of the area's accessibility
- Affordable housing and upgraded recreational and sporting infrastructure.

Initiative 6: Facilitating Industry Networks and Connections

The municipality's nimble and sophisticated manufacturing industries need to be acknowledged and supported in the forthcoming Frankston City Industrial Strategy.

Figure 44: Priority Industries - Victoria and Federal Governments

Victorian Industry Priorities	Federal Industry Priorities
Construction technologies	Resources Technology and critical minerals processing
Defence technologies	Food and beverage
Food and fibre	Medical products
Medical technologies and pharmaceuticals	Recycling and clean energy
New energy technologies	Defence
Transport technologies	Space
Professional services	

State and national efforts to refocus attention and support to Australia's manufacturing industry is driven by a desire to strengthen national economic resilience and supply chain certainty. Frankston LGA's fabrication, construction and incipient new energy industries seem best placed to benefit from government priorities.

The disruptions of Covid-19 along with a focus on national resilience has seen government refocus on local manufacturing capability. Leading initiatives include the Federal government's $1.3 billion Modern Manufacturing Initiative (MMI) and the Victorian government's *Future Industries* and $2 billion *Breakthrough Victoria Fund*.

Frankston City enjoys strengths in the manufacture of construction and automotive inputs that position local industry to benefit from policy and financial support for construction and transport technologies. The challenge is to link local enterprise, specialist knowledge and research institutions and policy leaders in which Council and state government have a role.

While industry policy is largely beyond the remit of local government, there are activities that local government can pursue to support economic growth and change including:

- Supporting industry networks: Working with the Victorian State government in facilitating industry networks to share specialist knowledge and develop connections.
- Promoting industry clusters: Identifying the municipality as home to a significant number of specialist fabricators, designers and construction supply enterprises in order to embed economic identity and attract new enterprise.
- Facilitating incubator and activation spaces: Actively supporting the development of high amenity low cost spaces for new design, fabrication, additive enterprises and start ups (particularly in and around a future Kananook and Seaford precinct).
- Funding opportunities: Exploring ways businesses can link in and access federal and state funding opportunities to innovate.

There is also a need to understand the way in which the transformation of the automotive sector will impact on land uses along Dandenong/Wells Roads and the substantive automotive service sector that this area supports. Digitized, automated and electric vehicles will see dealerships and service function very differently and a new breed of automotive technicians emerge with different amenity expectations and qualifications.

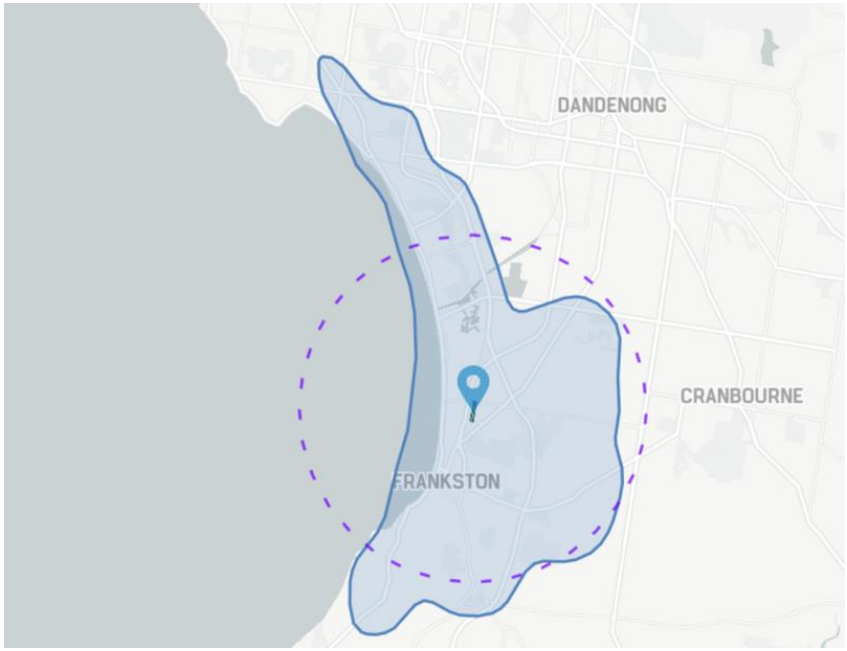
Initiative 7: Support the Evolution of Seaford

The Seaford Industrial Precinct is nestled in amongst established residential communities. It follows that the precinct now increasingly supports the needs of its surrounding communities via the provision of service, hospitality and retail uses. Hartnett Drive, Seaford, for instance, which is bounded by two residential communities to its north and south increasingly functions as a retail and service main street that incorporates financial services, cafes, fitness centres and numerous health practitioners.

Figure 45: Local Consumer Uses Along Hartnett Drive Seaford

The map below identifies Hartnett Drive, Seaford's primary trade area based on analysis of the mobile phone signatures of visitors to Hartnett Drive. As can be seen, the map identifies a highly localised trade area.

Figure 46: Hartnett Drive Primary Trade Area



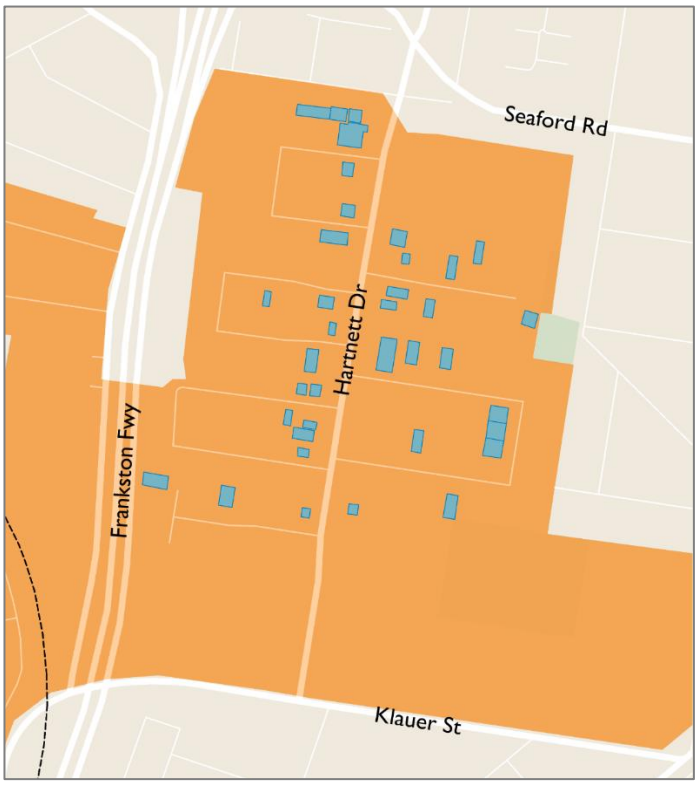
Source: Vista, Charter Keck Cramer

Seaford's future planning and development might recognise its evolution from a traditional industrial precinct into a locally focused population serving district.

Supporting Seaford's local service role might entail:

- Upgrading pedestrian infrastructure along Hartnett Drive and investigating associated traffic management interventions.
- Supporting population serving uses along the full length of Hartnett Drive including along its southern end at Klauer Road.
- Reimagining Hartnett Drive as a public boulevard that services both industrial and population serving uses.

Figure 47: Population Focused Businesses – Hartnett Drive



Source: Charter Keck Cramer

3.3. Urban Design Trends

The following outlines key trends influencing industrial development, not only within Frankston LGA, but more broadly across Victoria.

3.3.1. Climate Change and Sustainability

Urbanisation has caused significant negative impacts to the environment through pollution, waste management and biodiversity depletion. Urbanisation and climate change are also impacting on the amenity/liveability of urban spaces, such as through the increased Urban Heat Island effect and a disconnect from nature. As cities continue to grow, there is a need to become smarter and more efficient with natural resources, to ensure future generations are not compromised.

Industrial areas are now incorporating green spaces and a range of sustainability initiatives to minimise energy and water use, materials and waste, help reduce the urban heat island effect and link people to nature, health, and wellbeing.

In addition, the industrial sector is noted as the largest contributor to energy emissions. This includes refineries, manufacturing, mining, and wood and paper products. It is also the second largest emitter of non-energy emissions based on sector, which includes manufacturing processes that generate or leak greenhouse gas emissions. Planning policy supports sustainable transitions to reach net zero greenhouse gas emissions by 2050.

What does this mean for Frankston City's Industrial Precincts?

- Increased softscape and 'green' within urban environment - garden beds/ swales, green roofs, green walls and tree canopy coverage.
- Implementation of Integrated Water Management measures including water sensitive urban design (WSUD) treatments and greywater reuse strategies.
- Lot and building orientation to facilitate solar access and passive design.
- Solar panels and renewable energy sources.
- Active 'green' transport modes.
- Low carbon footprint materials.
- Use of alternative water sources such as recycled water from the Eastern Treatment Plant.
- Electric car and truck charging stations.

3.3.2. Active Transport

As Melbourne's population grows, there is a need for our transport system to become more efficient and sustainable. Moving large volumes of people requires a holistic transport solution that cars alone cannot provide. This, combined with increasing rates of obesity and related health issues, has led to a prioritisation of active transport modes such as walking and cycling to move people. These modes provide a range of benefits such as increased community interaction, safety, livelier streets and spaces and reduced greenhouse gas emissions.

Within industrial areas, encouraging active transport is challenging. This is due to safety risks associated with trucks and large vehicles and the lack of passive surveillance along key routes. It is important that new links address these safety issues.

What does this mean for Frankston City's Industrial Precincts?

- Integration of train stations/ transport nodes into industrial areas.
- Improving pedestrian and cycle connections and providing a permeable network of walkable and cycle friendly streets.
- Passive surveillance and built forms that activate the street.
- Autonomous vehicles as a shared/ pooled service, supporting and complementing walking, cycling and public transport.
- Bike, scooter & car share.
- Bike storage.
- Facilities to support cycling and walking to work i.e., showers and change rooms, etc.

3.3.3. Workplace Amenity

The role and function of workplaces in our everyday lives is evolving, along with client and customer expectations. Workplaces are no longer just a place to work, they form part of the company brand and influence the interactions, safety and wellbeing of staff and customers.

Research by the Office of the Victorian Government Architect (The case for good design: Workplace) has also found that good design can contribute to a more productive workplace for employers and a better experience for those of us who work and visit the places. Good design is more than making a place visually appealing. It is about understanding the behaviour and expectations of people and providing functional designs and layouts that meet specific needs. It also applies to individual sites, as well as the public realm and streetscapes within these precincts.

What does this mean for Frankston City's Industrial Precincts?

- Improved amenity for staff and presentation for customers and clients.
- High-quality and safe public spaces (i.e. streets and open spaces) with seating, BBQs, exercise facilities and landscaping.
- Access to outdoor open space / and communal spaces places for staff and visitors to enjoy breaks and down time.
- Access to facilities such as showers and change rooms.

3.4. Place Making Initiatives

The following outlines the overarching opportunities for the growth and improvement of Frankston City's industrial precincts.

3.4.1. Opportunities for the Public Realm

Initiative 8: Enhance Streetscapes and Open Spaces

Streetscapes are a unifying element that visually and physically connect Frankston City's Industrial Precincts. Each of the industrial precincts are accessed by and organised around major roads including Frankston-Dandenong Road, Lathams Road, McClelland Drive and Wells Road. The presentation of these roads play an important role in the arrival experience into industrial precincts and in shaping perceptions of the Frankston's LGA's industrial areas.

The streetscapes of major industrial roads provide opportunities for improvement including opportunities to:

- Provide increased planting to unify streetscapes and establish a cohesive and locally responsive character for the precinct / street.
- Provide additional canopy tree planting to provide shade for pedestrians and cyclist and to reduce the impacts of the urban heat island effect. This may include replacement of smaller trees with canopy trees and additional street tree planting where there are gaps. Street tree planting needs to consider existing services and vehicle access requirements.
- Implement water sensitive urban design (WSUD) treatments within streetscapes to capture and treat stormwater runoff.
- Underground power lines to improve opportunities for street tree planting along key streets.

Figure 48: Key streets such as Frankston-Dandenong Road and Wells Road could be enhanced to improve their appearance and pedestrian amenity

Source: Tract

In addition to the above, there is also the opportunity to improve the arrival experience into the broader municipality via increased and substantial landscaping along major road infrastructure. Each of EastLink, Peninsula Link, Frankston-Dandenong Road,

Frankston Freeway, Dandenong Valley Highway, McClelland Road, and Wells Road abut industrial built form shaping the arrival experience into many localities and the broader municipality.

Where industrial precincts interface with major links, there is the opportunity to provide additional and more substantial landscaping to improve the appearance of these interfaces and to screen unsightly storage areas and built form.

Figure 49: Canopy street tree planting and path connections make it easier and more comfortable for pedestrians to move within industrial precincts and enhance streetscape amenity

Source: Tract

The amenity of industrial precincts is also enhanced via inviting and useable open spaces. Open spaces within the Industrial Precincts provide a location for recreational activities and a space for local employees and customers to relax and gather. They also provide important drainage and environmental functions and create a buffer to sensitive uses. There is the opportunity to enhance several existing open space areas within precincts to ensure these spaces complement the local qualities of the area, provide a greater contribution to the environmental, recreational and aesthetic qualities within Industrial Precincts and provide an enjoyable and safe space for people.

Opportunities to improve open space in industrial locations include:

- Additional native and indigenous planting to reinforce the aesthetic, environmental and recreational qualities of open space areas, in particular along creek corridors and drainage channels.
- Providing enhanced recreational opportunities within open spaces for local workers and businesses including walking trails, seating, and BBQ / shelter facilities.
- Improving connections to open spaces within industrial precincts and surrounding areas.
- Encouraging future built form to address open spaces to improve passive surveillance and activation of these areas.
- Retaining significant and existing trees, where practical.

In some Precincts, access to open space is limited. This includes areas within Seaford North, Seaford and to the south of Carrum Downs. In these areas there might be the opportunity to utilise creek corridors and service and utility spaces to improve access and to enhance pedestrian connections. These spaces could be improved to allow for pedestrian access (i.e., provision of walking trails) and to enhance the amenity of the space through landscaping treatments. Opportunities for additional open spaces might also arise as part of the redevelopment of larger sites.

Figure 50: Service and utility spaces within Carrum Downs and Seaford North could be enhanced to improve open space access and pedestrian connections

Source: Tract

Figure 51: Landscaped open spaces provide amenities for local workers to enjoy

Source: Tract

Initiative 9: Provide safe and integrated active transport connections

While vehicle access will remain the dominant mode of transport within industrial areas, there is the opportunity to encourage more walking and cycling within all precincts.

Opportunities include:

- Ensuring pedestrian and cycle access is prioritised along key roads.
- Providing additional pedestrian crossings between surrounding residential and commercial uses into industrial precincts and along busy internal industrial roads.
- Completing footpath connections to establish a connected network throughout all industrial precincts.
- Connecting Industrial Precincts to surrounding shared path networks and trails, including Peninsula Link Trail.
- Utilising creek corridor and service and utility spaces to provide additional connections within industrial precincts.
- Providing supporting facilities for pedestrians and cyclists at key locations including seating, bike hoops and drinking fountains (i.e., at key nodes or within open spaces).

- Enhanced wayfinding to identify key connections and key destinations and amenities.

In some precincts, there may be a need for additional connections that cannot be provided due to land currently in private ownership. While opportunities might arise as part of the renewal or redevelopment of adjacent industrial sites, there may be a need to consider other methods of achieving these connections such as public acquisition.

Figure 52: Opportunity to ensure footpaths are safe, well connected and allow for pedestrians to access key amenities such as bus stops.

Source: Tract

Figure 53: Opportunity to connect industrial precincts to shared path trails including Peninsula Link Trail.

Source: Tract

3.4.2. Opportunities on Private Land

While the 2009 Industrial Land Strategy guidelines have provided guidance for recent development in Industrial Precincts, previous analysis has identified several elements that will need to be considered by the updated guidelines which are discussed as follows.

Initiative 10: Respond to Local Site Qualities

One of the key qualities of Carrum Downs is its response to existing site features. Significant trees have been retained within pocket parks and building setbacks, stormwater and drainage has been provided where required and the street and lot layout has been designed to respond to the existing topography, minimising the need for cut / fill and retaining walls.

There is the opportunity to require all new developments, including redevelopment sites, to be designed to respond to the local characteristics of the site and its context to minimise the impacts on existing environmental systems and qualities.

Figure 54: Retained trees within Carrum Downs contribute positively to the streetscape and enhance environmental values.

Source: Tract

Initiative 11: Encourage High Quality Built Form Outcomes

More recently completed precincts, such as Carrum Downs, incorporate built form that is generally of a higher quality and consistent in terms of site layout, heights, setbacks, style and materials and finishes. This provides a sense of rhythm and cohesion to the streetscape and influences the overall presentation of the Precinct. Additionally, more recent buildings typically address the adjoining street or public realm and provide articulated facades and entrances, windows, administrative space, and balconies at the front of the building. This provides a positive contribution to the appearance and presentation of the street by providing visual interest, breaking up larger building masses, providing opportunities for passive surveillance, encouraging activity and clearly delineating entrances.

Building forms and styles in older Industrial Precincts such as Seaford and Seaford North are mixed with a variety of layout, heights, setbacks, style and materials and finishes contributing to a streetscape appearance that is less cohesive. There is the opportunity to improve built form in these areas overtime as renewal proceeds.

Figure 55: Example of mixed built form styles at Seaford and Seaford North.

Source: Tract

Figure 56: Example of consistent materials, setbacks and landscaping at Carrum Downs that provides cohesion to the streetscape.

Source: Tract

Other built form attributes that detract from the streetscape and public realm include buildings with limited articulation and large blank walls. These present as a dominant element within the streetscape and provide limited opportunity for passive surveillance.

While it is accepted that large walls will continue to be a key component of industrial development, there are opportunities to screen blank walls along key roads and viewlines (i.e. such as Eastlink or Peninsula Link) and provide articulated or patterned concrete to provide greater visual interest.

As discussed earlier, there is also a need to consider taller buildings within Industrial Precincts in the future. As the demand for land increases, along with land prices, there may be a need for industrial uses to consider going higher rather than occupying greater areas of land, particularly for the office and administrative components of the building. This is likely to require careful consideration of the impacts of taller buildings on adjacent sensitive uses, the street interface, as well as other key features including

under croft parking that has already been incorporated in more recent developments within Carrum Downs and Seaford.

Initiative 12: Support the delivery of ESD and Sustainable Initiatives

Frankston City Council is committed to ensuring development achieves best practice in environmental sustainability, from the design stage through to construction and operation. The introduction of an ESD policy in the Frankston Planning Scheme via Amendment 138 will provide statutory weight and is one planning tool to encourage environmentally sustainable development.

Design guidelines provide another tool to encourage sustainable design within new industrial developments and the redevelopment of existing infrastructure. Design guidelines can establish benchmarks and outline site and precinct specific initiatives and approaches. For instance, while some developments include solar panels, there is the opportunity to encourage these more broadly across the industrial precinct and require these are provided for all new developments.

Considering sustainable design in the planning process enhances the ability to meet best practice and exceed the minimum standards set by the building approval process. Further, it potentially minimises additional extra costs associated with retrofitting a development to implement environmentally sustainable design principles in the future.

Initiative 13: Improve the organisation of front setbacks

The organisation of the front set back of industrial property is pivotal to its appearance and long term function. Across the municipality, the organisation of front set backs differs considerably between newer and older built form.

On recently developed sites, the front setback is typically well planned, providing clear and designated spaces for uses. In contrast, where spaces for uses are not clearly defined or are poorly maintained, the front setback can appear disorganised and messy, negatively impacting the appearance and amenity of the adjoining streetscapes. It can also have implications for safety and security, as well as amplify pedestrians and vehicle conflicts. Varied front setbacks can also negatively impact the continuity of the street.

Figure 57: Front setbacks at Seaford and Frankston East are varied and provide for an inconsistent approach to car parking and limited landscaping.

Source: Tract

Figure 58: Front setbacks at Carrum Downs provide sufficient space for car parking, access and landscaping.

Source: Tract

Where these is an opportunity to redevelop or reorganise an industrial site, sufficient space should be provided in the front setbacks for all intended uses. This should be in keeping with the character of the streetscape to provide visual cohesion and rhythm. The front setback should also be planned to provide clearly designated areas for uses and to ensure pedestrian and vehicle conflicts are mitigated. Setbacks should also contribute to the general sense of openness across an industrial precinct and enhance the legibility within and between sites.

Where redevelopment is not proposed, guidance should be provided within the design guidelines for how to best organise the front setback for a typical range of uses; noting that the scale and arrangement of each site is likely to differ between sites.

Initiative 14: Improve safety and security

Passive surveillance is critical in enhancing safety and security within Industrial Precincts. Opportunities for passive surveillance are created through open and visually permeable front setbacks, windows and customer service areas focused along the street or open space areas and suitable lighting to allow visibility at night time. In more recent Industrial Precincts, such as Carrum Downs, buildings typically incorporate these features, while landscaping is well maintained ensuring sightlines are clear and uninterrupted.

In other Precincts, sightlines are impacted by vegetation, large building setbacks, blank facades with a lack of windows, solid fencing and an absence of street lighting, which limit opportunities for passive surveillance and diminish the sense of safety and security.

Figure 59: Front setbacks at Carrum Downs provide sufficient space for car parking, access and landscaping.

Source: Tract

Initiative 15A: Improve the appearance of industrial sites: Landscaping

The northern section of Carrum Downs demonstrates how high-quality and well-maintained landscaping, particularly within front setbacks, can have a positive contribution on the character, cohesiveness and attractiveness of the street and the broader precinct. Landscaping softens the visual impact of built form and hardstand areas, buffers sensitive interfaces, and provides permeable surfaces that reduce stormwater runoff.

Landscaping can also be used to define areas including property boundaries, pedestrian entrances, and car parking.

Figure 60: Well maintained and high quality landscaping positively contributes to streetscape appearance.

Source: Tract

Landscaping however needs to be carefully considered to ensure it does not compromise passive surveillance and safety. Sightlines should be maintained between buildings and the street and planting should allow for clear views between vehicle entries and pedestrian footpaths to ensure safety. Low shrubs, grasses, hedges and ground cover, in combination with canopy trees provides an effective way to maintain passive surveillance. There is also the opportunity to enhance the local environmental qualities and aesthetics of the precinct by selecting planting species and materials that are local to the area.

Initiative 15b: Improve the appearance of Industrial Sites: Fencing

Fencing helps to clearly delineate the public and private realms and provides for site security. In most Precincts permeable fencing is provided and supports clear sight lines between sites and the public realm / streetscape. When fencing is consistent in style, well maintained, and visually permeable it makes a significant contribution to the streetscape character. This is demonstrated in Carrum Downs where the consistent use of vanguard fencing establishes a high quality and cohesive feel for the precinct. Where fencing is poorly maintained or where mesh is hung from the fence to screen uses, this has a negative impact on the street and limits opportunities for passive surveillance. This should generally be avoided.

There may, however, be circumstances where enclosed fencing is warranted (for instance, to screen noxious uses). Instead, landscaping may be used to soften the appearance of this within the streetscape.

Figure 61: Vanguard fencing combined with low planting provides a high quality and permeable interface to the street.

Source: Tract

Figure 62: While permeable, chain mesh fencing presents poorly to the street.

Source: Tract

Initiative 15C: Improve the appearance of industrial Sites: Signage

Visible and well presented signage is critical to identify and promote businesses. Where a consistent approach to signage is provided it also contributes to cohesive and high quality streetscapes. This is demonstrated in Carrum Downs, where signage is regularly integrated into the design of buildings, located below the roofline and is clear and informative.

Within other Precincts, there is a less consistent approach to signage, with varying sizes and locations and in some instance, signs are not provided at all. Areas such as Hartnett Drive, McClelland Drive and Wells Road, include a significant number of signs, including signs and flags within the streetscape and along front fences. These signs dominate and visually clutter the streetscape in these locations and are often repetitive.

While it is important that signage is provided to identify and promote businesses, there is the opportunity to ensure signage is ordered, well maintained, and responds to the preferred character of the streetscape and the broader precinct.

Figure 63: Signage and flags along Wells Road visually clutter the streetscape, making it feel disorganised and messy.

Source: Tract

Initiative 15D: Improve the appearance of industrial sites: Address unsightly uses and sites

There are several existing industrial sites where poor maintenance, storage, landscaping, waste management and other unsightly uses are located within front and side setbacks or the streetscape. This is primarily evident in Seaford and Seaford North, along Gray Street, Govan Street, Patrick Court and Curie Court, but is also visible in Carrum Downs along Titan Way. These areas present poorly to the street and adjacent public spaces and have a negative impact on the appearance of the broader precinct and municipality.

Figure 64: Contrasting examples of site amenity throughout Industrial Precincts.

Source: Tract

Unsightly sites need to be encouraged to improve their public presentation and for requirements to be enforced more actively. Where this is not possible, unsightly uses could be screened through landscaping treatments.

There is also the opportunity in the future, as sites redevelop, to address some of the legacy issues that have resulted in poor amenity outcomes. This includes, providing adequate space in the front setback to allow for carparking, pedestrian access and landscaping and ensuring side and rear setbacks allow for storage, loading and waste management, as well as appropriate screening to sensitive interfaces should be considered.

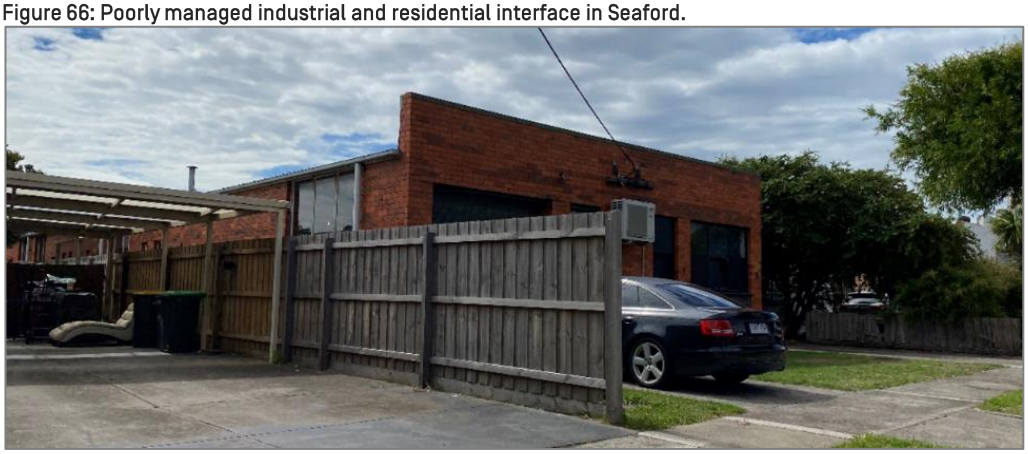
Initiative 16: Provide a sensitive interface to residential uses.

Several Industrial Precincts directly abut residential properties. Within more recent Precincts, such as Carrum Downs, this interface is generally managed through the provision of setbacks and landscaping, as well as transitioning the height of industrial built form in response to adjacent residential buildings. This treatment is most effective where substantial canopy tree planting is provided to screen adjoining industrial buildings, such as to the rear of sites along Access Way, Carrum Downs. Where canopy trees were not provided, industrial uses were highly visible.

Figure 65: Generous landscaped setback along properties in Carrum Downs screens industrial built form for abutting residential uses

Source: Tract

Figure 66: Poorly managed industrial and residential interface in Seaford.



Source: Tract

There is the opportunity to provide canopy tree planting and landscaping treatments along residential interfaces were these have not been provided to help screen industrial built form and to manage the impacts of industrial uses on these residential areas. There is also the opportunity to improve interfaces where sufficient space is not provided along these interfaces by requiring all new developments to provide a rear setback that allows for tree canopy planting in the future. Other effective ways to create separation between residential and industrial uses includes the provision of a road with a landscape buffer or a substantial open space area.

Initiative 17: Enhance worker amenity.

Staff expectations are changing. Within Carrum Downs, there are a few sites that provide outdoor areas for staff and visitors. Typically, this includes temporary seating and shade located within the front setback.

There is the opportunity to provide a considered approach to the provision and location of these spaces in the future to ensure shade, seating and lighting is provided for staff and that these spaces are located to enhance the activation of adjoining public spaces.

How can we make our industrial precincts more attractive places to work and visit?

In addition, there is the opportunity to complement improvements to active transport modes and provide supporting facilities for staff walking and cycling to work. This might include secure bike parking, lockers, and shower and changing facilities on site.